BMW/Mini Next Generation CRM Reference Guide

VinSolutions Connect CRM

BMW Next Generation – Feature Listing

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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.

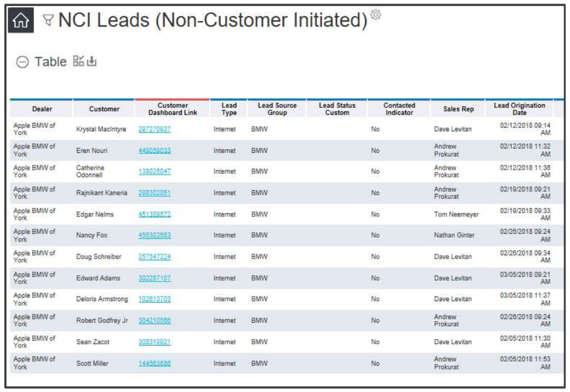
Example of NCI Lead:

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.

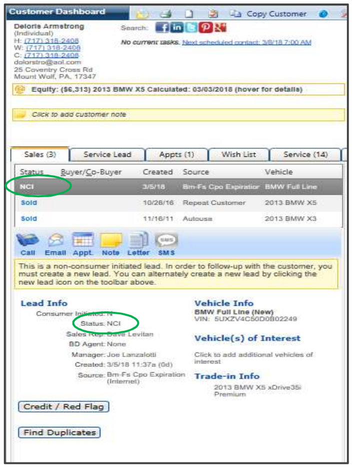
Connect CRM makes both NCI & CI leads available to a dealership with ease.

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

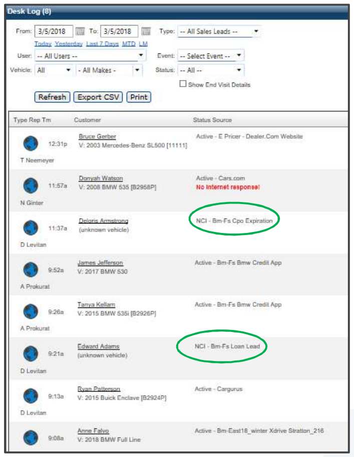
Lead Report



Customer Dashboard



Desk Log



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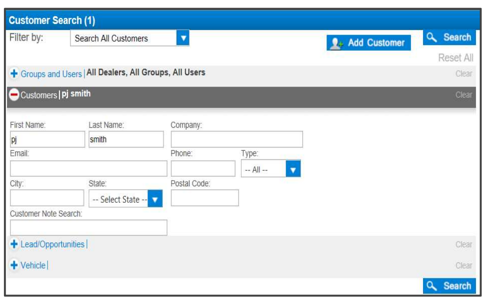
Text As Preferred Method of Contact

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…

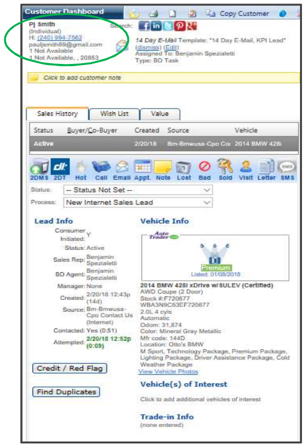
VinSolutions supports BMW's desire to share these customer interactions by sharing of the results with a dealership using the Connect CRM. VinSolutions has implemented the ability for BMW to share a customer's preferred method of contact for a lead, enabling a dealership to know more about a customer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

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

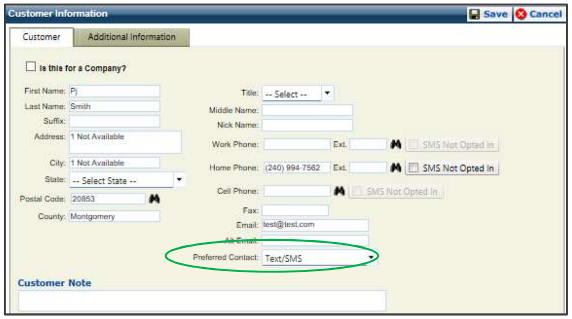
1. Using the Customer Search, locate the customer.



2. Select the customer's name.



3. View the customer's **Preferred Contact.**



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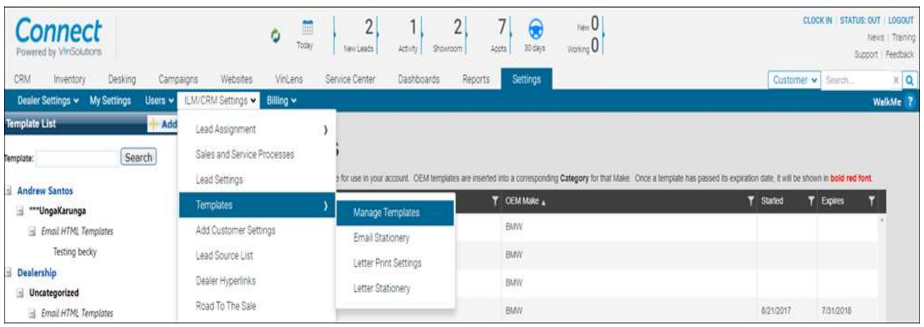
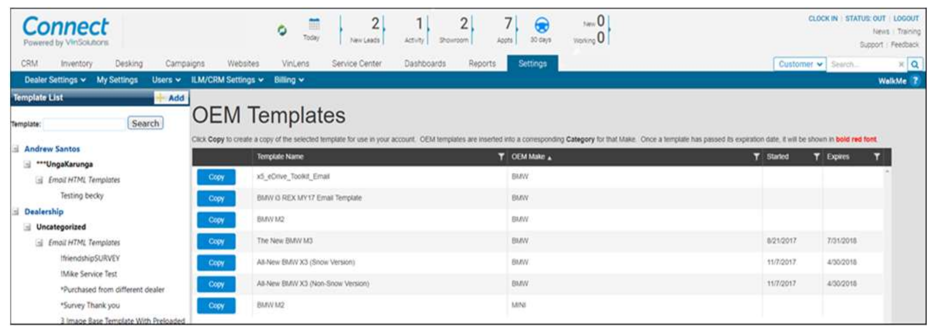
Downloadable Email Templates

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 <u>Link</u>

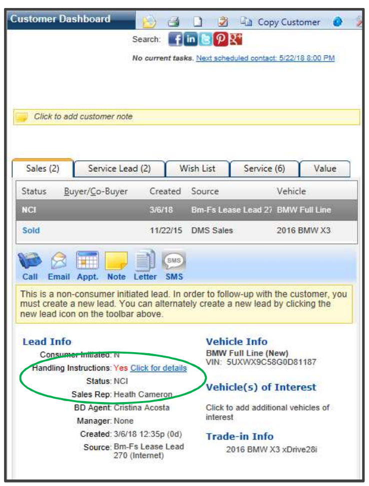
The Connect CRM allows BMW to share valuable information about how dealerships can approach handling leads based on BMW's experience with the customer.   A hyperlink providing dealer access to the *BMW Dealer Speed* website will only appear IF there are indeed instructions available for that specific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

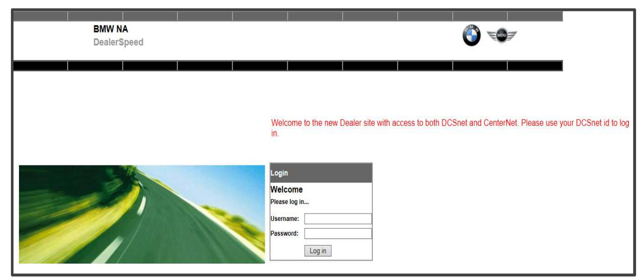
Below are is guidance on how to access this information:

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.

Contact BMW if login information is not known.



Note: VinSolutions does not maintain dealer login information.

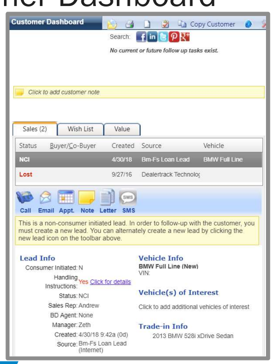
Lead Handling Instructions Notes

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.

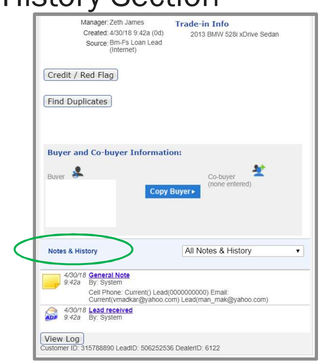
There are two methods in which lead handling instructions can be shared. The first was via hyperlink, which is discussed on the previous page. The second option is Lead Handling Notes. These two methods a mutually exclusive and many not always share identical information.

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

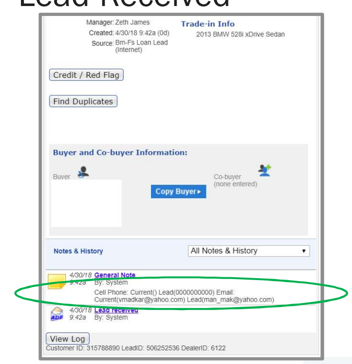
1. Select a lead from the Customer Dashboard



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.

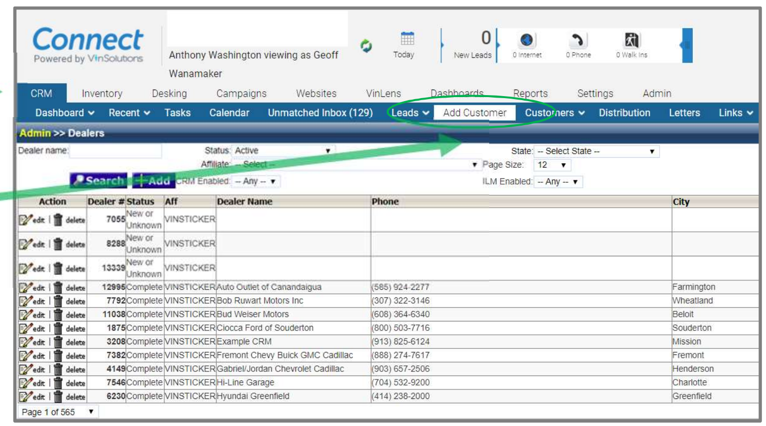
In essence, Connect CRM transmits dealership initiated leads to BMW for all dealerships who have agreed to the BMW data sharing agreement. To kick off this process, simply create a new customer & lead in Connect CRM.

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 reason a customer may be in market for a new vehicle. BMW FS performs research to uncover customers with high probability to purchase in the new 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 customers 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
Interne t	BMWUSA	FS BMW Credit App	CI
Interne t	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.

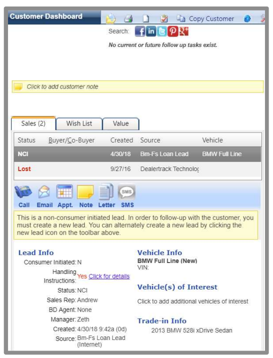
The Do Not Market Indicator is a indicator specifying whether BMW NA is allowed to market to the consumer directly.

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 enabled 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 share 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.

Connect CRM receives FS Lead
- Connect CRM alerts dealerships of new leads arrival on task bar.

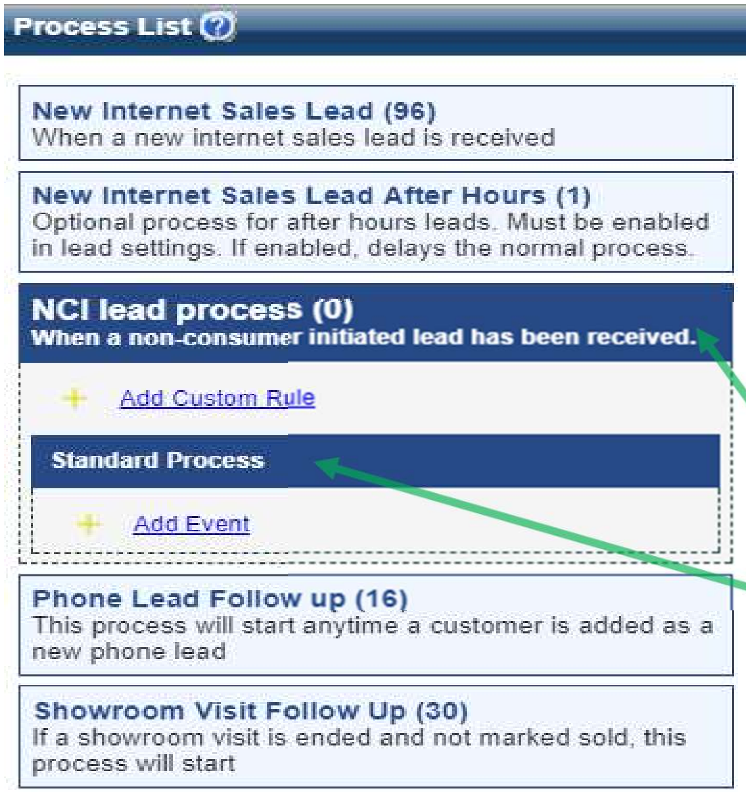
Dealer Reviews Lead
- Review the lead details including any accompanying BMW FS notes.

Dealer responds to BMW FS by entering lead note
- Only if the dealership wants to send feedback to BMW.

BMW FS review Dealer lead note
- BMW FS may elect to respond, if needed.

Two-Way Communication
- This communication via lead notes can continue as long as the lead remains in ACTIVE status.

NCI Lead Handling Process Setup

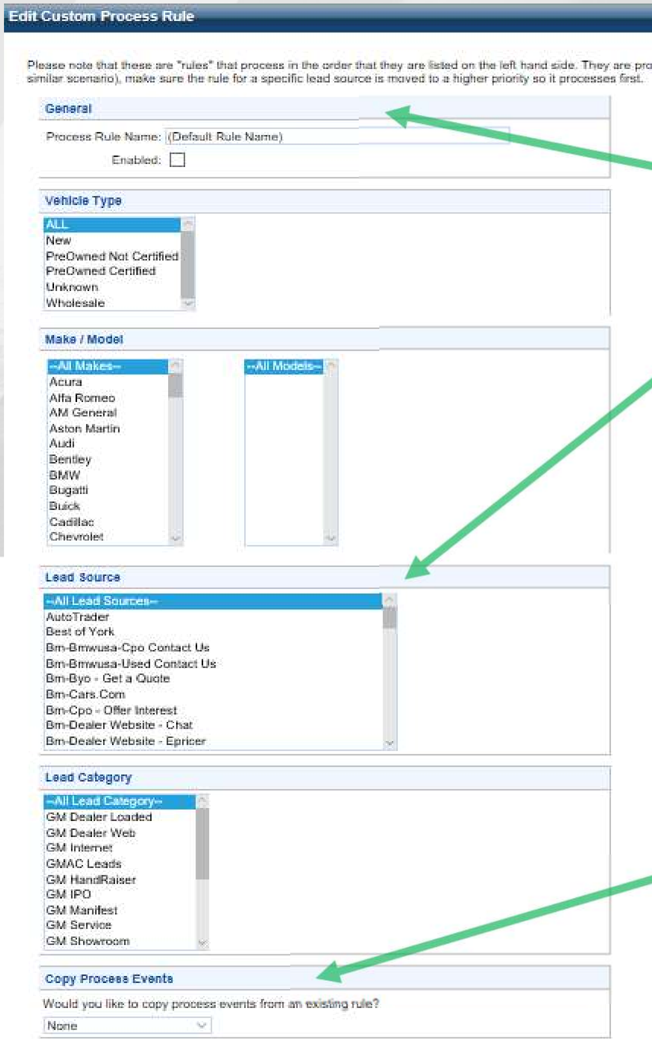


Below is step by step instructions on how to create process rule(s) for a BMW Non-Consumer Initiated Lead (NCI).

1. Select Settings > ILM/CRM Settings > Sales and Service Processes.

2. Select NCI Lead Process.

3. Select Add Custom Rule.



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!