

# #RealTalk About Artificial Intelligence



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Text messaging raises significant compliance risks that are outside the scope of this workshop. Dealers must consult their legal counsel to ensure compliance before sending text messages of any kind.

## **Learning Objectives: What you'll get out of this workshop!**

The goal of this workshop is to provide you with the background on the consumer trends driving the need for dealerships to begin incorporating A.I. and virtual assistant technologies into their technology suite. You will leave this presentation with a playbook to help you identify the right virtual assistant for your business.

To achieve this goal, you'll be able to understand and articulate the following by the end of the workshop:

- The trends driving the need for A.I. technology and virtual assistants
- The various approaches and trade-offs to virtual assistants
- The current state of A.I. technology and how we expect it to evolve
- The methods needed to identify organizational goals for virtual assistants
- The latest tools and services that can help you use virtual assistants

## **How to use this guide:**

This workbook is a companion guide to the NADA session, “#RealTalk About Artificial Intelligence & Virtual Assistants” presented by Erica Sietsma, Sr. Vice President, Consumer Engagement and Product Strategy, Digital Air Strike.

Presentation slides that have specific actions that will aid you in the development of your virtual assistant strategy are indicated on that slide and the associated action template can be found in this guide. For example, slide X has an action plan template indicated and that template is in this guide.

## **I. The Customer Journey and Challenges Dealerships Have Along the Journey**

### **1. What are some activities involved at each point in the “Customer Journey?”**

Awareness

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Interest

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Consideration

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Purchase

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Advocacy

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### **2. What are some of the “human” or staffing challenges you have at your dealership?**

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## II. Introducing Virtual Assistants

Virtual assistants can help fill gaps in your current processes where you either have staff shortages or challenges with training, consistency and/or subject matter expertise.

### 1. What can a Virtual Assistant Do? Check any that sound interesting to you.

- Qualify conversations to identify which team member should handle and identify whether a “hot transfer” needs to happen or the customer is ok waiting for a response
- Schedule service visits
- Prospect and qualify customers based on their wants, needs and timelines
- Guide customers through the online transaction process and answer questions along the way
- Answer questions about your inventory drilling down to vehicle details and specs
- Be able to answer questions about current national, regional and dealer-specific incentives
- Help field customer service complaints and requests, following up with team members to get resolution and notifying customer of the resolution
- Help with service issue diagnostics to qualify service customers and better load balance service scheduling
- Analyze customer feedback and provide suggested operational improvements while identifying areas of good performance

### 2. Where do Virtual Assistants work?

- Inside databases for data analysis
- Inside Salesforce Automation and CRM solutions to proactively identify customer opportunities and messaging strategy
- Any messaging channels, such as:
  - Website chat apps
  - Social Messaging apps like Facebook Messenger, Twitter DM, What’s App, and on and on...
  - Texting apps

**3. Of the places a Virtual Assistant can be found, how many does your dealership currently utilize? I.e. do you have chat on your website? And do you manage it in-house? With a managed team (i.e. managed chat)?**

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**4. Twilio Messaging Study, 2016 Results:**

- The average consumer has:
  - 3 messaging apps on the FIRST screen on their phone
  - Uses 3 different messaging apps per week
  - Sends 3 messages per hour
- Across ALL generations, people prefer messaging 3X more than face to face/phone communication
  - Among millennials this jumps to **8X** more!
- Consumers are more likely to opt-in to notifications from a messaging app than any other kind of app

**5. Benefits of a Virtual Assistant:**

- Saves 50% cost reduction vs. human staffing
  - Activities include routing, conversation warnings and escalation
- 42% lift in visitor-to-lead conversion rate over traditional lead forms
- Faster delivery of accurate information to the consumer by leveraging real-time vehicle data, comparison data, current incentives, best practices and your dealership's value proposition
- Continuously optimizes conversational paths by incorporating consumer behavioral data to improve conversion rates

**6. Qualifications for Real Artificial Intelligence:**

- Can be **trained** by experts & also **learn** from experience
- Can capture & retain the learned knowledge
- Access **large** volume of data in **variety** of formats
- **Understand** natural forms of expression (language, speech, etc.)

- **Generate** conclusions from learned knowledge
- **Plan** a set of actions to reach a desired goal
- Responds with a degree of **confidence**
- Have **perception** abilities like humans to interpret data
- **Rank** alternatives and **optimize**
- **Converse** in natural language and detect **emotions**
- Continuously learns & **improves** its behavior based on feedback
- Identifies new **patterns & relationships** from the data

7. Which of these did you think were only possible in the movies until today?

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8. Bring the best of all worlds together with a “Smart Assistant”. A Smart Assistant combines the following:

- The pros and cost-effectiveness of the rule-based Virtual Assistant
- The pros of the A.I. Virtual Assistant when most needed
- Your team as escalation points for key functions like hot transfers of prospects or upset customers wanting something outside of your Virtual Assistants role

### III. Hiring a Virtual Assistant for your dealership

1. **Assessing your needs.** Answer these 6 questions to help determine what kind of virtual assistant your dealership needs.

**What are your goals?**

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**What are your weaknesses?**

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**What functions will a virtual assistant need to support?**

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**What issues will they need to solve?**

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**What needs will your customers have?**

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#### 2. **Tips on evaluating Virtual Assistants:**

- Do they already have an automotive presence?
  - How long has the company been in automotive – i.e. do they UNDERSTAND THE INDUSTRY? Our customers? Our business?
- Can the Virtual Assistant handle the tasks you want it to handle and where you want it to work?
  - I.e. if you need help with messenger, can it handle Facebook messenger?
- Who trains it? You? Do they have a team that can help?
- What's their roadmap of innovation for their technology?

### **3. Remember these Smart Assistant Do's**

- Create a Strategic Plan
  - Define your bot's purpose thoroughly
  - Start with less automation and faster escalation to human and then increase the Virtual Assistant's role over time
- Personify Your Bot
  - Give it a unique name and personality
- Be Conversational
  - Don't make your bot sound like... a bot
- Guide Users
  - Prompt customers with suggestions
- Evaluate Performance
  - Track your active users and peak conversation times

### **4. Remember these Smart Assistant Don'ts**

- Forget to Test
  - Capture what is confusing users before you go live.
- Fire Your Humans
  - The goal is to reduce the number of repetitive tasks that involve live agents
- Expect perfection
  - There will inevitably be errors and misunderstandings
- Stop Iterating
  - Review analytics and customer feedback for improvement

### **5. How do I measure and manage my Smart Assistant?**

- Average number of conversations.
- Percentage of conversations that result in the defined success metric (i.e. contact information capture)
- Confusion triggers
  - When Virtual Assistant says "I don't understand".
- Conversation steps
  - The number of back-and-forth exchanges.

#### **IV. Summary:**

- 1.** Virtual Assistants can help along every step of the customer's experience with your dealership
- 2.** Three main kinds of Virtual Assistant:
  - a. Rule-based
  - b. Artificial Intelligence (A.I.)
  - c. Hybrid of the above including staff escalations– i.e. Smart Assistant
- 3.** Start with just a FEW aspects of your customer's experience you'd like to have a Virtual Assistant's help and have "early" escalation staff escalation points while you continue to build and train your assistant to handle more conversation and you become more confident in your assistant's capabilities.
- 4.** Identify the type of assistant that's right for your use case
- 5.** Select the provider and test – allow for a trial period to refine your assistant with real conversations
- 6.** Measure and work with your provider on ongoing training for your assistants