The Keys to Successfully Converting to Quorum’s DMS, XSellerator™

Guidelines for planning, preparing & participating in your transition success
It isn’t an easy decision.

“When you change a DMS, you’re messing with everyone’s livelihood,” says noted DMS Consultant Paul MacDonald.

You’ve looked carefully at your motives and made the decision to take advantage of newer technology and tools to grow your business. You’re migrating for improved usability and deeper insight into your business operations today — and down the road.

Looking beyond the nuisances to the opportunities, you get your managers intimately engaged in the process from the start.

Together you deliberate the options. You talk to other dealers. You view vendor demos. One stands out.

Finally confident, you say, “Yes, let’s do this!”

What did you get yourself into?

No one who has done it will tell you that a DMS migration is a snap. It’s work — for you, your team and your new DMS vendor — to ensure a smooth conversion. In the end it will be worth it. You’ll achieve the goals you set when you started down this path. But how soon you get to those goals depends on how you approach the conversion.
It helps to recognize that a migration has two phases:

1. *Psychology conversion* — preparing for the task, and
2. *Physical conversion* — the migration of data to the new system

*The psychology phase is typically the most critical for the dealership to get right.* The DMS vendor knows the technology, but only you and your staff can make it work in your operation. And it all starts with attitude and buy-in.

“The migration experience depends, quite frankly, on how the dealer principal or owners get the staff involved in the decision to change DMS,” said noted DMS Consultant Jim Skeans.

Expert DMS consultant MacDonald agreed: “Longtime managers used to another DMS are often scared of their inability to adapt to the new technology. If the dealer doesn’t get their buy-in, the migration’s toast.”

These cautionary insights should steer any dealer from making such a critical decision in a silo. There’s a more democratic process that almost always yields better results for everyone involved!
The Implementation Scorecard

“We stay up late studying how to make every Quorum installation better than the last one,” said Scott Maroni, Quorum’s Services Delivery Manager. “Our goal is to make your installation easier for you and your team, and to make the data migration as trouble-free as is humanly feasible.”

“What we’ve learned about assisting dealers with DMS migrations over the years is valuable to you too,” Maroni added.

“We’ve summarized these key steps — the best practices, timelines and responsibilities (the what, who, why and when) — into what we call the Dealer Implementation Scorecard.”

As they say, things that are tracked and measured get done. Hence the Scorecard. It contains the agreed-upon critical shared milestones for a successful conversion. Periodically, we’ll review the progress together.

“Our experience is that when a dealer hits 90%–100% on their scorecard, they are more productive and happier with the DMS change,” Maroni concluded.
Champion the Cause

A cause champion is your cheerleader, stage director, traffic cop, and quarterback. At Sean Sargent in Grande Prairie, Alberta, Canada, that champion was CFO Craig Cherwak. In 2007, Cherwak had begun discussing alternatives with his OEM for the then-OEM-mandated Reynolds DMS used in the store. He suggested that dealers would benefit from having more than one provider from which to choose. That appeal was successful in 2014.

With that option now available, Sean Sargent moved to migrate the store to Quorum’s DMS. Cherwak then gave the charge for the detailed DMS migration to controller Lisa Zylla.

“The first — and I believe most important — thing I did was to mentally prepare myself for this process,” she said. “I was excited about the change and viewed it as an opportunity. I explained to our managers just how important this migration was for them. Everyone got on board.”

At Stephen Motors Chevrolet, Buick and GMC in Monticello, Iowa, controller Brooke Kremer and other department managers identified the need to change DMS systems.

“They couldn’t seem to get support to help new employees, most of whom are younger, with learning that system.”

They evaluated options before bringing their conclusion to General Manager Greg Stephen for the OK. Kremer would then champion the migration through.
Preparing the Team

Quorum equips your team members to master the migration with greater confidence and assurance, both in the process and in themselves.

At Sean Sargent, Zylla made sure the company’s 40 employees shared in the experience: “Quorum provided us training and workbooks and proficiency examinations for XSELLERATOR, and each module was unique to the various department functions,” she said. “This prepared us to imagine what we could accomplish with the new system.”

Kremer took on that same role at Stephen Motors: “We got everyone who would use the new system together and looked at 10 different providers and took their demos,” she said. “We wanted a solution that everyone here liked, that we found to be user-friendly, and that was easy to teach a new hire how to use.”

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Brooke Kremer
Controller
Stephen Motors Chevrolet, Buick and GMC
Testing Your Data

In a perfect world, the data we migrate from another DMS into your new Quorum DMS would be complete, clean, and easily mapped. Because the world is not perfect, we think ahead so you can plan ahead. When your team follows the steps and meets the due dates outlined in your Scorecard, your data will be as clean and complete as possible for its conversion to the new DMS.

It’s important to note that conversion is a cautious step that needs to be taken in stages.

- First, test-data is pulled from the old system into a Test Quorum DMS format to verify how old data is mapped to the new system.

- Two weeks before your live date, you’ll test the data in your new XSELLERATOR DMS in parallel with your incumbent system. You run it this way to ensure all functionality, setups, and other criteria work as you need them to.

- Discrepancies are identified and corrected prior to the actual switchover date.

- Online training continues to grow your staff’s competence and confidence in using the new system.
When Things Go Wrong

Most industry experts agree: 80% of responsibility for an outstanding installation rests with you and your team. But it’s truly a joint effort, too. We both want success and a productive, long-term partnership. It’s our business to provide you with the know-how, tools and processes to facilitate that success. How you employ them, however, is key.

It’s designed to help even ugly stories turn out beautifully.

For instance, Everett Chevrolet in Hickory, North Carolina, had left Quorum for another DMS to align with a different system being used during a new acquisition. The migration under the new vendor “was difficult and unpleasant,” according to Controller Patty Annas.

“We had trouble pulling parts data, and I could not get my balance sheet and liabilities to balance,” Annas said. “Our team here worked for two weeks to get things straightened out without success. It was a nightmare. I believe that downtime cost us $50,000 in employee morale and labor alone.

“It was over the Christmas holidays when we asked Quorum back,” she noted. “Their team delayed vacation plans to untangle our original data that the other vendor hadn’t been able to migrate. They got it to match and got us migrated in time.”
Quorum Migration Summary

• At your “sales-to-service handoff” meeting shortly after signing up for XSELLERATOR, you’ll meet the Quorum project manager, and key personnel who will oversee your conversion, who will walk you through the process and help you leverage the efficiencies of the Dealer Implementation Scorecard.

• You’ll assign a Dealer Project Manager (DPM) to champion your dealership’s conversion. (We actually provide you with guidelines for selecting the right person!)

• Our project manager works with your DPM, dealer principal, department managers and key staff to map out implementation timeframes, milestones and checkpoints based on our project templates and the Scorecard.

• At your side, we help you set your start-to-finish migration timeline, and make sure everyone’s using the same Scorecard playbook to identify responsibilities and due dates.

• We’ll introduce you to our installation team and clarify workflow, system setup, and document templates.

• With your team members, training timetables and benchmarks will be identified and scheduled. Progress will be continually tracked and reported throughout the process.

• Together, we’ll run a “Dealer Test Drive” (DTD) phase about two weeks before you “Go Live.” We’ll put your teams together for further group training and proficiency assessment. Any potential discrepancies such as security access, system setup, account mapping and form adoption will be corrected.
• We take a **final cut of data** from your existing system on the Friday before you go live and prepare it for conversion into your live database.

• On the Sunday before Go Live, our trainers will **meet with your key managers and staff** at the dealership to confirm system setup and data conversion. They will also review the go-live activities with the managers and assist with the input of any open transactions not carried over from the old system.

• We have specialists to train and assist from Monday through Thursday of “Go Live” week. **We are right beside your employees teaching, coaching and guiding as necessary.**

• We call the next period our “TLC Phase.” Following the go-live week, we proactively check in with you, your department managers and various system users to ensure that processes being adopted and features utilized.

• During your first month-end on Quorum, an **accounting specialist** helps you through the process of submitting your financial statement.

Quorum’s **XSellerator DMS** is a comprehensive package embedded with full CRM functionality and unrivaled customer-communication capabilities. It gives your dealership seamless integration between departments and with manufacturers, advanced features in every department and ready access to key information to help you manage your business.

For more information, visit: [www.QuorumDMS.com](http://www.QuorumDMS.com)  
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