

BMW/Mini Next Generation CRM Reference Guide

VinSolutions Connect CRM

BMW Next Generation – Feature Listing

Table of Contents

Page 2.	What Is The Next Generation Program?
Page 3.	Non-Consumer Initiated leads (NCI)
Page 4.	Text as preferred method of contact
Page 5.	Downloadable email templates
Page 6.	Lead handling instructions link
Page 7.	Lead handling instructions notes
Page 8.	Dealership showroom traffic visibility

Page 9.	BMW Financial Services (BMW FS) leads
Page 10.	National do not market indicator
Page 11.	Two-way notes integration w/ BMW Infobahn
Page 12.	NCI leads customer process rule setup (2 pages)
Page 14.	NextGen CRM features coming soon
Page 15.	Frequently asked questions
Page 16.	Support contact information

What is BMW Next Generation (NextGen)?

BMW has identified VinSolutions Connect CRM as a certified NextGen CRM. This means that we are on the path towards inclusion of advanced CRM features and enhanced information exchange with automotive manufacturer databases. BMW utilizes Connect CRM to deliver these features to its dealerships that result in **deeper integration, improved knowledge sharing, lead handling** and **OEM based vehicle sales assistance**.

Through this partnership, VinSolutions' BMW dealerships are now better equipped with the tools needed to sell more vehicles in a more rapid time frame, while also improving customer loyalty in a growing luxury automobile industry.

Non-Consumer Initiated (NCI) Leads

Non-Consumer Initiated Leads are leads sent directly from BMW to dealerships. They represent instances where the OEM has identified customers who are likely in the market for a vehicle, but have not yet expressed interest.

Example of NCI Lead:

A customer who has a BMW Financed Services (FS) lease that expires soon. BMW FS has insight into the terms and dates associated with a customer's current financed vehicle. Hence, BMW FS passes that information on to the dealership in the form of a NCI lead. Since NCI leads are not the result of a customer expressing interest, Connect CRM doesn't send Auto-responses for this type of lead. On the contrary, BMW will sometimes share Customer Initiated leads (CI) where the customer has expressed interest.

Connect CRM makes both NCI & CI leads available to a dealership with ease.

NCI leads are received by the CRM and can be found in the following Connect CRM locations:

Lead Report

NCI Leads (Non-Customer Initiated)

Dealer	Customer	Customer Dashboard Link	Lead Type	Lead Source Group	Lead Status	Contacted Indicator	Sales Rep	Lead Origination Date
Apple BMW of York	Krystal Madryne	827270907	Internet	BMW		No	Dave Levitan	02/12/2018 09:14 AM
Apple BMW of York	Eliel Nouri	649020932	Internet	BMW		No	Andrew Prokurst	02/12/2018 11:32 AM
Apple BMW of York	Catherine Cotronei	138022047	Internet	BMW		No	Andrew Prokurst	02/12/2018 11:30 AM
Apple BMW of York	Rajnikant Karamia	201020281	Internet	BMW		No	Andrew Prokurst	02/19/2018 09:21 AM
Apple BMW of York	Edgar Nelms	651309771	Internet	BMW		No	Tom Heemeyer	02/19/2018 09:33 AM
Apple BMW of York	Nancy Fox	450320493	Internet	BMW		No	Nathan Ginter	02/26/2018 02:24 AM
Apple BMW of York	Doug Schreiber	257147224	Internet	BMW		No	Dave Levitan	02/29/2018 09:24 AM
Apple BMW of York	Edward Adams	302021607	Internet	BMW		No	Dave Levitan	03/05/2018 09:21 AM
Apple BMW of York	Delora Armstrong	102812223	Internet	BMW		No	Dave Levitan	03/05/2018 11:37 AM
Apple BMW of York	Robert Godfrey Jr	824110506	Internet	BMW		No	Andrew Prokurst	02/29/2018 09:24 AM
Apple BMW of York	Sean Zaccor	201010921	Internet	BMW		No	Dave Levitan	02/05/2018 11:30 AM
Apple BMW of York	Scott Miller	144932008	Internet	BMW		No	Andrew Prokurst	02/09/2018 11:43 AM

Customer Dashboard

Customer Dashboard

Delora Armstrong (Individual)

Equity: (\$6,313) 2013 BMW X5 Calculated: 03/03/2018 (hover for details)

Click to add customer note

Status	Buyer/Co-Buyer	Created	Source	Vehicle
NCI		3/6/18	Bm-Fs Cjco Expiration	BMW Full Line
Sold		10/26/16	Repeat Customer	2013 BMW X5
Sold		11/26/11	Aulousas	2013 BMW X3

Call Email Appt. Note Letter SMS

This is a non-consumer initiated lead. In order to follow-up with the customer, you must create a new lead. You can alternately create a new lead by clicking the new lead icon on the toolbar above.

Lead Info
Consumer NCI

Vehicle Info
BMW Full Line (New)

Desk Log

Desk Log (9)

From: 3/5/2018 To: 3/5/2018 Type: -- All Sales Leads --

Type Rep Trn	Customer	Status Source
13:19	Blaise Becker V. 2003 Mercedes Benz SL500 (11111)	Active - E-Pror - Dealer Com Website
11:57a	Delora Armstrong V. 2008 BMW 535 (B2098P)	Active - Cars.com NCI - Bm-Fs Cjco Expiration
11:57a	Delora Armstrong (unknown vehicle)	Active - Bm-Fs Bmw Credit App
9:52a	James Johnson V. 2011 BMW 330	Active - Bm-Fs Bmw Credit App
9:26a	Tanya Soltes V. 2018 BMW 535 (B2098P)	Active - Bm-Fs Bmw Credit App
9:17a	Edward Adams (unknown vehicle)	Active - Bm-Fs Loan Lead NCI - Bm-Fs Loan Lead
8:13a	David Robinson V. 2018 Buick Encore (B2098P)	Active - Carvana
9:08a	Anna Falar V. 2018 BMW Full Line	Active - Bm-Fs EMail - winter Xdrive Station_216

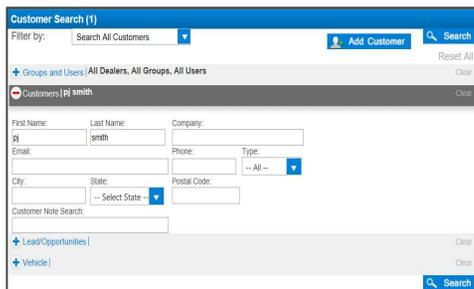
Text As Preferred Method of Contact

Connect CRM has a wealth of information related to prospective customers. BMW sometimes has direct contact with customers to exchange information about current or future vehicle purchases. From general browsing on BMW websites to interactive discussions about current or future financing opportunities...

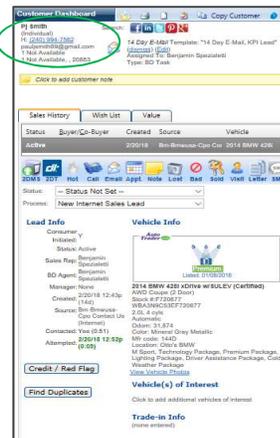
VinSolutions supports BMW's desire to share these customer interactions by sharing of the results with a dealership using the Connect CRM. VinSolutions has implemented the ability for BMW to share a customer's preferred method of contact for a lead, enabling a dealership to know more about a customer prior to lead follow-up.

Below are the steps to view a customer's preferred method of contact:

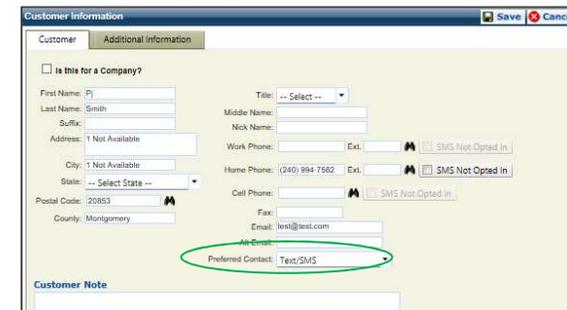
1. Using the Customer Search, locate the customer.



2. Select the customer's name.



3. View the customer's Preferred Contact.

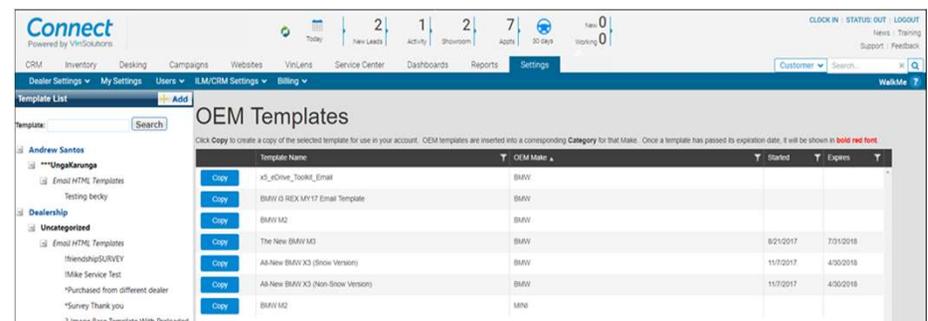
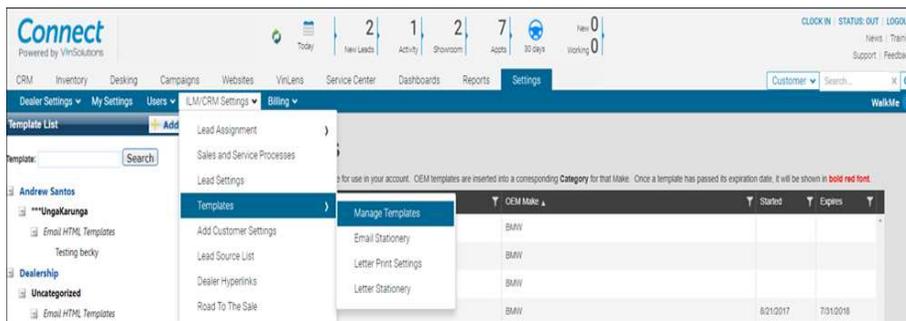


Downloadable Email Templates

BMW would like to improve the overall process for CRM email templates. This includes the way email templates are shared with dealerships. Connect CRM has a predesignated area where these OEM email templates are available.

1. To view or copy OEM templates, select Settings > ILM\CRM Settings > Templates > Manage Templates.

2. To copy an OEM template, select Copy next to the desired template.



Note: Once a template is copied to the Template List, a confirmation message will appear. If this is the first time a template for a specific OEM is copied, a template category for that OEM will be created under the Template List. After the template category is created, all templates for that specific OEM will be copied to that OEM category. If a template has already been copied, the Copy option will be disabled.

Lead Handling Instructions Link

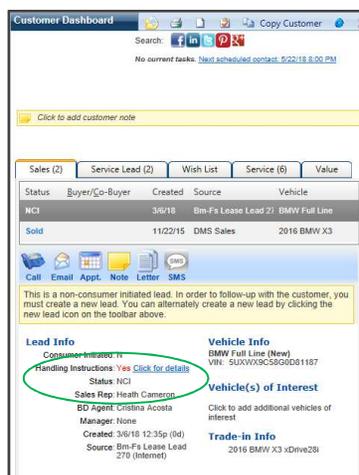
The Connect CRM allows BMW to share valuable information about how dealerships can approach handling leads based on BMW's experience with the customer. A hyperlink providing dealer access to the *BMW Dealer Speed* website will only appear IF there are indeed instructions available for that specific lead that is has been selected viewed by the dealer.

The enhanced lead handling instructions include two types of information:

- A. **Lead Instructions Indicator (Yes or No)** – Identifies whether instructions are available
- B. **Lead Instruction Hyperlink** – Provides a direct link to the BMW Dealer Speed website, which hosts the detailed instructions. Each dealer has their own personalized username and password that provides access to this website. To obtain the password, please contact your BMW OEM representative.

Below are is guidance on how to access this information:

Refer to Customer Dashboard for link



Select hyperlink to access the **BMW Dealer Speed** site. Use your dealer's username and password to access the site.



Note: VinSolutions does not maintain dealer login information.

Contact BMW if login information is not known.

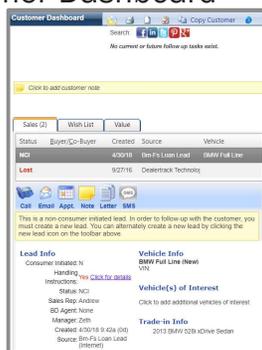
Lead Handling Instructions Notes

Some BMW Financial Services leads, provide lead handling instructions notes which provide guidance and context to dealers on how to best approach interaction with that specific lead. BMW will at times have very helpful insights that dealers can benefit from in efforts to sell customers a vehicle.

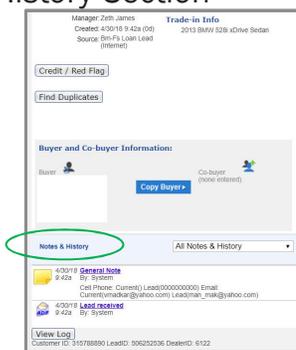
There are two methods in which lead handling instructions can be shared. The first was via hyperlink, which is discussed on the previous page. The second option is Lead Handling Notes. These two methods are mutually exclusive and may not always share identical information.

Below is how dealers can review the lead handling instruction Notes.

1. Select a lead from the Customer Dashboard



2. Scroll down to the Notes & History Section



3. Lead Instruction (if any) will be listed above "Lead Received"



Dealership Showroom Traffic Visibility

Connect CRM has enabled a method for dealerships to share elements of showroom activity with BMW. The great part is that there is no new or special actions necessary on behalf of the dealership.

In essence, Connect CRM transmits dealership initiated leads to BMW for all dealerships who have agreed to the BMW data sharing agreement. To kick off this process, simply create a new customer & lead in Connect CRM.

Below are steps to add a new customer in the Connect CRM:

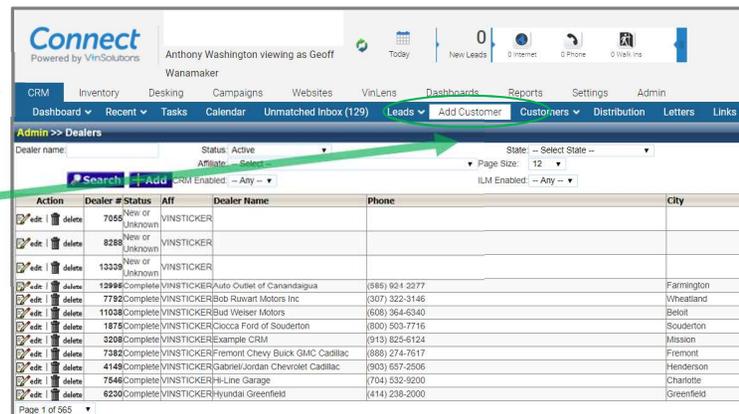
1. Select **CRM > Add Customer**.
2. Enter the new customer's contact information.
3. Select **Find Customer**.

Note: At this point, Connect CRM will search for customers with matching criteria

4. Enter the **Vehicle, Lead Source**, and **Lead Type**.
5. Select **Add Customer**.
6. Connect CRM transmits the dealership initiated lead to BMW.

Key Reminders:

- ✓ Some users may need manager approval to add a new lead that is already in the system.
- ✓ When creating a lead, select **Walk-In** and the customer will automatically be placed on the floor as a showroom visit.



BMW Financial Service Leads

BMW Financial Services (BMW FS) offers leads, which represent various reasons a customer may be in market for a new vehicle. BMW FS performs research to uncover customers with high probability to purchase in the near future.

Connect CRM is providing dealerships instantaneous access to this information and enabling dealerships to make a connection with customers before other luxury brands.

Research shows, first contact often leads to obtaining a captive audience with potential customers. Having a customer's undivided attention is a great way to help customers get into the brand new BMW of their dreams.

Sample BMW FS Lead Types:

FS	End of Term	FS CPO Expiration	NCI
FS	End of Term	FS CPO 30 Day Expiration	NCI
FS	Mobile App	FS Ultimate Drive	CI
FS	End of Term	Pull Ahead	NCI
FS	Equity	FS Loan Lead	NCI
FS	Service	FS Loan Lead Service	NCI
FS	Equity	FS Loan non-FS	NCI
FS	Service	FS Loan non-FS Service	NCI
FS	End of Term	FS Lease Lead 270	NCI
FS	Service	FS Active Lead Service	NCI

FS	Customer Intent	FS Loan Customer Intent Lead	NCI
FS	Customer Intent	FS Select Customer Intent Lead	NCI
FS	Customer Intent	FS Lease Customer Intent Lead	NCI
Internet	BMWUSA	FS BMW Credit App	CI
Internet	MINIUSA	FS MINI Credit App	CI

National Do Not Market Indicator

There are times when customers have expressed to BMW that they do not desire to receive marketing communications. This includes calls, emails, etc. When this is the case BMW will share information with Connect CRM that indicates a customer should not be marketed to.

The Do Not Market Indicator is a indicator specifying whether BMW NA is allowed to market to the consumer directly.

The Do Not Market Indicator will only appear when there are marketing restrictions related to a customer. In this case, BMW NA does not have the permission to contact the consumer

If not indicator appears, then no communication restrictions are in place. This means BMW NA has permission to contact the consumer

Below are the steps on how to determine if a customer can be marketed to.

1. Select a lead from the Customer Dashboard



2. Look for the “Do Not Market” Indicator in the lead details screen.

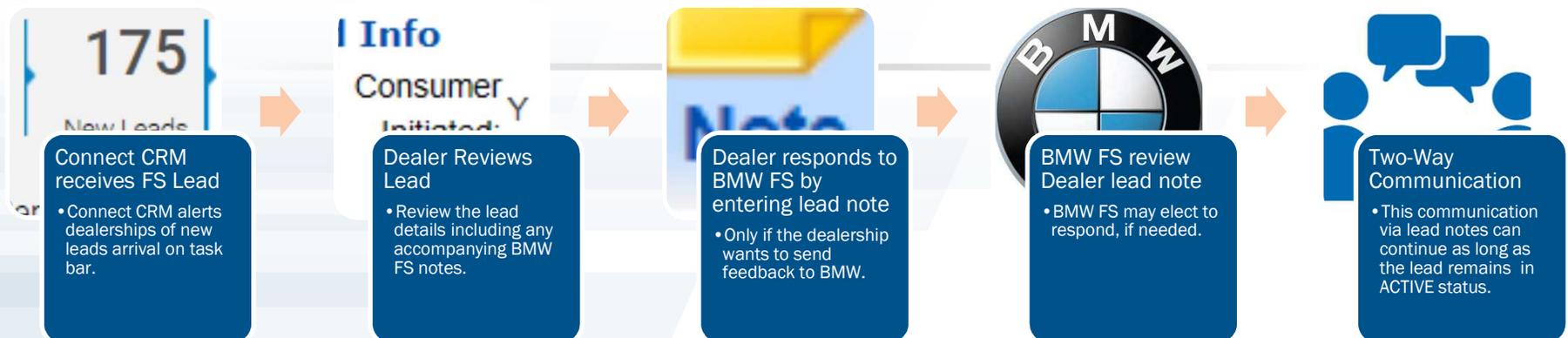
If no indicator is present, customer can be contacted without restriction.



Two-Way Notes Integration

Connect CRM has partnered with BMW to enable an advanced method of lead data sharing between dealerships and BMW Infobahn. The passing of notes generated by BMW FS and/or the Dealership's CRM bi-directionally is now a reality. These lead notes are available to be displayed in both the Connect CRM, as well as BMW FS Infobahn and Express.

How it works: Connect CRM will alert dealerships upon receipt of a new BMW FS lead. At any time BMW FS or dealership staff can add notes to the lead. Notes are shared bi-directionally between dealerships and BMW, which enables effective dynamic two-way communication and brings dealerships into close partnership with BMW to sell some of the best luxury vehicles manufactured in the world.



NCI Lead Handling Process Setup

Process List ⓘ

New Internet Sales Lead (96)
When a new internet sales lead is received

New Internet Sales Lead After Hours (1)
Optional process for after hours leads. Must be enabled in lead settings. If enabled, delays the normal process.

NCI lead process (0)
When a non-consumer initiated lead has been received.

+ [Add Custom Rule](#)

Standard Process

+ [Add Event](#)

Phone Lead Follow up (16)
This process will start anytime a customer is added as a new phone lead

Showroom Visit Follow Up (30)
If a showroom visit is ended and not marked sold, this process will start

Below is step by step instructions on how to create process rule(s) for a BMW Non-Consumer Initiated Lead (NCI).

1. Select **Settings > ILM/CRM Settings > Sales and Service Processes**.
2. Select **NCI Lead Process**.
3. Select **Add Custom Rule**.

Edit Custom Process Rule

Please note that these are "rules" that process in the order that they are listed on the left hand side. They are processed in the order that they are listed on the left hand side. If you have a similar scenario, make sure the rule for a specific lead source is moved to a higher priority so it processes first.

General

Process Rule Name: ((Default Rule Name))

Enabled:

Vehicle Type

ALL
New
PreOwned Not Certified
PreOwned Certified
Unknown
Wholesale

Make / Model

--All Makes--
Acura
Alfa Romeo
AM General
Aston Martin
Audi
Bentley
BMW
Bugatti
Buick
Cadillac
Chevrolet

--All Models--

Lead Source

--All Lead Sources--
AutoTrader
Best of York
Bm-Bmwusa-Cpo Contact Us
Bm-Bmwusa-Used Contact Us
Bm-Byo - Get a Quote
Bm-Cars.Com
Bm-Cpo - Offer Interest
Bm-Dealer Website - Chat
Bm-Dealer Website - Epricer

Lead Category

--All Lead Category--
GM Dealer Loaded
GM Dealer Web
GM Internet
GMAC Leads
GM HandRaiser
GM IPO
GM Manifest
GM Service
GM Showroom

Copy Process Events

Would you like to copy process events from an existing rule?
None

4. On the Edit Custom Process Rule page, create your own custom rule.
5. Enter a **Process Rule Name** and make the appropriate selections on the page.
6. Reminder, **NCI leads** normally come from BMW Financial Services. Ensure you select the appropriate BMW lead source for the rule being created.

Note: For example: A "BMW-FS BMW Credit App" lead source may warrant creation of task automatically when that type of NCI lead is received by your CRM.

7. After creating the rule, scroll to the top of the page and select **SAVE**.

❖ **Note:** An alternative to #4 is to select the **Copy Process Events** dropdown (to copy an already created rule).

Features Coming Soon

Customer Intelligence

- VinSolutions plans to enrich the details and identity of customers for BMW Dealers. By sharing OEM insights to customers preferences, demographics or past behaviors, Dealers can take customer relationship management to new levels. Customer intelligence items provide dealers more knowledge about the customer and enables the dealer to market/relationship build more effectively.
- Examples of customer intelligence attributes that will be available in Connect CRM:
 - ✓ Number of children in household
 - ✓ Likely In Market To Buy
 - ✓ Lifestyle Interests
 - ✓ Customer Mood Indicator & more...

Pipeline Vehicle Inventory

- Finding the “right” vehicle to meet our customers needs is crucial in making the sale. That vehicle may not always be located on the lot. In the past that would block sending the customer home in a new vehicle of their dreams. With the ability to search vehicle inventory in the pipeline, dealers can perform the role of “match-maker” even better. Locate the vehicle that will bring the sale is what this feature is all about.

Frequently Asked Questions (FAQs)

1. How often will this guide be updated?

- » This guide will receive new updates each time new NextGen features are released. The latest guide is always available via the link you used to access this guide originally.

2. Does this guide cover BMW or Mini?

- » This guide applies to features for dealers who sell BMW, Mini or both.

3. How do I obtain a demo of VinSolutions Connect CRM?

- » A demo can be requested by going to: <http://www.vinsolutions.com/request-demo>

4. What other information is available about VinSolutions Connect CRM?

- » **Dealer Reference Guides** – This is a collection of helpful information that provides guidance to dealers on optimizing their usage of Connect CRM - <http://vinsolutions.com/dealer-reference-guides>
- » **Upcoming Workshops & Webinars** – Throughout the year we have some very impactful Connect CRM knowledge sharing/training opportunities. Here's our latest lineup - <https://www.vinsolutions.com/workshops-webinars>
- » **VinWorx** - This is a two-day intensive training and networking event that brings together VinSolutions users from across the country. Dealers have the opportunity to hear from industry leaders, increase their CRM skills and knowledge and create valuable peer connections. For more info: <https://www.vinsolutions.com/vinworx>

Support Contact Information

1. VinSolutions Central Support

- » **Hours:** Mon-Fri: 7:00a-7:00p CST, Saturday: 8:00a-5:00p CST
- » **Phone:** **Toll Free (800) 980-7488** Local (913) 825-6124
- » **Email:** Support@vinsolutions.com
- » **Web:** <http://www.vinsolutions.com/company/contact-us>

2. VinSolutions Sales

- » **Hours:** Mon-Fri: 8:00a-5:00p CST
- » **Phone:** Toll Free (866) 578-8152

3. VinSolutions OEM Support (only for needs of automotive manufacturers)

- » **Email:** oemsupport@vinsolutions.com
- » **Phone:** Local (913) 643-9889

4. VinSolutions Performance Manager

- » Your dealer's performance manager can be reached through your Sales Manager. The performance manager is available to answer general usability questions and to help you get the most out of Connect CRM!