RESEARCH

AI and Dealership Staff: Finding the Right Balance

Insights from dealerships on integrating AI and building operations where technology and people work together.

PASCHGROUP

AI and Dealership Staff: Finding the Right Balance

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Foreward

Automotive retail is in the midst of one of the most significant shifts in its history. Customers are more informed, more connected, and more accustomed to instant, personalized experiences than ever before. AI is now part of how they shop for vehicles and how they expect to be served. For dealers, the opportunity is enormous, and so is the responsibility to get it right.

At Impel, we have the privilege of working alongside more than 8,000 retailers and OEMs as they navigate this moment. We've seen what's possible when AI is thoughtfully woven into a dealership's culture and operations: better business results, more meaningful customer conversations, and teams freed up to focus on the work that only people can do. We've also learned that technology alone is never the whole story. The dealers who are thriving are the ones who have paired great technology with great leadership.

That is why we commissioned this research. We wanted to move beyond the hype and ask a more practical question: what does it really take to optimize how AI and people work together? Rather than theorize, we turned to the dealers living it every day. Glenn Pasch and the team at PCG Digital listened closely to leaders across a wide range of stores, groups, and markets, and what they heard is both instructive and encouraging. The path to success is not reserved for the biggest groups or the most technical teams. It is open to any dealership willing to be intentional about how they lead their people through change.

We believe that the future of automotive retail belongs to organizations that see AI not as a replacement for the human touch, but as a way to amplify it. When AI handles the volume, the speed, and the consistency, your people are able to spend more time building relationships, exercising judgment, and creating the kind of experiences that earn loyalty for years to come. That is the vision behind everything we build at Impel, and it is the spirit in which this report was written.

Whether you're just getting started with AI or are already building momentum, we hope the perspectives and lessons in this report give you greater confidence and clarity. The dealers who shared their stories did so with remarkable openness, and their experience can help all of us move forward faster and with greater purpose. I'm grateful to Glenn for the rigor and honesty he brought to this work, and to the dealers who so generously shared their experiences. They've made the path easier for everyone who follows.

We hope you find this report a valuable companion as your dealership grows with AI. Use it to make sharper decisions, steer clear of the pitfalls others have already mapped, and prepare your organization, from the GM to the newest hire, for even greater success in the years ahead. We're proud to be with you on this AI journey, today and for everything that's ahead.

Devin Daly,
Co-Founder & CEO, Impel

Executive Summary

This report draws on interviews conducted between June 3 and August 25, 2026, with automotive dealership leaders who actively use Impel's AI-powered sales and service tools. To build a complete picture, we also spoke with industry experts and technology providers, and integrated insights from existing automotive research. Wherever we rely on this external data to back up our interview findings, we have noted it in the text.

The research covers a wide range of dealership operational structures ;from single-point stores and multi-rooftop groups, centralized and decentralized BDC structures, luxury and domestic brands, and dealers ranging from one month to nearly four years into their AI process launch.

The main question asked of the interviewees: how do dealerships find the right balance between AI and human staff? This question produced a consistent answer across every conversation. The dealerships with the strongest outcomes were those who had the best clarity and discipline of their management decisions around that technology. The common points made in most conversations centered around these four topics:

- AI should own the text and email communication initially. Humans should focus on making phone calls and sending personalized videos. This structure, when maintained consistently, produced the best results across every organizational structure studied. Every dealer who allowed staff to interfere in the process described the same results: customer confusion, declining lead engagement, and staff frustration.
- AI is not a set-and-forget system. The dealers who experienced the most consistent results maintained active monitoring practices ;daily in the first 90 days and weekly thereafter. Those who treated the technology as a one-time installation consistently underperformed.
- The staff's fear of losing their job from AI replacement was a real concern, and management needed to address this prior to installation at every store. The dealers who proactively communicated specific answers about compensation and role adjustments before launch showed higher adoption than those who waited.
- The smartest approach is for management to treat the AI like a new employee. That means training it on your standards, correcting it when it gets something wrong, updating it as your business processes change, and holding someone accountable for managing it.

PLAN FOR SUCCESS

A GM whose store is part of a large public dealership group achieved a 19% contact rate improvement after completely redesigning workflows around AI. Other stores in the group, using the same system without redesigning their workflows, achieved 3%. That sixteen-point gap is not a product difference. It is a management difference.

AI Is Already Here, Are You Managing It?

A few months ago, I asked a dealership general manager how his team was using AI. He said they hadn't implemented anything yet, and he was still evaluating options. Two days later, one of his salespeople sent me a follow-up email. I could tell within the first sentence that it had been written by ChatGPT. The manager didn't realize his team had already made the decision for him.

This is the reality of AI now. AI is not a line item on next year's budget, it is in your showroom. The only question is whether the people in your organization are using a strategy to protect your business, or whether there is any plan at all.

IMPORTANT: Very few dealers in the sample group had a written AI Policy for their staff. While this is a new territory for businesses, your staff needs a framework, guardrails and training. It is recommended that any current processes, or any new processes/ideas generated from reading this report are formatted into a policy structure for the staff of the dealership and reviewed by your HR or legal team.

Typically, in business, success has been the result of ready access to information and the ability to act on it quickly. Organizations that could gather better data, analyze it faster, and act more decisively had a visible advantage. That advantage is eroding. AI has made collecting information and generating responses as easy as typing a prompt. A team of five with the right AI tools can now produce what previously required a team of 25.

But one constraint has become scarcer: attention. AI makes each individual task easier, but in doing so, it creates more tasks that could be done. Without strict management discipline, a technology designed to reduce mental load ends up increasing the total demand on the people using it. For dealerships, this means that without clear decisions about what to prioritize, AI can create more activity without producing more results. The discipline required to get value from AI is not technical. It is managerial.

Your customers are already using AI in their day-to-day activities. The question is not whether they are using AI to shop for cars or service. They already are. The question is whether your operation is designed to meet them where they are, and whether your team is prepared for an informed customer who expects the technology to pick up where the last interaction left off.

Where Automotive AI Actually Stands

The industry research that emerged over the past year paints a clear picture of where AI adoption in automotive retail stands and where the gap between expectation and reality is widest.

69% Dealer AI Expectation	69% of dealers using AI expected the technology to drive sales and revenue growth. Only 22% report seeing those results. The gap is not a product failure. It is an implementation failure.
25% New Vehicle Buyers	25% of new vehicle buyers engaged AI tools during the shopping process in 2025, according to Cox Automotive. Those who did reported higher satisfaction, greater trust in dealers, and a faster buying experience.
83% Consumer Outlook	83% of consumers believe AI will reshape car buying within the next 10 years. The technology's influence on buyer behavior is not hypothetical. It is already measurable.

The Cox Automotive Car Buyer Journey Study helped shape how dealers think about their AI investment: buyers who engaged AI tools were among the most satisfied buyers in the survey, receiving real-time answers, personalized recommendations, and less friction. Buyers who engaged AI reported 84% satisfaction with the overall buying process, rating among the highest in the entire study.

Dealers must lean into this shift and prepare accordingly. Before the pandemic, a digital retailing process where AI, staff, and technology assisted in real time was a passing fad. COVID changed that. Lockdowns forced automation and real-time engagement out of necessity. Now, customers have returned to the market expecting a similar or better experience, only to find that many dealers have reverted to placing forms on the website that force customers to wait for responses. The world has moved forward.

The Three Stages of AI in Automotive Retail

AJ McGowan of Reynolds & Reynolds describes the evolution of AI in automotive retail in three stages in an interview with Automotive News:

Stage One: Generative AI

Most dealers first encountered AI through generating email templates, summarizing interactions, drafting marketing copy, or answering basic questions. Widely accessible, which is precisely why it is no longer a competitive differentiator.

Stage Two: Agentic AI Where We Are Now

Agentic AI takes action rather than simply generating output. It evaluates information across systems, initiates outreach, updates the CRM, schedules follow-ups, and adapts based on how the customer responds without a human initiating each step. This is what Impel's platform does. The challenge is not capability. It is organizational readiness. Agentic AI needs clean data, integrated systems, and clearly defined decision rules. Without those foundations, it acts on bad information at speed, which is worse than not acting at all.

Stage Three: Predictive and Proactive AI

Imagine knowing your customer's service needs before their vehicle alerts them. Loyalty programs that reach out with the perfect offer at the right moment. AI-assisted F&I guidance. Management alerts when a loyal repeat customer enters the service lane. We're not fully here yet, but the industry will move in these directions. These opportunities will constitute a competitive advantage.

The Disconnect That Is Costing Dealers

The Cox Automotive AI Readiness study identified the biggest disconnect in current automotive AI usage between adoption and implementation. Roughly 60% of dealers are testing AI tools in some form, but only 15% have implemented those tools into actual team workflows and processes.

The consequence of this gap is apparent in the report's data: 69% of dealers expected AI to drive sales and revenue growth, but only 22% actually experienced that success ratio. That gap is a direct result of the small number of dealers who worked through a thoughtful implementation plan. It shows that this issue is not the technology itself, it is the hesitation to fully embrace a new strategy.

The dealers getting successful results shared one consistent practice: they focused on what specific problem AI was going to address before evaluating technology. They didn't ask 'what AI should we use?' They asked, 'what specific problem are we addressing and what outcome do we expect?' Problem first, technology second is the single most consistent practice that led to AI success.

> **"Dealers don't care about AI for AI's sake. They care about outcomes they can measure. More cars sold, lower inventory costs, higher gross profit. That's why we're focused on delivering results, not just pushing technology."**
>
> Lori Wittman, President of Retail Solutions, Cox Automotive

A critical related barrier McGowan identifies is disconnected systems. AI layered on top of siloed technology (CRM, DMS, inventory, service scheduling, marketing) only accelerates the disconnection. When AI pulls inaccurate or incomplete data, it produces inaccurate outreach faster than any human. I am not sure that is the result anyone is after.

Your staff is also already using AI, whether you know it or not. According to Matt Muilenburg, Chief Product Officer at Impel, roughly half the dealers who say they are not formally using AI have team members using it individually, without management's knowledge or any guidance about appropriate use. Your salespeople are drafting follow-up emails with it. Your service advisors are writing estimates. Your marketing coordinator is generating social content. Whether or not you have a written AI policy, your organization already has AI behavior.

The risk is not the technology, it is the absence of a structured framework. AI used without guidelines can produce inconsistent brand messaging, inaccurate customer communications, and in regulated areas like financing, potential legal issues. The solution is not to prohibit AI use. It is to create clear policies and training that help your team use AI in ways that serve the business rather than create liability.

Section 1: Why Dealers Are Adopting AI

The dealers in this research are not all facing the same challenges, operating in the same markets, or structured the same way. What connects them is a version of the same core problem: the gap between the volume and timing of customer inquiries and the capacity of their teams to respond to those inquiries effectively.

Internet leads for both sales and service arrive at all hours, at variable rates, with unpredictable complexity. When the pressure is on, response quality declines before response speed does. A staff member racing to stop the OEM clock sends a template that ignores the customer's actual question. The customer who gets a generic response often moves on without saying why, or worse, the customer who has to repeat themselves feels their time is being wasted.

> **"Our salespeople were so focused on going for the appointment that we were ignoring what the customer was actually asking. If someone asked, 'does the car come in blue?' we'd respond: can you come in today or tomorrow?"**
>
> GM of a Midwest Auto Group

AI addresses this structurally. It responds in seconds regardless of the hour, engages with the customer's actual question, and maintains consistent long-term follow-up well past the point where human follow-up has stopped. The value is not that AI is better than a skilled salesperson at building a relationship. it isn't. The value is that AI is dramatically more consistent than a busy team managing 300 leads.

When we asked dealers why they adopted AI, we received more varied answers than expected. Those differences matter, because what a dealer is trying to accomplish shapes how the system should be configured, what metrics define success, and what to prioritize in the first 90 days.

For many dealers, the push was driven by the math of lead volume versus staff capacity. One manager had individual BDC reps managing 300+ leads; a workload where consistent, quality follow-up is impossible. Other dealers shared more concrete results. One doubled his team's lead capacity with no decline in KPIs. Another's BDC handled 50% more leads without adding headcount. As one GM put it: "Why spend more on marketing to gain more leads if you are not handling what you currently have correctly?"

One dealer named three specific situations where his operation was failing customers:

- When everyone is occupied and a call comes in
- When the team is tied up and a new inquiry arrives
- After hours, when the dealership is closed entirely.

Three gaps. Three reasons to implement. That level of specificity made every subsequent configuration decision easier.

One GM was the most direct about a motivation many dealers share but fewer will openly admit: unsustainable overhead costs. For this group, the primary ROI case for AI is cost restructuring, not revenue growth. Even if performance remained flat, eliminating two or three BDC positions through natural attrition would justify the platform investment.

Two managers operating luxury stores focused on the gap between brand promise and actual customer communication. A tired BDC agent sending a generic template to a Porsche buyer at 4:45 on a Friday is not a minor inconvenience. It is a brand inconsistency. Both managers emphasized that the greatest value of AI lies in its absolute consistency. The same communication standard at 11pm that it maintains at 11am, without variation based on workload or mood.

Reminder: Every dealer who struggled with implementation had one thing in common: they launched before they could clearly articulate what problem they were solving. Every dealer who succeeded could name their goal specifically.

Section 2: The AI/Staff Balance Framework

This research group, composed of dealers with diverse organizational structures in varied markets, eventually arrived at the same foundational conclusion about how AI and human staff should divide responsibility. Some reached this through deliberate design before launch, while others arrived at it only after working through the consequences of a messy rollout. All dealers ended up in the same place.

The Foundational Rule

Nearly every dealer interviewed agreed on one thing: AI should handle the initial text and email outreach until a customer engages. This frees human staff to focus where they matter most: making phone calls, sending personalized videos, and handling high-level engagement. As tools like Impel's Next-Gen software evolve and teams grow more comfortable, the salesperson's email role will shift from chasing cold leads to seamlessly taking over AI handoffs to answer highly specific customer questions.

The key is ensuring this overlap or handoff acknowledges both parties, so the customer is not confused by multiple people responding. When this boundary is clearly defined and consistently maintained, performance improves. When it is ambiguous or inconsistently applied, the customer experience suffers and the benefits of AI are largely offset by the friction it creates.

AI excels at speed, 24/7 availability, and maintaining a flawless communication standard without burning out. These advantages are most powerful in written channels, catching customers right at the moment they submit an inquiry. A marketing manager of a large Florida dealership group shared what happens when this foundation is not established before launch: without clear guardrails, AI, BDC agents, and individual salespeople wound up contacting the same customer within the same hour.

The answer to how you create this process emerged across the interviews by evaluating each specific customer interaction and deciding who should own it. Leaders focused on complexity and emotional stakes in the interaction.

Complexity refers to how much real-time judgment, contextual interpretation, and adaptive response the interaction requires. A low-complexity interaction follows an easier path: the customer needs specific information, the response is known, the exchange is transactional. A high-complexity interaction requires deep understanding of the customer's immediate situation and real-time decision-making.

Emotional Stakes define how much the customer's trust and sense of being valued depend on interacting with a human being.

Plotting these two categories produces three distinct accountability zones:

- Low Complexity and Low Stakes (AI-Owned): Examples include confirming vehicle availability or scheduling a routine service appointment
- High Complexity and High Stakes (Human-Led): Finance discussions, complex services, paperwork
- Mixed Complexity (Hybrid): Situations where AI initiates outreach and human judgment determines exactly when to step in.

To be successful, map out potential touchpoints in advance. Clearly define where a human handoff happens, the process for engagement, and which team member is responsible.

Human Interaction Only

Across all dealer interviews and organizational structures, several interactions were universally declared as staff-owned. The feedback was not that AI is incapable of generating a response, it is that AI handling these interactions damages the customer relationship in ways that are difficult to repair.

When any of these appear. AI follow-up stops immediately – regardless of where the customer is in the process.

Financing and F&I Conversations

Without exception, every dealer placed financing discussions strictly in the human-only category. These conversations require a human who can sense hesitation in real time, adapt an offer to a customer's actual financial situation, and respond to objections that cannot be anticipated in advance. While AI is effective at gathering preliminary data and asking clarifying questions about financing intent prior to a handoff, the in-depth conversation belongs exclusively to a person with authority and judgment.

Customer Complaints and Service Recovery

When conflict arises, an upset customer needs to feel heard by a real person with immediate authority to act. Multiple dealers confirmed that letting AI handle complaints actually escalated bad situations

rather than resolving them. While AI developers are building emotional signals into software to recognize frustration and trigger an immediate handoff, the current solution remains strictly human-to-human. The moment a complaint is recognized, a real person must step in.

Repeat Buyers and Long-Tenure Customers

Customers who have purchased before expect to be recognized, not treated like a cold prospect. The most significant feedback from the study was the critical need for a CRM configuration that flags returning customers before AI touches the inquiry, routing the lead to the appropriate person, ideally the salesperson from the prior transaction. Not a single dealer in the group indicated their CRM had this capability natively. To overcome this obstacle, some participants are building a Customer Data Platform (CDP) to create a single comprehensive customer record that ensures personalized experience delivery whether from a team member or an AI assistant.

Any Direct Request for a Human

When a customer asks to speak with a person, AI follow-up should stop immediately, without exception. While there is currently no federal law regarding continued AI use, certain states are enacting consumer protections around chatbot disclosure. A customer who asked for a human and continued to receive AI follow-up has been told, implicitly, that their preference doesn't matter. The loss of trust is significant. Review all processes around this topic with your HR and legal team.

Where AI Has the Structural Advantage

The categories where AI has a clear advantage are those where its structural characteristics (speed, consistency, availability, and persistence) are so effective that human involvement typically reduces rather than improves outcomes.

Speed-to-Lead on New Internet Inquiries

The probability of achieving meaningful contact with an internet lead drops sharply after the first hour, and conversion probability drops with it. You are 21 times more likely to connect with a person within 5 minutes vs 30 minutes. At volume, a human team cannot consistently respond in under five minutes across all lead sources, all hours, at all staffing levels. AI eliminates this constraint entirely.

Source: Ringlead Automotive Blog

Long-Term Follow-up Day 14 Onward

The quality of human follow-up degrades significantly past Day 7. By Day 14, the majority of non-responsive leads are effectively abandoned. AI maintains identical quality across Day 7, Day 30, Day 51, and beyond.

Multiple dealers highlighted a specific engagement pattern: leads that human agents had given up on were leads AI was still converting. The customer had not abandoned their need for service, the dealership had abandoned the customer.

After-Hours and Weekend Engagement

40% to 50% of internet leads arrive outside of regular business hours when most stores lack an active phone or instant response process. (Ringlead)

Ninety percent of dealers cited after-hours capability as their primary motivation to adopt AI or as AI's most clearly defensible value. These are appointments that would not exist without AI, not redistributed from human activity, but genuinely incremental. One dealer tracks after-hours appointment sets as a valuable metric specifically because it produces the cleanest isolation of AI's contribution, with no human effort to account for.

High-Volume Service Outreach

One GM launched Service AI during his store's spring tire season in Ontario, his highest-volume service period. In previous years, his service team reported being exhausted by the inbound volume. In the first year with AI, he heard no such complaints. The seasonal workload that previously fell entirely on his team was distributed across a system that doesn't get tired.

The Handoff: Where Value Is Won or Lost

The transition from AI to a human advisor is the single most critical operational moment in any AI deployment. Done well, it creates continuity, and the customer feels the conversation progressing rather than restarting. Done poorly, it forces the customer to re-explain their situation, signals the dealership isn't paying attention, and frequently hands the conversion to a competitor.

This is not a breakdown unique to AI technology. In my recent book, *The Road to Sold*, I highlighted this same problem in the traditional handoff from the BDC to the sales team. Too often, the salesperson doesn't slow down to read the BDC conversation, forcing the customer to repeat themselves and creating friction at the start of the relationship.

When discussing handoff timing, dealers' answers fell into five categories:

- Signal-triggered (an immediate handoff within 15 minutes when a trigger is detected)
- Scheduled (planned at a specific cadence checkpoint)
- Threshold (when a lead reaches a time or engagement limit)
- Manager-initiated (due to an alert from AI about a customer's specific question)

- Re-entry (human back to AI) the single most neglected direction in modern deployment workflows. When a staff member closes an active conversation without a sale and returns the lead to automated follow-up, most AI systems restart from the beginning, treating the prior human conversation as though it never happened.

As AI evolves, next-gen systems understand context and recognize exactly what the BDC or sales reps have already contributed, provided those notes are tracked within the AI dashboard.

The dealers with the strongest handoff protocols shared three consistent practices: the staff member reads the AI conversation summary before making any contact; the first human message explicitly references what AI already discussed, and the channel of communication matches what the customer has been using. One GM coached his team to think of it as picking up where the conversation left off, not starting a new one. This must be monitored for compliance.

> **“Let AI beat you to the customer. Then open with: I know my assistant Susie reached out to you. I’m the sales rep, and here’s a video of the car. You’re closing the two together.”**
>
> GM of a Midwest dealer group

Section 3: Operational Mechanics

The word 'cadence' is used casually in most internet sales processes to mean a schedule of messages. In practice, an effective cadence is a system of structured decisions: how often to reach out, in what channel, with what content, and for how long, calibrated to the specific situation of the lead, the lead source, and the stage of the customer's journey. Applying a single cadence to every lead type and every campaign produces an ineffective result.

Phase 1: Activation (Days 1–6)

Establish immediate contact and start a genuine conversation, not aggressively sell the car or an appointment. The initial response should arrive within five minutes of inquiry receipt, 24 hours a day, followed by daily high-value outreach that engages directly with the customer's specific questions. Tone: prompt, consultative, and free from high pressure.

Phase 2: Nurture (Days 7–21)

Transition from active outreach to maintaining long-term relevance. Frequency drops to every two to three days, calibrated by lead source and intent signals. Every message should deliver value: new information about the vehicle they inquired about, a relevant inventory update, useful content. A message that serves only the dealership's self-interest erodes rather than builds customer trust.

Phase 3: Long-tail (Day 22 onward)

Remain persistent. Shift to low-pressure, marketing-based messaging delivered weekly to bi-weekly. This is the phase most dealerships prematurely abandon, and where AI's persistence advantage is most effective. A customer who hasn't responded in three weeks may simply not be ready to buy yet.

Service vs. Sales Cadences: A Targeted Approach

The majority of dealers reported their structured service outreach focused heavily on specific campaigns and distinct outcomes rather than mass marketing. Because service outreach targets current customers rather than new prospects, the messaging can be more granular and targeted.

Safety recall outreach provided a great example. The focus on vehicle safety justifies persistence without an expiration date. Automated outreach continues until the vehicle is confirmed as no longer theirs, the customer opts out, or a service appointment is booked. One dealer shared an interesting data point: customers responded at a higher rate on the fourth and fifth attempt than on the first two. Without AI's persistence, those responses don't happen.

Other cadence choices from the research: next-service reminders (three attempts), declined service follow-up (two to three attempts), first service after delivery (initiate early - biggest opportunity to

establish the long-term service relationship), abandoned customers (12+ months without service), and targeted marketing campaigns.

When building an automated cadence, also align specific outreach templates with specific lead sources. If a unique lead source is not mapped and configured in the AI's knowledge bank, the AI will default to a generic template. Sending a generic response to the wrong type of inquiry can be worse than sending no response at all. Disable any lead source not yet configured until appropriate responses can be built and tested.

Service AI: A Meaningful Distinction

Ninety-five percent of dealers confirmed that Service AI is more predictable, better received, and for many stores more immediately valuable than Sales AI. Service interactions are inherently transactional: appointment scheduling, recall follow-up, confirmation, declined service re-engagement. AI manages them well because they do not require the nuance, negotiation, or real-time adaptation that sales conversations demand.

An Illinois dealership group streamlined its service BDC from 31 agents to 15 through structural reorganization rather than termination, with AI handling basic tasks so each remaining person could manage high-value AI handoffs across two stores. A Canadian dealership's four-month service AI pilot directly influenced 729 repair orders, generating approximately $400,000 in influenced service revenue; one of the most specific financial pieces of evidence in the research set.

One of the most innovative uses of AI revealed during the research: a progressive marketing manager deployed AI specifically to identify individuals who no longer own the vehicles in her database. By launching a "Do you still own this vehicle?" campaign with 40,000 outreach messages over four months, she cleaned years of dated DMS data. Approximately 20% of targeted customers responded they no longer owned the car. Executing this audit manually would have required three additional full-time staff. While this ROI doesn't appear in any standard report, cleaner data will impact all future marketing initiatives and OEM scoring.

A second structural vulnerability within AI service workflows: Op code alignment. Those who don't map these codes properly ahead of launch encounter three distinct failure modes:

- Incorrect Op Code Assignment: Appointments booked under incorrect op codes (oil changes appearing as wiper-change appointments in the DMS).
- Declined-Service False Positives: Customers who verbally agreed to vehicle repairs during their service visit receive automated AI follow-up suggesting they declined the work.
- Scheduler Mapping Gaps: AI-booked appointments fail to register in the store's primary scheduling system, leading to double bookings and lost time slots.

All three failure modes are preventable with initial mapping, strict pre-launch testing, and a systematic operational audit in the first two weeks.

Website AI Chat Integration: Capture-First vs. Conversation-First

The interviews revealed two distinct approaches for setting up automated chat on dealership websites.

Capture-first: The AI prioritizes collection of the customer's name, phone number, and email early in the exchange. Conversation-first: The AI focuses on engaging with the customer's actual inquiry by answering questions and building rapport, without prioritizing early contact capture. The trade-off presents a real strategic debate:

Approach	Advantages	Disadvantages
Capture-First	Generates a higher gross volume of raw lead data.	Results in significantly lower open and long-term engagement rates.
Conversation-First	Drives superior engagement rates and a premium customer experience.	Yields fewer directly actionable leads if a customer exits before volunteering contact info.

The majority of dealers resolved to adopt the conversation-first style, focusing on answering questions transparently to earn the right to request contact information. One GM tested both approaches and switched three times before returning to conversation-first and reporting better customer experience outcomes. The right choice depends on the dealership's priorities and culture. It should be a decision made before launch, not discovered through trial and error after the system is live.

Website call-to-action structure directly affects AI conversation volume. Pasch Group's research report on CTA interaction showed that reducing website CTAs from six to four increased website interaction. Fewer and more focused CTAs produce more engagement.

CRM Alignment

The CRM alignment issue surfaced across many dealer interviews. The most common problem was most CRMs default to closing or archiving leads at 30 days, while Impel's follow-up cadence runs 51 days. Dealers who don't review these settings are potentially truncating their AI deployment without realizing it.

A second structural issue: AI needs to sync with human interaction activity logged in the CRM. If a salesperson calls a customer and logs the activity, the AI is often unaware and may send an automated follow-up text the same afternoon. From the customer's perspective, the dealership appears disorganized. From the salesperson's perspective, the AI is stepping on their work. Currently,

dealerships resolve this by manually turning the AI off or configuring the CRM to automatically pause the AI workflow upon human engagement.

A second integration issue specific to service AI workflows: when an AI assistant books a service appointment, the data must flow seamlessly into the primary service scheduler. If this mapping logic isn't verified before go-live, customers will arrive for appointments that don't exist in the system.

Check both of these structural issues before going live.

The Knowledge Bank (or Agent Studio): Treating AI as a New Hire

The knowledge bank is the central repository of information that makes a customized AI process operational, containing everything the AI has been taught about your dealership: products, unique sales processes, communication standards, and marketing messaging. Every dealer who sustained strong AI performance described the knowledge bank as an active, ongoing management responsibility. Every dealer whose performance flatlined pointed to a lack of engagement with the knowledge bank.

One marketing manager's group's first AI deployment failed entirely because corporate leadership had locked dealer-level customization. The pre-set installation mistakenly sent COVID-era messaging to 2025 luxury BMW customers, and the AI repeatedly responded to basic inventory questions with "I don't know, let me get with an agent." She shut the technology off within two months and rebuilt from scratch, this time demanding full control over every automated response. The second launch was much more successful.

The defining difference was not a change in the technology, it was having direct access to the knowledge bank and dedicating daily attention to the information AI was actively sharing with customers. On the rebuild, she uploaded the same training materials provided to all new human hires, giving the AI the baseline needed to represent the brand effectively.

When AI Makes a Mistake

Every dealer in this study encountered AI slip-ups. One customer asked, "What's an X3?" and got "I don't know, let me get with an agent." Others agreed to recommended vehicle services only to receive AI follow-up asking why they declined the work. The dealers who survived these mishaps caught the problem quickly through active monitoring. The dealers who failed didn't have oversight in place, allowing errors to run unchecked. Yet both groups shared a significant blind spot: none had a documented protocol for what to do when AI made a major mistake with a live customer. That gap will matter more as AI systems become more capable and errors become more consequential.

The Three Categories of AI Error:

Quality Errors: The AI said something inaccurate or off-brand.

The most common and most manageable category. These errors belong in the knowledge bank correction process: identify the gap, update the knowledge bank or Agent Studio, monitor for recurrence. If the customer received inaccurate information but has not acted on it, a proactive human correction framed as a clarification, not a retraction, can recover the situation.

Relationship Errors: The AI communicated in a way that damaged trust.

This includes situations where a customer felt 'bamboozled,' cold restart failures where AI built engagement and a human took over without reading the conversation history, and AI language that felt dismissive or generic. Recovery requires a human who acknowledges the specific failure, not a generic apology. "I understand you've been working with our system to get information about this vehicle, and I want to make sure your questions were actually answered" restores confidence.

Consequential Errors: The AI communicated information with financial, legal, or safety implications.

This is the category that no dealer has a documented protocol for, and the one that the industry must address as AI takes on more consequential roles. These errors require immediate human intervention, legal awareness, and a documented remediation process. They cannot be handled by the manager updating the knowledge bank. Most dealerships do not currently have this escalation path defined.

When Customers Don't Know They Are Talking to AI

Several dealers in this study faced a deliberate choice: do they tell customers their follow-up emails are AI-generated, and if so, when? One manager opted for a stealth rollout, introducing the AI to her team as an "offsite assistant" and not disclosing it to customers. The results: less friction from staff and a smoother initial customer experience. When people didn't realize they were messaging a bot, they let their guard down and shared specific, detailed notes that helped human sales reps pick up the conversation later.

But the counterargument grows harder to ignore as technology evolves. If a customer finds out weeks into a deal, or after signing paperwork, that the "person" they were bonding with was software, it can feel like a bait-and-switch. The manager raised this directly from her experience:

This remains an ongoing discussion requiring monitoring and adjustment. One suggestion: add questions about communication outreach into any post-sale or post-service survey, not highlighting that the conversation was AI-driven, but asking customers to evaluate their overall experience.

> **“There’s definitely frustration on the customer side when it’s not disclosed immediately that they’re talking to AI, and they’ve started to have what feels like a real conversation. Then there’s a feeling of being tricked or bamboozled. That’s a real risk.”**
>
> Marketing Manager Mid-Size Group

Voice AI: A More Complete Treatment

Dealers were optimistic around voice AI but concerned with its current state. Comments included AI struggles to read emotional cues, stumbles during unexpected conversational pivots, and lacks the human authority needed for complex car deals. Multiple dealers concluded that voice AI simply isn’t ready for sales discussions.

However, some are already testing it in service due to its more linear, predictable scenarios:

- Routine Service Scheduling: Booking a quick oil change involves only a few options: what car, what service, and what time. Several service centers are successfully using voice AI here, achieving satisfaction scores that match human agents.
- Appointment Confirmations: Automated outbound calls can easily confirm a scheduled visit, offer a quick reschedule, or provide directions.
- After-Hours Scheduling: Instead of routing late-night calls to voicemail, an AI that greets customers, takes their name, notes their problem, and promises a human callback the next morning is a significant upgrade.

Voice AI shouldn’t be judged on whether it can replace a skilled salesperson. Its real value lies in taking simple, repetitive administrative calls off their plates. There are many companies providing these services in automotive right now.

Section 4: Managing the Human Side of AI Adoption

A foundational question posed to survey participants focused on AI's immediate impact on staffing: what happens to headcount and employee workload? Interestingly, no dealer in this research group terminated a team member because they were adding an AI platform. Rather than layoffs, 50% of interviewed dealers reported their total workforce decreased through standard attrition.

Automated initial outreach allowed human agents to focus exclusively on highly engaged, low-funnel buyers. One General Manager expanded BDR lead assignments from 100–125 leads per month up to 240–250 with no decline in performance metrics. Because of natural attrition, another manager's remaining BDC agents saw 20–25% pay increases because the same appointment pool was shared among fewer employees.

The impact of AI on dealership personnel is best described as an evolution of roles rather than elimination of staff. Team members who embraced the new environment managed more leads, drove higher-quality interactions, and substantially increased their earning potential.

Overcoming Employee Friction: The Four Types of Resistance

Every participating dealer encountered employee resistance when introducing AI automation. While the intensity varied, the underlying cause was consistent: fear. However, what team members feared differed enough to require four different management strategies.

Fear-Based Resistance:

Staff feel genuine concern about job security and income. The antidote is a written, pre-launch communication about compensation policy. Successful dealers ensure staff receive full commission credit when AI sets an appointment, as long as they complete their designated process steps. Delivering that message before launch, not after was a significant factor in reducing anxiety.

Quality-Based Resistance:

Staff believe the AI's communication is not as effective. Multiple dealers confirmed that early quality-based complaints from staff were often entirely accurate. The AI was delivering responses that didn't represent the dealership well because the knowledge bank hadn't been properly configured. Treating this feedback as legitimate improves adoption while improving quality.

Territorial Resistance:

Staff feel AI is operating in their personal pipeline. Management must clearly outline what the AI is doing, when it engages, and the explicit triggers that dictate a handoff. When team members understand the AI guardrails, they are less likely to feel their territory is being invaded.

Habit-Based Resistance:

Staff don't oppose the AI in principle but consistently revert to prior manual habits when not actively coached. This is the quietest and most durable form of friction, requiring ongoing management accountability rather than one-time onboarding training. One regional manager runs monthly boot camps, while another builds a dedicated AI orientation into standard new hire training.

Why AI Adoption Takes Time

Multiple dealers described that it typically takes three to six months before their teams genuinely accept AI as a working partner. Trust in a new system is not primarily rational. It is built through accumulated experience, not through communication alone, and it moves through three phases.

Phase 1: Skeptical Observation (Months 1–2)

Most staff are in a wait-and-see posture, watching for mistakes and actively looking for evidence that confirms their belief that AI can't do the job adequately. This is not bad faith, it is a reasonable response to a new system that they were told will change their role and that they did not choose to adopt. The management focus during this phase is ensuring AI performance quality. A significant early error can create a negative opinion that persists long after the error is corrected. Conversely, a staff member who watches AI handle a difficult customer question well begins to shift their view.

Phase 2: Conditional Acceptance (Months 2–4)

The trust timeline shifts when staff accumulate enough positive experiences to update their assumptions. What moves people through this phase is not overall data, it is specific moments: a customer contacted by AI at midnight who scheduled an appointment the staff member would not have been able to set, a handoff where the AI conversation gave real context to work with, or a compensation outcome that reflected what they were promised.

Phase 3: Active Integration (Months 4–6 and beyond)

Staff are no longer just tolerating AI. They are actively using it as a tool, contributing to its improvement, and advocating for its expansion. The employee's view has changed from 'a system that might replace me' to 'a system that extends my capability.'

Managers can accelerate the trust-building timeline by sharing early visible wins, share when AI succeeds, share when a correction was made at the suggestion of a team member. The more management keeps AI at the forefront of conversations, the team will speed up adoption.

The Single Most Consistent Predictor of Sustained Adoption: The Champion

Across every dealership in this research, the single most consistent predictor of sustained AI success was a dedicated Internal Champion at each individual location. The title varied but the Champion's four core responsibilities were identical across every successful deployment.

Knowledge Base Maintenance: Update the knowledge bank or Agent Studio regularly with new initiatives, incentives, local marketing messages, and brand expectations.

Conversation Audits: During the initial 30 days, manually audit five to seven complete customer conversations every day, moving to twice weekly but never stopping.

Technical Failure Monitoring: Not just communication failures, but integration failures like double bookings from scheduler mapping gaps.

Team Communication: Serving as the face of AI deployment and alleviating staff fear and hesitation.

Without a Champion, the deployment is sure to fail. One Florida-based marketing manager acknowledged not having a Champion as a direct and consequential miss. Once they addressed the issue by installing Champions in each dealership, performance improved.

Here is a key piece of feedback from a GM who has been a long-time Impel user: **"The Champion stops asking, "Did AI answer correctly?"** and starts asking **"What else can we teach it to handle?"** *His internet managers now bring him knowledge bank suggestions rather than complaints. The team views the technology as an asset to be developed, not a threat."*

Institutional Success: Building and Sustaining AI Training and Governance

Most automotive groups train staff on AI the same way they train any new software rollout: a generic product walkthrough. While necessary, this is insufficient. It teaches people how to see the system, not how to execute within it. The competencies that determine success include reading a conversation summary quickly before making live customer contact, taking an AI handoff without forcing the customer to repeat themselves, recognizing a conversation trigger signal that warrants stepping in, and flagging an AI response that doesn't meet company standards.

Ongoing training that extends beyond implementation is a predictor of sustained adoption, not a luxury. Failing to create institutionalized training can lead to hidden failure modes. In one documented case, a salesperson grew frustrated by incoming texts from Impel and replied 'stop.' That single reply unsubscribed him from all Impel SMS updates. Neither the salesperson nor leadership knew until notifications stopped arriving. This should be a named, explicit item in every new hire orientation.

Part of the structured orientation process must establish organizational guardrails for AI use. Just as automotive groups enforce compliance guidelines for social media behavior and customer data privacy, each group or store must create and enforce a formalized corporate AI Policy clearly defining acceptable employee compliance boundaries.

Section 5: Measuring What Matters

Most AI reporting produces an increased number of top-funnel customer engagement signals, so evaluating by standard sales metrics leads to inconclusive or inaccurate decisions. Successful dealers isolated metrics into three core areas:

- Engagement rate: The percentage of total leads that respond and initiate a genuine two-way conversation. The logic is precise: AI controls whether a customer responds to initial outreach. Whether that response converts to an appointment, a show, and ultimately a purchase is determined by the dealership's human processes and staff performance.
- Close Rate: Judging AI performance purely on overall close rate produces misleading evaluations in two directions: crediting AI for conversions that human skill produced and blaming AI for failures that belong to the floor.
- After-hours appointment set rate: Appointments set outside business hours represent pure incremental value, with no human effort to account for. Dealers mentioned tracking this specifically to measure the revenue increase from being available 24/7.

AI deployment has also fundamentally changed how to view human response time. How quickly does a salesperson step into a live conversation after the AI issues a handoff alert? High-performing dealers maintained a standard of three to four minutes to no more than 15 minutes during business hours. As a best practice, execute custom CRM reporting to verify AI appointment data independently of vendor dashboards.

The Lethal Failure Modes of AI Integration

Across the research interviews, seven distinct failure modes emerged consistently enough to be treated as predictable structural risks. Six apply universally, and a seventh is specific to service AI configuration. Dealership leaders must actively audit their operations for the following traps.

Layering AI on Top of Unchanged Workflows

The most consequential failure mode. Adding AI to existing workflows without redesigning the process creates a new layer of customer contact, not efficiency gains. The 19% vs. 3% contact rate comparison demonstrates the magnitude of this gap. The workflow change must precede or accompany the deployment.

Set-and-Forget Deployment

In one example, a locked knowledge bank without inspection left an automated outreach sharing outdated information inconsistent with brand standards and discovered only when management

monitored conversations. In another, 10 months into a deployment with minimal monitoring and no Champion, performance was gradually drifting downward, visible only in retrospect. Both trace to the same root cause: no ongoing management attention.

No Internal Champion

When a dealership lacks a localized Champion, the consequences are predictable: knowledge bank updates drift, AI responses become stale, staff loses confidence, management loses visibility. One named person with clear ownership and accountability produces better outcomes than distributed awareness.

Compensation Ambiguity

Staff who believe AI is taking money from their pocket will work around it, sabotage it, or turn it off. The only antidote is direct, written, pre-launch communication about compensation policy. The dealers who delivered this message before launch experienced less resistance.

CRM Misconfiguration

80% of dealers in this study experienced preventable CRM-related breakdowns: lead-close default settings cutting off AI cadence, parallel CRM automations creating duplicate outreach, AI continuing to follow up on customers staff have already engaged, or service appointment mapping gaps leaving customers without confirmed bookings. All are preventable with a pre-launch configuration audit.

Ambiguous Implementation Guidance

Accurate guidance that is operationally ambiguous produces the same outcome as incorrect guidance. Multiple dealerships instructed staff not to ‘interfere with their AI persona.’ Leadership meant: don’t respond in the AI thread, because doing so shuts off the follow-up cadence. Team members understood it as: don’t contact the customer while the AI is working the lead. Lead performance declined before anyone connected the behavior to the instruction. Implementation instructions should be written with specific behavioral examples and communicated in person, not just through email.

Op Code Misalignment for Service AI

The most critical technical setup items for service AI include appointments booked under incorrect op codes that produce downstream DMS errors, declined-service false positives that trigger incorrect AI follow-up to customers who agreed to work, and scheduler mapping gaps that leave AI-booked appointments unregistered.

Section 6: The Road Map For Success - First 90 Days

Days 0–30: Foundation Before Launch

The quality of the first 30 days, largely determined by what happens before the system goes live, shapes the trajectory of everything that follows. The dealers who invested time in pre-launch decisions had smoother adoptions, faster staff acceptance, and better early results. Before going live:

- Define the specific problem you are solving. Write it down. This single statement should guide every configuration decision.
- Redesign workflows on paper before activation. Document who handles what, what triggers a handoff, and what turns AI off. Put these decisions in writing before any customer contact occurs.
- Adjust the CRM lead-close window to match automation workflow. Disable any CRM automations that run in parallel with AI on the same lead sources.
- For service AI: audit op codes before launch and again at two weeks. Verify that AI-booked appointments flow correctly into the service scheduler.
- Disable any lead source not yet configured in the knowledge bank or Agent Studio.
- Review the knowledge bank for state-specific legal accuracy, particularly leasing terms and consumer protection disclosures, before activation.
- Name the Champion before launch, not after. Assign back-end access. Establish a daily monitoring cadence for the first 30 days.
- Communicate the compensation policy to staff in writing before the AI goes live. Confirm that agents receive credit when AI sets an appointment, as long as they fulfill their process responsibilities.
- Choose your sales AI approach: conversation-first or capture-first, and understand the trade-off.
- Review website CTAs, as fewer, more focused CTAs lead to chat interactions and produce more AI-initiated conversations.
- Train staff on the handoff protocol specifically: how to read conversation history before contact, how to reference it in the first message, and what a trigger signal looks like.
- Include the SMS notification unsubscribe risk in new hire training. Staff who reply ‘stop’ to Impel text alerts are immediately unsubscribed from all notifications.

Days 30–60: Refinement

This is the period where real patterns emerge: which questions customers are asking that the AI isn’t handling well, where staff and AI are creating overlapping contact, where handoffs are generating cold

restarts. The answers should drive knowledge bank updates and workflow adjustments before the patterns become entrenched.

- Review AI conversations daily. Not dashboard metrics, but actual conversations. The quality signals are in the conversations.
- Update the knowledge bank when an AI response doesn't meet your standard. The update should happen the same day, not at the next review session.
- Audit the handoff protocol. Is the staff reading conversation history before contact? Are they referencing it in their first message?
- Identify where staff is pulling leads from AI cadence without a documented trigger. Find the root cause before addressing the behavior.
- Consider letting the default configuration demonstrate what it does before making adjustments. The instinct to customize immediately can introduce more disruption than improvement.

Days 60–90: Evaluation

By day 60, there is enough data to make meaningful assessments. Baselines are established and trends are visible.

- Review engagement rates, after-hours appointment sets, speed to human involvement, and handoff response time. These four metrics together tell you whether both AI and staff are performing their respective roles.
- Compare appointment show rate to the prior baseline. If contact and set rates improved but show rate did not, the gap is in the appointment confirmation process, not AI performance.
- Verify knowledge bank information against any changes in products, policies, promotions, or market conditions since launch.
- Set the next quarterly review date before the 90-day period ends. A review without a scheduled follow-up tends not to recur.

What Stays Human

Financing conversations, customer complaints and service recovery, returning buyers and long-tenure customers, post-purchase problems, negotiations, and any customer who explicitly requests to speak with a person. These situations are not candidates for AI management, regardless of how capable AI becomes or how mature the deployment grows. This is not a concession to the current state of the technology. It is a recognition that certain moments in the customer relationship are too consequential to delegate, not because AI cannot generate a response, but because the customer's experience of being handled by AI in those moments undermines the trust that makes the rest possible.

Pre-Launch AI Checklist ✓

- ☐ Define Your Why: Write one sentence naming the specific problem AI is solving
- ☐ Redesign your Workflow: Map role responsibilities between human and AI. Map out cadence, outreach contact and handoff process before going live.
- ☐ Identify Day 1-14 workflow and events between AI and Staff
- ☐ Define the KPIs. Key metrics to define success and should include: Engagement, Calls, Appointment Set, Appointment Show and Close (AI and Human)
- ☐ Align comp plans to ensure revised workflows and events are aligned
- ☐ Write your AI Policy: Document acceptable use of AI, disclosure rules and data input guidelines. Get HR/Legal to review
- ☐ Name a Process Champion: Designate one person and assign back-end access, daily monitoring and knowledge bank ownership.
- ☐ Impact of AI on Staff: Review how new process affects workflow, responsibilities, staffing and compensation changes (or lack thereof) so the team understands ahead of time and questions can be addressed.
- ☐ Audit and align with CRM: Make sure CRM pre-set processes or automations are aligned or cancelled if needed. Verify assignments and connections to appointment scheduler or other technologies.
- ☐ Conduct periodic mystery shops to audit the overall quality of the customer experience that you are delivering.

NOTE: Don't forget to share updates and improvements to the team as process in implemented.

Conclusion

Over the course of months and multiple conversations, the answer to the research question (how do dealerships find the right balance between AI and human staff?) became clearer with each interview.

The balance is not a fixed ratio or a configuration setting. It is a set of deliberate decisions about what AI handles, what people handle, and what happens at the boundary between them. These decisions must be documented before launch, communicated to every person affected, and revisited regularly as the business evolves.

The dealers getting strong results have figured out that managing AI well looks a lot like managing people well. Define roles clearly. Communicate expectations before you measure against them. Monitor performance and address problems while they're small. Give the system time to develop and resist the urge to judge it quickly.

The dealers who are struggling are making recognizable mistakes: launching without changing their workflows, not addressing compensation concerns before they became resentment, treating the system like software that manages itself, operating without a Champion or with a Champion who has no process. None of these are technology mistakes. They are management mistakes, the kind that are entirely correctable once identified. The dealers who moved from struggle to success in this research did not change their technology. They changed how they managed alongside it.

AI's role at the dealership, done well, is to handle volume with consistency: the speed-to-lead at midnight, the follow-up on day 47, the service outreach during peak season when the team is stretched. Human involvement handles the relationships and the judgment calls, working with the customer who needs to negotiate, resolving the complaint that requires empathy and authority, and nurturing the loyal buyer who deserves to be recognized.

When that division of responsibility is clear, communicated, and maintained, positive results follow. The road forward is the same for every dealer: define the boundary, manage it like it matters, and treat both the technology and the people alongside it as investments worth developing.

Methodology

Structured qualitative interviews were conducted between June 3 and August 25, 2026, averaging 30 minutes each. Interviews were transcribed via automated transcription and reviewed. Interviews followed a semi-structured guide covering adoption rationale, workflow design, staff integration, measurement, obstacles, and first-90-day recommendations. Transcripts were reviewed and synthesized by Glenn Pasch, PCG Digital.

Limitations

This research is qualitative and draws on a purposive sample of Impel dealer customers. Findings reflect the experiences of these dealers and should not be treated as statistically representative of Impel's full dealer base or the automotive retail industry. Dealer participation was voluntary.

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About Impel

Impel AI is the automotive industry's only end-to-end AI Operating System, connecting and unifying every customer touchpoint across merchandising, marketing, sales, and service. The company helps more than 8,000 retailers and OEMs unify the entire customer journey, fueling faster decisions, deeper connections, and measurable impact at every step. To date, Impel has delivered 42 billion shopper interactions, influencing more than $12 billion in Sales and Service revenue across 51 countries.

To learn how leading retailers are operating in the agentic era, visit impel.ai

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