

Establishing Field Efficiency with CoEFFICIENT[®] Notes

With CoEFFICIENT Notes, an auto lender realized field efficiency by standardized dealer visits. Field managers adopted the platform quickly, giving them a data-driven solution that drove change at the dealer level. **After just three months, CoEFFICIENT Notes had a 95% adoption rate.**

Objective: Change Needed Throughout the Enterprise

1

Effective Documentation:

Field managers needed a solution that formalized the dealer visit process.

2

Better Communication:

To make changes at the dealer level, field managers needed to have smarter, data-driven conversations with dealers.

3

Upward Visibility:

Alignment was lacking between dealers and the corporate office, making it difficult to know what actions would improve performance.

4

Field Adoption:

Develop a mandatory process across all field users.

The Keys to Effective Implementation and Strong User Adoption:

CoEFFICIENT Notes was implemented after a complex data integration. Process management and user adoption were then coordinated with training and collaboration between corporate stakeholders and users.

Data Integration:

After discovery and business use case discussions, 19 different feeds and more than 100 metrics were integrated. This data was consolidated into six dashboards for key audiences.

Process Management:

Dealer visits needed to be formally documented. Notes provided a template that highlighted top goals and captured details of each visit. Now, KPIs can be monitored and progress tracked over time.

User Adoption:

Training, transparency and openness drove user adoption by showcasing the platform as easy to use and the data understandable.

Results

- A cohesive dealer visit process with the CoEFFICIENT Notes template.
- Collaboration and communication between corporate stakeholders and users.
- Access to real-time data that uncovered key opportunities with dealership managers.
- A continuous feedback loop and iteration post-launch.

Looking Forward

Field managers have called for Notes to be available to dealership managers to help them self-serve data and provide transparency around metrics. This will be the next step in collaboration and data-driven performance.

“ I’ve never had a vendor deliver above my expectations in a software deployment and then analyze usage to increase productivity within the first few months after going live. Square Root is the best partner I’ve ever worked with. ”

Colin Cooke, Sales Operations

Field Manager Feedback

“ It’s now my go-to thing. I use CoEFFICIENT, and I use my iPad. ”

“ I didn’t think I’d use it, but I like it. I feel confident and professional when I walk into a dealership. ”

“ It makes my job easier since I can focus on taking action on the information instead of gathering the information. ”