



Lead handling success & starter kit

May 2025

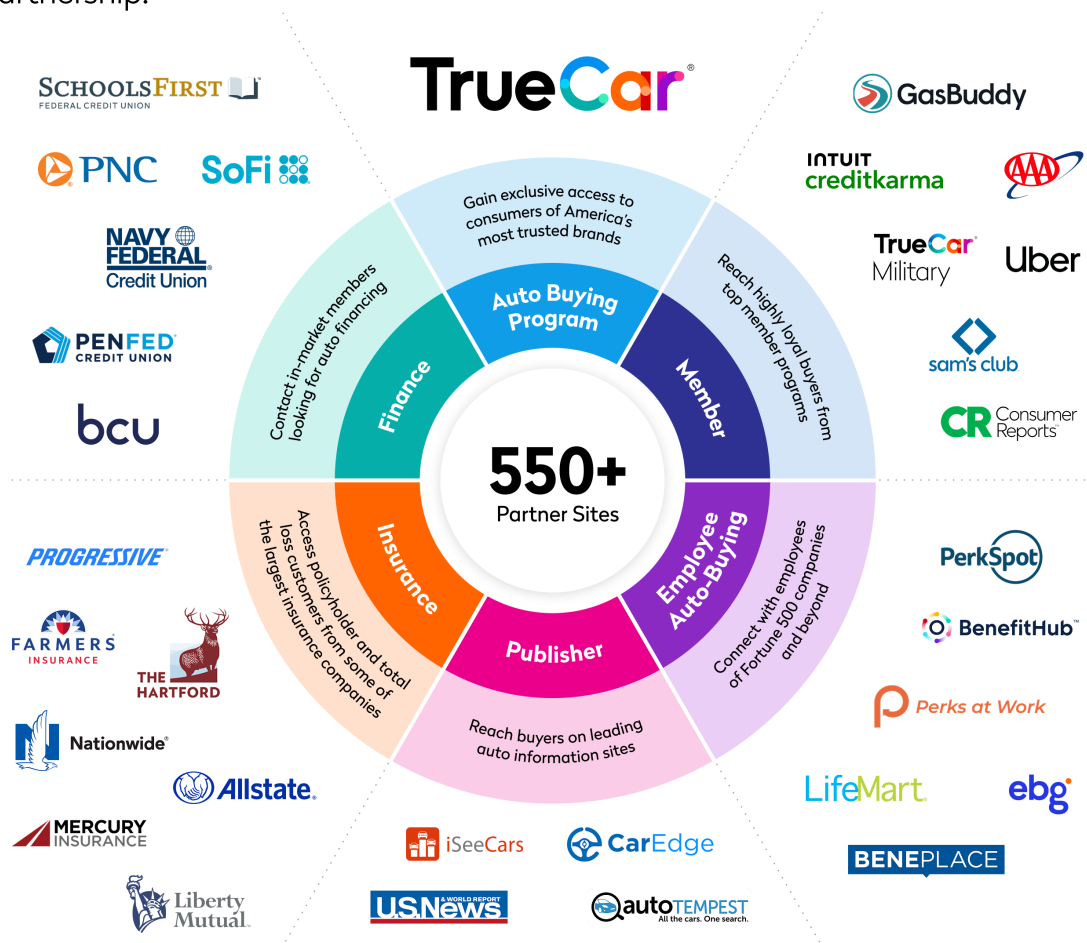
Welcome to TrueCar!

On behalf of the entire TrueCar team, we are excited to welcome you as a new dealer partner!

On behalf of the entire TrueCar team, we are excited to welcome you as a new dealer partner! By joining our network, you now have access to a powerful lead generation platform that includes opportunities not only from TrueCar.com but also from our extensive network of over 500 trusted partner sites. These leads come from informed, ready-to-buy customers who trust the auto-buying programs of companies like AAA, PNC, and others.

At TrueCar, we emphasize transparency, empowering customers to navigate the car-buying process with confidence. This approach creates a smoother and more efficient sales experience for your dealership. By implementing the best practices outlined in this starter kit, you'll enhance customer engagement, build trust, and ultimately drive more sales.

We are committed to supporting you as you grow your business and make the most of your TrueCar partnership.



Steps for success with TrueCar

- ✓ **Read the entire Starter Kit:**

Familiarize yourself with the entire success kit to ensure you're making the most of the resources available to your dealership.

- ✓ **Distribute the Starter Kit:**

Ensure all staff working with TrueCar opportunities receive the provided guides for calls, texts, emails and voicemails. Ideally, you will get these templates uploaded into your CRM for more efficiency.

- ✓ **Partner with your Dealer Performance Manager:**

Collaborate to ensure you have everything needed to maximize your success with TrueCar.

- ✓ **Ensure training completion:**

All staff working with TrueCar opportunities should either complete in-store training or sign up for the virtual "Driving Engagement" training.

The following pages include additional resources about your Dealer Performance Manager, virtual training opportunities for your staff and TrueCar University—your dealership resource page for everything TrueCar.



Navigating success with TrueCar

The role of your Dealer Performance Manager (DPM)

This guide is a great starting point for your dealership to optimize your experience with TrueCar. It offers valuable tools and strategies to help you get the most out of the platform. However, you're not on this journey alone. At TrueCar, we understand that consistent support and expert guidance are key to achieving your dealership's goals. That's why every dealership partnered with TrueCar benefits from a dedicated Dealer Performance Manager (DPM). Your DPM is not just a point of contact—they are your strategic partner, offering tailored insights and personalized support to help you maximize success with TrueCar. From monthly outreach to advanced analytics, they're here to ensure you have everything you need to thrive.



Monthly outreach to
your dealership's points
of contact



Quarterly performance
reviews



Consultative approach
to help achieve your
dealership's goals



Access to advanced
analytics



Dedicated
training



Your dealership's go-to
for anything TrueCar

Online virtual training

In addition to utilizing this success kit, we recommend that your staff who work with TrueCar opportunities participate in our one-to-many virtual trainings. These sessions are designed to help your team enhance their skills and effectiveness. Each course is approximately 30-45 minutes long and easy to fit into your schedule.

AVAILABLE COURSES

Driving engagement

Strategies for effectively engaging with customers and improving their experience with TrueCar and your Dealership.

Utilizing the "Create Offer" tool

Guidance on using the "Create Offer" tool to provide appealing offers to potential buyers.

Management essentials for the portal

This course focuses on helping managers navigate pricing, manage staff within the portal, and utilize the platform efficiently.

Simple sign-up

Registration is straightforward and quick. Go to www.calendly.com/training/truecar for available courses and registration times.

TrueCar Best Practices to Drive Engagement

Independent Dealer Training

TrueCar Management Training

TrueCar Create Offer Tool Training

Robbie Beard

TrueCar Best Practices to Drive Engagement

45 min

Web conferencing details provided upon confirmation.

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October 2024

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SUN	MON	TUE	WED	THU	FRI	SAT
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

GETTING HELP

If you need assistance with signing up your staff, your Dealer Performance Manager (DPM) is available to help. We encourage you to consider these trainings for your team.

Driving engagement

Creating a strong connection with customers begins with effective communication.

The following best practices, call, voicemail, text and email templates will assist you in smoothly transitioning the customer from an online experience to dealership outreach. By utilizing these templates and guides, you can effectively transfer the trust customers have in TrueCar.com and our trusted partners, significantly enhancing how potential buyers engage with you.

By using a mix of calls, voicemails, texts and emails, you can make your customers feel more comfortable and open to talking. Each message is designed to build on the trust customers have in TrueCar.com and our trusted sources. Always remember to lead with the Trusted Source to reinforce that trust from the start.



**Connect with
more buyers**



**Set more
appointments**



**Close more
sales**

Key strategies for engaging TrueCar opportunities

To maximize your success with TrueCar opportunities, it's essential to follow these proven strategies for timely and effective communication:

1 Read the opportunity information before reaching out. Be prepared.

Before contacting any customer, review all the details provided in the opportunity. Understand where the opportunity came from (e.g., American Express, PNC), whether the customer mentioned a trade-in, and any specific notes they may have included. This helps you personalize your approach, showing the customer that you've done your homework and are ready to assist with their specific needs. Well-prepared outreach increases the likelihood of building trust and moving the conversation forward.

2 Speed makes or breaks deals. Timeliness is everything.

TrueCar opportunities consist of highly engaged, ready-to-buy customers who are already deep in their buying process. Responding quickly is crucial to ensuring they don't seek alternatives elsewhere. Top-performing dealerships consistently respond within 5 minutes or less, which dramatically increases engagement and conversion rates.

3 Always lead with the trusted source. Build trust early.

Start every interaction by highlighting the trusted source (e.g., "I'm calling on behalf of the (Trusted Source) Auto Buying Program"). Mentioning the source right away and frequently throughout the conversation establishes credibility and reassures the customer that this is referral-based communication, not a cold call.

4 Skip the name game. Assume familiarity.

Never ask, "Is this Mike?" or "May I speak with Mike?" Doing so signals to the customer that you're an unfamiliar caller, which can make them defensive or hesitant. Instead, confidently greet them by name with, "Hi Mike," which immediately creates a more personal and professional tone.

5 Cut the small talk. Get to the point.

Starting a conversation with "How are you today?" or "Is this a good time to talk?" can make you sound like a telemarketer, leading to customer resistance. Instead, lead with value and purpose right from the start to maintain their interest and trust.

6 Double-call for higher answer rates. Persistence pays off.

If a customer doesn't answer the first call, immediately try again. Many people are more likely to answer a second call from the same number, especially if they initially hesitated to respond to an unfamiliar number.

7 Consistent follow-up and follow through. Multiple touchpoints matter.

For the first three days, aim to contact the customer at least twice per day. On days four through seven, reduce this to one call per day. Always follow up phone calls with communications such as voicemails, texts and emails to ensure you're reaching them through multiple channels.

By following these guidelines, you will engage opportunities more effectively, build trust quickly, and increase your chances of converting TrueCar opportunities into satisfied customers.

Contact made call guide

This call guide helps smoothly transition customers from online shopping to direct dealership engagement.

By leading with the Trusted Source, you build immediate trust and credibility, increasing customer confidence. Following this guide ensures a consistent, professional approach that maximizes engagement and moves the customer closer to purchase.

Hi, **(First Name)**,

I'm calling on behalf of the **(Trusted Source)** Auto Buying Program. My name is **(Your Name)**, and I'm your **(Trusted Source)** Advisor here at **(Dealership)**. My goal is to ensure you have an outstanding and hassle-free car buying experience!

I noticed you've shown interest in the **(Vehicle Name)** with **(specific details like color, trim or feature)**. Is that correct? **(Wait for confirmation)**

Fantastic! Let me quickly explain how the **(Trusted Source)** Auto Buying Program works and the benefits you'll receive as a member. **(Trusted Source)** has partnered with **(Dealership)** to provide its members with an easy, transparent, and stress-free car-buying experience. This includes up-front, transparent pricing for the vehicle you're interested in, or for any vehicle we have in stock.

As a preferred **(Trusted Source)** member, you'll have access to some great perks. You can streamline your purchase through our expedited process—just come in to sign the paperwork and pick up your car—or we can arrange for you to test drive it first. Which option works better for you? **(Pause for their choice)**

Great! We have availability **(give two options like “this afternoon” or “tomorrow afternoon”— feel free to customize times based on the client's preference)**. Which one would be most convenient for you? **(Confirm)**

Perfect, I'll go ahead and schedule that for you. If you have any questions or need anything else in the meantime, feel free to reach out. I'm here to help make your car-buying journey as smooth as possible. Looking forward to seeing you!

Voicemail guides

A well-crafted voicemail can spark their interest and prompt a callback, helping you move the opportunity forward.

In today's world, many customers don't answer calls from unknown numbers, making voicemails a crucial part of your follow-up strategy. Leaving a clear, concise message ensures they know who is calling and why. It's especially important to lead with the Trusted Source, as customers are more likely to recognize and trust the name, even if they only glance at a voicemail transcript.



Initial call

Hi **(First Name)**,

This is **(Your Name)**, your **(Trusted Source)** Advisor with the **(Trusted Source)** Auto Buying Program. I'm reaching out to make sure you have everything you need regarding the **(Vehicle Name)** you've been looking at. Feel free to call me back at **(Your Number)** when it's convenient. I look forward to helping you with a smooth and hassle-free car buying experience. Talk soon!



Friendly reminder

Hi **(First Name)**,

It's **(Your Name)** again from the **(Trusted Source)** Auto Buying Program. Just checking in to see if you had any questions about the **(Vehicle Name)** or the program itself. We make the car buying process easy and transparent, and I'm here to help you every step of the way. Give me a call at **(Your Number)** whenever you're ready. Have a great day!



Urgency and benefits

Hi **(First Name)**,

This is **(Your Name)** with the **(Trusted Source)** Auto Buying Program. I wanted to remind you about the great benefits you have as a **(Trusted Source)** member, like upfront pricing and a stress-free buying process. I'd love to help you take advantage of these perks and assist with any questions. You can reach me at **(Your Number)**. Looking forward to hearing from you!

Voicemail guides



End of week

Hi (First Name),

This is (Your Name) from the (Trusted Source) Auto Buying Program. I've been trying to connect with you regarding the (Vehicle Name) and make sure you have all the information you need. Please give me a call back at (Your Number) whenever it's convenient. I'm here to make your car buying experience as smooth as possible. Have a great day!



Checking in

Hi (First Name),

It's (Your Name) from the (Trusted Source) Auto Buying Program. Just checking in again about the (Vehicle Name). I'm here to help with anything you need to move forward, so feel free to call me at (Your Number). I look forward to hearing from you soon!



Focus on convenience

Hi (First Name),

This is (Your Name) with the (Trusted Source) Auto Buying Program. I understand life gets busy, but I wanted to remind you that our process is designed to be as convenient as possible. Whether you're ready to move forward or just have a few questions, I'm happy to assist. Call me anytime at (Your Number). I'm here to help!



Final follow-up

Hi (First Name),

It's (Your Name) from the (Trusted Source) Auto Buying Program. I wanted to reach out one final time to see if you're still interested in the (Vehicle Name). I'd hate for you to miss out on the benefits available to you through the program. Please give me a call at (Your Number) and let me know how I can assist. Thanks again!

Text guides

Don't rush to ask for an appointment—research shows it takes around 4-5 texts to build trust before you're in a good position to suggest it.

Focus on providing value in each message and always lead with the Trusted Source to build credibility. This approach strengthens your connection and increases the chances of securing an appointment.



Day 1: Initial contact

The **(Trusted Source)** Auto Buying Program offers a simple and transparent car buying experience. My name is **(Your Name)** and I'm your **(Trusted Source)** advisor. How may I be of service?



Program benefits

Hi **(First Name)**, this is **(Your Name)** with the **(Trusted Source)** Auto Buying Program. As a member, you have access to exclusive benefits like transparent pricing and a hassle-free experience. Let me know if you'd like more info on the **(Vehicle Name)**!



Checking in

Hi **(First Name)**, it's **(Your Name)**, your **(Trusted Source)** Auto Buying Advisor. Just checking in—are you still considering the **(Vehicle Name)**? I'm here to answer any questions or help with next steps!



Test drive offer

Hi **(First Name)**, it's **(Your Name)**, your **(Trusted Source)** Auto Buying Advisor. Would you like to schedule a test drive for the **(Vehicle Name)**? I can help arrange a time that works for you. Let me know!



Next week follow-up

Hi **(First Name)**, this is **(Your Name)**, your **(Trusted Source)** Auto Buying Advisor. I wanted to touch base again about the **(Vehicle Name)**. Let me know if you'd like to schedule a time to come in or if you have any questions about the program!

Text guides



Reminder of benefits

Hi **(First Name)**, it's **(Your Name)** with the **(Trusted Source)** Auto Buying Program. As a **(Trusted Source)** member, you have access to great benefits, including upfront pricing and an expedited buying process. I'd love to help—let me know if you're ready to move forward with the **(Vehicle Name)**!



End of the week check-in

Hi **(First Name)**, it's **(Your Name)**, your **(Trusted Source)** Auto Buying Advisor. Just checking in at the end of the week—let me know if you're ready to move forward with the **(Vehicle Name)**, or if you have any questions. I'm here to help!



Focus on convenience

Hi **(First Name)**, it's **(Your Name)** from the **(Trusted Source)** Auto Buying Program. Just a reminder that our process is designed to be simple and convenient. Let me know if you'd like to move forward with the **(Vehicle Name)** or schedule a test drive!

Notes:

Email guides

Remember, the subject line is key to standing out. Lead with the Trusted Source and get creative to ensure your message gets noticed in a crowded inbox.

Following up thoroughly during the first two weeks is essential, as 65% of TrueCar buyers close within a week, with the average purchase happening around day 11. Using a structured email approach keeps you top-of-mind and helps build trust. You can input these templates—or similar ones—into your CRM workflows for streamlined follow-up.



Day 1: Initial contact

Subject: Welcome to the (Trusted Source) Auto Buying Program, (First Name)!

Hi (First Name),

I hope this message finds you well. My name is (Your Name), and I'm your (Trusted Source) Auto Buying Advisor here at (Dealership Name). I saw that you're interested in the (Vehicle Name) and wanted to reach out to see if there's anything you need or any questions I can answer about the vehicle or our program.

As a member of the (Trusted Source) Auto Buying Program, you have access to great benefits, including upfront pricing and an easy, hassle-free car buying experience. My goal is to make sure you have everything you need to make the best decision for you.

If you'd like to schedule a test drive or have any questions, feel free to reply to this email or give me a call. I look forward to helping you with your car buying journey!

Best regards,



Scheduling test drive

Subject: Ready to take the (Vehicle Name) for a spin, (First Name)?

Hi (First Name),

I wanted to check in and see if you're ready to schedule a test drive for the (Vehicle Name). We can find a time that works for you to come in and take it for a spin!

As your (Trusted Source) Auto Buying Advisor, my goal is to make the process as easy as possible, and I'd love to assist with any questions or details you need.

Feel free to reply to this email or give me a call to schedule your test drive.

Best regards,

Email guides



Mid-week check-in

Subject: Welcome to the (Trusted Source) Auto Buying Program, (First Name)!

Hi (First Name),

I hope you're having a great week! I wanted to touch base again about the (Vehicle Name) you've been looking at.

I'm happy to assist with any questions or to help you take the next steps, whether that's scheduling a test drive or providing more details about the vehicle or the (Trusted Source) Auto Buying Program.

Let me know how I can be of help!

Best regards,



Program perks reminder

Subject: Don't miss out on these (Trusted Source) Auto Buying Program benefits, (First Name)!

Hi (First Name),

I just wanted to send a quick reminder about the benefits you have access to through the (Trusted Source) Auto Buying Program.

These include upfront, transparent pricing, a hassle-free buying process, and personalized service from me, your dedicated Auto Buying Advisor.

If you're still considering the (Vehicle Name), I'd love to help you take advantage of these perks! Feel free to reach out if you have any questions or would like to schedule a test drive.

Best regards,



Reminder about auto program benefits

Subject: Still considering the (Vehicle Name), (First Name)?

Hi (First Name),

I hope you're doing well! I just wanted to follow up to see if you had any more questions about the (Vehicle Name) or the (Trusted Source) Auto Buying Program.

As a reminder, the program offers great benefits like upfront pricing and a streamlined buying process. I'm here to help with any information you need or to schedule a test drive if you'd like to come in and see the vehicle in person.

Let me know how I can assist!

Creating custom offers

Boosting engagement and close rates

Custom offers are a powerful tool that can enhance your dealership's follow-up strategy. By providing personalized offers to potential buyers, you can leverage third-party validation and build greater trust.

We highly recommend giving your team the ability to send custom offers when working with TrueCar leads, the reason being:

- ✓ **Better engagement.** Custom offers show potential buyers that you're paying attention to their specific needs, encouraging them to engage with your follow-up communications.
- ✓ **Higher close rates.** Personalized offers backed by trusted sources (e.g., American Express, PNC) create more urgency and credibility, increasing the likelihood of a sale.
- ✓ **Multiple touchpoints for follow-up.** A custom offer provides an additional way to reach out and re-engage a customer, offering something new and tailored to their preferences.
- ✓ **Third-party validation.** Offers backed by the trusted source build immediate trust with potential buyers.
- ✓ **Different email and phone number.** Utilizing another contact method (email/phone) for the custom offer makes the follow-up feel like a new and fresh communication, increasing response rates.

Your Offer from [Redacted]
OFFER CODE [Redacted] EXPIRES 4/5/2026

2025 Nissan Sentra SV CVT

\$22,515

Great Price

Your offer is a great deal!

This offer is \$100 below MSRP

Offer Price represents a cash purchase price. Lease or Loan vehicle price may differ depending on available rebates, incentives or dealer pricing.

[View Offer Details](#)

Interior Charcoal
Transmission Automatic

ra SV CVT. I look forward to speaking with you

Cash Summary

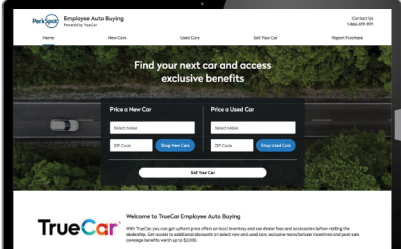
Price	\$22,515
Base MSRP	\$21,170.00
Factory Installed Options	\$350.00
Destination Charge	\$1,095.00
Total MSRP	\$22,615.00
Dealer Discount	-\$100.00
Total Price	\$22,515.00
Due at Signing (before tax)	\$22,665
Price	\$22,515.00
Fees	\$150.00
Due at Signing (before tax)	\$22,665.00
Your personalized savings total \$100	

AAA
Questions? 1-800-TRUECAR (5555-5555)
[View vehicle Details](#)

For more information on creating custom offers, contact your Dealer Performance Manager, or sign up for our virtual training on this topic at www.calendly.com/training/truecar

Buyer's Bonus

Buyer's Bonus is an exclusive program, fully funded by TrueCar, that is made available to members of certain affinity auto buying sites. It is designed to further reinforce the value of working with a TrueCar Certified Dealer for the member's next vehicle purchase.





TrueCar Buyer's Bonus

Enjoy benefits worth up to \$2,000, like Auto Repair and Auto Deductible Reimbursement, when you report your new or used car purchase from a Certified Dealer.**

[Learn More](#)

Depending on the partner, the member is eligible for the following in the first year of car ownership:



Auto Repair Expense Reimbursement

Reimburses 20% of the payment, if any, made to repair the vehicle purchased through the car buying program. Covers up to a \$500 reimbursement on repair (parts included), 2x a year.



Auto Deductible Reimbursement

Reimburses what the member paid, if anything, for their insurance deductible when they file a claim. Covers up to \$500, 2x a year.



Auto Expert Opinion

A member can talk directly to an ASE-Certified mechanic to discuss questions they might have on recommended repairs and cost, sounds their car is making, etc.

Participating auto buying programs include:

	TrueCar Employee AutoBuying	PENFED CREDIT UNION	Allstate	FARMERS INSURANCE	PROGRESSIVE	Uber	INTUIT creditkarma	NAVY FEDERAL Credit Union	AAA
Auto Repair Expense Reimbursement	✓		✓	✓	✓	✓	✓	✓	✓
Auto Deductible Reimbursement	✓	✓	✓	✓	✓	✓	✓	✓	✓
Auto Expert Opinion	✓	✓	✓	✓	✓	✓	✓	✓	✓

*Not all participating programs are listed. Please contact us at info@truecar.com or 866.480.1313 with any questions.

**Nave Federal members get 2X the benefits through the Military Appreciation Package.

***Some benefits not available in NY or NH. Terms and conditions apply. Auto Deductible Reimbursement is provided by Voyager Indemnity Insurance Company, an Assurant company.

Buyer's Bonus

What do you need to do?

To confirm your customer's eligibility, review the lead notes in your CRM to see if they reference Buyer's Bonus. If you can't view this information in your CRM, click the lead's link to the TrueCar Dealer Portal and refer to the comments section of the prospect's details

What do customers need to do?

Customer's will receive an email with information on how to activate Buyer's Bonus once they submit their contact information to connect with Certified Dealers who have the car they want. They can also visit the "Report Your Purchase" page of their Auto Buying Program's website for additional information.

The screenshot shows the TrueCar Dealer Portal interface. The top navigation bar includes 'TrueCar Dealer Portal', 'Prospects', 'Profile', and 'My Account'. The main content area displays prospect details for George Smith. On the left, a dark grey box contains the 'PerkSpot' logo, the prospect's name 'George Smith', contact information '12/5/2019 (Thu) 10:21 am' and 'Prospect ID: 4x9TN22Z38', and a link to 'Conquest Zone' with email 'georgesmith042@gmail.com' and phone '(555) 555-5555'. Below this, a 'Comments' section lists 'Buyer's Bonus: Auto Repair Expense', 'Reimbursement Auto Deductible', and 'Reimbursement Auto Expert Opinion'. A 'Purchase Strategy' section indicates a 'Loan'. A 'Trade In' section lists '2013 BMW 3 Series 370 Sedan' and 'Mileage 75k'. On the right, a section titled 'George's Desired Vehicles' shows several car listings with images and brief descriptions.



Purchase a vehicle.

Customer must buy or lease a new or used vehicle from a TrueCar Certified Dealer through a qualifying TrueCar-powered affinity program to qualify. Purchases from dealers who are not TrueCar Certified will not be eligible for TrueCar Buyer's Bonus benefits.



Report their purchase.

After purchasing a vehicle from a Certified Dealer, customers must return to their affinity auto buying site's "Report Your Purchase" page within 45 days and enter their email address to get started. They should have their VIN, dealership details and personal information handy to complete the process.



Access their benefits.

Once a customer reports their purchase, they will receive a confirmation email with instructions on how to access their Buyer's Bonus benefits. Whether they use one benefit or use them all, there's no additional cost to the customer!

Military Appreciation Package

We are expanding your reach to high-quality military buyers

The TrueCar Military Program was designed to provide exclusive benefits to the military community looking to buy, sell or trade. As a TrueCar Certified Dealer, you're now able to broaden your reach to a large military audience of over 45 million people, including active duty military, veterans and their immediate family.



Attract incremental buyers through **exclusive OEM incentives**



Engage shopper with **exclusive consumer benefits funded by TrueCar**



Maximize revenue opportunities by **directly presenting your finance offerings**

Engage shoppers with our exclusive Military Appreciation Package

In addition to buying incentives TrueCar Military buyers can receive up to \$4,000 of added benefits—at no cost to the dealership, including:



Auto Repair Expense Reimbursement*

Reimburses 20% of vehicle repair payments, up to \$500 (parts included), 2 times a year for 2 years.

Auto Deductible Reimbursement*

Reimburses the insurance deductible on a vehicle claim, covering up to \$500, 2 times a year for 2 years.

Dedicated military resources*

Dedicated customer hotline and comprehensive buying guides are available to support buyers along the way.

Eligible buyers can visit [TrueCar.com/Report-Purchase](https://www.truecar.com/report-purchase) within 45-days to activate their benefits.

***Some benefits not available in NY or NH. Terms and conditions apply. Auto Deductible Reimbursement is provided by Voyager Indemnity Insurance Company, an Assurant company.

TrueCar University

Dealerresources.truecar.com/home

The Dealer Resources site on TrueCar.com offers a wealth of information to support your dealership's operations. From pricing new vehicles and managing employees to updating fees, accessories and sending custom offers, this page provides valuable tools at your fingertips. You'll also find key details on Co-op, Buyers Bonus, and partner information—and remember, if you ever can't find what you're looking for, don't hesitate to reach out to your Dealer Performance Manager for assistance.



Getting started on TrueCar

Need help getting started? Take a look through these resources to learn more about the basics.

[Get started](#)

Dealer Portal basics

Looking for help with the Dealer Portal? Review resources from how to price your vehicles to adding new employees.

[Open resources](#)

Product how-to guides

Review the resources in here to learn how to use products like Sponsored Listings, TrueCar Wholesale Solutions, Buyer's Bonus, and more!

[Open resources](#)

Partner information

Take a look through these one pagers to learn more about some of TrueCar's biggest partners.

[Open resources](#)