

CDK GLOBAL

Streamlining the Discovery Process with a Sales App for Reps

Company Overview

CDK Global is a leading provider of retail technology and SaaS solutions that help upwards of 15,000 automotive dealers and manufacturers operate more efficiently.

The Challenge

For decades, the sales team would meet with auto dealerships to evaluate their infrastructure, technology, and equipment needs using a pen-and-paper discovery process. After each visit, reps used a slow VPN system and then manually entered information into Salesforce. Recognizing the inefficiency and risks, CDK set out to create an industry-specific discovery application for sales reps to use.

The Approach

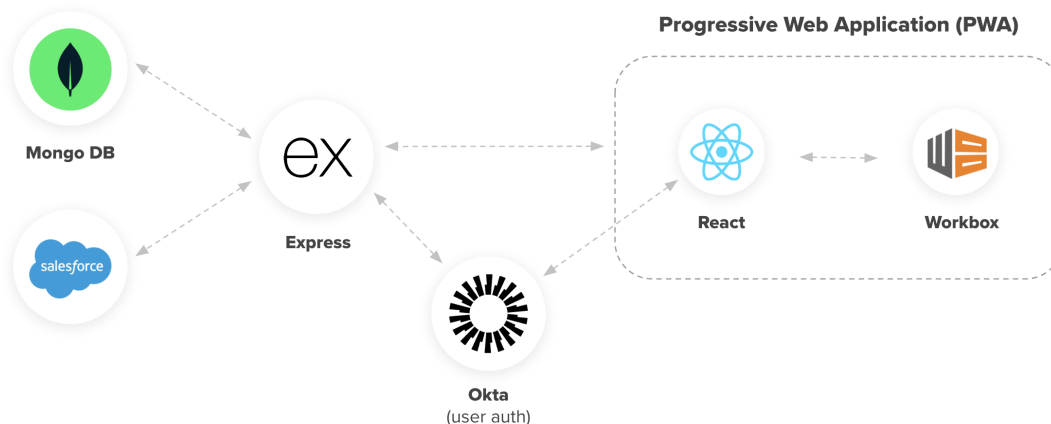
CDK partnered with LaunchPad Lab to build a new Sales Discovery Portal. After technical conversations and a Blueprint Workshop, the goals were set for building an intuitive Progressive Web Application portal for reps to use the field. Not only would the application streamline the discovery process, it would improve the customer experience, expedite quoting, reduce errors, and include a data model that synced seamlessly with Salesforce.

Pain Points

- ✗ Inefficient process
- ✗ Time-consuming
- ✗ Manual data entry
- ✗ Risk for errors

Product Requirements

- ✓ Progressive Web Application (PWA)
- ✓ Streamlined workflow
- ✓ Ease of use on tablets
- ✓ Sync with Salesforce



Introducing CDK Global's Sales Discovery Portal

The Solution

The new Sales Discovery Portal broke down the discovery process into three key components: Deals, Departments, and Campuses. Each component includes a guided question flow that helps gather relevant data, with questions that adapt based on previous answers.



The Deals page provides a view of all active opportunities with a progress bar indicating the discovery stage, and deal status.



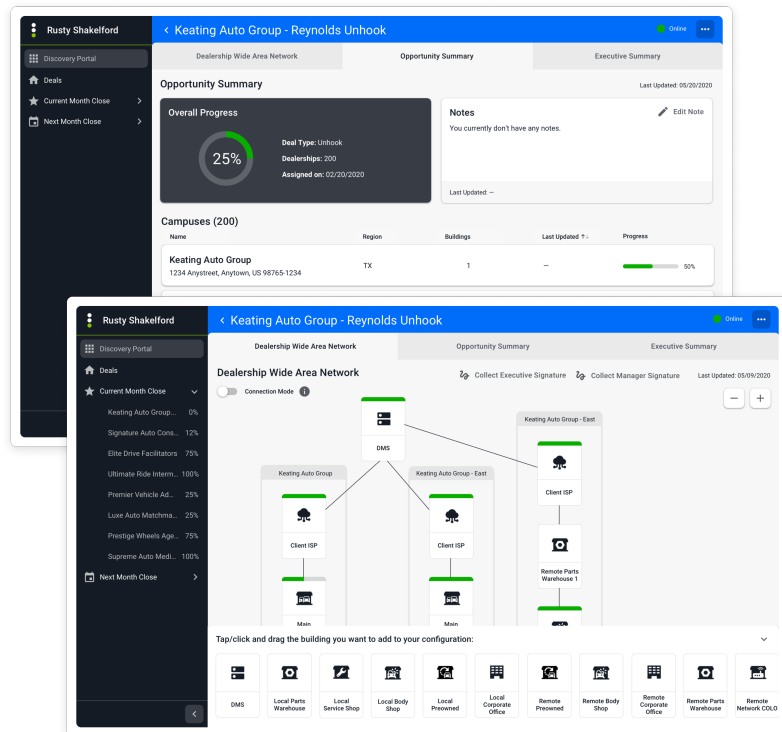
With the Wide Area Network (WAN) page, reps can access a drag-and-drop canvas to design dealership 'campuses.'



The Satellite View lets reps drag and drop indicators on the map to help the installation team identify key access points.



Every opportunity includes an overview screen with the status of campuses and progress. A similar screen is available at the campus level.



The Results

CDK Global has seen remarkable improvements in efficiency, consistency, and overall customer satisfaction since launching the Sales Discovery Portal.

- ✓ Streamlined discovery process
- ✓ Improved customer experience
- ✓ Expedited quoting
- ✓ Reduced errors
- ✓ Seamless Salesforce integration

80%

Adoption Rate by Sales

90%

Reduction Onboarding Sales

“We looked at LaunchPad Lab as the partner who could not only help us develop the interface faster than our internal IT staff would be able to do, but you also had the lens of what’s currently going on in the market, the current trends, and the knowledge that’s crucial to creating the proper user interface.”

