CORA RESOURCE SERIES

AI Conference Readiness for Dealers

A practical guide to evaluating AI vendors, managing risk, and leaving the conference with decisions you can defend.

THE CORE PRINCIPLE

Start with the business problem.

Do not let the exhibit floor decide your priorities. Arrive with clear needs, defined guardrails, and a consistent way to compare every solution.

Prepared by the Council of Responsible AI

01 | BEFORE YOU GO

Prepare with purpose

Conference success starts before the first vendor conversation. Build a shared view of the problems worth solving, the systems already in place, and the limits you will not compromise.

Run a quick internal audit

1 Where is the friction?

Ask department leaders where time, revenue, or customer experience is being lost today. Be specific.

2 What is already in the stack?

Map your DMS, CRM, marketing, service, and analytics tools. Note integrations, owners, contracts, and gaps.

3 What data is involved?

Identify the customer, employee, operational, and financial data a new tool would need to access or create.

4 Who owns the outcome?

Name the leader accountable for adoption, performance, risk, and the decision to expand or stop the tool.

Set three must-solve objectives

- Reduce after-hours service scheduling abandonment.
- Improve lead response without weakening the customer handoff.
- Shorten used-vehicle merchandising time while preserving brand standards.

Write the success measure before the demo

A useful objective includes a baseline, a target, and a timeframe. For example: increase booked service appointments from after-hours leads by 15% within 90 days, without increasing opt-outs or escalations.

02 | ON THE FLOOR

Make every conversation count

The exhibit hall rewards focus. Use the same opening questions with every vendor so the strongest solution stands out for substance, not presentation.

The three-minute test

1 Problem

What specific dealership problem do you solve?

2 Fit

How do you connect with our DMS, CRM, and workflows?

3 Proof

Show one comparable dealer result and how it was measured.

Red flags worth slowing down for

Black-box claims	The vendor cannot explain what drives the system's decisions, where confidence breaks down, or how exceptions are reviewed.
Data without boundaries	The answers on access, retention, ownership, model training, or deletion are vague or deferred.
No meaningful handoff	The tool automates the easy path but has no reliable way to escalate complex or sensitive customer situations.
Implementation by slogan	'Easy' replaces a timeline. There is no named owner, integration plan, training commitment, or adoption support.
ROI without a baseline	The proof depends on broad claims, incomparable dealerships, or metrics that cannot be independently verified.

03 | EVALUATE

Score the solution, not the pitch

Use one framework across vendors. Score each category from 1 (weak) to 5 (strong), then document the evidence behind the number.

CATEGORY	WHAT TO VERIFY	SCORE
Business fit	Clear problem, defined users, measurable outcome, and a credible advantage over the current process.	__/5
Integration	Bi-directional connections where needed, realistic implementation effort, and no new manual re-entry burden.	__/5
Data governance	Purpose limits, access controls, retention and deletion terms, data ownership, security, and auditability.	__/5
Human control	Clear escalation paths, override capability, exception handling, and accountable human ownership.	__/5
Transparency	Understandable system behavior, known limitations, monitoring, and documentation appropriate to the risk.	__/5
Operational fit	Training, support, workflow changes, adoption plan, customization, and named responsibilities on both sides.	__/5
Commercial value	Transparent pricing, contract flexibility, validated proof, expected time to value, and a defensible ROI model.	__/5

Decision rule

A high total score does not cancel a critical governance failure. Treat data rights, security, compliance, human escalation, and the ability to stop the system as pass-or-fail requirements.

04 | AFTER THE EVENT

Turn interest into evidence

The goal is not to return with the longest vendor list. It is to leave with a small number of testable decisions and a process for learning quickly.

Within 48 hours

1 Debrief while the details are fresh

Compare notes against the same objectives and scorecard. Capture open questions, conflicts in vendor claims, and any risks that need legal, security, or operational review.

2 Build a short list, not a shopping list

Advance only the solutions that address a named problem, fit the current environment, and can support a controlled pilot with measurable outcomes.

Design a responsible pilot

1 Before launch

Set the baseline, scope, users, data access, escalation path, approval points, and stop conditions.

2 During the pilot

Monitor performance, adoption, customer impact, exceptions, staff workload, and any unintended behavior.

3 Decision point

Compare results with the baseline. Expand, revise, or stop based on evidence, not sunk cost or enthusiasm.

Define 'winning' across four dimensions

BUSINESS

Revenue, appointments, cost, speed

CUSTOMER

Experience, trust, opt-outs, complaints

WORKFORCE

Adoption, workload, handoffs, confidence

GOVERNANCE

Exceptions, access, incidents, auditability

05 | TAKE WITH YOU

Dealer readiness checklist

Use this page before, during, and immediately after the conference.

PREPARE | 14 DAYS BEFORE

- [ ] Name the three dealership problems worth solving.
- [ ] Record baseline metrics for each problem.
- [ ] Map affected systems, data, contracts, and owners.
- [ ] Schedule priority demos and share objectives in advance.

EXECUTE | ON SITE

- [ ] Use the same three-minute test with every vendor.
- [ ] Ask for a live workflow, not only a polished presentation.
- [ ] Document integrations, data terms, handoffs, and limitations.
- [ ] Capture the source and measurement behind every ROI claim.

DECIDE | WITHIN 48 HOURS

- [ ] Score vendors using one shared evaluation framework.
- [ ] Resolve governance, security, compliance, and ownership questions.
- [ ] Select a narrow pilot with success metrics and stop conditions.
- [ ] Assign an accountable owner and schedule the decision review.

The goal is not more AI.

It is better decisions about AI.

Responsible adoption connects business value with transparency, accountability, human control, and measurable impact.