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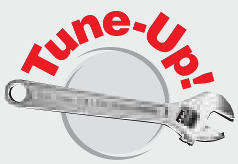
Customer Relationship Management Tune-Up



The Customer Relationship Management (CRM) Tune-Up consists of a 2-day on-site Client Operations Analyst (COA) visit focused on the CRM application. The visit includes:

- Custom assessment identifying training and utilization needs
- Review of dealership processes
- Implementation of "Best Practices"
- Report outlining what the visit and assessment has found

Subject	*Process*	*Results*
Set-ups	**System Administration Module**	
	Review active users, groups, teams and permissions. Review task events and look up tables.	Accurate setups ensure all needed deal information is being taken into consideration.
	Business Development Center Module	
	Review templates, programs and events.	Ensure programs are in tune with current dealership goals and business environment. Ensure that events and templates are timely and appropriate for program.
	Review surveys.	Capture the what, how, when and why of the dealership client base.
Prospecting and Follow-ups	**Customer Management Module**	
	Review logging Ups and getting deal numbers.	Ensure accurate capture and follow-up of prospects. Search existing database first to ensure that duplicate records are not being created. Ensure complete and accurate capture of prospect information for new prospects. Provides ready access to new and used inventory, as well as matching prospective trade-in vehicles to prospective buyers.
	Review deals.	Existing deals can be updated as consumer adds/ changes vehicle specifications, such as model or color.
	Review tasks.	Continued follow-up increases sales, now and in the future. Consistent and appropriate follow-up increases customer satisfaction and dealership loyalty.

	Review service appointments.	Face-to-face interaction reminds customers that they are important.
	Review feedback.	Negative feedback requires immediate attention. Recognizing and rewarding positive feedback is just as important.
	Review customers.	Ensure users can recall information about current and previous customers. Existing customers and households can provide additional prospects.
	Review quick search for customers, vehicles and deals.	Ensure users can quickly find consumers, inventory selections and deals in process.
	Campaign Manager Module Review campaigns.	Use specific criteria to target direct mail more effectively.
Desking and Deal Flow	Review importance of deal numbers being generated from the CRM application.	Streamline the desking process to facilitate transfer of customer and stock number information into the DMS through Work-A-Quote, providing a link to F&I.
Database Management	Review process for re-assigning orphans.	Timely reassignment of orphan prospects guarantees that each prospect receives consistent follow-up. Reassignment of orphan owners and service customers helps maintain the long-term relationship with clients for future sales and referrals.
Reports	**Business Development Center Module** Review reports.	Provides management team with information to analyze sales, productivity and profitability. Advertising dollars can be allocated to get the most value per dollar spent. Compare sales performance by sales associate, location, prospect type, etc. Summarize complaints, surveys and customer needs.
	Management Reporting Module Review cubes, dimensions and measures.	Contains a combination of dealership purchase and service data, customer specific demographic information, auction pricing data and in some states, motor vehicle registration records.

Tune-Up Visit Overview

Dealership management will be given a comprehensive report outlining the findings of the assessment. The report will include department accomplishments and recommendations for productivity improvement.

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