



## Onboarding Checklist for Shopper Suite Kickoff

### 1 SCHEDULE A KICKOFF MEETING ASAP

We will need the following required items in the next week to kick off this account:

**Confirm the Website is Secure**  
Simply identify that the address starts with **HTTPS://** and not **HTTP://**

**Installation of the Shopper Suite Pixel/Script**

Verify the script has been installed on site.

**Facebook Admin Access for Stream Companies**  
Make sure **Stream Companies** is authorized to manage the client's Facebook page. Facebook page admins will see a request from Stream Companies to manage the page and it must be approved.

**High-Resolution Logo for the Dealership**  
Each client must supply a **high-resolution logo** to be used in all marketing materials that are communicated to prospects.

**Request Dealer Code/BAC Code**  
Each dealer has a specific OEM Dealer Code or BAC Code for their business. This is **required** for the Shopper Suite.

### 2 BEST CONTACT INFORMATION TO USE

#### Best Person to Contact

For best results, we need a point person at the dealership who is the best contact person for the prospect to reference. This will be used in marketing to the prospects.

#### Best Phone Number to Use

This is the phone number that will appear on the marketing materials sent to prospects.

#### Best Email to Use

This is the email address that the marketing will come from in the marketing materials sent to prospects. (This should be sent from a person or at least an email that recipients can reply to.)

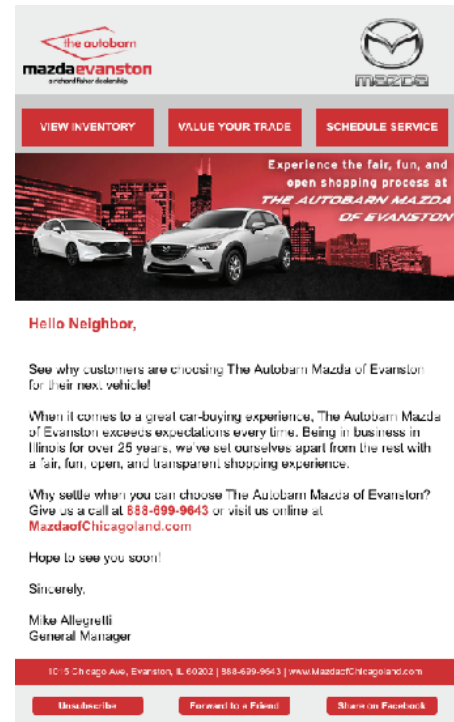
# Examples of Direct Mailer, Email Blast, and Digital Ad Packages

You'll get creative proofs 2-3 business days after we've received all necessary items and information.

## Direct Mailer: 4.25 x 5.5 inches



## Email Blast



## Digital Advertising Set

These will be posted on Facebook, Google, Amazon, and Adtegrity. We design a standard of 3 ads per size.



# Kickoff Questions & Answers for Shopper Suite

These need to be answered in the kickoff meeting.

## 1 Subject Line

Is there a specific subject line you would like to have with the email?

e.g., "Super Prices, Super Selection - Only at Norm Reeves Hyundai"

## 2 Direct Mailer Signature

How would you like to sign the note card?

e.g., "Sincerely, <Mike Allegretti>, General Manager" or "Your Friends at <The Autobarn Mazda of Evanston>"

## 3 USPs or WHY BUYS for Dealership

Please provide **at least 3** USPs or Why Buys that we can include in the messaging.

e.g., Tires for Life, In Business Since 1950, Family Owned and Operated, Free Courtesy Vehicles for Your Convenience, 2018 Dealer of the Year Award from DealerRater.

**Please Note:** Any Why Buys that state the dealership is the **best** or **#1**, highest selling in a specific location, greatest volume dealer, etc. must provide a disclaimer proving these sort of claims.

Must provide the logo for any awards the dealer would like to include on the mailer.

## 4 Top 3 Vehicles You Would Like Featured

## 5 Color and Branding

Would you like color and branding that will match the website? Any specific colors?

## 6 Sales and Service Transaction Data

What is the easiest way to get us sales and service transaction data at the beginning of each month?



# Timeline for Shopper Suite

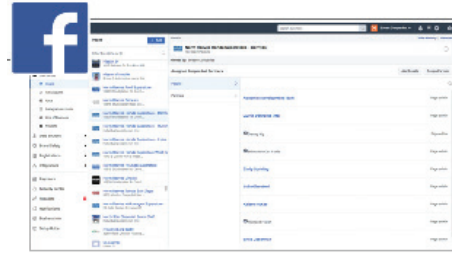
A successful kickoff should follow this timeline:

## 1 FACEBOOK ACCESS

### 7 Days after Kickoff

Confirm the code has been put on the website.

Confirm Stream Companies has been granted Facebook admin access.



## 2 CREATIVE APPROVAL

### Internal Proofing

The direct mailer, email blast, and digital ads will be reviewed by Stream's internal proofing team to catch any aspects of the creative that may not follow brand guidelines and will not pass compliance.

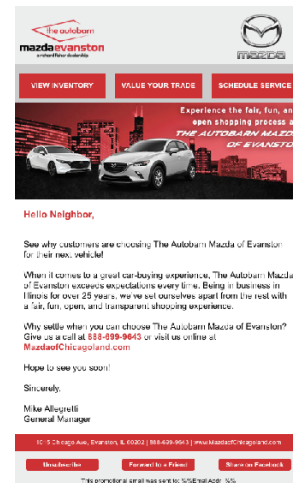
### Client Approval

Will send all creative **2-3 days business days** after we've received all necessary items and information.

### OEM Approval

For coop requests/funds, we will be requesting access to submit on your behalf to ensure that all brand guidelines are met and to ensure a speedy coop reimbursement process.

**Please Note:** Most OEM approval processes take about 24 hours.



## 3 AFTER 1<sup>st</sup> MONTH COMPLETE

Request sales and service transaction data from the dealership to allow the sales match-back reports to be generated to show the ROI by unit sales and repair orders.

What we need from dealership DMS to create reports:

- SALES TRANSACTIONS
- SERVICE TRANSACTIONS

