

Before Monthly Meeting

Vendor _____

Meeting Date _____

We have been on the current version of the product since _____.

We currently spend \$ _____ per _____

	In CRM	Vendor	Competitor 1	Competitor 2
Website Visits				
Leads Sent				
Sales				
Closing %				
Cost / Lead				
Cost / Sold				
Net				

Initial Questions

What are the main goals you have for dealers using your products?

What results are dealerships like ours seeing on your platform?

What KPI's does your company find the most valuable in leading to a customer visit?
(We will begin to track these in a monthly spreadsheet)

Who is the best performing dealer on your platform currently? What are they doing differently that we can add, with our current products?

What does your average consumer look like? What stage of the shopping process are they usually in?

What is a typical click through rate from your website to ours?

What is your role for us at the company? What actions can you take personally on our behalf, and what do we need outside support for?

Questions to ask monthly

What did your company spend advertising nationally last month? And in my DMA? (Most vendors will decline to answer this, but it's important to put in perspective the actions their company can take that may affect our effectiveness)

Who in my market is currently outperforming me on your platform? Why?

Are there any features of my current package that I am not utilizing or could utilize better?

Is my inventory feed sending all available fields, including image description if supported?

What improvements have been made to your platform since the last meeting?

Are you working with any 3rd parties to buy or sell customer data?

Have you made any new partnerships since our last meeting? Can you integrate with any other vendors?