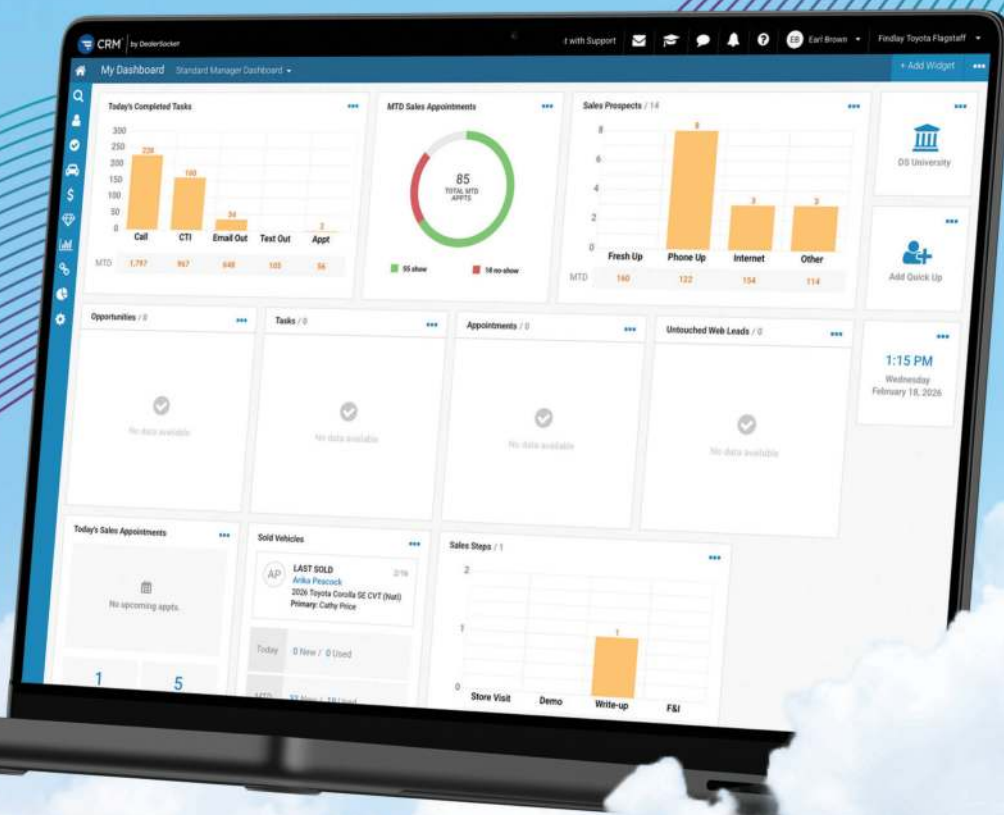


Respond faster.
Prioritize smarter.
Sell more.

AI-Powered CRM by Solera



CRM by Solera

Built for the pace of the showroom, with intelligent automation and AI-driven insights that keep your team on the playbook and your pipeline moving.

Dealers **thrive** here.™

dealer.solera.com



Turn every lead into a next step—with embedded AI and automation.

A dealership CRM should do more than store records—it should drive action. CRM by Solera (DealerSocket) gives your team a single command center for leads, follow-up, and customer lifecycle engagement. With embedded AI capabilities on the roadmap, the platform is designed to help you respond to every lead with timely, dealership-branded follow-up and focus your team on the right opportunities—without adding more systems or headcount.

Step-by-step onboarding and training

Typical go-live in under 30 days.

Dedicated customer support focus

Including Customer Success and Strategic Growth Manager support.

Enterprise SSO available

Capture and route leads in real time so nothing slips through the cracks.

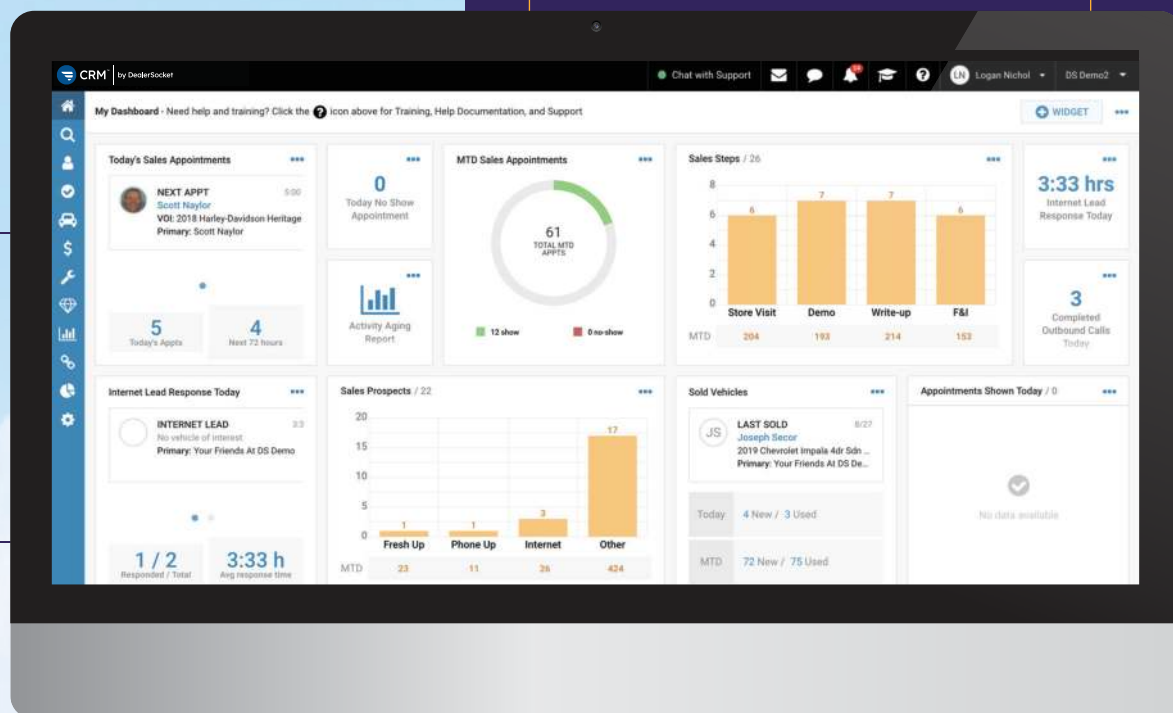
Standardize follow-up with guided workflows, task queues, and automation rules that act 24/7.

Unify sales, service, and marketing around a 360-degree customer view.

Prioritize high-intent opportunities with AI-powered scoring and insights.

Engage shoppers across SMS, email, phone, and web—with full history on every customer record.

REQUEST
A DEMO



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AI Automations built into your workflow.

AI works best when it's part of the process, not a separate tool. DealerSocket CRM upgrades are designed to embed conversational AI lead response and AI-powered lead scoring directly into your day-to-day lead workflows. That means timely, dealership-branded follow-up at scale, prioritized task lists that surface high-intent shoppers, and automated nurture for lower-intent prospects, so your team spends more time closing and less time chasing.

PROVEN RESULTS

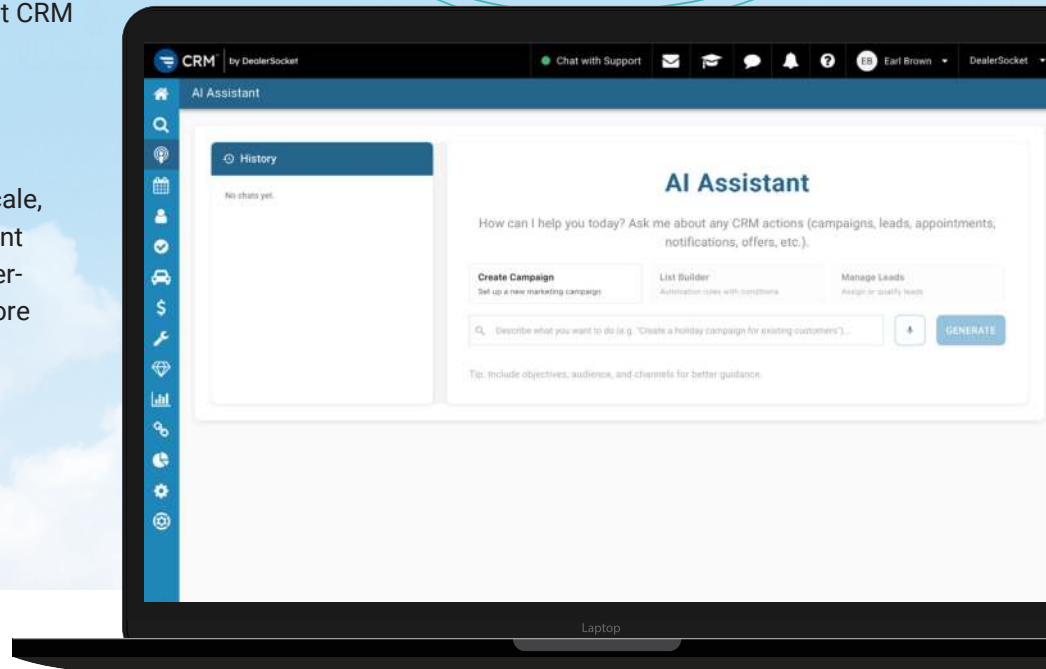
Pat Lobb
Toyota

+13%
close rate

+50%
monthly sales

Pat Lobb Toyota grew monthly sales nearly 50% and boosted close rate to 55% by aligning CRM structure, accountability, and lead performance.

- structured workflows and accountability reporting
- manager visibility/coaching
- campaign-driven execution
- channel optimization



Automated lead alerts +
smart routing



**Faster response times
+ fewer missed leads**

Guided workflows +
conversion accountability



**Consistent execution from
managers down to reps**

Multichannel communication
(email, text, phone) + video



**More personal follow-up
+ higher engagement**

360-degree customer
profiles across departments



**Better conversations,
fewer handoff gaps
between sales & service**

Equity mining +
lifecycle automation



**More upgrade opportunities
+ stronger retention**

Real-time dashboards +
group-level visibility



**Coaching, forecasting, +
performance management
across rooftops**

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AI Sales Coach

**MORE REACH. SMARTER FOLLOW-UP.
BETTER COACHING.**

CRM by Solera brings AI directly into the dealership workflow so teams can engage more leads, focus on the right opportunities, and coach performance with greater precision. Instead of adding another disconnected tool, it embeds AI automations and AI Sales Coach insights into the day-to-day CRM experience, helping dealerships improve responsiveness, standardize execution, and create more opportunities to close without adding systems or headcount.

AI THAT HELPS YOUR TEAM ENGAGE MORE SHOPPERS.

AI Lead Management helps dealerships respond faster and more consistently from the moment an eligible lead enters CRM. CRM by Solera can initiate outreach, answer vehicle and inventory questions, recommend similar units, support multilingual conversations, and guide shoppers toward a test drive or appointment — all within dealership-defined controls for branding, permissions, and engagement.

AI THAT HELPS YOUR TEAM PRIORITIZE SMARTER.

Built-in AI lead scoring helps teams quickly identify which shoppers need immediate attention and which opportunities should stay in nurture. The system evaluates signals such as finance interest, trade-in activity, purchase timeframe, model preference, communication channel, customer comments, and distance from the dealership to help surface higher-intent leads first.

AI THAT HELPS MANAGERS COACH FOR BETTER RESULTS.

AI Sales Coach gives managers a sharper view of sales rep performance through dynamic filters, team-level visibility, and AI-generated coaching notes tailored to each rep. The platform can highlight patterns such as strong lead volume but weak visit or sales conversion, making it easier to identify coaching opportunities and take action directly from the dashboard.

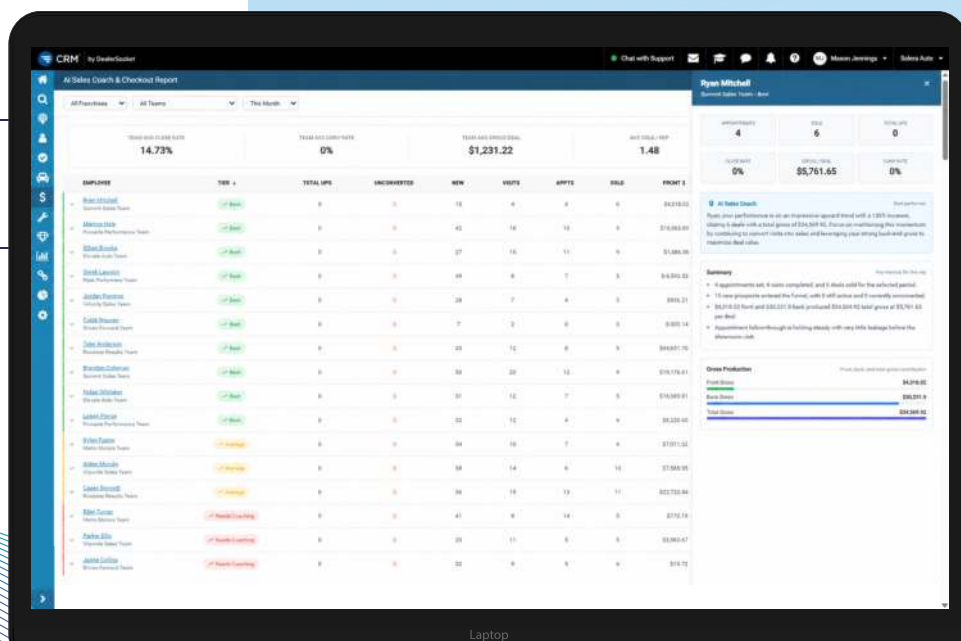
Respond faster with AI-driven lead engagement.

AI Sales Coach gives managers at-a-glance visibility into rep performance, coaching priorities, and actionable next steps – all within the CRM workflow.

Coach reps with targeted, AI-generated performance insights.

**Extend sales coverage
without adding headcount.**

Prioritize high-intent opportunities with built-in scoring.

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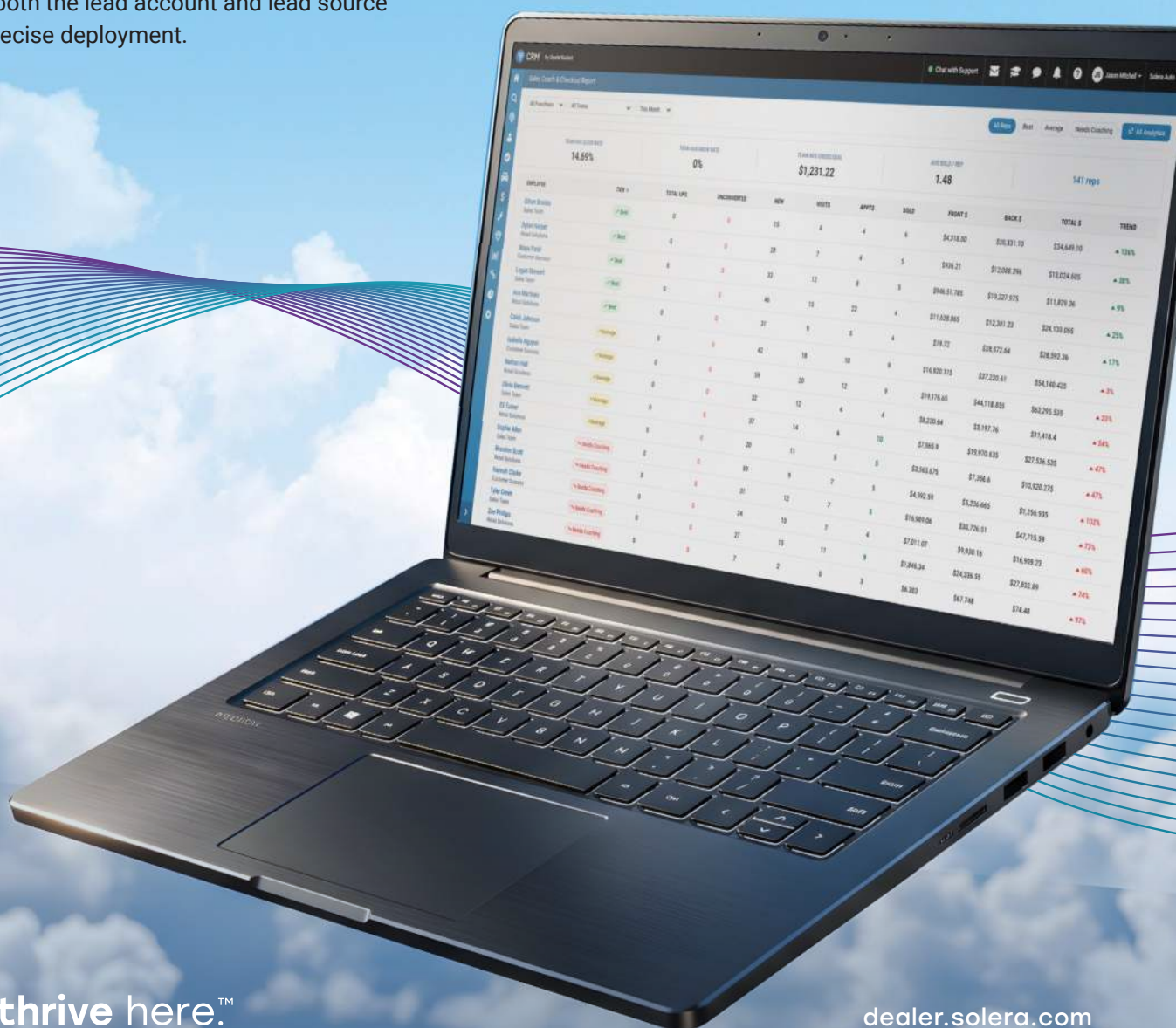
Turn more leads into next steps with AI built into CRM.

BUILT INTO CRM. CONTROLLED BY THE DEALERSHIP.

AI in CRM by Solera is designed to work as part of the dealership process, not as a separate tool layered on top of it. Dealers can manage access through role-based permissions, configure the AI agent and dealership name used in customer-facing responses, and control AI engagement at both the lead account and lead source level for more precise deployment.

A CONNECTED SALES ENGINE FOR STRONGER PERFORMANCE.

Together, CRM by Solera, AI automations, and AI Sales Coach help dealerships extend coverage, improve follow-up consistency, prioritize higher-opportunity leads, and give managers clearer guidance for developing rep performance. The result is a more connected workflow built to help sales teams respond faster, work smarter, and create more revenue opportunities across the pipeline.



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