

Trusted by 4,500+ Automotive & Retail Businesses across the United States

Onboarding Checklist for Shopper Suite

1 COMPLETE ENROLLMENT FORM

Whether you're brand new or upgrading from a trial, every company will need an enrollment form.

New companies, fill out the form here:
<https://bit.ly/3jEZHYN>

To upgrade:

Navigate to Dashboard >
Program Alignment > Submit Order

Confirm the Website is Secure

Simply identify that the address starts with **HTTPS://** and not **HTTP://**

Installation of GTM

A Google Tag Manager containing the Shopper Suite pixel is needed to track anonymous shoppers. You can have this installed via the dealer technology team or the website provider.

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. Popular formats include .EPS, .AI & .PNG.

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 shopper.

Best Phone Number to Use

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

Best Email to Use

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

Questions & Answers for Shopper Suite

1 Direct Mailer Signature

How would you like to sign your piece?

For example: "Sincerely, John Doe,
General Manager" or "Your friends at
Doe Dealerships"

2 Color and Branding

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

Any specific colors?

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/disclaimers for any awards the dealer would like to include on marketing assets.

4 Top 3 Vehicles You Would Like Featured

This is to create a diverse set of artwork featuring top models that you would like to market.

5 Setting Up DMS Matchback

INCREDIBLY IMPORTANT!

Continued on next page.

Questions & Answers for Shopper Suite

5 Setting UP DMS Matchback

THIS SECTION IS INCREDIBLY IMPORTANT!

Dealer Management System, or DMS, allows Shopper Suite to perform the matchback process.

DMS Type:

Examples are Reynolds & Reynolds, Dealertrack, CDK, etc.

DMS Contact:

Who can accept our feed request?

Contact Number:

What is your best contact number?

Contact Email:

What is your best email for the contact who will be accepting our feed?

Non CDK Dealers

Any Non-CDK dealer will need to accept our feed through DealerVault. If your dealer is CDK, they will need to accept Fullthrottle in their Estore.

Non Auto Clients or No DMS

If your client is non-automotive or opting for no DMS, please provide a .csv or .xls sheet with sales data. Requirements for running matchback are available via your Account Manager.

Shopper Suite Onboarding

What to expect; steps to a successful launch.

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2 Time to Get Creative

Shopper Suite creative focuses on why-buy messaging to influence shoppers.

Provide your Account Manager with a few copy points and branding items so our team can create direct mail, social, email, and digital ads for your company.

Here are a few things we need:

- Any Taglines
- Colors/Brand Guidelines
- Top 3 Vehicles
- Why Buy copy points.

Creative cannot be started until all required items are received.



3 Tracking Your Company

We will need to install a Google Tag Manager (GTM) to begin capturing anonymous shoppers.

An Account Manager will send you the GTM within a Dropbox link for implementation.

What is a GTM? A GTM is a container that houses the Shopper Suite Pixel, enabling our team to monitor the data from the site.



Shopper Suite Onboarding

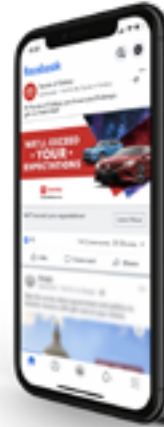
What to expect; steps to a successful launch.

4 Facebook Access

Providing our team Facebook access will give us the opportunity to remarket to people who visited your site on social media.

How to give Stream Companies Facebook Access:

Navigate to the Business Admin Settings > Select Page Role > Accept Stream Companies as a partner.



5 Setting up DMS

The Dealer Management System or DMS, allows shopper suite to perform the matchback process.

Here are a few things we need:

- DMS type
- DMS contact
- Contact number
- Contact email
- Accepting our feed



6 Approve Creative & Launch

- Your Account Manager will send you creative for approval.
- Please approve or return to your team with clear direction of revisions.
- Once approved, give our team 48-72 hours to launch.
- Your program goes through a coding and test phase to ensure a quality pre-launch.
- You will receive a login for the dashboard along with closeout items for resources

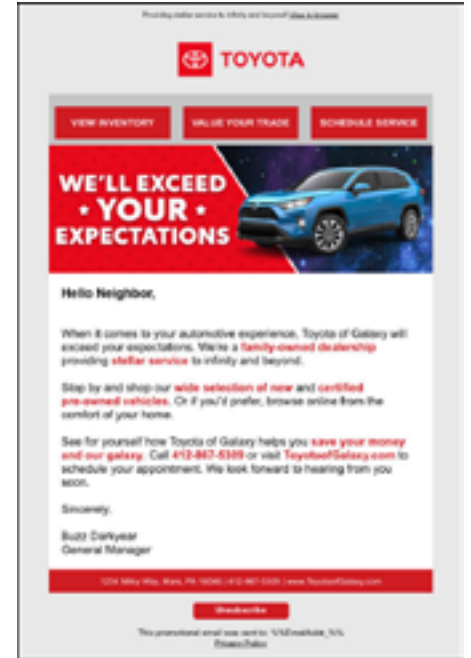


Examples of Direct Mailer, Email Blast, and Digital Ad Packages

Direct Mailer: 4.25 x 5.5 inches



Email Blast



Digital Advertising Set

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



1200x628



300x250



728x90