

Start the Deal Before the Customer Arrives

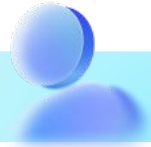
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Your Monday Morning Outcome

By following this guide, you will have Sales Concierge configured so customers start their deal from home before they ever walk in, capturing driver's license, insurance, and signatures from the source, reducing the four-to-six-hour showroom visit, and removing the privacy exposure of staff carrying customer documents on their phones.

Before You Start



Pre-Implementation Checklist

✓ Showroom time baseline

Pull current average showroom visit time for finalized deals. Sales Concierge's primary metric is time reduction; you need a starting number to prove the gain.

✓ Common deal errors documented

Talk to your finance managers. List the most common deal errors such as missing documents, missing signatures, incomplete forms. Concierge is going to stop the customer before each of these errors can occur.

✓ Customer-facing URL or QR ready

Decide how customers access Concierge. Link sent by text, email, or QR Code. Pick the entry point that fits your customer mix.

✓ Document checklist defined

Decide which documents are required for every deal type such as driver's license, insurance card, proof of income, trade title. Concierge will not let the customer skip any of these.

✓ Baseline captured

Plan a sales-team briefing. Concierge changes the salesperson workflow; they no longer collect documents on their phone. Without the briefing, salespeople default to the old workflow.



Enable Sales Concierge

Time: 10 minutes | **Navigation:** Settings > Sales Settings > Concierge Setup

Settings	Configuration
Concierge Activation	Toggle ON. Concierge becomes available across all sales workflows in ARC and ready to be configured for customer use.
Dealership Branding	Upload your logo, set your brand colors, and confirm the dealership name displays correctly. The customer's first digital touch with your store should look like yours.
Entry Point Setup	Decide the entry point(s) your customers will use, text link, email link, or QR code. Different mixes work for different stores; many stores offer all three.
Mobile-Optimized Flow	Confirm the Concierge flow renders correctly on mobile. The vast majority of customers complete Concierge on their phones from home. Test on multiple device sizes before going live.

Build the Concierge Adoption Routine

Time: 10 minutes

Setting	Configuration
Required Documents List	Build the document checklist required for every deal. Driver's license, insurance card, proof of income, trade title (if trading in). Concierge allows customers to upload images of each directly from the customer's phone.
Signature Block Configuration	Configure which documents require customer signature in Concierge, privacy disclosure, electronic consent. Concierge stops the customer until every required signature is captured.
Error Prevention Rules	Set Concierge to refuse submission if any required field, document, or signature is missing. The error gets caught in Concierge, not in the F&I office or at month-end accounting.
Source-of-Truth Capture	Implement process where customer data comes from the customer directly, not entered by a salesperson. The customer owns the input; the dealership receives clean data.

Build the Report Routine

Setting	Configuration
Policy Update for Sales Team	Document the new policy: salespeople no longer photograph customer documents on personal or store phones. All document capture flows through Concierge. The policy reduces the privacy exposure surface significantly.
Concierge Link Sharing	Train sales staff to share the Concierge link when a customer cannot complete in person. The link can be sent by text or email from ARC, not from a personal phone.
In-Store Tablet Workflow	For walk-in customers who want to complete Concierge in the showroom, provide a dealership tablet. The customer's data lives in Concierge from the start; the salesperson's phone never enters the chain.
Storage and Retention Audit	If any sales staff currently store customer documents on personal phones or in non-Tekion locations, those documents need to be deleted from personal storage and uploaded through Concierge. Address before go-live.

Routine	Configuration
<p>Daily Concierge Completion Review</p>	<p>Each morning, the sales manager reviews Concierge completion rates from yesterday. Customers who started but did not finish need a follow-up call. Each non-completion is recoverable if caught fast.</p>
<p>Weekly Time-to-Close Comparison</p>	<p>Pull Concierge-completed deal time-to-close against non-Concierge deal time-to-close weekly. The gap is the visible proof of value. Share it with the team.</p>
<p>Monthly Error Rate Audit</p>	<p>Compare F&I error rates on Concierge deals against non-Concierge deals each month. Concierge deals should show measurably fewer missing documents and signatures. Where they do not, identify the gap in the Concierge configuration.</p>
<p>Quarterly Salesperson Workflow Audit</p>	<p>Each quarter, walk the showroom floor. Any salesperson still photographing customer documents is a policy gap and a privacy exposure. Coach the behavior and reinforce Concierge as the only document path.</p>



Measure Your Results

Report	Navigation	What to Look For
eSign Usage Report	Reports > Sales > eSign Usage	Customer Concierge completion, abandonment points, and time-to-completion. Identifies friction in the customer flow.
Deal Time-to-Close	Reports > Sales > Sales Report	Showroom visit time on Concierge-completed deals versus non-Concierge deals. The primary measure of Concierge ROI.



Best Practices

✓ **Make Concierge the only path for document capture**

The biggest gain from Concierge is reducing the time customers spend in the dealership to close the sale. In addition, the privacy exposure that disappears when salespeople stop storing customer documents on phones. Concierge only delivers this gain when it becomes the only path, not an optional one alongside the old workflow. Update the policy, retrain the team, and audit the showroom floor in the first month. Without that discipline, you have a feature, not a workflow change.