AUTOMOTIVE CRM

THE CHALLENGES
FACING BUSINESSES TODAY

AUTOTRADER

54%
of consumers would buy from a dealership that offers their preferred experience, even if it didn't have the lowest price.

72%
would visit dealerships more often if the buying process was improved.

DRIVING SALES

56%
of shoppers would buy more cars if the process was easier.

25%
rise could come in auto sales, if the retail experience improves.

Vehicle dealers are challenged by expectations of modern vehicle buyers. Customer journeys leading to a vehicle purchase span across multiple communication channels and customers always expect consistent premium care.

Konica Minolta Automotive CRM has been designed together with vehicle dealers leading the transformation of their sales model to reflect buying behavior of today's customers.

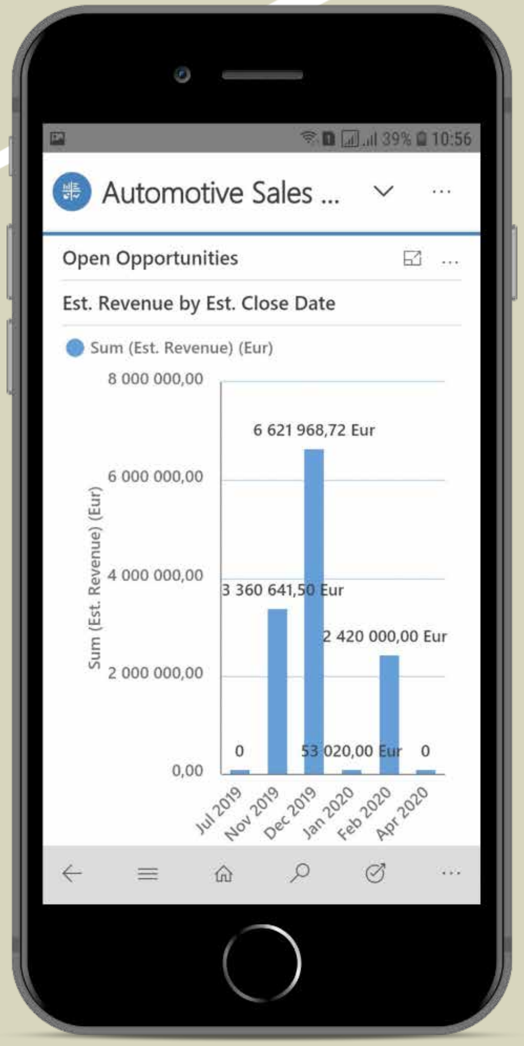
PAIN POINTS

- Missing unified sales process.
- Impossible to forecast, compare and evaluate individual or team results.
- Salespersons are overwhelmed and losing focus on their customers.
- Salespersons lack one complex tool for managing their opportunities
- Not complete overview of activities performed with respective customers. Usually, there is more than one salesperson communicating with the customer at the same time.
- Lack of structured data for the following analysis and generating new leads, campaigns, aftersales actions, etc.

BENEFITS

- Unified sales process tailored to the needs of your dealership.
- One complex system covering the whole sales process e.g. tracking customer's requirements, vehicle search, quote evidence, planning test drives, vehicle reservations system, vehicle handover agenda and more.
- User experience fine-tuned together with salespersons e.g. prefiltering fields, well-placed buttons, automatically populated fields from the context and ergonomically designed forms.
- 360° Customer overview including all performed or planned interaction, ongoing leads, opportunities or sales contracts, historical sales cases, current or past vehicles, connections and relationships with other customers, service history.
- Structured data for further comprehensive and deep analysis of sales funnel and customer base, performance management, forecasting and generation of new leads.
- Straight-forward, easy to use overview about ongoing opportunities and activities in the form of charts and dashboards. Various level of details leading to better micro-management and improved efficiency and decreased workload.
- Native integration to Microsoft products, Office 365 and Dynamics 365 product family e.g. Power platform (Power Apps, Power BI, Power Automate, Power Virtual Agents), Outlook, Teams, SharePoint, Excel, Word, Business Central, Finance & Operations, and many other tools and apps.
- Available integrations give flexibility to the sales team by utilizing tools they know best, yet they have complete information about the customer, ongoing sales cases or vehicles available.
- Improved customer's experience during interaction with the dealership. Shorter reaction time on customer needs and demands.
- Modern technology allows dealerships to bring Automotive CRM into mobile devices. Salespersons have the customer information available anytime and from any place.

AUTOMOTIVE CRM



FEATURES SIMPLE OVERVIEW

LEAD MANAGEMENT

- Collect leads from various sources.
- Record contact details, the vehicle of interest specification and current vehicle information including information about a potential trade-in.
- Follow-up a lead to assess customer needs.
- Assign a lead to the responsible salesperson to qualify it, disqualify it or postpone it for the future.
- Measure response time to new incoming leads and receive escalations for a long time pending new leads.
- Use historical data in your database to generate loyalty leads.
- Analyze the structure and sources of incoming leads to manage your marketing strategy.

SALES CONTRACT MANAGEMENT

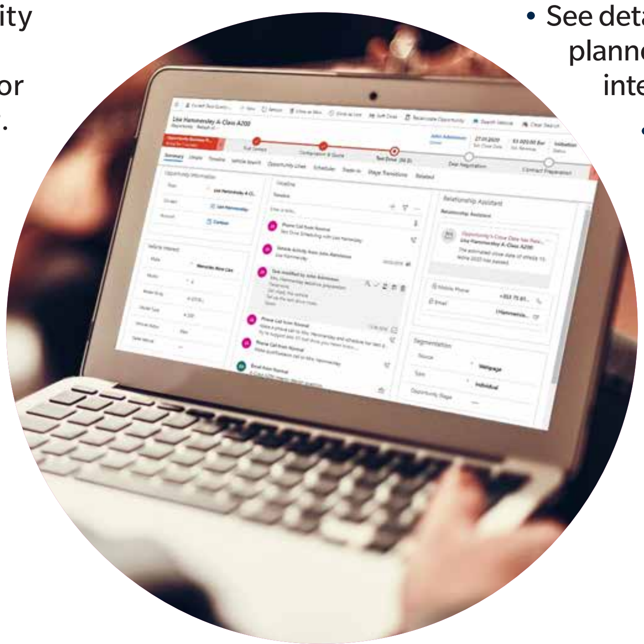
- Follow-up won Opportunities as Sales Contracts.
- Plan and perform vehicle handover. Record real vehicle handover date.
- Record details of vehicle financing.
- Record expected vehicle replacement date and let the system remind you of the right time to initiate a new sales process.
- Update data in the vehicle database so it can be used for marketing purposes afterwards.

OPPORTUNITY MANAGEMENT

- Nurture your potential customers using tools of opportunities.
- Search a vehicle fulfilling customer's requirements. Reserve the candidate vehicle for a customer.
- Book a test drive.
- Postpone an Opportunity to the future in case a customer is not ready for the deal at the moment.
- Keep track, manage and evaluate sales pipeline. Use your pipeline to forecast your revenue.
- Use a database of lost opportunities to generate new leads in the future.

360° VIEW ON CUSTOMERS

- Review personal details about a contact, including hobbies, driving license details etc.
- Check relations of contact to companies and other contacts.
- Check vehicles used or owned by contact, including previous vehicles.
- See details of performed and planned activities presented in the interactive Timeline section.
- Follow-up currently open and previously closed opportunities.
- Investigate the history of sales and service transactions.
- Learn which marketing activities a contact has been involved in.



VEHICLE SEARCH

- Apply various search conditions to find a vehicle fulfilling the needs of a customer. Search by model specification, availability, status, price range, colour, included options etc.
- Check the detailed specification of the selected vehicle including configuration options.
- Create new lead or opportunity for a selected vehicle.
- Reserve selected vehicle for a customer or an opportunity. Enqueue a reservation in case of pending reservations already exist.
- Create a binding reservation of the vehicle to indicate that a vehicle is not available for sale any more.

TEST DRIVE HANDLING

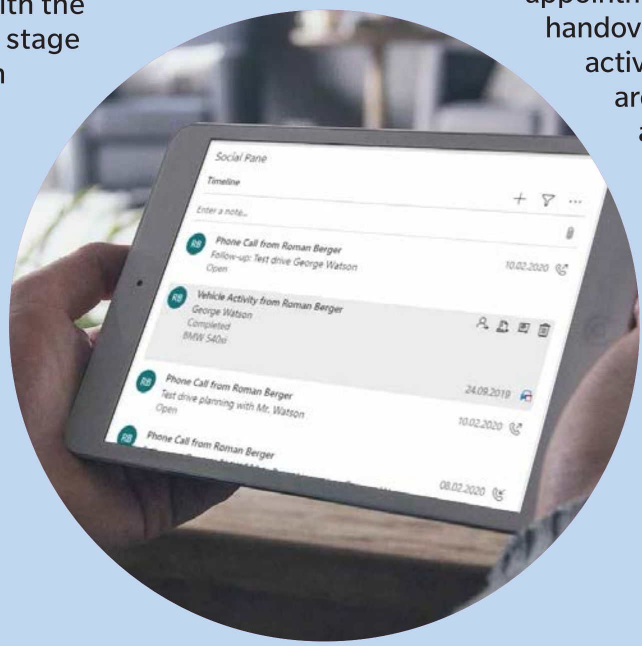
- Find the desired vehicle and acceptable time slot in a calendar to book a test drive.
- Collect details required for the vehicle handover and printout documentation for the signature.
- Record the final status of a vehicle after return and plan test drive follow-up.
- Manage also courtesy rentals and long term rentals in the same environment.

TRADE-IN MANAGEMENT

- Collect information about potential vehicle trade-ins.
- Record evaluation of vehicle status and specify evaluated price and price offered to a customer.
- Keep track of business discussions with the customer and stage of the trade-in process.
- Print the purchase contract to finalize the trade-in process.

ACTIVITIES TRACKING

- See all the activities regarding the respective record displayed on the visual component.
- Use Microsoft Dynamics out-of-box designed and Automotive CRM customized timeline component to track all interactions with the customers such as phone calls, tasks, appointments, test drives, given offers, vehicle handovers, emails. A salesperson can track activity by a few clicks, most of the fields are prepopulated from the context of a given record.
- Overview completed or planned activities with a customer during the time. Salespersons can have a clear overview of communications regardless of who communicated with the customer.



MAIN ROLES
IN THE AUTOMOTIVE CRM

SALESPERSON

USER GOAL

- Selling more vehicles to most promising customers.

PAIN POINTS

- Overloaded with communication streams
- Lack of overview of daily tasks
- Not complete view of customers and activities with them

SOLUTION AUTOMOTIVE CRM

In the Automotive CRM Salesperson can handle the whole sales process, related agendas with all vehicle dealership business-specific at one place. It starts with generating and nurturing leads, developing opportunities and processing sales contracts. Continuing with searching customer's desired vehicle quotation tracking. Planning test drives and creating customer's vehicle reservations. Scheduling vehicle handovers. Meanwhile, they have all relevant information always in place such as customer's history, vehicle details, their tasks and appointments to balance workload. All above while tracking all customer interactions to build transparent conversation history for future review.

SALES MANAGER

USER GOAL

- Improving sales team efficiency
- Guiding his subordinates to sell more vehicles to most promising customers
- Distribute a workload
- Generating new potential sales based on current data

PAIN POINTS

- Lack of information about ongoing opportunities of their sales teams
- Lack of data for more accurate analysis and forecast
- Not able to compare a performance of individuals, teams or dealerships
- Not able to see sales funnel or conversion ratios of respective lead sources

SOLUTION AUTOMOTIVE CRM

Automotive CRM enables the sales managers to be always informed about ongoing sales cases, today's planned or performed activities of his subordinates. Data are well structured and always ready to review in the form of either out-of-the-box or custom user's dashboards, charts and views all this can be viewed in different levels of granularity. .

The sales manager's job is also to create, analyze and evaluate sales goals for individuals or sales teams.

All mentioned can be exported and used for more detailed report creation, presentation or during individual meetings with salespersons.

In specific cases, the sales manager is also able to create and schedule tasks for salesperson within Automotive CRM.

SALES ASSISTANT

USER GOAL

- Be able to flexibly react to customers or salespersons demands in vehicle test drive agenda

PAIN POINTS

- Working in many different systems to cover the daily agenda
- Inconsistency in processing individual test drives
- No transparent overview across the whole dealership about current status of test drive vehicles
- Slow processing of test drives related to paperwork during handover of the vehicle

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The Sales Assistant's job is mostly to take care of the vehicle test drives agenda. Automotive CRM supports this role very generously with a special process tailored to reflect all test drive specifics. Working with test drive is designed to be fast-paced and straight forward. Sales Assistant can quickly schedule a test drive on the scheduling board while having a complete overview of all vehicles available for the test drive. Test drive record holds the information about the customer, salesperson related to the test drive, as well as information about the vehicle, such as mileage and current defects. At the end of the process Sales Assistant schedules follow-up activity for a respective salesperson for proper process continuity.

Sales Assistants are also usually first persons who communicate with walk-in customers therefore they need to have quick and easy access to the information.

Automotive CRM helps Sales Assistants with their efficiency in test drive agenda such as tracking information, handling customers' needs for rescheduling the test drive, printing necessary paperwork directly out of the system with all information, etc.

TESTDRIVE COORDINATOR

USER GOAL

- Maintain current vehicle status in terms of availability, defects and mileage

PAIN POINTS

- Not a consistent and transparent list of test drive vehicles
- Not able to track vehicle current mileage and defects

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TestDrive Coordinator workday consists of taking care of test drive vehicles. Each day they overview a list of upcoming test drives and check their current status.

When a new vehicle arrives at the dealership, they need to make sure that this vehicle is ready to become a test drive vehicle and is visible in the scheduling calendar for the whole dealership as a usable resource.

Once the test drive vehicle is in the workshop, it must be temporarily removed from the scheduling calendar. After the reparation test drive vehicle defect's must be adjusted on the test drive vehicle record accordingly. There also could be a situation when real test drive vehicle mileage is not equal to the recorded one. If this happens, it is Test Drive coordinators's job to correct the data.

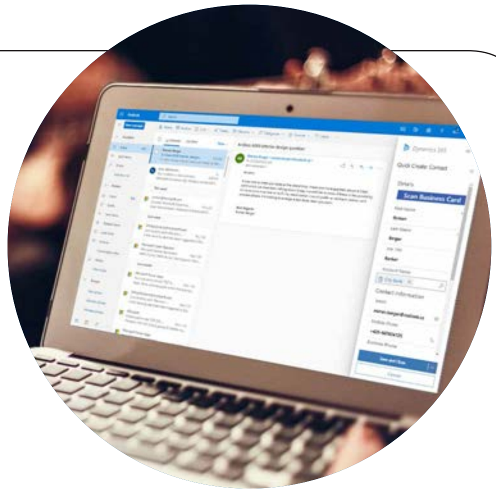
After the test drive vehicle is sold, it must be also removed from the scheduling calendar.

Occasionally TestDrive Coordinators should be also available for scheduling test drives if they are asked to do that by salespersons. They are also eligible for performing the whole test drive agenda if it is necessary.

INTEGRATIONS AND EXTENSIONS

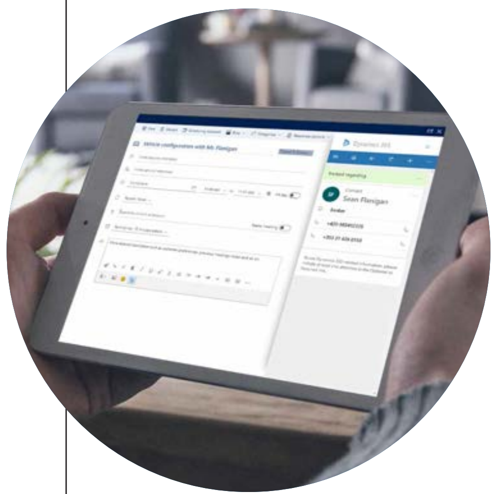
- Automotive CRM is ready to integrate on dealer's back-end system such as vehicle disposition systems, dealer management system etc. using Microsoft technologies.
- One of the pillars of the Power Platform is Power Automate tool which has 250+ out-of-the-box connectors to the third-party systems which brings us a broad variety of options with solving different integration scenarios.
- Automotive CRM is ready to be extended with various enhanced marketing tools for handling specifics agendas such as digital campaigns, web leads, email analysis, surveys, landing pages etc.

OUTLOOK



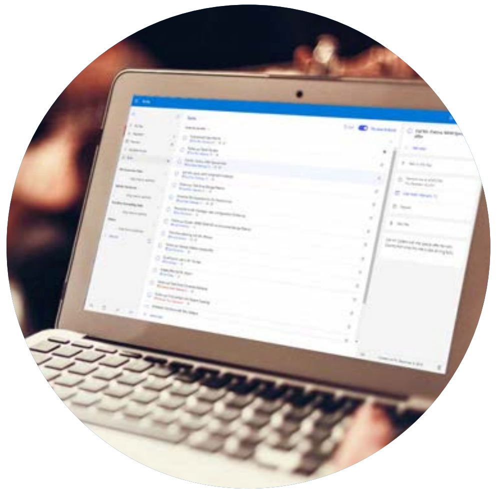
OUTLOOK INTEGRATION

- Create Contact / Accounts and Leads directly from Outlook email
- Track emails to the Automotive CRM. Emails will be captured on the customers timeline.
- Create activities such as phone calls, tasks, appointments etc. directly from Outlook and see them also in Automotive CRM
- Use standard Outlook App on mobile devices



OUTLOOK INTEGRATION – APPOINTMENTS

- Use Automotive CRM integration and schedule your day from Outlook
- Reorganize meetings planned from Automotive CRM in Outlook
- See all relevant customers information when you are scheduling a meeting or typing email to the customer.



OUTLOOK INTEGRATION – TASKS

- Use Automotive CRM activities integration and work with tasks also in Outlook
- Plan your day, manage activities and setup their priorities
- Emails, calendar and Automotive CRM are just one click away
- Use mobile app to have your task always with you to not forget anything

AUTOMOTIVE CRM

MICROSOFT TEAMS INTEGRATION

- Enhance effectivity and work with Automotive CRM directly from Microsoft Teams
- Start your day with Microsoft Teams and check your todays Automotive CRM tasks and most promising opportunities to work on.
- Collaborate with your colleagues while reviewing customer's data
- Share documents related to key opportunities to the whole team
- Check Charts or Dashboards and share your opinion with others on the team wall
- Like, share and comment posts within a team

MOBILE CLIENT

- Work with Automotive CRM from everywhere with mobile clients
- Create activities
- Work with ongoing opportunities
- Browse contact list
- Check up to date reports
- See your own dashboards
- Search vehicles
- Manage test drives

REPORTING

- Dynamics 365 Platform provide wide variety of data visualization in form of views, charts and interactive dashboards.
- Automotive CRM brings lot of out-of-box dashboards showing overview of most crucial information about leads, opportunities, activities.
- Use Dashboard's filters to drill down data to desired detail
- Create your own views, charts and dashboard to exactly fit your needs
- Automotive CRM system contains variety of out-of-box dashboards
- Use Enhanced and deep analysis within Power BI tool with native connection to the Automotive CRM data
- Use powerful possibilities of Excel with data export to xlsx files

POWER BI EXTENSION TO AUTOMOTIVE CRM

Get self-service analytics at enterprise scale
Reduce the added cost, complexity, and security risks of multiple solutions with an analytics platform that scales from individuals to the organization as a whole.

Use smart tools for strong results
Find and share meaningful insights with hundreds of data visualizations, built-in AI capabilities, tight Excel integration, and prebuilt and custom data connectors.

Help protect your analytics data
Gain leading sensitivity classification and data loss prevention capabilities to help keep your data secure and compliant—even when it's exported.

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