



CRM™
by DealerSocket



DealerSocket Playbook

A Quick Guide to Jumpstarting Your CRM



Navigate the Playbook

Use the links below to easily navigate through each section of the playbook. To return here, use the compass link at the end of each section.

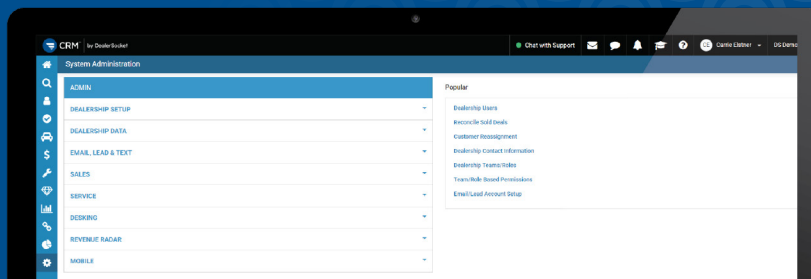


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Questions?

Contact your DealerSocket Customer Success Manager or call (877) 751-0403.

Admin Review



How well do you know the DealerSocket Admin Menu? Below is a quick guide with walkthrough videos and processes to help you align your CRM setup with your current needs.

1. Dealership Users

▶ Watch Video

Employee Status

- Are there any users that need to be reactivated?
- Are there any users that need to be inactivated?
- Are there any users that need to be created?

Employee Information Review

- Correct Team?
- Correct Preferred Phone?
- ALL CAPS INFORMATION?
- Reply Email Selected from dropdown and not filled in manually?
- Correct Job Title?
- DMS Employee filled in?
- If using call management, are outbound and inbound phone ID's populated?

Permissions

- Scheduling
 - Does User need to be included in scheduling? (Lead routing)
 - Does User need to be able to edit the schedule?
- SocketTalk
 - Does the User need permission to text?
 - Does the User need permission to IM other dealership employees?
 - Does the User need permission to Group IM other dealership employees?

2. Customer Reassignment

▶ Watch Video

- Are any opportunities assigned to Inactive or Bucket Users?
- Should you Round Robin Opportunities to a specific Team or Assign them to one user?
- Are there any reassignments that need to undone?
- Do you have a process for orphan customers? [Click Here](#) to See Orphan Process Ideas.

3. Dealership Contact Information

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- Are Default Contacts Correct?
- Are Phone Numbers and Social Media Links Correct?
- Branding > Are Dealership images Broken? Do they need to be updated?

4. Dealership Teams/Roles

[▶ Watch Video](#)

- Is the Dealership's Hierarchy represented in the way Teams and Roles are set up?
- Are power teams set up?

5. Team/Role Based Permissions

[▶ Watch Video](#)

- Admin Permission – Are there teams who don't need access to the admin menu listed?
- CDAllowDuplicate – Is this turned on or turned off for appropriate users?
- Individual – Do those who need merging access, have access?
- Sales – Do those who need opportunity merging access, have access?
- Event Tracking Code Required – This is a recent enhancement; has it been turned on?
- Insert Restriction: Multiple Events
- Insert Restriction: Sales Source

6. Email/Lead Account Setup/Lead Source Maintenance

[▶ Watch Video](#)

- If Auto Responders are active, are they still accurate?
- Are all lead accounts being routed to the correct individuals or teams?
- Is "Use this account to relay Lead Notifications to DS Users Turned on?"
- Are there any lead sources coming through as emails instead of leads?

7. Store Hours

[▶ Watch Video](#)

- Are store sales hours up to date?

8. Store Security/IP Restriction

[▶ Watch Video](#)

- Is a Force Password Reset needed?
- Do you want to control who can access the CRM from home or away from the dealership?

9. Bulk Activity Delete/Undelete

[▶ Watch Video](#)

- Do tasks that have built up need to be cleaned out?

10. Desking Admin

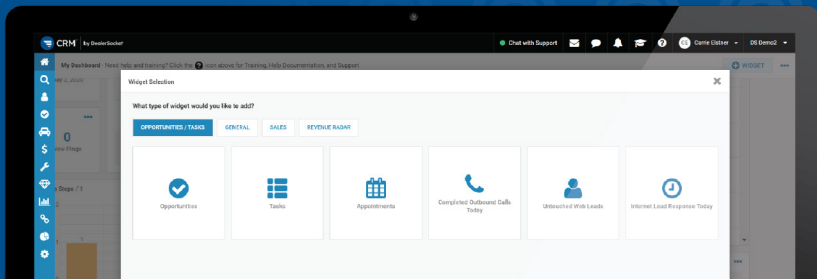
[▶ Watch Video](#)

- Do any aftermarket products need to be added or removed?



SECTION TWO

Filter Management



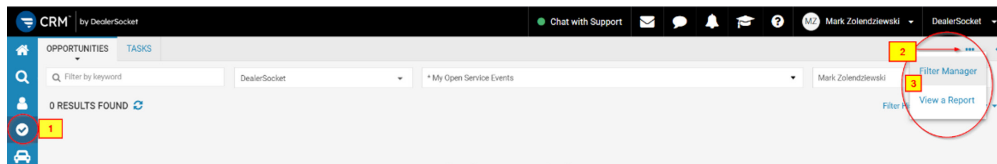
Filters or “widgets” are highly customizable and can be set up on an individual basis to personalize your CRM dashboard to your liking.

Step One: Locating Your Widget Management Center

From your CRM dashboard, look for the **Add Widget** button  . Here you will find a number of prebuilt categories and once built, any custom filters you create.

Step Two: Creating Custom Widgets

From the **Opportunities & Tasks** tab, use the ellipses menu to locate **Filter Manager**.



From **Filter Manager**, you can create, edit, delete, or duplicate filters. Follow the prompts, remember what category you select, and don't forget to hit **SAVE**.

Popular Custom Widgets

Internet Unqualified Last 30 Days

The basics...

I want to a filter called

Do you want to rename the filter? ☐ Yes ☒ No

Who can access this filter?

This new filter may be accessed by

Set your filter conditions...

For all opportunities, create a filter using the following set of conditions:

Date Created	is equal to	Past Month
and Source	is equal to	Internet
and Sales Step	is equal to	0 - Unqualified

[ADD CONDITION](#)

How do you want your filtered results to be sorted?

By default, I want the filtered results to be sorted by

[CANCEL](#) [SAVE](#)

Deals Sitting in Pending F&I

The basics...

I want to a filter called

Do you want to rename the filter? ☐ Yes ☒ No

Who can access this filter?

This new filter may be accessed by

Set your filter conditions...

For all opportunities, create a filter using the following set of conditions:

is equal to

and is equal to

How do you want your filtered results to be sorted?

By default, I want the filtered results to be sorted by

All Emails Received

The basics...

I want to a filter called

Do you want to rename the filter? ☐ Yes ☒ No

Who can access this filter?

This new filter may be accessed by

Set your filter conditions...

For all opportunities, create a filter using the following set of conditions:

is equal to

and is equal to

and is equal to

How do you want your filtered results to be sorted?

By default, I want the filtered results to be sorted by

For “my emails received” just add this condition:

and is equal to

Aged Inventory Pings / 20		
806 Days	New Stock# C	5 customers
771 Days	New Stock# 2	27 customers

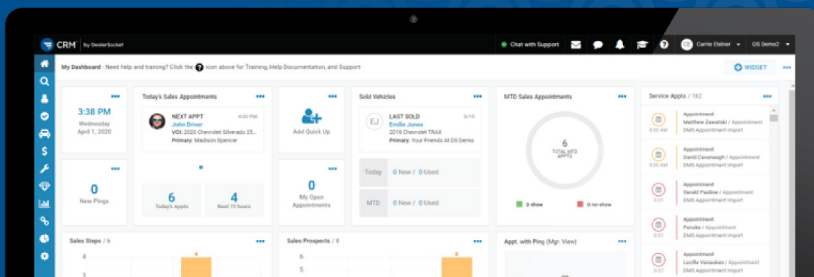
Getting Rid of Aged Inventory

If you have our RevenueRadar data mining tool, the **Aged Inventory Pings** widget is a must-have for finding opportunities on old age units. Clicking any of the stock numbers in the widget will bring up a list of customers that may be a fit for that particular aged unit.



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Opportunity Reassignment



Orphaned Opportunity Process Options

When a salesperson leaves the dealership, what is the best way to handle the opportunities assigned to them? Here are three ways you can ensure your “orphaned” customers receive attention. To enact these processes, you will need to be familiar with the **Customer Reassignment** tool. [Click here for a tutorial.](#)

Option One: Reassign all opportunities to newer salespeople.

[▶ Watch Video](#)

Why this works: This approach will help build pipeline for salespeople that don't otherwise have it.

What to watch for: All salespeople are not equal, and some may follow up with orphan customers in a timely manner while others will let tasks age and become irrelevant.

For either of the next two methods, you'll start by implementing a round-robin on all **OPEN** opportunities **to the sales team or a specific user**. These are the hottest opportunities and need immediate follow up. You can also enroll these customers into a separate follow up campaign that would generate a phone call task for the salesperson.

Option Two: Round-robin and reassign via business rule.

[▶ Watch Video](#)

Reassign Sold and Lost Opportunities to the “Your Friends at ...” Then, build a business rule to round robin tasks for “Your Friends at...” to the sales staff.

Why this works: This is a fair approach that could provide benefit to every team member equally.

What to watch for: Because tasks are spread out evenly, you won't be accounting for current task load, so salespeople who already have a lot, might be getting more than they can handle.

Option Three: Round-robin and open up via widgets.

[▶ Watch Video](#)

Reassign Sold and Lost Opportunities to the “Your Friends at...” User. Build widgets for Orphan Birthday and Anniversary Calls that are visible by all salespeople.

Why this works: Orphans don’t get mixed into the salesperson’s current pipeline, mitigating risk of discouragement cause by too many unknown prospects filling up their daily tasks and pipeline. This also provides salespeople with a “Bucket” of relevant calls that anyone can make should they need it before they checkout for the day.

What to watch for: Because the salespeople do not see the orphan tasks in their daily tasks, the orphan filters will need to be monitored to ensure that they are completed.



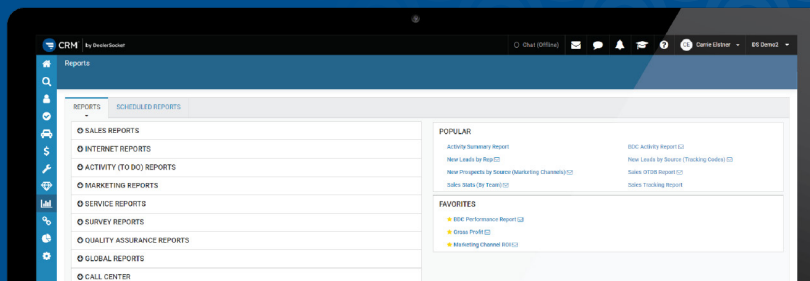
Quick Tips

- **Call with purpose.** Always have a reason to call an orphan customer, for example, anniversary, birthday, or promotion. Never call an orphan customer just to introduce yourself as their new contact at the dealership. With staff turnover rates at dealerships today, it’s possible that a customer could receive multiple calls like this in year. From the customer’s perspective, it makes your dealership look unstable.
- **Reassign as needed.** If a salesperson hits it off with an orphan customer while following up, a sales manager can always reassign that customer’s existing opportunities to that salesperson for all future follow up.
- **Update the system.** A salesperson can always create a new sales opportunity in their name if an Orphan customer is looking for a vehicle.



SECTION FOUR

Reporting Revamp



The answer to improving your performance metrics is available within your own data. Customizing your reports will enable you to unlock the insights you need to implement improvements for any area of the dealership.

Select Your Favorites

Visit **Reports** from within the reporting category in your CRM's main navigation:  Reporting. A list of popular reports as well as any you've favorited is conveniently located on this screen.

To adjust your **Favorites Menu**, simply click the star next to any listed report: ★ [BDC Performance Report](#) .

Schedule Reports

Any report with an envelope to the right of it can be scheduled to automatically be delivered to your inbox at intervals you choose. To do this, simply select **Schedule Report Email** from the dropdown on any report.

A screenshot of the 'Marketing Channel Report' scheduling form. The form includes a 'Date Range' section with a 'Custom' dropdown and a date range of '5/1/2020 - 5/3/2020'. Below this is a 'Filters' section with dropdowns for 'Type' (All), 'Source' (All Items checked), 'Marketing Channels' (All Marketing Channels), and 'Franchise' (All Franchises). There are also checkboxes for 'Date Flag' (Key Off Event Create Date, Key Off Date of Each Activity) and 'Expand' (Source, Tracking Code). The 'Subscription Details' section includes a 'Subscription Name' field (Marketing Channel ROI) and a 'Run this subscription:' dropdown menu with options like 'Every 1st of the Month Morning', 'Every 1st of the Month Evening', 'Every 2nd of the Month Morning', 'Every 5th of the Month Morning', 'Every Friday Evening', 'Every Late Afternoon', 'Every Monday Morning', 'Every Morning - Business Days', 'Every Morning - Every Day', and 'Every Saturday Morning'. The 'Report Delivery Options' section includes checkboxes for 'PDF' and 'Excel', and fields for 'To:', 'Cc:', 'Bcc:', 'Reply To:', 'Subject:', and 'Message (Optional):'. At the bottom are 'Save Schedule' and 'Cancel' buttons.

You can add these reports as widgets on your homepage by selecting the **Add Widget** Button  from your CRM dashboard, then navigating to the **Reports Link** option under the **General** category.

Explore Market Comparison Reporting

[▶ Watch Video](#)

A new set of reports will show you how you're trending against your prior two years as well as other dealerships using DealerSocket CRM. Any user with the **Market Comparison Report** permission activated will have access to the new **Market Comparison Reports** category, which contains a view of user login counts as well as customer engagement, communication, and sales metrics.

Sold Difference	All Dealerships	
Percent Difference Of Prior Year	-22%	
Avg Sold Units	Franchise	Independent
Avg Sold Units 2020	142	131
Avg Sold Units 2019	149	111
Avg Sold Units 2018	150	109
Sold Units	All Dealerships Avg	My Dealership Totals
Sold New		
Sold New 2020	67	46
Sold New 2019	73	54
Sold New 2018	76	254
Sold Used		
Sold Used 2020	72	31
Sold Used 2019	70	71
Sold Used 2018	68	107
In Store Management	All Dealerships Avg	My Dealership Totals
Demos		
Demos 2020	198	121
Demos 2019	230	163
Demos 2018	230	445



Want to do a deeper dive on your reporting practices and procedures?

[Download Reporting Best Practice Guide](#)[Return to Navigation](#)

SECTION FIVE

Checkout Process

Employee	Performance	New	Visits	Apps	Sold	Profit	Bank	Total
Aaron	3 16 1 9	31	17	9	2	\$-188	\$ 945	\$ 757
Chris	6 12 5 11	54	21	20	9	\$10,044	\$11,024	\$ 21,078
David	6 13 8 8	139	19	14	6.5	\$5,502	\$5,174	\$6,256
Ernie	6 11 9 9	76	77	16	13.5	\$14,035	\$13,837	\$27,872
John	6 15 5 9	139	30	28	7	\$-79	\$4,488	\$4,418
Johnny	1 16 9 8	137	28	22	11.5	\$12,030	\$14,001	\$26,031
LC	4 16 8 7	82	37	22	9	\$10,010	\$16,261	\$26,271
Len	6 5 3 21	26	12	13	3.5	\$3,838	\$2,913	\$6,750
Melanie	1 12 6 11	106	24	21	9	\$1,1164	\$4,608	\$5,724

By utilizing the **Daily Checkout Report** paired with a well-prepared **Checkout** process, you can expect stronger results within the areas of CRM utilization, salesperson accountability, customer data input, and sales activities.

Using the Checkout Feature

[Watch Video](#)

As a manager, you can access the **Checkout** tool from the CRM's main navigation under the **\$ Sales** category. The tool, which tracks your sales team's activity, notates their progress with a Green, Yellow, or Red Checkout status. Determining how a salesperson checks out is up to your management team. Here are some examples of checkout criteria:

Sample Checkout Grading Criteria

Activity Tracking

Did not input all known prospects
<80% completed calls tracked by CTI
Did not update call notes
Missed check out meeting

Input all known prospects
80%+ completed calls tracked by CTI
Updated 80%+ call notes

Input all known prospects
All completed calls tracked by CTI
Updated all call notes

Performance

Completed <50% of open To-Dos
Connected with <5 prospects
Made <10 outbound calls

Completed 50-99% of To-Dos
Connected with 5-10 prospects
Made 10-20 outbound calls

Completed all To-Dos
Connected with 10+ prospects
Made 21+ outbound calls

Results

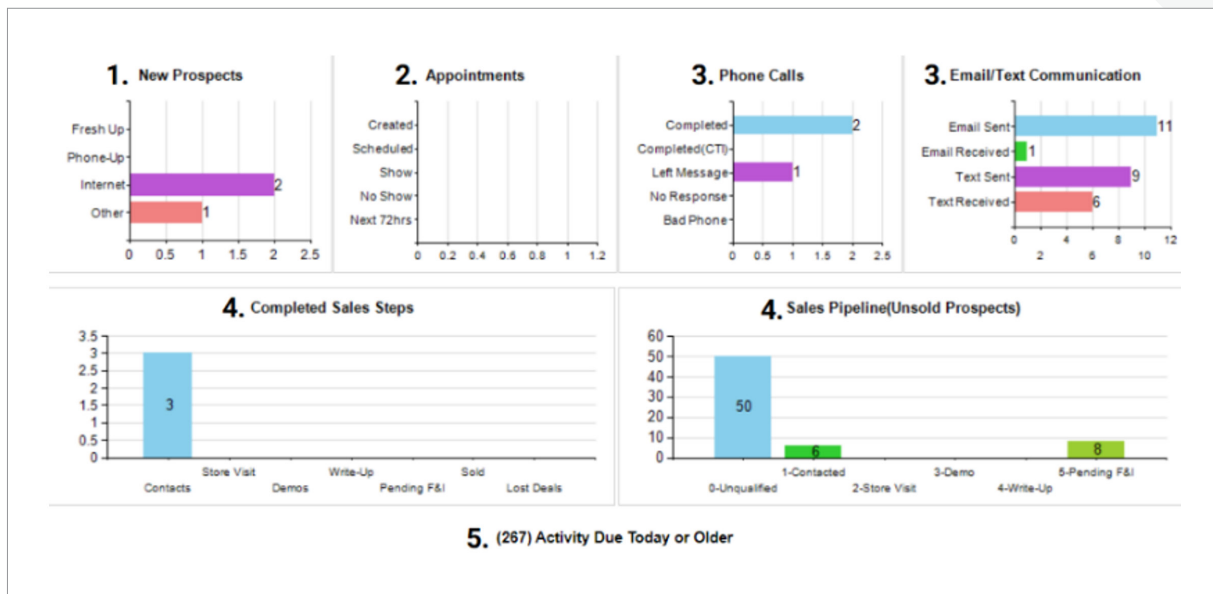
No OTDBs added (fresh or phone up)
No appointments set or confirmed

Added 1-2 OTDBs (fresh or phone up)
Created 0-1 verifiable appointments

Added 3 OTDBs (fresh or phone up)
Created 2 verifiable appointments
Sold vehicle (automatic green)

Results can be used for reward or discipline purposes such as a spiff for checking out green all week, or not qualifying for weekend spiffs if you checkout red at all during the week. From left to right you have the sales person's name, an open green, yellow, red or off radio button through which you can grade them (on a daily basis), monthly totals of these green, yellow, red or off, then monthly totals of their key metrics. These reset on the first of each month.

Using the Daily Checkout Report



Require each salesperson to print out their daily checkout report and review it with you at the end of each day. They can access the report from the CRM's main navigation under [My Links](#) and use it to keep track of their individual metrics as needed. This report can also be set for a specific date range (ex: Saturday through Friday), enabling you to add a weekly checkout on a day in which your full team is working. Use the information in that report and the green "money maker" sales pipeline graph to motivate the group.

1. Customer Reassignment

Review the number of new prospects added to the CRM by the salesperson.

- Have all ups been logged?

2. Appointments

Shown appointments close at a 50% rate vs. 20% for a fresh up. They also help provide a more predicable business model. Confirmed appointments have a 70% show rate.

- Has the salesperson created an appointment?
- Has that appointment been confirmed by a manager?

3. Phone Calls, Emails, and Texts

This section is a great place to measure activity, set individual goals, and track results for salespeople. For example, if it takes a salesperson 4 scheduled appointments to sell a car and 5 calls to set an appointment, that salesperson should be making at least 20 calls per day in order to sell 1 car per day.

- More left messages than completed calls. Are we calling at the right time of day?
- Have we responded to the emails and texts we received?

4. Completed Sales Steps and Sales Pipeline

Use this to track sales steps and monitor the salesperson's sales pipeline.

- Are there any write ups that did not buy?
- Are there any write ups that need to be moved to Pending F&I?
- Are there enough prospects for the salesperson to attain their sales goal?

5. Activity Due Today or Older

Each salesperson should have zero tasks due at the end of each day.

- How many open tasks are assigned to the salesperson?



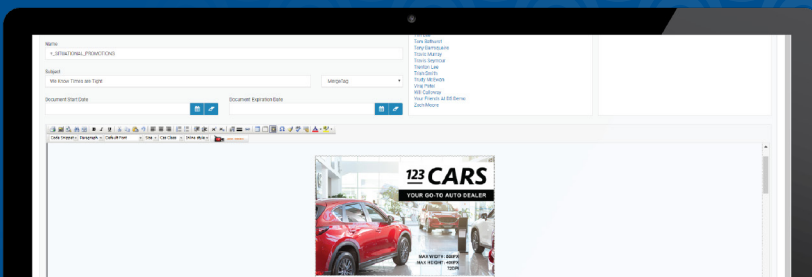
Want to do a deeper dive into your checkout process?

[Download Checkout Best Practice Guide](#)



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Task & Marketing Automation Audit



With change and transition comes the possibility of outdated processes. Doing periodic inspections of the automated workflows you have set up within the CRM will help ensure your outgoing communications are timely, relevant, and on point with your expectations.

Business Rule Optimization

Business rules are the “code” that power your CRM. If you don’t yet have a full understanding of Business Rule Manager, contact your Customer Success Manager or visit the [Help Center](#) prior to making changes.

1. Navigate to **Business Rule Manager** from **Marketing Tools** within the CRM's main navigation:  Marketing Tools

2. Search by **Active** business rules: 

3. Click on the **Business Rule ID** number to see business rule criteria, i.e. whether the business rule is actively enrolling customers, events, or vehicles into campaigns:

☐	Edit	35	Sales Event
☐	Edit	50	Sales Event

4. Identify which campaigns customers are actively being enrolled into:

Rule Description:

Where the Event was 'Inserted' in the last... 5 day(s)

Except Where: [Edit](#)

Event In Campaign: Internet Process - Unqualified

ACTION: Enroll in a Marketing Campaign [Edit](#)

Campaign Name: Internet Process - Unqualified

Campaign Type: Purchase Inquiry Follow up

Run in (x) days: 0

5. Sort business rules by **Inactive**. Identify any that you may wish to reactivate. Note the campaigns they are tied to (if any). To activate the rule, simply click on “No” to toggle to “Yes”.

Schedule	Seq No.	Active ▲	Flagged	Dupes
Every 15 Minutes	1	No	No	Yes
Daily	1	No	No	No

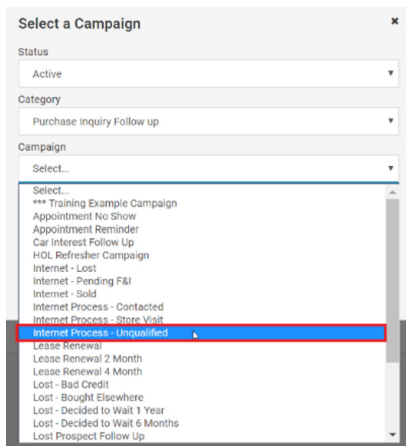
6. Proceed to **Campaign Manager**.

Campaign Optimization

[▶ Watch Video](#)

Campaign Manager is the hub for all your marketing programs and has a breadth of functionality. New to Campaign Manager? Watch a 4-minute tutorial with the link above.

1. Navigate to **Campaign Manager** from **Marketing Tools** within the CRM's main navigation: 
2. In Campaign Manager, use the **Search** function located in the top left of the screen to locate your desired campaign.
3. Search by **Status = Active**, the category of your choice, and the desired campaign.



Select a Campaign

Status: Active

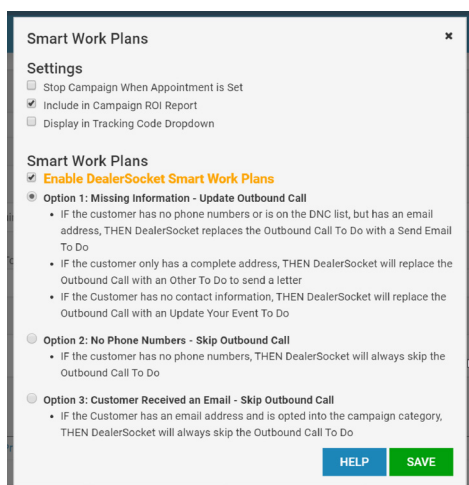
Category: Purchase Inquiry Follow up

Campaign: Select...

Select...

- *** Training Example Campaign
- Appointment No Show
- Appointment Reminder
- Car Interest Follow Up
- HOL Refresher Campaign
- Internet - Lost
- Internet - Pending F&I
- Internet - Sold
- Internet Process - Contacted
- Internet Process - Store Visit
- Internet Process - Unqualified**
- Lease Renewal
- Lease Renewal 2 Month
- Lease Renewal 4 Month
- Lost - Bad Credit
- Lost - Bought Elsewhere
- Lost - Decided to Wait 1 Year
- Lost - Decided to Wait 6 Months
- Lost Prospect Follow Up

4. Identify the Event Stop Status. The campaign will end when a customer reaches this designated status or beyond. Verify that this status is correct for your processes.
 - For Fresh Up/Phone Up campaigns, the stop status is usually “Sold” or “F&I”.
 - For Internet, there is generally a more extensive setup. The unqualified campaign will have a stop status of up/contacted. A separate business rule will then enroll internet contacts that are up/contacted into an internet up/contacted campaign. The next campaign will have a stop status of store visit, and so on.
5. Are **Smart Work Plans** ON or OFF? Smart Work Plans will adjust the To-Do type on activity milestones according to the customer contact information available.



Smart Work Plans

Settings

- ☐ Stop Campaign When Appointment is Set
- ☒ Include in Campaign ROI Report
- ☐ Display in Tracking Code Dropdown

Smart Work Plans

- ☒ **Enable DealerSocket Smart Work Plans**
- ☐ **Option 1: Missing Information - Update Outbound Call**
 - If the customer has no phone numbers or is on the DNC list, but has an email address, THEN DealerSocket replaces the Outbound Call To Do with a Send Email To Do
 - If the customer only has a complete address, THEN DealerSocket will replace the Outbound Call with an Other To Do to send a letter
 - If the Customer has no contact information, THEN DealerSocket will replace the Outbound Call with an Update Your Event To Do
- ☐ **Option 2: No Phone Numbers - Skip Outbound Call**
 - If the customer has no phone numbers, THEN DealerSocket will always skip the Outbound Call To Do
- ☐ **Option 3: Customer Received an Email - Skip Outbound Call**
 - If the Customer has an email address and is opted into the campaign category, THEN DealerSocket will always skip the Outbound Call To Do

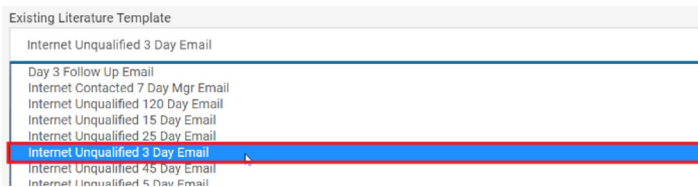
[HELP](#) [SAVE](#)

6. Review the steps in the campaign. There are four different activity types:
 - Event – generates a new sales or service event, depending on the business rule type
 - Activity – generates a task
 - Literature – sends an email and/or print document
 - Campaign – enrolls the customer into a campaign
7. Review the individual campaign milestones by clicking on the pencil and paper icon on the left-hand side.
 - Adjust task assignment and/or description for Activity type milestones if needed.
 - Review email/print documents going out on literature milestones. Note the Print Doc/Email Doc number as you are unable to preview Documents in Campaign Manager.
 - **DO NOT DELETE CAMPAIGN MILESTONES.** Deleting milestones will likely cause a campaign to error out some/all contacts enrolled in the campaign.
8. **Days After** looks at the previous milestone and sets a delay of X days until the next milestone will execute.
9. If a milestone is inactive, the action of the milestone is skipped as are the Days After. If you do inactivate a milestone, all subsequent Days After will need to be updated.
10. Review remaining active campaigns until all have been verified..

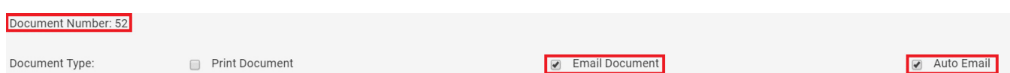
Document Optimization

Document Manager is the tool that produces “literature” used by Campaign Manager and List Builder. Document Manager is used to create phone scripts to be attached to activities, email documents to be delivered, and print documents to be mailed. If you’re not familiar with Document Manager, [take this brief training](#) and visit the [Help Center](#) as needed.

1. Navigate to **Document Manager** from **Marketing Tools** within the CRM’s main navigation: 
2. Within Document Manager, search for the documents you would like to inspect (whether from your campaigns or otherwise):



3. Verify that the appropriate boxes are selected at the top for Document Type. For an email to automatically deliver as part of a campaign, Email Document and Auto Email will need to be selected. If only Email Document is selected, the document will be able to be sent out as part of an email blast, but not as part of a campaign.



4. Review the Document settings and message:

- Review the subject line. Avoid verbiage that may trigger Spam filters: NEVER USE ALL CAPS and avoid overuse of special characters multiple special characters (**Hurry In!!!**). Search the Internet for “Email Subject Words to Avoid” because the spam word list constantly changes.
- Under the **Reply Address** for each document, review the users selected to receive customer replies to the selected document. Generally speaking, **Rep Reply** will be the preferred choice as it routes customer responses back to their salesperson.
- Under the **Reply Other** dropdown, select any other parties that you would like to be copied on customer replies. You can select individuals or teams.
- Make any necessary adjustments to the **Friendly Name**, which is the name that will display as the sender in the recipient’s email inbox.
- In the email editor window, adjust your email document. Code Snippets are available to automatically pull information from the CRM, for example, the make, model, and mileage or the recipients trade. You can also add images and videos, all of which can be hyperlinked.
Quick Tip: It is best practice to create an email document using tables for your email to format properly when viewed on different devices and email providers.

5. If you have created a **Smart Links** campaign, you can add smart links to your document by selecting the **Set Up Smart Links** button in the top right. New to Smart Links? Learn how to use them [here](#).

6. **Save** your Document after any changes have been made.



Want to elevate your email marketing efforts?

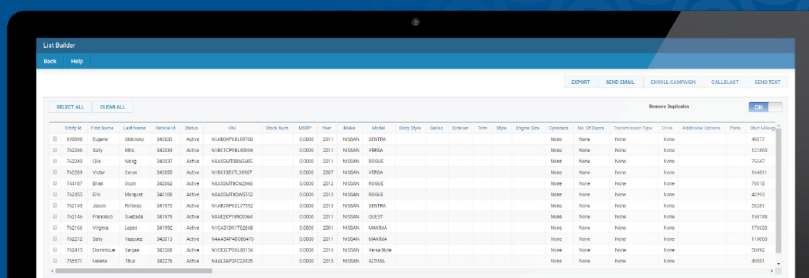
Download Email Marketing Best Practice Guide



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SECTION SEVEN

List Builder Activation



List Builder provides the ability to segment audiences and target sales and marketing messages for maximum relevancy. Use it to connect with your customers regardless of current traffic to the showroom.

Using List Builder

[▶ Watch Video](#)

If you're not well-acquainted with List Builder, start by watching a tutorial with the link above. When a list is created, there are four options for what you can do with the information you've filtered:

1. **Export as an Excel File**
2. **Send an Email Blast.** The email document must be created before creating the list and must be designated as an email document.
3. **Enroll the Customers in a Campaign**
4. **Perform a Call Blast.** Call blasts are rarely used, and they do require an additional subscription fee. If you pay for the additional subscription, you can set up a phone script along with customer information and it will send it to a partnered call center which will call every customer on the list following the phone script.

Target Lists for Outreach During COVID-19

Tax Refunds and Stimulus Checks = Down Payments

Many consumers will be receiving either a tax refund or a stimulus check as part of the U.S. government's economic relief package. Or for Canada, a variety of economic options as outlined [here](#). Reach out to previous owners and in-market prospects to capitalize.

Customers → Entity Type = 2

Vehicles → Status IN Active

Vehicles → Model IN [List Targeted Models]

Vehicles → Purchase Date Between 3-7 Years Ago

Vehicles → Sales Type IN New

And/Or (As a separate list)

Customers → Entity Type = 2

Events → Sales Status IN Unqualified, Contacted, Store Visit, Demo, Write Up

Events → Sales Source IN Fresh Up, Phone Up, Internet

Events → Sales Type IN New Quotes ♦ Model IN [List Targeted Models]

Vehicle Buyback Specials for Loyal Customers

The current state of the economy is impacting the nation in unprecedented ways. Consumer behavior is changing, and customers may be looking to trade in their vehicle for one with a lower payment while others may be looking to take advantage of lower interest rates or OEM incentives. Customers who regularly purchase and service their vehicles with your dealership are often willing to do business with you again. Reach out and reward them for their loyalty by promising higher trade-in values.

Customers → Entity Type = 2

Vehicle → Purchase Date BETWEEN Date 3-7 Years Ago

Vehicle → Model IN THE LIST (List Desired Models - These are the models you would like to buy back specifically, if any. This step may be omitted if you are not particular about the trades you would accept.)

Customer Summary → No of Services ROs GREATER THAN (your choice)

Customer Summary → Last Service Date GREATER THAN Date 1 Year Ago

First Major Maintenance Rebate

Send a combined "Sales and Service" marketing campaign to customers coming up on their first major recommended service. Offer a rebate they can apply to the cost of the service or put toward trading in their current vehicle for a newer model. Many vehicle owners prefer to avoid the high costs of maintaining aging vehicles, so take advantage of this dual opportunity.

Vehicles → Status IN Active

Vehicles → Model LIKE [Targeted Model]

Vehicles → Current Mileage BETWEEN [First Costly Maintenance Interval]

Vehicles → Purchase Date LESS THAN [Date 2 years ago]

Vehicles → Purchase Type IN Cash, Finance

Vehicles → Weeks from Service GREATER THAN 8



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