



PEOPLE, PROCESS, PRODUCT

What to Expect When Adopting Software

A checklist for dealers seeking clarity on what to look for when investing in software for their organization.

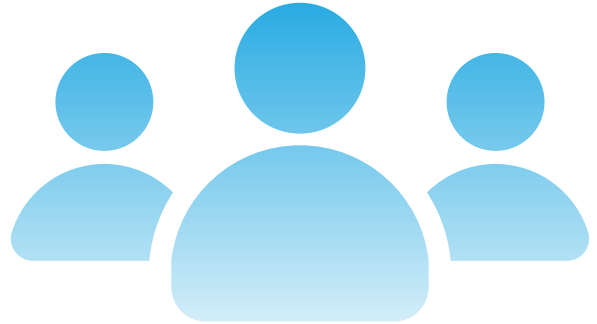
Choosing a new sales and operations solution is one of the more impactful decisions an equipment dealership will make. It will permanently shape workflows and behavior for end users, and that means getting your teams on board is just as critical as any other factor.

Use this checklist to hold every vendor you evaluate to the same standard. Whether you're just beginning to explore your options or close to a decision, these are the items to confirm before you ever sign a contract.

PEOPLE

Who Will Be In Your Corner?

The vendor relationship doesn't end at the contract. The people assigned to your account, along with the continuity between your sales experience and your post-sale support, are often the biggest indicator of whether an implementation will go smoothly.



Fully understand what vendor-side support includes

- The salesperson can name the people or team who will manage my implementation and have provided an overview of that relationship.
- My Customer Success rep's role has been clearly defined, including how often we'll connect after go-live.
- A documented handoff process exists between sales, onboarding, and ongoing support so no surprises appear between stages.

Know who on your team will be leading the charge

- I have identified someone at my dealership who has both the authority and the bandwidth to own this rollout and drive adoption.
- My leadership team is aligned on the "why" behind this change and has thought through how to communicate it to the people who will use the platform.
- We've done internal discovery to clearly name two or three specific problems we're trying to solve, not just "we need software to make us better."



What Does Getting Live Actually Look Like?

Implementation (or “onboarding”) is where most software investments either prove their value or quietly stall. “We’ll figure it out once you sign” doesn’t count as a plan. A serious software partner will have a clear, documented process, and they’ll be upfront about what it requires from your team and from theirs.

Know which of your current systems will be connected

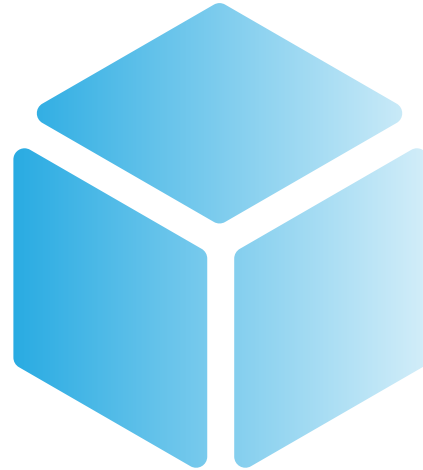
- There's an explanation of what data will be pulled from my DMS (dealership management system) and what my team needs to prepare before that work begins.
- All the additional systems we use have been scoped into the implementation plan, not left to figure out later.

Get official confirmation of the plan and steps involved

- Various members of the vendor’s team are brought into the conversation to give me a well-rounded view of the process and product where needed (platform admins, market insights leaders, data team members, etc.).
- A written implementation plan exists (not just a verbal overview) with a realistic timeline and defined milestones.
- My team's responsibilities have been spelled out clearly: Time commitments, key decisions, system access, and when each will be needed.

Be aware of the onboarding and training process

- The training approach goes beyond a product walkthrough; there's a defined plan for driving real, lasting adoption across my sales team.
- I've been walked through what the first 30–90 days after go-live looks like in practical terms for the people using the platform every day.
- The vendor has informed me how they handle roadblocks and why leading from a “foundation-first” approach speeds up adoption.
- We've thought through how to introduce this to our sales team in a way that shows them what's in it for them, and my vendor has helped me plan for this.



Does the Platform Actually Fit The Way You Work?

A long feature list is easy to produce. What's harder to find is a platform built specifically around the workflows equipment dealerships depend on, and one your salespeople will actually want to use. When evaluating the product, focus less on whether a feature exists and more on whether the platform reflects how your team actually operates.

Get official confirmation of the plan and steps involved

- I understand what it means that this was purpose-built for equipment dealers and what that means for how it fits my operation.
- I know whether it was built in-house or on a third-party platform like Salesforce, and I understand what that means for configuration, flexibility, and long-term cost.
- I know who controls configuration: My team, the vendor, or both; and I'm aware of how updates and requests work after go-live.

Ensure the solution fits your workflow

- The software consolidates the core workflows my sales team depends on (quoting, lead management, appraisals, inventory, invoicing) in one place, rather than just adding another tool to my tech stack.
- My salespeople can clearly see how this platform makes their job easier and helps them close more deals. They're assured it's not just a tracking tool for managers.

Be aware of the onboarding and training process

- Specific implementation examples have been shared from dealerships similar to mine in size and operational complexity.
- When I ask what's been an issue in past implementations, the answer is honest and not a pivot back to features and pricing.

Common Software-Buying Mistakes Dealers Should Avoid

- X Shopping for features alone or trying to recreate your current system.**
A long feature list means nothing if your team won't use the software or it doesn't follow best practices for dealer workflows.
- X Underestimating implementation steps and your commitment.**
Going live is a real project. It takes time and commitment from your people, so plan for it before you sign.
- X Skipping the "people" conversation.**
Know specifically who will be responsible for your success before you commit to any vendor. The people make the product work.
- X Neglecting to name an internal champion.**
No vendor can drive adoption at your dealership. That has to come from inside and should be a decision made early on.
- X Letting urgency override due diligence.**
A bad software decision costs a lot more in time, money, and team morale than a few extra weeks of evaluation. Take your time and do your homework.

One Question Worth Asking Every Vender

Implementing integrated software is not a simple process, and this means every serious vendor has experienced challenges during this phase at some point. During your demos and quote comparisons, ask this before you decide:

"Walk me through the last few implementations you've done for dealerships like mine. What went well, what was hard, and what would you do differently?"

A vendor who answers that question honestly and will clear details has earned serious consideration. One who pivots back to features and pricing is showing you what your postsale experience will look like.

Ready to see how a purpose-built dealership solution measures up?

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