



incadea CVRM

Customer + Vehicle Relationship Management

**... optimize your workflows to better
serve your customers ...**

speed up your business

INTRODUCTION

What is CRM?

Customer Relationship Management (CRM) is an integrated information system that is used to plan, schedule and control pre-sales and post-sales activities in an organization.

CRM embraces all aspects of dealing with prospects and customers including sales force, marketing, technical support and field service.

The primary goal of CRM is to improve long-term growth and profitability by better understanding the customer's behavior. CRM aims to provide more effective feedback and improved integration to better measure the return on investment (ROI) in these areas.

Why use a CRM Software?

Bringing together a smart, detailed business strategy and customer relationship management (CRM) software can help to develop, find and reward top customers. Knowing the customers and maintaining good relationships is the key to make the most of every relationship. A CRM software is a tool which can help nurture those relationships.

CRM software can help businesses learn which customers produce the most profit, not just the most revenue.

CRM helps analyze buying patterns which in turn identify potential high-value customers.

CRM also can help maximize per-customer profits by showing how to reduce the costs of sales to that customer.

"In the past a business might have said, 'We're not sure what these customers want, so we'll show them 20 products and hope one of them sells'. Using CRM analyses a business can narrow down a segment and say, 'Customers who did X are also likely to want Y.'"



Why incadea.CVRM?

"Because a challenging economy demands strong customer relationships."

incadea.CVRM (Customer and Vehicle Relationship Management) combines CRM and DMS (Dealer Management System) in a unique way.

Based on Microsoft Dynamics CRM incadea has tailored a new powerful product to meet the demands of car dealerships. In doing so incadea relied on its experience gathered from over 40,000 users of its DMS incadea.engine® and was so able to apply that experience to the specific demands of the automotive trade.

Due to the extended customization options of incadea.CVRM, it is possible to adapt it to any dealership structure.

incadea.CVRM features a flexible connector to interact with all versions of incadea.engine but also other DMS. This leads to a real 360° view on customers and contacts, since each activity in the workshop or parts purchases & sales is recorded in incadea.CVRM and can be tracked and analyzed, also by the sales department.

Further applications can be easily integrated in incadea.CVRM by means of web services.

incadea CRM and Vehicle Data

CRM systems usually offer a customer relationship management. A car dealership has, however, apart from the customer, another focus playing an important role: The vehicles.

It is expected that a vehicle that is already known in a dealership can be maintained further on independently from the customer to ideally maximize the value-added chain of a vehicle for its entire service life.

incadea.CVRM treats vehicles equally to contacts and that is the reason why also a Vehicle Relationship Management (VRM) is featured besides a Customer Relationship. Using the VRM feature all contacts in connection with a vehicle, e.g. driver, user, buyer, owner, can be listed anytime.

"Technology must be able to adapt to unique business processes and changing strategies. Organizations that invest in flexible, proven CRM solutions will position themselves for success today as well as tomorrow."





The User Interface - a Microsoft base

One of the most frequently used tools in daily business operations is "Microsoft Office", above all "Microsoft Outlook". Employees are already familiar with the user interface of incadea.CVRM, since they are familiar with Microsoft Office. incadea.CVRM is based on Microsoft Dynamics CRM (over 1 Million users, 20,000 customers worldwide) and therefore all benefits of Microsoft are included.

Flexibility together with options for deployment, purchase, and access.

Familiar and easy to use because it works as any other Microsoft product.

Designed to fit to businesses through extensive customization and offerings by incadea.

incadea.CVRM is completely integrated in Microsoft Office. By means of Microsoft Outlook it is possible to access CRM data online as well as offline.

Additionally, incadea.CVRM allows access to a CRM database using any web browser, no matter if in an internal network or outside the company. The only requirement is a working internet connection.

Benefits of incadea.CVRM

- ❑ **Microsoft based**
familiar and easy to use because it works as other Microsoft products
- ❑ **Great automotive experience of incadea**
automotive experts understand cardealer needs & wants
- ❑ **Tailored solution for car dealerships**
adaptable to different company structures, levels and individual dealership purposes
- ❑ **Flexible interaction with other systems**
full integration in incadea.engine® and 3rd party systems
- ❑ **360° view of customers**
intuitive user interface, customer histories, gain traceable insights
- ❑ **Streamlines workflows**
faster response to customer queries and advanced customer care with automated workflows (flexible to compile)
- ❑ **Efficient lead management**
increased market share through advanced utilization of potentials
- ❑ **Optimized sales process**
automated processes, quickly resolved issues and reduced handling times
- ❑ **Advanced vehicle management**
find the right vehicle for the customer on the spot and maintain customer vehicle histories
- ❑ **Individual marketing campaigns**
target group specific actions with result able measurement and follow up
- ❑ **Streamlined case management**
easy handling of customer questions, complaints and requests
- ❑ **Advanced Reporting**
selected reports available for certain persons

Optimizing Workflows - Automated Processes

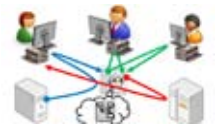
One of incadea.CVRM's main advantages is the workflow functionality. The system is able to automate every single action the employee is taking, be it in the area of customers or vehicles.

Many companies face obstacles in fully integrating CRM solutions and business process automation into their organizations. incadea.CVRM synthesizes with existing systems, giving employees access to familiar tools. This can lower training costs, decrease ramp-up time, and reduce frustration resulting in greater user acceptance.

With incadea.CVRM processes can be easily automated. Actions which were taken by an employee are now executed automatically by incadea.CVRM. This can lead to a tremendous increase of speed and efficiency in daily routines and operations. Besides this, that great feature also ensures a standard quality of certain actions and processes. The workflow set will always be executed in the same manner and period of time. This helps establishing a certain quality. incadea.CVRM enables to set many workflows as detailed as needed. Employees are released from time-consuming tasks and administrative constraints. incadea.CVRM ensures that sales processes are always executed in the same way and in case of deviations it informs on time.

Features and Benefits:

- Organization and personnel level workflows
- Extensible workflow model (for on-premise and partner-hosted offerings)
- Custom workflow actions
- Business Logic Extensions: event-based plug-ins with pre- and post-events on all platform executions



Examples of automated workflows in incadea.CVRM*

Ensure sales consistency

Create a workflow by which the lead manager receives a notification that there was a lead assigned to a salesperson with a due date and there were no activities set for the lead. Automatically assign new leads to the right person in the company.

Take on opportunities

Create a workflow by which the sales manager receives a weekly email notification with an actual "Opportunity Status" or "Lost Quotes Analysis" or any report he is wanted to see.

Streamline sales activities

Create a workflow which informs the salesperson after a certain period of time, for example 2 days, when a sales quote was sent to a customer to take an action, e.g. phone call, email, etc. Tell the system to send an automatic email notification to the customer for a successful vehicle sale (define the text as liked). Set a workflow to prompt a message to the salesperson to do follow-up actions on a sale after a certain period of time. Constantly inform the sales manager with special reports about anything he is wanted to know.

* Please note these are only examples which do not limit any other possible constellation of automated workflows.



Figure 1: Workflow setting

Overview of incadea.CVRM*



includes all benefits of Microsoft Dynamics CRM

compatible to:

"In business, CRM tools should not restrict your options - they should enable solutions that drive customer retention and revenue."



all versions of incadea.engine



incadea.MyEngine

* Version 1 et. seq.

Personal Dashboard

Offers a classic or rather visual entry into daily work by a prompt overview of the most important tasks and appointments as well as current news:



Figure 2: Entrance Screen | Personal Workplace (Logical Dashboard)

By means of "Mouse Over" details are shown for each topic as Figure 2 shows.

The classic "Salesperson Workplace" also contains all important information; just the display type is different:

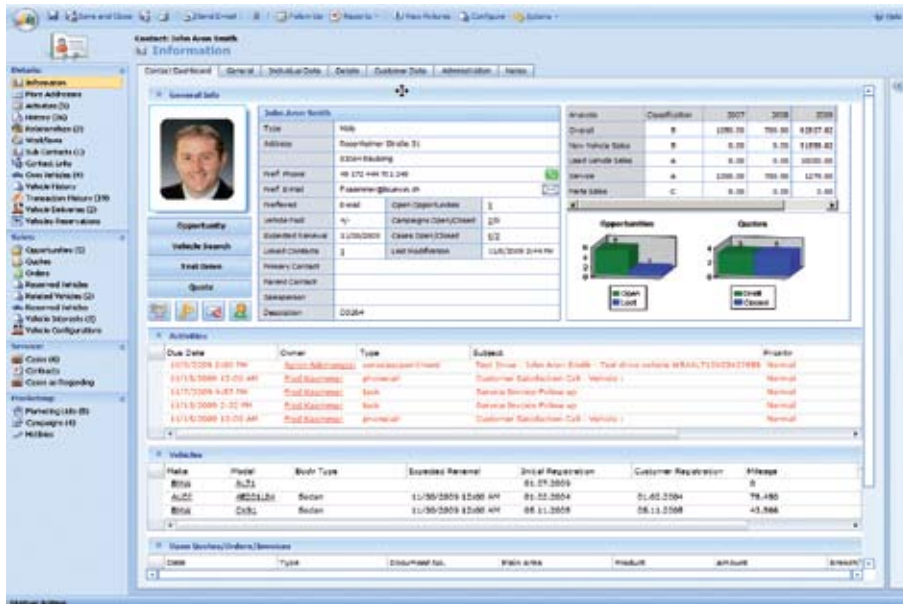


Figure 3: Entrance Screen classic

Each salesperson can choose which workplace suits him/her better. The displayed information can also be customized for each salesperson. A flexible search function makes it possible to directly access data by means of various search criteria, for example "First Name"/"Last Name", "Address", "Email", "Phone" or "License Plate".

Customer Dashboard - Contact Management

The Contact Management gives an instant overview of the customer. It enables to gather and analyze all the information on contacts and customers. The information is immediately available to the salesperson in charge for a customer and can also be used for target-group-specific marketing activities. All further tasks can be started from within the customer information. Be it an appointment arrangement, a quote or a test drive.



- Track all activities and interactions for each contact or account
- Quickly identify cross-sell and up-sell opportunities
- Create and monitor customized offers and pricing for each opportunity
- Establish consistent sales processes enterprise-wide
- Windows Live integration

Figure 4: Customer information

Vehicle Dashboard - Vehicle Management

As already mentioned, for incadea.CVRM the vehicle is an important component of relationship management. That is the reason why also for vehicles all important information is available and information can be used for marketing activities or to directly address contacts linked to a vehicle.

In case of a connected DMS also new information from the workshop, i.e. service done, new mileage or submitted warranty claim can be used to update the data.

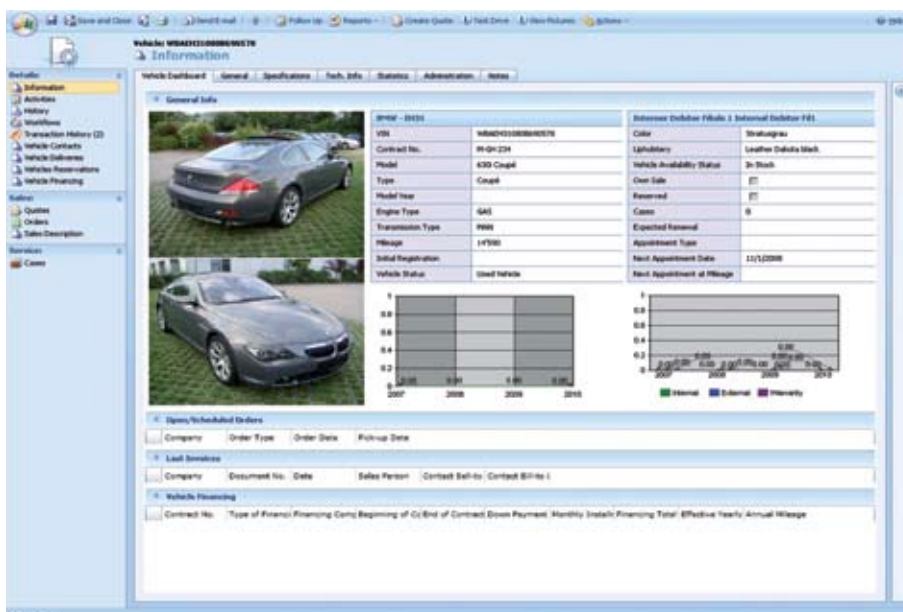


Figure 5: Vehicle list

Vehicle Sales Process

The vehicle sales process supports employees:

- Treating vehicle interests
- Processing received leads
- Qualifying of leads
- Maintaining sales opportunities
- Searching for vehicles
- Accepting used vehicles
- Tracking orders and activities
- Creating and tracking offers for
 - Inventory vehicles
 - Vehicles due to come (order, return vehicles)
 - New vehicles to be ordered
- Arranging test drives
- Planning the delivery of the vehicle to the customer.

A lot can be automated within the sales process, to the extent that users can focus entirely on their major task: To sell vehicles.

Vehicle Search

The salesperson quickly finds the right vehicle the customer wants, even if it has just been ordered and is not yet delivered or if it is to be traded-in as a used vehicle.

From a central location incadea.CVRM provides all information needed. The system collects all data, even from different companies, branches or even an OEM in order to find the right vehicle for the customer waiting on the spot.

The user also gets additional information from the company view on which vehicles are to be sold using traffic light indicators. Flexibly definable traffic lights indicate, for example, the days carried of the vehicle or current sales campaigns. The use of such traffic lights can be defined individually by each dealer. The traffic lights can give information which is only understood by the salesperson, so that the customer is not able to interpret certain critical information not meant for him/her (Figure 6).

The salesperson can compare different vehicles directly within the search and create a quote or change to the vehicle configurator in case the search was not successful.



Figure 6: Vehicle search

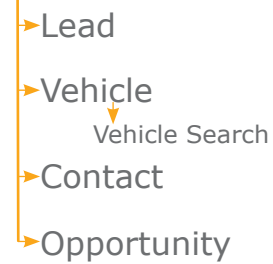
	Opel	Opel Astra G	15,243	MAN-6		\$11,900.00
						\$10,000.00
			0.00		11/19/2007	Used Vehicle

Figure 7 : Status Information

Lead Management

Get the sales force quickly up to speed with the advanced and easy to use Lead Management features of incadea.CVRM to boost sales productivity, streamline sales cycles, automate lead management and gain insights to drive more sales. With the Lead Management it is simple to import lead information and convert it to contact information. incadea.CVRM not only connects lead and contact information but also vehicles. This feature allows to easily organize leads with the option to change the status into contact, opportunity and more. The sales person is always up-to-date and can easily follow up with further sales actions.

import



- Capture and track all lead details in one system
- Automatically associate e-mail messages with relevant leads/opportunities
- Assign leads and tasks automatically
- Easily segment data to generate leads from the customer base



Marketing and Campaigns

Pinpoint marketing efforts by creating highly targeted lists associated with campaigns. incadea.CVRM makes it possible to create detailed profiles of target groups. These profiles can be used for target-group-specific campaigns which can be designed to fit best to the customers, e.g. budget, timing, owner of campaign, etc. Each campaign can be further refined based on the reactions until the contacts are handed over to the sales department.

incadea.CVRM enables the evaluation of marketing efforts. The systems automatically records any electronic customer response to a certain campaign. Using this practical feature the success of marketing can be easily measured and campaigns can be adjusted in the future.

The following incadea.CVRM features enrich your marketing efforts:

- ❑ Create highly targeted lists and associate them with campaigns
- ❑ Proactively create offers with 360° customer views
- ❑ Plan and track activities, tasks, budgets, and details for each marketing activity
- ❑ Save time and money with reusable campaign templates
- ❑ Set up product catalogs, price lists, and discounts for optimal offers
- ❑ Use embedded Mail Merge capabilities to instantly send mass communications
- ❑ Manually or automatically assign tasks or leads to individuals or groups
- ❑ Create on-the-fly campaigns with the Quick Campaign Wizard
- ❑ Capture and store responses and leads in one place for easy tracking
- ❑ Track responses across communications channels, linking them to campaigns and lead sources
- ❑ Convert responses to leads and opportunities with a few mouse clicks
- ❑ Create documents and mail-merges with embedded Office Word capabilities
- ❑ Automate actions with triggers based on events, time, or business logic
- ❑ Measure the marketing success with key performance indicators (KPIs)

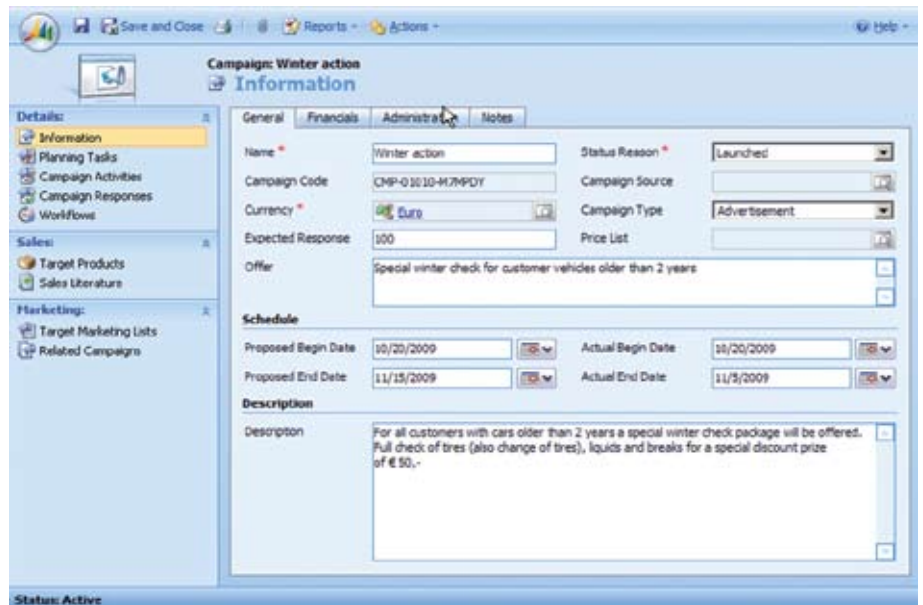


Figure 8: Marketing Campaigns

Case Management

incadea.CVRM includes a comprehensive Case Management. Whether the customer has a complaint, a request or a specific question to any topic, the system makes it possible to easily gather all important information and links it to contact and the responsible person within the company. Further actions can be set manually or simply by a predefined workflow setting which ensures a proper execution of the right actions. In the future every single customer case will be treated with maximum efficiency and a fast response by the right employee.

Cases need to be treated as an opportunity to keep customers and establish a bonding between customer and company. incadea.CVRM offers the opportunity to record each case in order to allocate it and track the processing by means of automated processes.

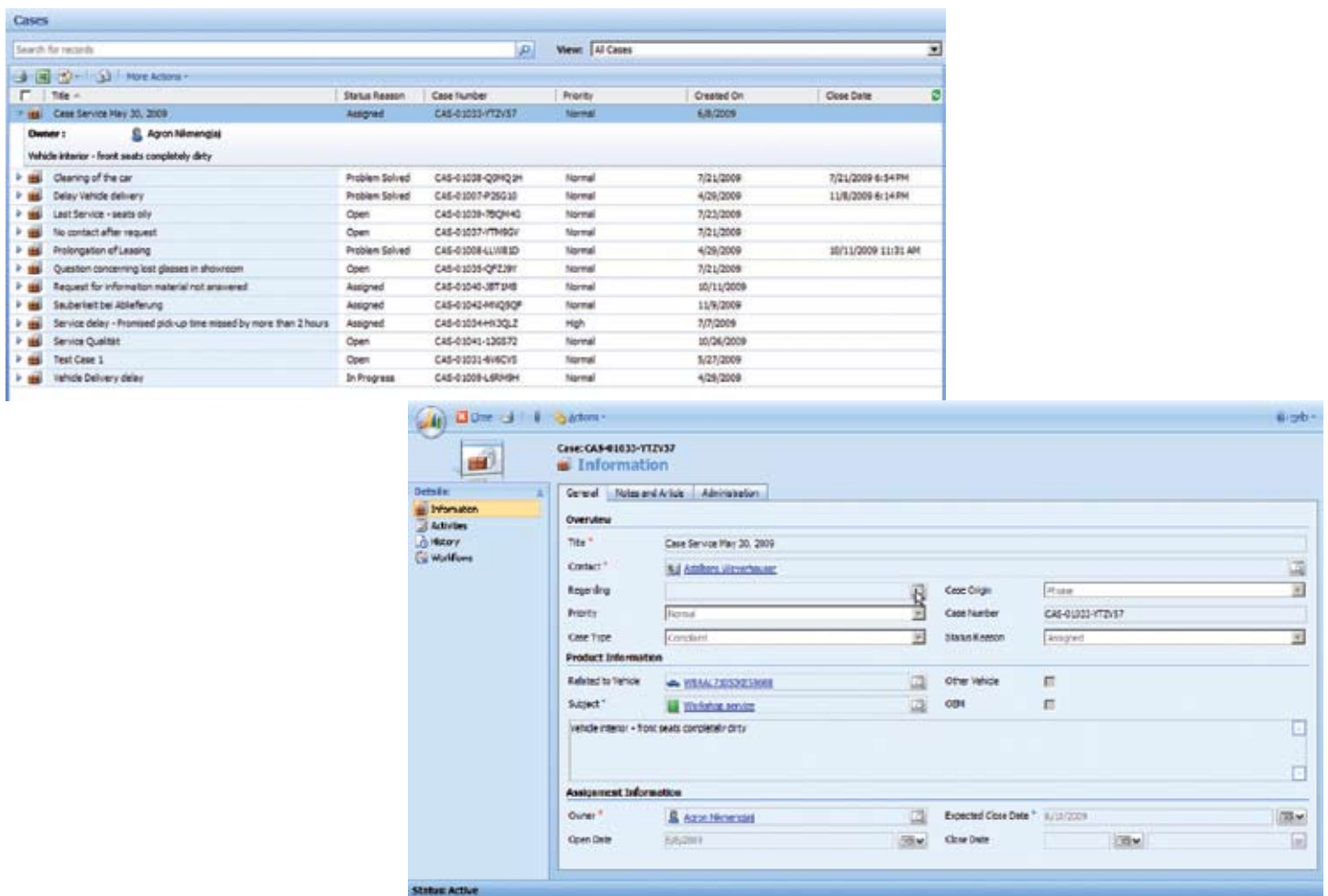


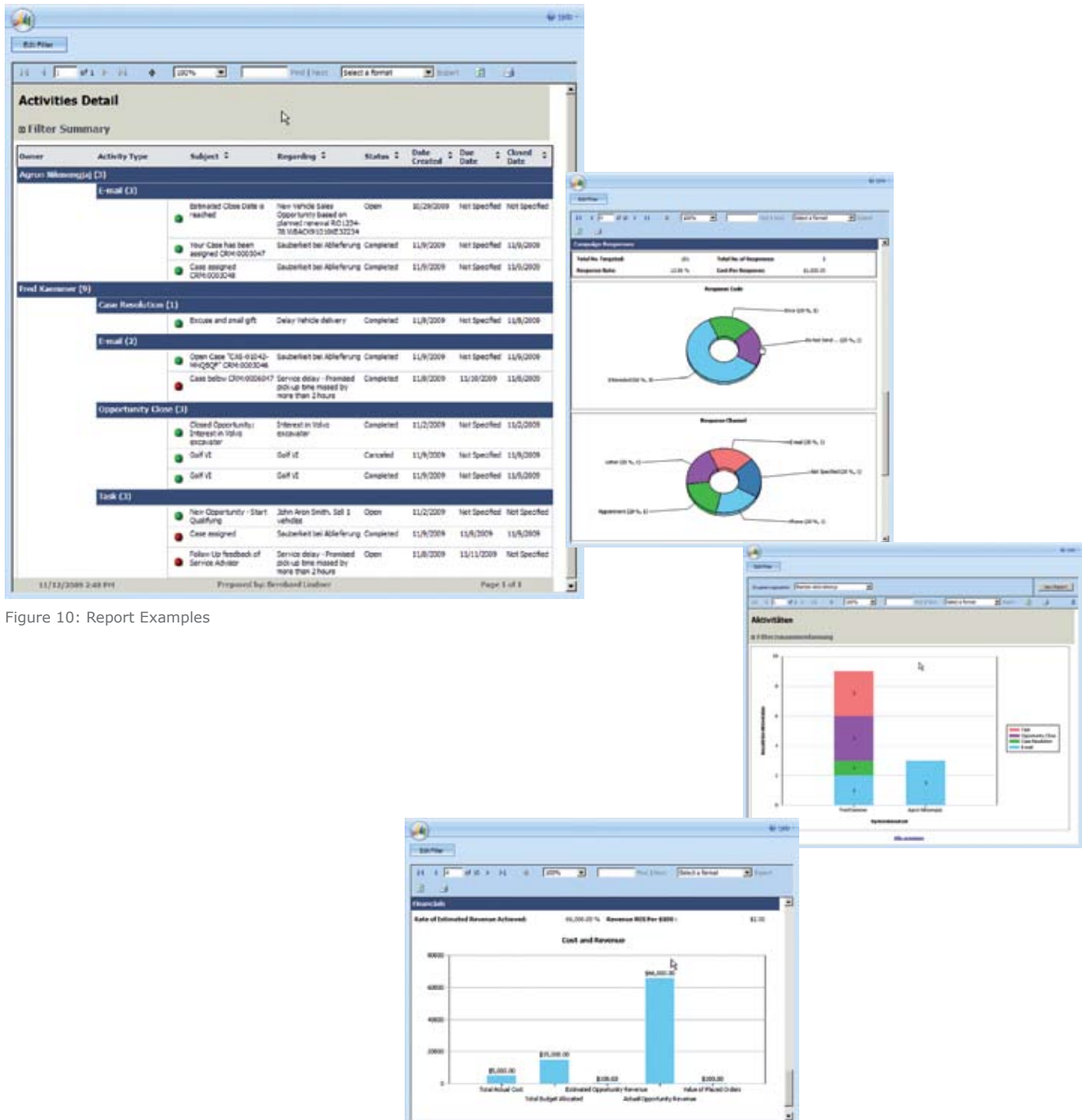
Figure 9: Case Management

Manage cases efficiently:

- Create, manage, and resolve cases by phone, e-mail, chat, web, or in-person contact
- Plan and complete case activities manually or automatically and record them for future reference
- Deliver appropriate service fast with an at-a-glance view of each customer's history and service contracts

Reporting

Extensive reports enable the evaluation of executed activities, sales transactions and marketing measures. Contact and vehicle overviews allow a quick and clear analysis of individual customers and vehicles. incadea.CVRM stores any report with the entire organization or parts of it and therefore again speeds up the daily workflow of the employees. Reports and analyses can be easily exported to MS Excel and refined with graphs and charts. The data can be updated any time and the files can be stored and shared in incadea.CVRM. This saves time and assures a standard quality of reports.



Administration and User Permissions

incadea.CVRM enables to reproduce any organizational structure of a company. There is no limit in setting company levels and hierarchies. Whether different branches or different makes, incadea.CVRM allows to simply reflect important organizational structures and levels in the automotive retail market.

This feature ensures efficient business processes and controls employees' access to information and how they contact customers. Additionally team functions, such as sharing certain views and analyses, simplify the exchange and the common use of information. A quick and precise reproduction of organizational hierarchies is easy now.

incadea.CVRM enables to access required data and at the same time protects sensitive information. This is possible through adjustable permissions for employees and the management.



Figure 11: Administration



Figure 12: User Access Rights

Current incadea partner network:



Please visit our website at www.incadea.com for additional partner information and links to our partner websites.

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