

BDC Customer Care Specialist Job Description

Markquart Motors, a leader in the automotive industry, is looking for an enthusiastic-motivated individual to join our team. The “Customer Care Specialist” will be part of the Business Center Development team and will be responsible for assisting both internal and external customers on the phone and via email.

We offer a competitive benefits package, which includes:

- ❖ Competitive base salary
- ❖ Group Healthcare Plan
- ❖ 401K with matching company contribution
- ❖ Flexible Spending Account
- ❖ Paid Time Off
- ❖ Company training
- ❖ Career advancement

Essential Duties and Responsibilities:

- Receive inbound calls, including transferred calls from internal and external customers
- Place outbound calls for appointment reminders, scheduling, campaigns, etc.
- Answer questions about product details, the company, and issues with accounts for customers
- Assist customers with scheduling appointments
- Meet Quality Assurance Requirements and other key performance metrics

Specific Knowledge, Skills, and Abilities Required:

- Excellent interpersonal, written, and oral communication skills
- Excellent listening skills
- Ability to ask probing questions, understand concerns, and overcome objections
- Strong work ethic and ability to self-start
- Ability to work in a fast-paced business environment
- Ability to multitask
- Must possess a professional, friendly attitude and be able to quickly develop rapport with customers over the phone
- Ability to learn and navigate new software quickly
- Ability to type 30 WPM +
- Associates Degree preferred, but not required
- Previous call center experience a plus, but not required

Minimum Required Qualifications:

- Pass criminal background check required
- Must be at least 19 years of age and have a valid driver licenses.

There are both part-time and full-time positions available.

Starting wage \$13/hour plus sales compensation, depending on experience. Apply online today!

Markquart Motors is an Equal Opportunity Employer

First Week of Training Overview

Day One:

- Go through Markquart Motors Info page
- GM Global training & videos

Day Two:

- GM Global training & videos
- Helping with RASS Report

Day Three:

- CDK Training
- XTime Training
- Get passwords and programs set up

Day Four & On:

- Hands on
 - Listening to phone calls
 - Helping with RASS Report
 - Start taking phone calls – oil change only (eventually add on recalls)
-

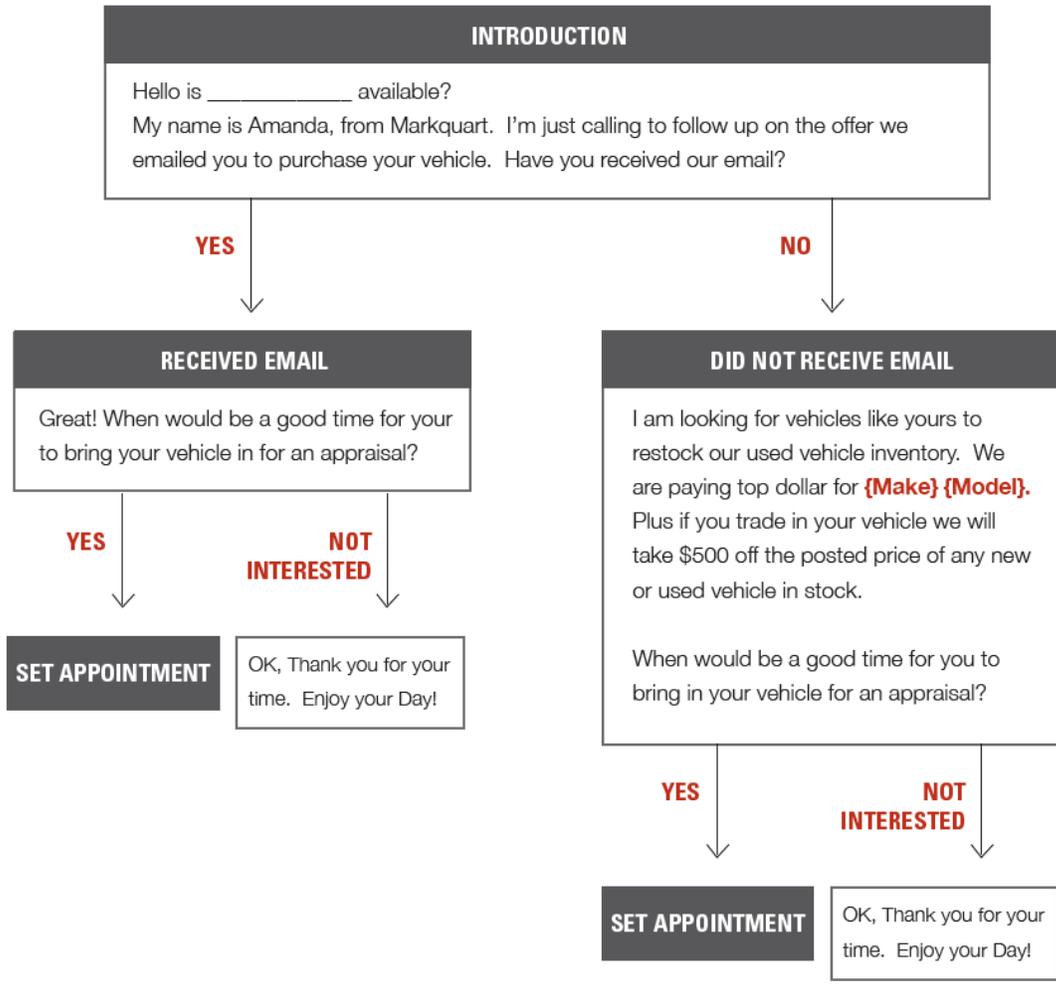
Tracking Report:

Calls Made	Connected	Appts Scheduled

Spif for Sales (New & Used Cars) - Appointment Showed
Appointment Sold

Spif for Service - Differed Services, 1st Time Sevice (New/Used Sales) Customers,
Defected Customer (12Months), - Appointment Showed
- Appointment Sold

Revenue Radar Call Script
Equity and End of Finance Term



SALES BDC

SMART PAYMENT – EMAILS:

IF WE LEFT A VOICEMAIL FOR THE CUSTOMER:

Hey Tiffany,

I left you a voicemail today checking to see if you still own the (vehicle) . If so, it looks like you have the opportunity to get into a new vehicle AND pay off your current vehicle for about the same monthly price! We're not kidding, this is no joke!

If this sounds like something you would like to come in and talk to your sales rep, (sales rep) about, shoot me an email or give me a call and we can get you scheduled to come in.

I look forward to hearing from you!

THANK YOU – TALKED TO CUSTOMER – NOT INTERESTED:

Hey Tiffany,

It was great talking to you today! If you ever change your mind about upgrading your vehicle I wanted to make sure you had my information. You can email me at _____ or call me on my direct line at _____ and we'll get you scheduled to come in!

Have a good one!

REVISED

Hey Tiffany,

It was great talking to you today! If you ever change your mind, and would like to learn more about upgrading your vehicle please call me.

Have a good one!

THANK YOU – TALKED TO CUSTOMER – APT CONFIRMATION:

Hey Tiffany,

It was great talking to you today! Just wanted to confirm that we have you scheduled to come in on (date) at (time) with (sales rep) . If you have any questions about your appointment, feel free to shoot me an email or give me a call!

We look forward to seeing you!

REVISED

Hey Tiffany,

It was great talking to you today! I have scheduled your appointment for (date) at (time) with (sales rep) . If you have any questions, feel free to shoot me an email or give me a call!

We look forward to seeing you!

SMART PAYMENT – SCRIPTS:

FIRST CONTACT/CALL:

“Hi, is _____ available?”

This is _____ from Markquart Motors, how’s it going today?”

.....

Well I was just checking in to see if you still own __ (vehicle) __ ?

If no: “Alright, well thank you for your time and I hope you have a great rest of your day.”

If yes: “Alright, well I was just going over your records and it looks like you have the opportunity to upgrade your vehicle, pay off your current vehicle, for about the same monthly price. Does this sound like something you would want to discuss further?”

If no: “Alright, no problem at all. If you change your mind I can give you my number to give me a call when you’re ready.” (If they have an email, tell them you can send them an email with your contact information.)

If yes: “Alright, what we’d like to do then is set up an appointment for you to come in and speak with your sales representative, __ (sales rep) __. What day and time works best for you?”

FIRST CONTACT/CALL - VOICEMAIL:

“Hi, this is _____ from Markquart Motors. We are going over our customer records and checking to see if you still own the __ (vehicle) __.

If you could give me a call back at __ (your direct line) __ so we can discuss this, that would be wonderful! Thank you and have a great day.”

****THESE SHOULD HAVE SIMILAR EDITS**

IF WE HAVE NOT RECEIVED CONTACT FROM FIRST CALL AND EMAIL:

“Hi, is _____ available?”

This is _____ from Markquart Motors. Just following up with the call / email I had made to you checking to see if you still own the __ (vehicle) __.

If no: “Alright, well thank you for your time and I hope you have a great rest of your day.”

If yes: “Alright, well I was just going over your records and it looks like you have the opportunity to upgrade your vehicle, pay off your current vehicle, for about the same monthly price. Does this sound like something you would want to discuss further?”

If no: “Alright, no problem at all. If you change your mind I can give you my number to give me a call when you’re ready.” (If they have an email, tell them you can send them an email with your contact information.)

If yes: “Alright, what we’d like to do then is set up an appointment for you to come in and speak with your sales representative, __ (sales rep) __. What day and time works best for you?”

IF WE HAVE NOT GOTTEN/RECEIVED CONTACT FROM FIRST CALL AND EMAIL - VOICEMAIL:

“Hi, this is _____ from Markquart Motors. Just following up with the call / email I had made to you checking to see if you still own the __ (vehicle) __.

If you could give me a call back at __ (your direct line) __ so we can discuss this, that would be wonderful! Thank you and have a great day.”

SERVICE BDC

Deferred Services - Scripts

Email Template:

Hi _____,

My name is _____, and I am a Customer Care Specialist with Markquart Motors. While reviewing your service records I noticed that some of the services we had recommended haven't been completed yet: (list services – NO PRICING!) Because your safety is our top priority, would you like to come in so we can take care of these issues for you?

Please email me back or give me a call on my direct line at _____ so we can get you scheduled.

Thank you!

Phone Template:

Hi, is _____ available?

My name is _____, and I am a Customer Care Specialist with Markquart Motors. Looking back at your records I noticed that there are some services we had recommended that you had declined and I was just checking in to see if you would like to come in and get those done?

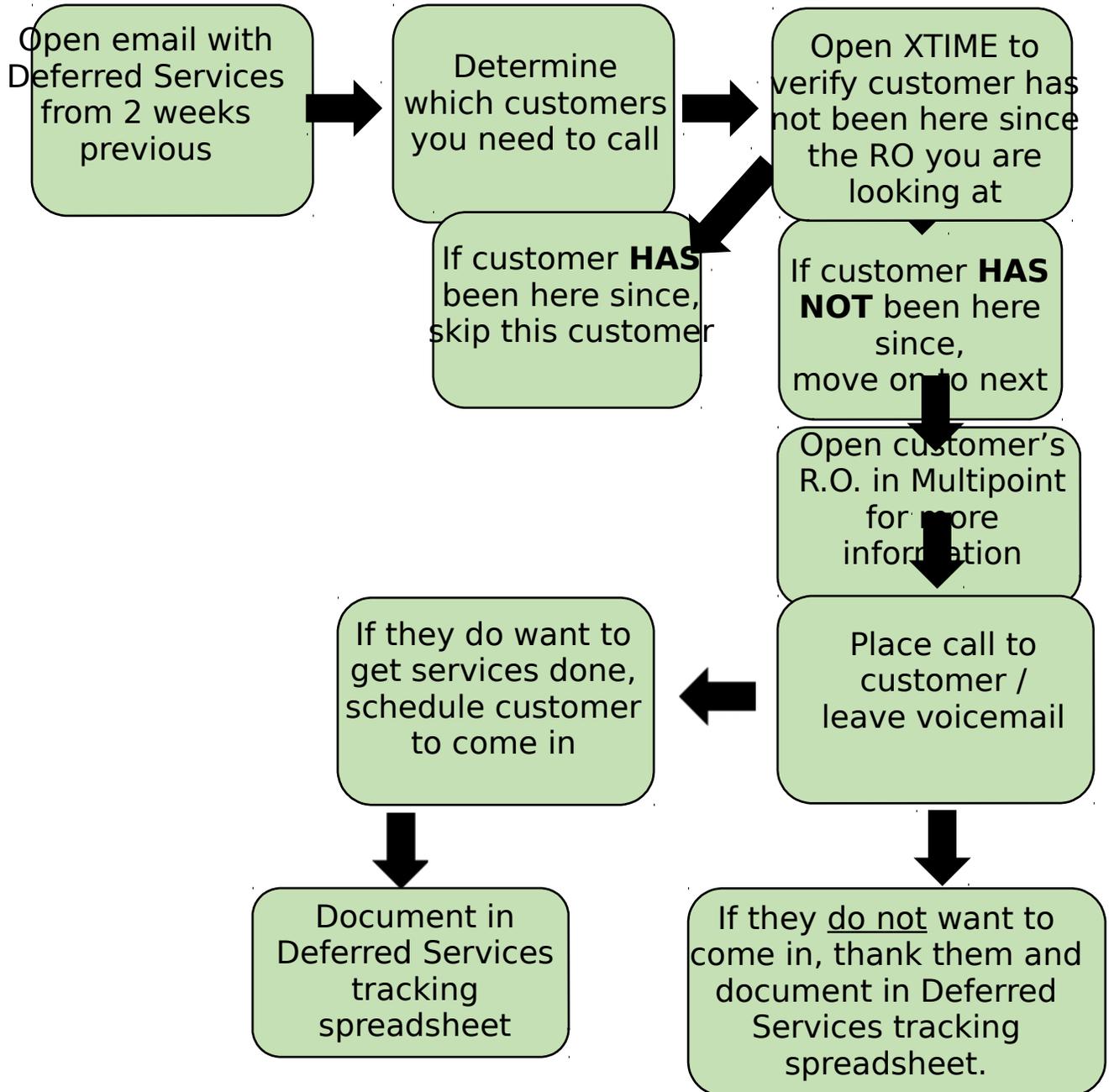
(Give them a list of the services that were recommended – NO PRICING!)

Yes – get them scheduled with the advisor that recommended the services.

No – “Would you like me to call you back or email you at a later date as a friendly reminder?”

Thank you for your time! Have a great day!”

Deferred Services Process Flow:



Deferred Services Work Direction / Training:

- Every day you will receive an email containing an attached spreadsheet with customer's deferred services like shown below. Each day you will go back to the email you received 14 days (2 weeks) ago and those will be the customer's you call that day. You can print all of the pages out or work from the computer, whatever works best for you.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
	RO #	RO Closed Date	Last Name	First Name	Work Phone	Home Phone	Email	Vehicle Make	Model	Year	Mileage	SA Name	Task Status	Observation	Recommendation	Estimate	Comments
1	293291	3/13/2017	BOLGR EN	KEN		(715) 833-0914	KBOLGREN@HOTMAIL.COM	Chevrolet	Equinox	2015	16,043	Cody Beeksma	Caution	Scheduled Maintenance due by time/mileage	Perform brake caliper service: 1.5 - 1.9 years	\$89.90	
2	293286	3/13/2017	BOWE	NEIL	(715) 720-2171	(715) 829-9826		Chevrolet	Cobalt	2010	75,331	Cody Beeksma	Fail	Scheduled Maintenance due by time/mileage	Perform Transmission service: 50,000 miles	\$129.99	
3	293286	3/13/2017	BOWE	NEIL	(715) 720-2171	(715) 829-9826		Chevrolet	Cobalt	2010	75,331	Cody Beeksma	Fail	Scheduled Maintenance due by time/mileage	Perform coolant exchange service: 5 years	\$129.99	
4	293286	3/13/2017	BOWE	NEIL	(715) 720-2171	(715) 829-9826		Chevrolet	Cobalt	2010	75,331	Cody Beeksma	Fail	Scheduled Maintenance due by time/mileage	Perform fuel induction service: 30,000 miles	\$149.99	
5	293286	3/13/2017	BOWE	NEIL	(715) 720-2171	(715) 829-9826		Chevrolet	Cobalt	2010	75,331	Cody Beeksma	Fail	Scheduled Maintenance due by time/mileage	Perform brake caliper service: 2 years	\$89.90	
6	293286	3/13/2017	BOWE	NEIL	(715) 720-2171	(715) 829-9826		Chevrolet	Cobalt	2010	75,331	Cody Beeksma	Fail	Scheduled Maintenance due by time/mileage	Replace battery/batteries : 5 years	\$144.98	
7	293349	3/13/2017	CASTLEBERG	CURTIS		(608) 886-0230	ccastleberg@sbcglobal.net	Chrysler	Town & Country (Van)	2012	45,623	Cody Beeksma	Caution	6 mm	Have your rear brakes inspected next visit	\$300.05	
8	293302	3/13/2017	COFFEY	SEAN		(608) 886-7113	SEANCOFFEY2003@YAHOO.C	GMC	Sierra 1500	2015	16,780	Cody Beeksma	Caution	Scheduled Maintenance due by	Perform brake caliper service: 1.5 - 1.9 years	\$89.90	

Cody Beeksma

Kevin Boeselager

Jordan Haas

Bill Klages

Kelly Mueller

Caleb Rykal

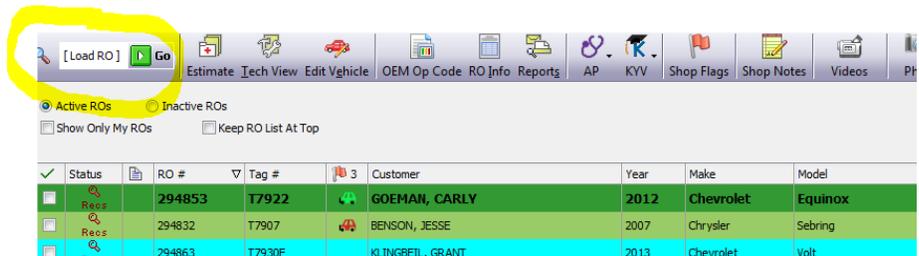
- As you can see, each Service Advisor has their own tab. Go through every Service Advisor and mark off the customers you will be calling.

(There is another section “How to determine what to call on” to help you decipher this.)

You will only be calling customers about:

- Fluid leaks
 - Brakes
 - Shocks and struts
- ** and **ONLY** if they are **FAILED** inspections.
We do not call on CAUTIONARY**

3. From here pull up XTime to check if the customer has been here since the RO you are looking into.
 - a. If the customer HAS been here since the RO you are looking at, skip this customer, they will come up in future Deferred Services that you will be working on.
 - b. If the customer HAS NOT been here since the RO you are looking at, move on to the next step.
4. After you have determined that the customer has not been here since the RO you are looking at, you will open up Multipoint to review all of the information. Once you have Multipoint open, type in the RO in the search bar.



- A new window will open up with the customer's information like shown below. Here you can see what the customer "Approved" and had worked on at that appointment, and you can also see the **"Recommendations"** section - this is what we're going to focus on for your Deferred Services.

Estimate

Customer Approved Services

Original Customer Requests

Line #	Op Code	Op Code Description	Parts	Labor Hours	Labor Rate	Labor	Total	Deferred	Approved
✓ A	ROTATE TIRES								
✓ B	SHUTTLE TO CESA 10 IN C.F.								
✓ C	VEHICLE HEALTH CHECK								

Additional Customer Requests (not included in customer reports)

Line #	Op Code	Op Code Description	Added RO Line Items	Parts	Labor Hours	Labor Rate	Labor	Total	Deferred	Approved
D	CVT	GENERAL REPAIR	REPLACE TRANSMISSION COOLER HOSE							
E	95-PCAF	Replace passenger compartment cabin air filter	Replace passenger compartment cabin air filter							
F	CAF	Replace engine air filter	Replace engine air filter							

Recommendations

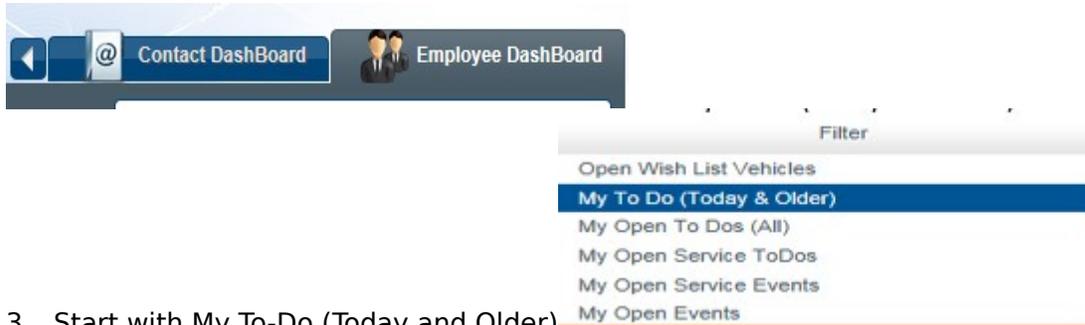
Item	Inspection Item	Recommended By	Parts	Labor Hours	Labor Rate	Labor	Total	Deferred	Approved
✓	Perform Transmission service: 50,000 miles (Scheduled Maintenance due by time/mileage)	Jake Jackson					\$129.99	Deferred	
○	Transmission Service								
✓	Perform coolant exchange service: 5 years (Scheduled Maintenance due by time/mileage)	Jake Jackson					\$129.99	Deferred	
○	Coolant Service								
✓	Perform fuel induction service: 30,000 miles (Scheduled Maintenance due by time/mileage)	Jake Jackson					\$149.99	Deferred	
○	Fuel Induction Service								
✓	Perform brake caliper service: 2 years (Scheduled Maintenance due by time/mileage)	Jake Jackson					\$89.90	Deferred	
○	Caliper Service								
✓	Replace battery/batteries: 5 years (Scheduled Maintenance due by time/mileage)	Jake Jackson					\$144.98	Deferred	
○	Battery Service								
✓	Replace air filter (Found air filter excessively dirty)	Jake Jackson	\$29.99				\$29.99	Approved	
○	Inspect air cleaner element								
✓	Replace cabin air filter (Found cabin air filter excessively dirty)	Jake Jackson	\$29.99				\$29.99	Approved	
○	Inspect cabin air (HEPA/micro) filter (if equipped)								
✓	Replace transmission cooler hose (Found transmission fluid leak)	Jake Jackson	\$78.91	0.80	\$112.00	\$89.60	\$168.51	Deferred	
○	Inspect transmission for leaks								

Measurements

- As you can see here under the Recommendations section the customer has Deferred some services and Approved some. The Deferred services are in red and the Approved are in green. Since you have determined what you will be calling on, you can now call your customers using the script provided for Deferred Services.

How To Dealer Socket - BDC

1. Sign into Dealer Socket
2. Click on Employee Dashboard



3. Start with My To-Do (Today and Older)
4. Click on a name in your To-Do. This screen will pop up.

This is an Outbound Call To-Do. You will know what offer they are eligible for under Event Description.

Markquart Motors Employee Dashboard for Thomas Biasi. The interface shows contact information, event details, and a list of tasks.

Event Summary

Event ID: 647987 Lost Sold

Event Status: 1 - Up/Contacted

Assigned To: Amanda Kircher

Type: New Vehicle

Tracking Code: RR-End of Finance Te

Source: RevenueRadar

Event Description: RR END FINANCE TERM - Contact customer to go over their End of Term options

Survey Score: Survey Module Disabled

Event Details:

- BDC Assigned:** Amanda Kircher
- Purchase Type:** Unknown
- Ranking:** 1 - Hot
- Close Date:** Over 2 Months

To Do Type: Outbound Call

Status: Open

Assigned To: Amanda Kircher

Due Date: 11/18/2016 5:30 AM

Comment: RR END FINANCE TERM - Contact customer to go over their End of Term options. Follow up with email

VEHICLE

Year: VIN:

Make: Stock Num:

Model: Current Miles:

Co-Buyer: No Co-Buyer Purchase:

WORK NOTES

Customer Trades: 2002 Jeep Liberty

To Do | **Contacts**

	All To Dos	Status	Ranking	Due Date	Due Time	Assigned	Comment
<input type="checkbox"/>	Outbound Call	Open	Low	11/18/2016	5:30 AM	Amanda Kircher	RR END FINANCE TERM - Contact customer to go over
<input type="checkbox"/>	Escalated	Left Message	High	11/14/2016	4:15 AM	Amanda Kircher	RR END FINANCE TERM - Contact customer to go over
<input type="checkbox"/>	Send Email	Completed	Low	11/10/2016	4:15 AM	Amanda Kircher	RR END FINANCE TERM Send Email

Page 1

To make sure you are notified about changes in the To-Do please make sure to select your name in the box for BDC Assigned.

Contact steps

1. Day one:

- a. The first To-Do for any event should be an Outbound Call. You will make a phone call first. Then you should also on the first day see a To-Do to send an email.
 - i. If you contact the customer and set up an appointment you will send an email, if customer has an email on file, confirming the customer's appointment. See attached sheet for scripts and emails. To complete the To-Do, you are just going to reassign it to the sales person and it will be taken care of for you.
 - ii. If you contact the customer and they are not interested, you will send an email thanking them for their time.
 - iii. If you leave a voicemail for the customer you will send an email following up on the voicemail you left.

2. In 2 days, you will see a new To-Do for an Outbound Call. Please make the outbound call.

Send email To-Do

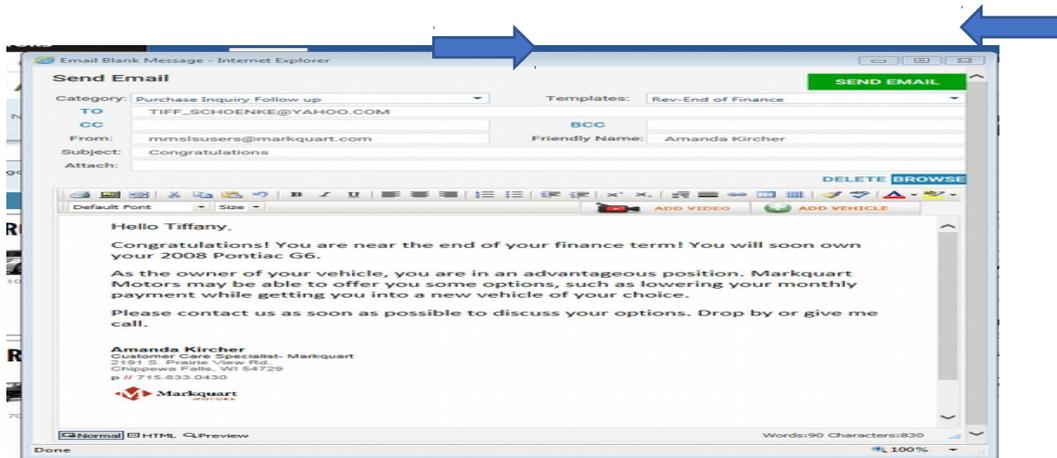
- 1. For a Send Email To-Do click on send email link next to email. If gear symbol next to email is red or you cannot select a template to send thru email that means the customer has chosen not to be contacted by email.
 - a. To choose the right email to send out: under category choose Vehicle ownership then select email you are sending out.
 - i. On a few of the email you will have to enter certain information, such as the sales person, or the date and time of an appointment. You will see highlight areas in the email and that is where you would fill that information in.



The screenshot shows a CRM interface with a top navigation bar containing various icons and a GM logo. Below the navigation bar is a customer profile card for Tiffany Tlusty. The card includes fields for Name, Home #, Special Notes, Company, Work #, Email, Mobile #, and Primary Contact. A blue arrow points to the Email field, which contains the address TIFF_SCHOENKE@YAHOO. The Special Notes field contains deal and customer information.

Name	Tiffany Tlusty	Company		Email	TIFF_SCHOENKE@YAHOO
Home #	(715) 271-2644	Work #	(715) 834	Mobile #	(715) 271-2644
Special Notes	DealNumber:29727 ADPNumber:76583 CIFCustomerID:534582 VehicleID:115474 RewardPurchaseReward:0.00 RewardEnviroReward:0.00			Primary Contact	Any Type

- Once you click on email link you will receive an email pop up, select correct template to send to customer, then click send email.



Completing the To-Dos

Phone call To-Do-

- If you called and spoke with customer and set an appointment, please reassign To-Do to the customers' sales person, change event status to 1 - Up/Contacted, then save and close.

Event ID: 647987	<input type="checkbox"/> Lost <input type="checkbox"/> Sold	EVENT		To Do Type	Outbound Call
Event Status	1 - Up/Contacted	BDC Assigned	Amanda Kircher	Status	Open
Assigned To	Bryan Ankeny	Purchase Type	Unknown	Assigned To	Bryan Ankeny
Type	New Vehicle	Ranking	1 - Hot	Due Date	11/22/2016 5:30 AM
Tracking Code	RR-End of Finance Te	Close Date	Over 2 Months	Comment	RR END FINANCE TERM - Contact customer to go over their End of Term options. Follow up with email
Source	RevenueRadar				
Event Description	RR END FINANCE TERM - Contact customer to go over their End of Term options				
Survey Score	Survey Module Disabled				

*Change to sales person under event status, assigned to, because that will change the other assigned to option to the sales person's name.

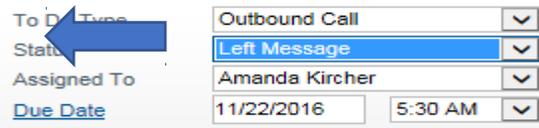
- If you have contact with the customer and they are not interested, please mark event status as

1 - Up/Contacted, mark complete, then save and close.

Event ID: 647987	<input type="checkbox"/> Lost <input type="checkbox"/> Sold	EVENT		To Do Type	Outbound Call
Event Status	1 - Up/Contacted	BDC Assigned	Amanda Kircher	Status	Completed
Assigned To	Amanda Kircher	Purchase Type	Unknown	Assigned To	Amanda Kircher
Type	New Vehicle	Ranking	1 - Hot	Due Date	11/22/2016 5:30 AM
Tracking Code	RR-End of Finance Te	Close Date	Over 2 Months	Comment	RR END FINANCE TERM - Contact customer to go over their End of Term options. Follow up with email
Source	RevenueRadar				
Event Description	RR END FINANCE TERM - Contact customer to go over their End of Term options				
Survey Score	Survey Module Disabled				

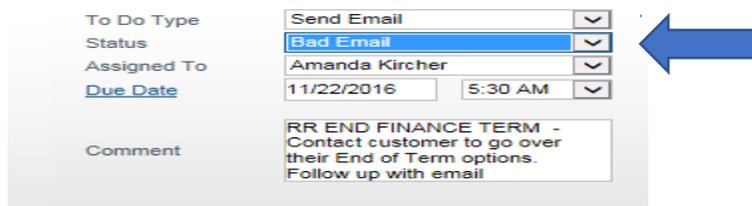
3. If you leave a message, please select left message then save and close. You would not change this To-Do to contacted because you have had no actual

communication with the customer.



To Do Type	Outbound Call
Status	Left Message
Assigned To	Amanda Kircher
Due Date	11/22/2016 5:30 AM

4. If you are completing a Send Email To-Do and you send the customer and email you would mark the To-Do complete, then save and close. If they customer has no email, please mark the To-Do as bad email then save and close.



To Do Type	Send Email
Status	Bad Email
Assigned To	Amanda Kircher
Due Date	11/22/2016 5:30 AM
Comment	RR END FINANCE TERM - Contact customer to go over their End of Term options. Follow up with email

Work Notes

After making the phone call for the Outbound Call To-Dos you must make notes in the Work Note section. They can be as simple as left message or spoke with customer no longer owns vehicle. The notes are mostly for your personal reference so they can be as detailed as you would like.

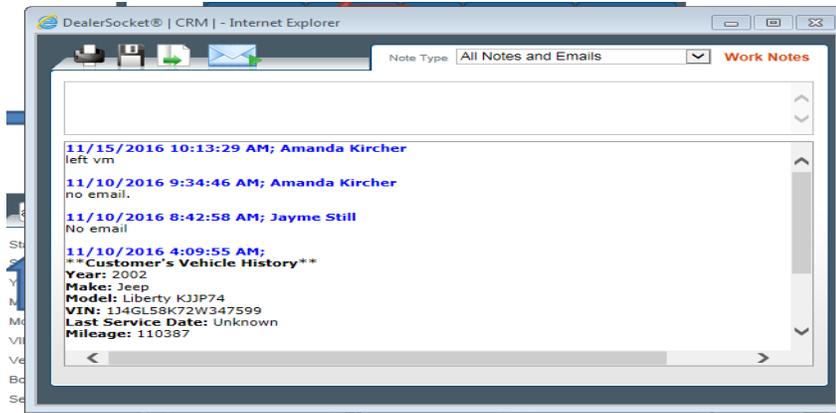
1. First click on the work notes section to add notes.



WORK NOTES

[Text input area]

2. Then you will see a pop up that looks like this, add your notes then save and the box will close.



3. You will make a no email note if there is no email for the customer. If there is an email, once you send the email there will be a note automatically generated for you.

Customer is marked DNC

1. Click on contact dashboard
2. Search for customer. Once you have the customer pulled up click on DNC List - Written Permission. The number with then display.

Contact Type	Prospect	Contact Type	Prospect
Subtype	Hot (1-3 Weeks)	Subtype	Hot (1-3 Weeks)
Pref. Language	English	Pref. Language	English
Company		Company	
Email	meatballaaron3@gmail.com	Email	meatballaaron3@gmail.com
Home Phone	DNC - Do Not Call	Home Phone	
Work Phone	DNC - Do Not Call	Work Phone	(715) 533-3985
Mobile Phone	DNC - Do Not Call	Mobile Phone	(715) 533-3985
Fax	DNC - Do Not Call	Fax	
Special Notes		Special Notes	
Original Source	Web	Original Source	Web
Status	Active	Status	Active
BirthDay		BirthDay	
Primary Contact	Any Type	Primary Contact	Any Type
Never Contact Via	DNC List - Don't Contact	Never Contact Via	DNC List - Written Permissio



Customer does not want to be contacted by phone or email.

1. Go to contact dashboard and search for customer
 - a. Click on Never Contact Via
 - b. Click on Don't Contact (Internal)

Salutation/Gender: -- M F
 Formal First Name: Thomas
 Mailing First Name: Hegge
 Last Name: Hegge
 Address 1: 5508 SHOREWOOD HEIGHTS
 Address 2:
 Address 3:
 City: EAU CLAIRE
 County: State WI Zip 54703
 Country: US
 Complete Addr.: YES
 Annual Income: Blank
 External Ref. ID: 35634
 Drivers Lic.:
 Allow Duplicate: SSN

Contact Type: Customer
 Subtype: Platinum
 Pref. Language: English
 Company:
 Email: fishing4life_thegge@hotmail.com
 Home Phone: (715) 771-9177
 Work Phone:
 Mobile Phone: (715) 771-0094
 Fax:
 Special Notes:
 Original Source: Dealer Mgmt Sys
 Status: Active
 Birthday: 10/20/1982
 Primary Contact: Any Type
 Never Contact Via:
 Email gear icon

2. To remove the email

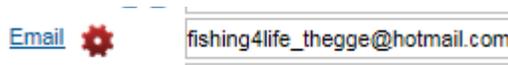
- a. Click on the little gear symbol by email (should be blue) this box will appear.

Preferences

Override Clear All Select All

	<input checked="" type="checkbox"/> Email	<input checked="" type="checkbox"/> Print	<input type="checkbox"/> Text
Special Offers and Dealership Events	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Purchase Inquiry Follow up	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Service Maintenance Notices	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
News Letters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Vehicle Ownership	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Satisfaction	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Parts & Accessories Orders and Specials	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- b. Clear all preferences and click the save button in the top right corner.
 - i. This will turn the gear icon red and make it so you cannot send an email.
 - ii. Click the save disk icon to save all preference changes.



Customer states they no longer own vehicle

1. Go to Contact Dashboard and search for the customer.
 - a. Once you have customer up click on the vehicle tab.



2. You will get a screen that looks like this
 - a. Both vehicles are active
 - b. Click on the stock number for vehicle customer no longer owns

Stock#	VIN	Make	Model	Trans	Year	Exterior	Purchased	Miles	Warranty	Status
121291	1GT220CG2CZ352668	GMC	Sierra 2500HD TK20753	Manu 2 W	2012	Black	7/13/2012 12:00:00 AM	6003	0/	
130694	1GT120CG5DF194907	GMC	Sierra 2500HD TK20743	None Non	2013	Black	6/5/2013 12:00:00 AM	43420	0/	Active

3. A screen with vehicle info will pop up
 - a. Click on status and select inactive

4. Click the save button on the top and this will mark the vehicle as inactive
5. Sign into Dealer Socket
6. Click on Employee Dashboard

7. Start with My To-Do (Today and Older)
8. Click on a name in your To-Do. This screen will pop up.

Markquart Motors

Name: Thomas Biasi
Home #: (407) 340-8599
Special Notes: DealNumber:36962 ADPNumber:37951 CIFCustomerID:617899 VehicleID:123326 RewardPurchaseReward:0.00 RewardEnviroReward:0.00

Event ID: 647987 Lost Sold

Event Status: 1 - Up/Contacted

Assigned To: Amanda Kircher

Type: New Vehicle

Tracking Code: RR-End of Finance Te

Source: RevenueRadar

Event Description: RR END FINANCE TERM - Contact customer to go over their End of Term options

Survey Score: Survey Module Disabled

EVENT

BDC Assigned: Amanda Kircher

Purchase Type: Unknown

Ranking: 1 - Hot

Close Date: Over 2 Months

To Do Type: Outbound Call

Status: Open

Assigned To: Amanda Kircher

Due Date: 11/18/2016 5:30 AM

Comment: RR END FINANCE TERM - Contact customer to go over their End of Term options. Follow up with email

VEHICLE

Year:

Make:

Model:

Co-Buyer: No Co-Buyer

VIN:

Stock Num:

Current Miles:

Purchase:

WORK NOTES

Customer Trades: 2002 Jeep Liberty

To Do

All To Dos	Status	Ranking	Due Date	Due Time	Assigned	Comment
<input type="checkbox"/> Outbound Call	Open	Low	11/18/2016	5:30 AM	Amanda Kircher	RR END FINANCE TERM - Contact customer to go ove
<input type="checkbox"/> Escalated	Left Message	High	11/14/2016	4:15 AM	Amanda Kircher	RR END FINANCE TERM - Contact customer to go ove
<input type="checkbox"/> Send Email	Completed	Low	11/10/2016	4:15 AM	Amanda Kircher	RR END FINANCE TERM Send Email

Page 1

This is an Outbound Call To-Do. You will know what offer they are eligible for under Event Description.

To make sure you are notified about changes in the To-Do please make sure to select your name in the box for BDC Assigned.

Contact steps

3. Day one:

- a. The first To-Do for any event should be an Outbound Call. You will make a phone call first. Then you should also on the first day see a To-Do to send an email.
 - i. If you contact the customer and set up an appointment you will send an email, if customer has an email on file, confirming the customer's appointment. See attached sheet for scripts and emails. To complete the To-Do, you are just going to reassign it to the sales person and it will be taken care of for you.
 - ii. If you contact the customer and they are not interested, you will send an email thanking them for their time.

- iii. If you leave a voicemail for the customer you will send an email following up on the voicemail you left.
- 4. In 2 days, you will see a new To-Do for an Outbound Call. Please make the outbound call.

Send email To-Do

- 3. For a Send Email To-Do click on send email link next to email. If gear symbol next to email is red or you cannot select a template to send thru email that means the customer has chosen not to be contacted by email.
 - a. To choose the right email to send out: under category choose Vehicle ownership then select email you are sending out.
 - i. On a few of the email you will have to enter certain information, such as the sales person, or the date and time of an appointment. You will see highlight areas in the email and that is where you would fill that information in.

This screenshot shows a customer profile form for Tiffany Tilusty. The form includes fields for Name, Home #, Special Notes, Company, Work #, Email, Mobile #, and Primary Contact. A blue arrow points to the 'Email' field, which contains the address TIFF_SCHOENKE@YAHOO.COM. The 'Event Summary' tab is visible in the top right corner.

- 4. Once you click on email link you will receive an email pop up, select correct template to send to customer, then click send email.

This screenshot shows an 'Email Blank Message' pop-up window in Internet Explorer. The window has a 'Send Email' title bar and a 'SEND EMAIL' button in the top right corner. The email content is a congratulatory message from Amanda Kircher, a Customer Care Specialist at Markquart, regarding the end of a finance term for a 2008 Pontiac G6. A blue arrow points to the 'SEND EMAIL' button.

Completing the To-Dos

Phone call To-Do-

- If you called and spoke with customer and set an appointment, please reassign To-Do to the customers' sales person, change event status to 1 - Up/Contacted, then save and close.

*Change to sales person under event status, assigned to, because that will change the other assigned to option to the sales person's name.

- If you have contact with the customer and they are not interested, please mark event status as

1 - Up/Contacted, mark complete, then save and close.

- If you leave a message, please select left message then save and close. You would not change this To-Do to contacted because you have had no actual

communication with the customer.

- If you are completing a Send Email To-Do and you send the customer and email you would mark the To-Do complete, then save and close. If they customer has no email, please mark the To-Do as bad email then save and close.

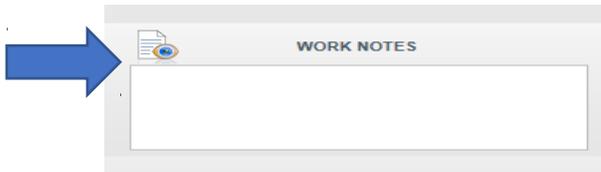
To Do Type	Send Email	▼
Status	Bad Email	▼
Assigned To	Amanda Kircher	▼
Due Date	11/22/2016	5:30 AM ▼
Comment	RR END FINANCE TERM - Contact customer to go over their End of Term options. Follow up with email	



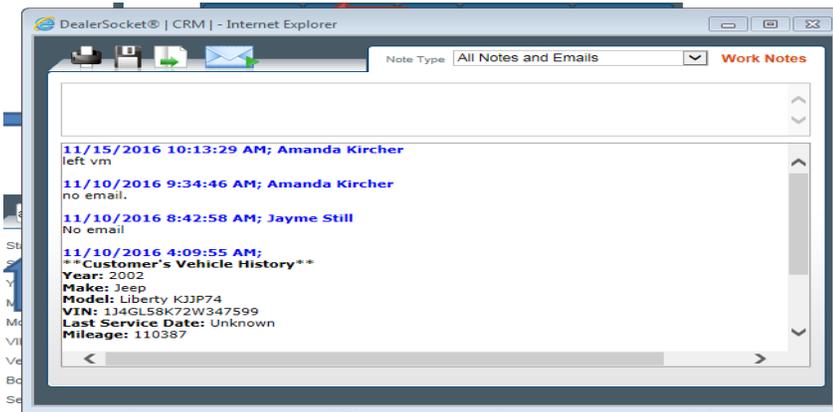
Work Notes

After making the phone call for the Outbound Call To-Dos you must make notes in the Work Note section. They can be as simple as left message or spoke with customer no longer owns vehicle. The notes are mostly for your personal reference so they can be as detailed as you would like.

4. First click on the work notes section to add notes.



5. Then you will see a pop up that looks like this, add your notes then save and the box will close.



6. You will make a no email note if there is no email for the customer. If there is an email, once you send the email there will be a note automatically generated for you.

Customer is marked DNC

3. Click on contact dashboard

4. Search for customer. Once you have the customer pulled up click on DNC List - Written Permission. The number will then display.

Contact Type	Prospect	Contact Type	Prospect
Subtype	Hot (1-3 Weeks)	Subtype	Hot (1-3 Weeks)
Prof. Language	English	Prof. Language	English
Company		Company	
Email	meatballaaron3@gmail.com	Email	meatballaaron3@gmail.com
Home Phone	DNC - Do Not Call	Home Phone	
Work Phone	DNC - Do Not Call	Work Phone	(715) 533-3985
Mobile Phone	DNC - Do Not Call	Mobile Phone	(715) 533-3985
Fax	DNC - Do Not Call	Fax	
Special Notes		Special Notes	
Original Source	Web	Original Source	Web
Status	Active	Status	Active
Birthdate		Birthdate	
Primary Contact	Any Type	Primary Contact	Any Type
Never Contact Via	DNC List - Don't Contact	Never Contact Via	DNC List - Written Permission

Customer does not want to be contacted by phone or email.

3. Go to contact dashboard and search for customer
 - a. Click on Never Contact Via
 - b. Click on Don't Contact (Internal)

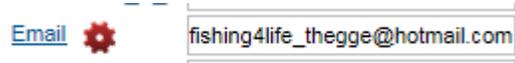
Salutation/Gender		Contact Type	Customer
Formal First Name	Thomas	Subtype	Platinum
Mailing First Name		Prof. Language	English
Last Name	Hegge	Company	
Address 1	5508 SHOREWOOD HEIGHTS	Email	fishing4life_thegge@hotmail.com
Address 2		Home Phone	(715) 771-9177
Address 3		Work Phone	
City	EAU CLAIRE	Mobile Phone	(715) 771-0094
County		Fax	
Country	US	Special Notes	
Complete Addr.	YES	Original Source	Dealer Mgmt Sys
Annual Income	Blank	Status	Active
External Ref. ID	35634	Birthdate	10/20/1982
Drivers Lic.		Primary Contact	Any Type
Allow Duplicate	<input type="checkbox"/>	Never Contact Via	

4. To remove the email
 - a. Click on the little gear symbol by email (should be blue) this box will appear.

	<input checked="" type="checkbox"/> Email	<input checked="" type="checkbox"/> Print	<input type="checkbox"/> Text
Special Offers and Dealership Events	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Purchase Inquiry Follow up	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Service Maintenance Notices	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
News Letters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Vehicle Ownership	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Satisfaction	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Parts & Accessories Orders and Specials	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- b. Clear all preferences and click the save button in the top right corner.

- i. This will turn the gear icon red and make it so you cannot send an email.
- ii. Click the save disk icon to save all preference changes.



Customer states they no longer own vehicle

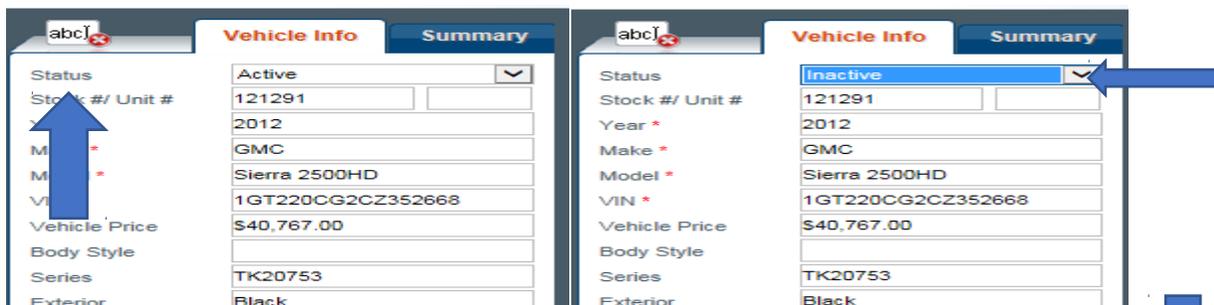
- 5. Go to Contact Dashboard and search for the customer.
 - a. Once you have customer up click on the vehicle tab.



- 6. You will get a screen that looks like this
 - a. Both vehicles are active
 - b. Click on the stock number for vehicle customer no longer owns

Stock#	VIN	Make	Model	Trans	Year	Exterior	Purchased	Miles	Warranty	Status
<input type="checkbox"/> 121291	1GT220CG2CZ352668	GMC	Sierra 2500HD TK20753	Manu 2 W	2012	Black	7/13/2012 12:00:00 AM	6003	0/	Active
<input type="checkbox"/> 130694	1GT120CG5DF194907	GMC	Sierra 2500HD TK20743	None Non	2013	Black	6/5/2013 12:00:00 AM	43420	0/	Active

- 7. A screen with vehicle info will pop up
 - a. Click on status and select inactive



- 8. Click the save button on the top and this will mark the vehicle as inactive