

protomiq

The RIGHT Lever

Live from the CRM with the
People Who Use It

With Jeremy Rodrigues



Speaking Today



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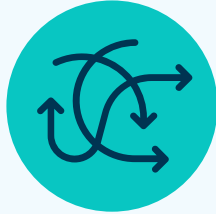
**Sr. Director of
Product,
Protomiq**





Recap on the Series

The Problem:



Leads become harder to close

The more a lead is comparison-shopped, the harder it closes — only about 1 in 10 internet leads ever becomes a buyer.



Car buyers...

- Spend >14 hours doing research
- Visit ~5 websites
- Visit 1.2 dealerships

Source

Every click off your site is a deal you're not closing.

The Why:

The IQ Webinar
The What



The Wrong Lever
The Why



The Right Lever
The How

Data is flat and focused on the lead



We can't see the whole customer journey.

Every lead looks the same



We have very little ability to personalize outreach and strategy.

No insight beyond the website



Readiness and ability to buy are a mystery.

Leads move from team to team



Handoffs duplicate work and rely on people.

The What:

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An IQ Lead

A Typical Lead

Date: 07/04/26 Time: 11:11 AM Status: Lead received

Lead Summary

Trade-in: Yes
Trade-in Vehicle: 2025 Ford F-150 STX Super Crew
Trade-in Mileage: 11,000
Scheduled Appraisal: No

OR

Date: 07/04/26 Time: 11:11 AM Status: Lead received

Lead Summary

Trade-in: Yes
Trade-in Vehicle: 2025 Ford F-150 STX Super Crew
Trade-in Mileage: 11,000
Trade-in Demand Tier: Strong Demand
Estimated Value-to-Dealer: \$33,106

Market & Engagement Signals

Ready-to-Buy: High
Ready-to-Buy Signals: Present
Consent Status: Yes
Value-Watch Open Rate: 25%
Trade Insights: Steady Interest in 2025 Ford F-150 STC Super Crew vehicles in your area

Activities & Actions

View Market Report: [\[link to Trade-in report\]](#)
Link to User in Console: [\[link to Protomiq dashboard\]](#)
Days Since Last Site Visit: 2
Scheduled Appraisal: No
Trade-in Video Sent: Yes

“Mr. Customer I see you’ve got a trade. When can you bring it in?”

Trade talk track

Vehicle of Interest talk track

Interested Party

Strong Demand

Local Market talk track

Some of the levers



The Why:

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All these solutions cost:



Money



Time



Bandwidth



Resources



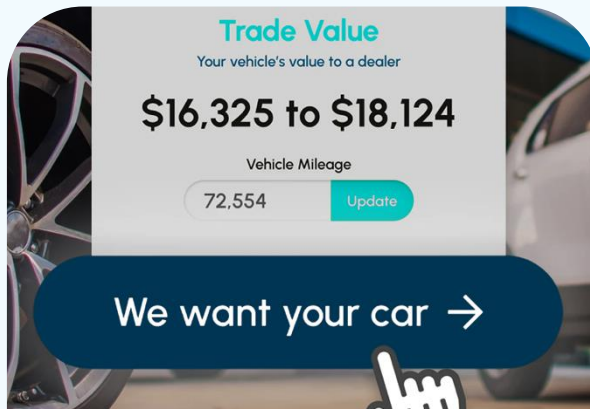
**Doesn't
Always Work**

The IQ Webinar
The What

The Why:

The Wrong Lever
The Why

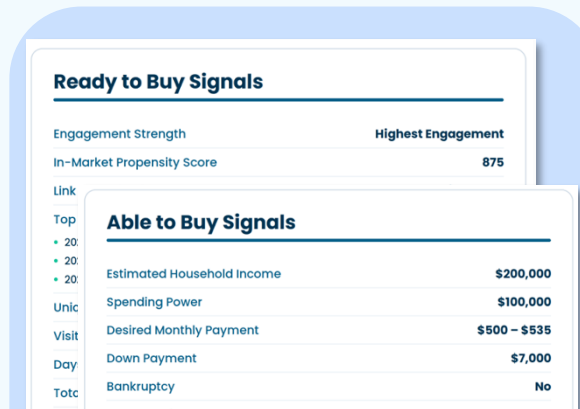
The Right Lever
The How



1

Capture

Turn your shoppers into leads with web experiences that answer critical customer questions.



2

Contextualize

Zoom out from the flat lead and look at the entire customer picture



3

Convert

Use personalized, impactful conversations that open up more opportunities.

The How
Let's see it



How to think about adding context

A complete customer profile – actionable at first contact

- Ready to buy
- Able to buy
- Preferences

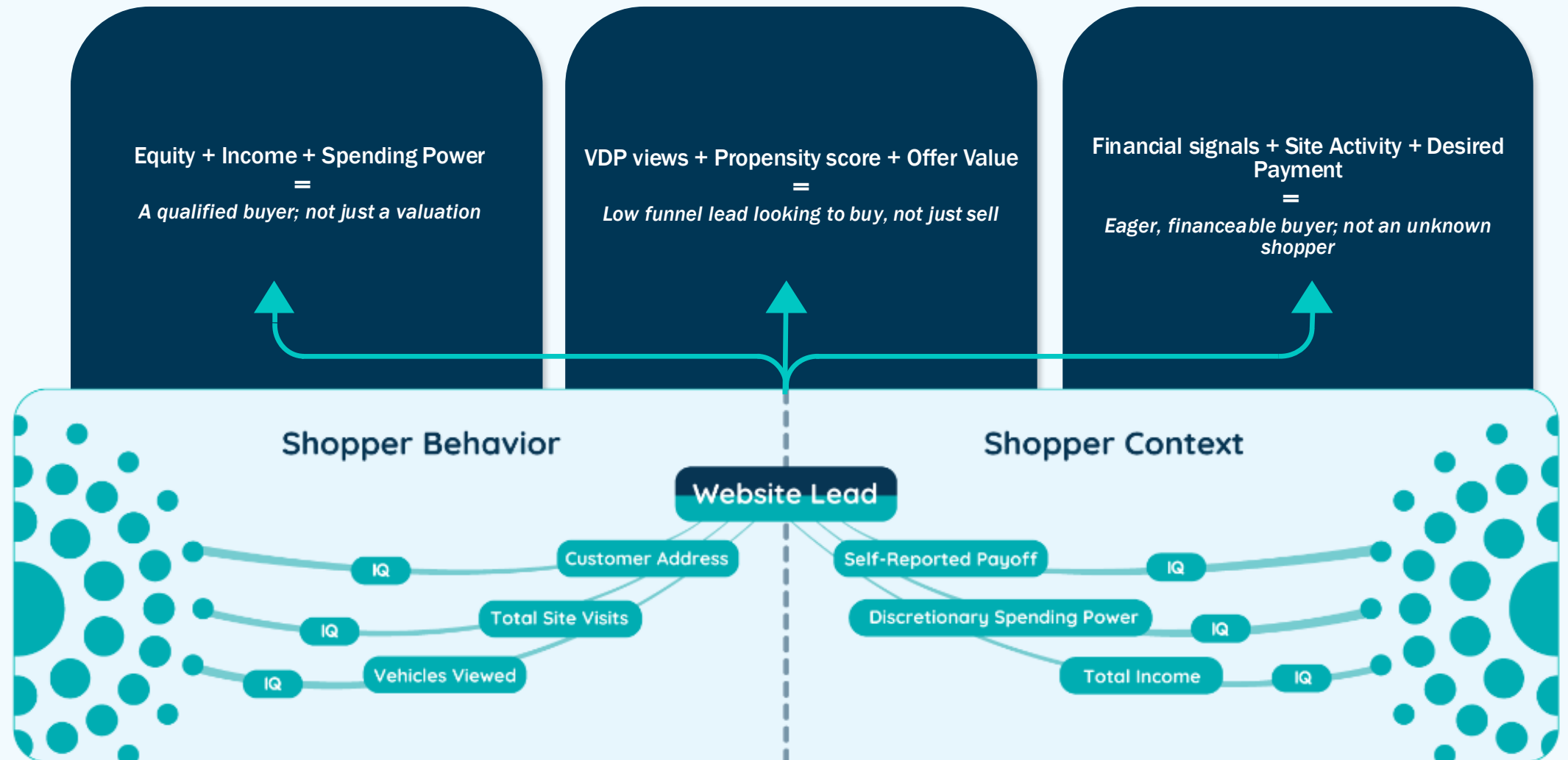
Ready to Buy Signals

Engagement Strength	Highest Engagement
In-Market Propensity Score	875
Link to Trade Video	Click here
Top Vehicles Viewed (Last 60 Days)	
• 2023 Toyota RAV4 XLE	Stock #T24187
• 2022 Honda CR-V EX-L	Stock #H23091
• 2024 Mazda CX-5 Premium	Stock #M24455
Unique VDPs Visited (Last 60 Days)	14
Visit Count to VDP	63
Days Since Last Site Visit	1
Total Site Visits	73
Scheduled Appraisal	Yes
Trade Video Sent	Yes
Clicked "Sell My Car"	Yes
Value Watch Click-Through	Yes
Last Value Watch Open	7/16/26
Value Watch Email Opened	Yes
Value Watch Email Open Rate	75%

Able to Buy Signals

Estimated Household Income	\$200,000
Spending Power	\$100,000
Desired Monthly Payment	\$500 – \$535
Down Payment	\$7,000
Bankruptcy	No
Repossession	No
Trade-In	2021 Honda Passport EX
Trade-In Mileage	68,000 mi
Trade-In Condition	Excellent
Trade-In Demand	Strong
Trade-In Value	\$25,686
Self-Reported Payoff	\$18,655
Offer Value	\$20,422
Offer Expiration	Jul 31, 2026

Using Signals Together are Force Multipliers



Now, let's dive into some questions....



Audit Challenge – Take 20 Sample Leads

Can you answer these questions with the information you have?

- Who are the most ready to transact?
- Who are the most engaged?
- What are the parameters of the deal?
- Does the deal fit the customer's financial realities around budget and desired payment?
- How could you tailor a personal response to this customer that is specific to their situation?
 - Can you even define what that situation looks like?

Audit Challenge – Lost Deals Your Team Engaged With

- Why did you lose this deal?
 - With more buyer info what could have changed?
 - Quality of discovery?
 - Quality of first response?
 - Appointment before a competitor?
 - Less time/friction in dealership?



Reach out to your rep today for help.

Thank you!

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