



KONICA MINOLTA

AUTOMOTIVE CRM

User documentation

V 1.0

April 2019

Giving Shape to Ideas

1 Overview

The Automotive CRM application offers set of tools to manage sales of vehicles, focusing primarily on activities with retail customers.

Heart of the application is the database of customers (persons and companies) providing 360° view about the relationship history and currently pending activities (see details in chapter 2 - 360° view on Customers). All major processes in the application are primarily related to persons (Contacts) with the option to specify also related company (Accounts). The application offers tools to plan and track activities with customers and to use this information to steer the sales teams.

Backbone process supported by the Automotive CRM starts with a Lead (see chapter 3 - Handling of Leads). Leads include information about prospect customer and their interest. Leads can be created manually, received from online sources or imported from files. Leads are assigned to responsible salesperson to follow-up, nurture and qualify to opportunity or disqualify. Leads can also be postponed for future follow-up in case a salesperson identifies that a lead is currently not relevant but requires attention later on.

The major part of the sales process is handled within Opportunities (see chapter 4 - Handling of Opportunities). Opportunity represents solid potential to sell a vehicle and the Automotive CRM provides tool how to turn the potential to deal. This includes:

- searching of the right vehicle fulfilling needs of a customer
- reservations of stock vehicles to protect it from being sold to other customer
- booking of test drives to intimidate a customer with own driver experience
- handling a trade-in discussion that might be key for the sales of the new vehicle

Opportunities are also key for management of sales pipeline. Salesperson indicates the progress and probability to win on every opportunity and reviews regularly pending opportunities with sales manager. Sales manager uses the pipeline of opportunities for forecasting and for steering vehicle sales of a dealership. Opportunities can be closed with one of following three results:

- Win – indicates that a deal has been made with a customer.
- Loss – indicates that a customer doesn't want to continue with the sales discussion at all. Salesperson has to specify reason for opportunity loss and this information can be used for further marketing activities and new leads generation.
- Postponement – indicates that a customer doesn't want to continue with the sales discussion for the moment but there is a good chance to reopen the discussion. Such opportunities are recorded in the queue of leads to be followed-up in the future on specified date.

The Automotive CRM application offers functionalities to handle activities related to sales process and opportunities:

- Management of vehicle reservation queues (see chapter 5 - Vehicle Search and Reservations).



- Handling of test drive / vehicle rentals handovers and returns including creation of related paperwork (see chapter 6 - Handling of Test Drives).
- Handling of a vehicle trade-in purchase process – vehicle evaluations, price negotiations, printing of purchase contract (see chapter 7 - Handling of Vehicle trade-ins).

2 360° view on Customers

On the Contact and Account forms, we introduced, besides several industry-specific fields, what we call “360° view on Customers”. The main idea behind this feature is to have all relevant information about a customer in one place so the user can have a clear and straightforward overview.

Following this concept, we decided to add this information to the contact and account form:

- Open and Past opportunity:
The salesperson can see and easily follow-up currently open and past opportunity for the Contact/Account.
- List of Simplified Vehicles
Simplified vehicles agenda is described later in this chapter
- Connections
The clear and simple overview of vehicles used or owned by a contact, including previous vehicles

Additionally only on the contact form salesperson can see:

- Customer Transactions
Providing information about Sales and Service Transactions of the customer.

Additionally only on the account form sales person can see:

- Information about fleet
Simple overview about account's fleet

Important component of the “360° view on customer” is Timeline. In this component, you can see all relevant activities such as Phone Calls, Appointments, Emails, Tasks, Offers and Vehicle Activities (Test Drives) etc. related to this contact starting with contact creation action.

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Save Save & Close New Deactivate Connect Add to Marketing List Assign Email a Link Delete Refresh Process Share Follow Flow

CONTACT
Aleš Eliáš

Owner
Roman Berger

Summary Details Vehicles Sales Vehicles Transactions Connections Related

Contact Information

First Name * Aleš

Last Name * Eliáš

Academic Title Ing.

Account Name Pavera BI Consulting a.s.

Industry Business Consulting

Job Position Consultant

Email ales.elias@email.cz

Business Phone 732852304

Mobile Phone 732852304

Presalutation Vážený pane

Salutation Eliáši

Fax ---

Preferred Method of

Timeline

Enter a note...

LAST WEEK

Vehicle Activity from Roman Berger - středa 12:49
Test Drive: BMW 3-Series saloon (F30) 2012-present : 27.02.2019 18:00 - 28.02.2019 12:00

Assign Delete

Appointment from Roman Berger - čtvrtek 13:00
Meeting with Mr. Eliáš about evaluation of his Trade-in vehicle

Assign Delete

Phone Call from Roman Berger - středa 12:34
Call to Mr. Eliáš about his tradein

Assign Delete

Appointment from Ludovít Kabáč - pondělí 25. února 2019 16:30
Test Drive

Relationship Assistant

There are currently no insights.

Company Pavera BI Consulting a.s.

OPEN OPPORTUNITIES

ART TEST

Fleet 1series pro KM ITS

Kabrio na léto


Kopé vozidla Mini Cooper

2.1 Simplified Vehicles

Simplified Vehicle is an entity, which stores all information about a customer's current vehicle. From the marketing point of view it is quite important to have such an information. In this register, the salesperson can store even vehicle of the different make than ours. In other words, this list gives salesperson information about what vehicle the customer currently drives.

2.1.1 Fleet

With this Simplified Vehicle agenda, the salesperson can also record fleet information. He just specifies additional information such as Quantity and Management Level and few more in the "Fleet" section of the form. In case that he wants to save record with fleet information, account field is required.


SIMPLIFIED VEHICLE
Skoda Octavia

Dealership
autodev

Make
Skoda

General Related

General	
Name	Skoda Octavia
Description	---
Parent Contact	John Doe
Account	---
Parent Lead	---
Parent opportunity	---

Vehicle Clasification	
Make	* Skoda
Model	* Octavia
Model Body	---
Model Type	---

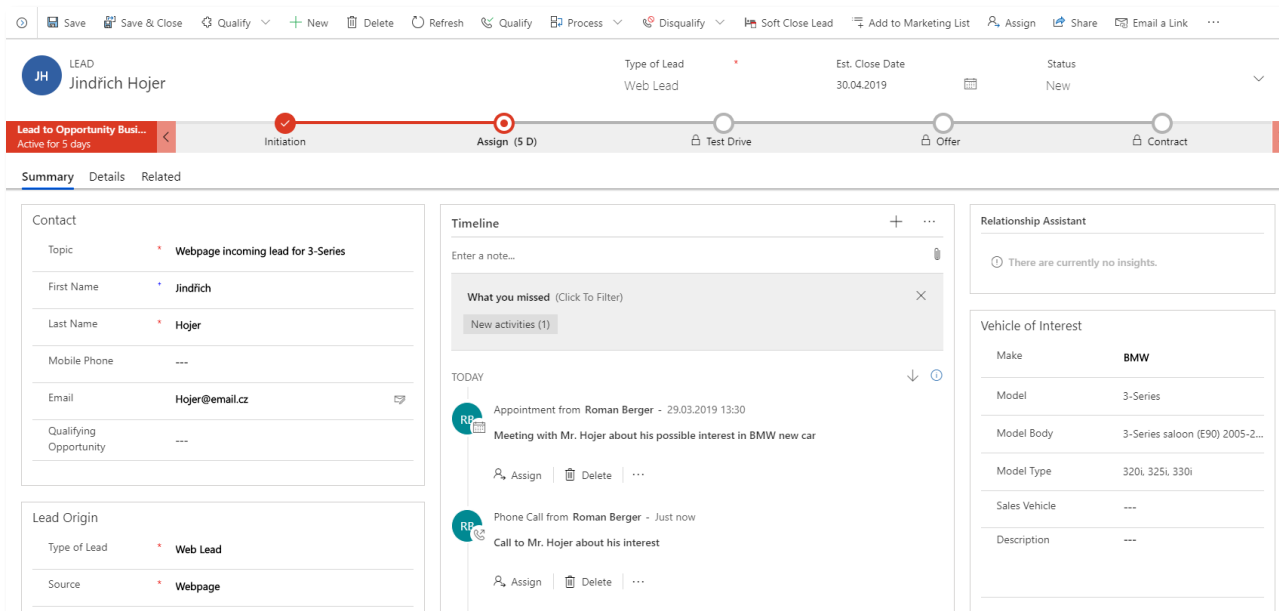
Fleet	
Management Level	---
Quantity	---

Vehicle Details	
Fuel Type	Diesel
Transmission	Manual
Upholstery	---
VIN	---
Paint Colour	Black
Mileage	---
Initial Registration	---
Production Year	2 016

3 Handling of Leads

On Lead we introduced several fields to cover industry-specific needs, most noticeable are Vehicle of Interest and Current Vehicle fields described later in this chapter. As you can see on the picture below we also came up with industry-specific business process flow which user can follow during the whole sales process.

The form is designed for comfortable daily work of salespersons. In the left section, you can find information about lead itself his origin etc. In the middle section, we track all the relevant activities for this lead such as Phone Calls, Appointments, Emails, and Tasks etc. In the right section can user specify Vehicle of Interest and Current Vehicle information. As you can see on the picture below we also came up with industry-specific business process flow which user can follow during the whole sales process.



LEAD
Jindrich Hojer

Type of Lead: Web Lead
Est. Close Date: 30.04.2019
Status: New

Lead to Opportunity Business
Active for 5 days

Initiation → **Assign (5 D)** → Test Drive → Offer → Contract

Contact

Topic: * Webpage incoming lead for 3-Series

First Name: * Jindrich

Last Name: * Hojer

Mobile Phone: ---

Email: Hojer@email.cz

Qualifying Opportunity: ---

Lead Origin

Type of Lead: * Web Lead

Source: * Webpage

Timeline

Enter a note...

What you missed (Click To Filter)

New activities (1)

TODAY

Appointment from Roman Berger - 29.03.2019 13:30
Meeting with Mr. Hojer about his possible interest in BMW new car

Phone Call from Roman Berger - Just now
Call to Mr. Hojer about his interest

Relationship Assistant

There are currently no insights.

Vehicle of Interest

Make: **BMW**

Model: 3-Series

Model Body: 3-Series saloon (E90) 2005-2...

Model Type: 320i, 325i, 330i

Sales Vehicle: ---

Description: ---

3.1.1 Vehicle of Interest

There is a special section to maintain information about the lead's vehicle of interest. User can filled following fields:

- Make (option set)
- Model (option set pre-filtered for the models relevant for the Make selected earlier)
- Model Body (also pre-filtered that user see only relevant option to the Model and Make selected earlier)
- Model Type (also pre-filtered that user see only relevant option to the Model Body, Model and Make selected earlier)
- Sales Vehicle (lookup field)
- Description

3.1.2 Current Vehicle

The section designed to maintain information in case that the potential customer is interested in trade-in.

- Current Vehicle Make (option set)
- Current Vehicle Model (option set pre-filtered for the models relevant for the Make selected earlier)
- Current Vehicle Description
- Current Vehicle Production Year
- Current Vehicle Mileage
- Available for Trade-in

3.1.3 Lead Qualification including duplicity checks

The salesperson can decide how he or she qualifies their leads. There are several options to choose:

- **To Opportunity**

In this case, an opportunity will be created. The vehicle of interest section will be automatically pre-populated.

- **To Purchase Case**

An option designed for the situation when a client wants to only sell his old car to our dealership but doesn't want to buy a new one from us. After this qualification, the new Purchase Case record will be created and fields specifying the vehicle will be prepopulated from current vehicle section on the lead record.

See Chapter 7 - Handling of Vehicle trade-ins for more. Information about handling this kind of business scenario.

- **To Opportunity and a Purchase Case**

Salesperson chooses this option when the customer wants to buy a car from us but also wants to sell to our dealership his old car. All the mentioned qualification options contain duplicity checks. If the system finds possible duplicity dialog pops up and it is up to a person who is qualifying the lead to decide if the record is duplicity or not.

3.1.4 Lead postponement (Soft Close)

Soft Close is a functionality that we introduce for specific cases which can occur in the salesperson daily work. It's an action that you will perform when you don't want to qualify or disqualify the lead. Let us assume the following situation.

The salesperson is in touch with the potential customer from the lead. The customer after while of communication (days, weeks) decides that he will not buy the car immediately, but he will have the interest again in the future after some specified time (e.g.: 3 months long business trip, half a year of waiting for the internal changes in the company etc.). In this case, the salesperson does not want to qualify this lead but also don't want to lose this by disqualifying so he performs soft close of the lead. When he does that, he can specify the reopen date as well as a new topic for this future lead.

Soft Close Opportunity

×


If you soft close an Opportunity or Lead, a new lead will be created at a later date. Use this function if, for instance, the customer is not ready to buy but you want to contact him again at a later point in time (i.e. in 6 months, 1 year or similar).

Lead Topic

*

Reopen Date

*



Note

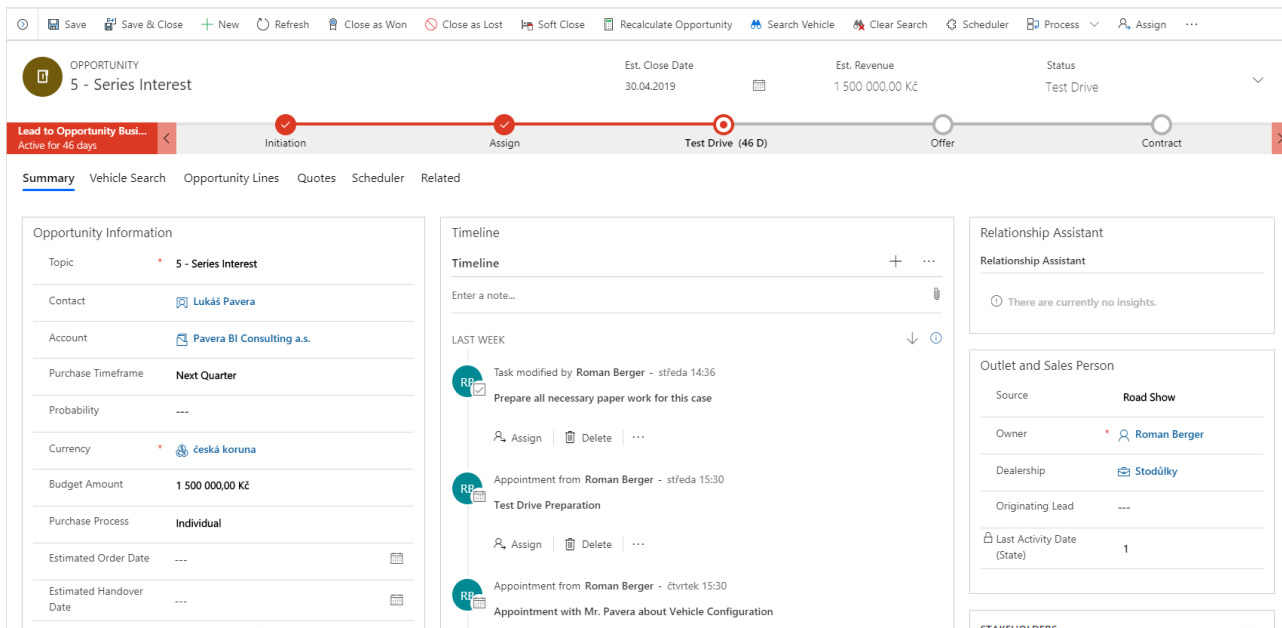
Soft Close

Cancel

4 Handling of Opportunities

In Automotive CRM, we enhanced the standard opportunity entity with several industry-specific components. From fields and business process flow to key features such as Vehicle Search or embedded Test Drive Scheduler.

The form is designed for comfortable daily work of a salesperson.



4.1 Vehicle Search

One of the key components of the Opportunity form is the Vehicle Search tool. The salesperson can find the vehicle which suits the customer's needs. Searching criteria are automatically prepopulated from the vehicle of interest section of the opportunity and can be adjusted later. Search results can be added to the opportunity and can be found on the tab "Opportunity Line". More about Vehicle Search you can find in chapter 5 - Vehicle Search and Reservations.

4.2 Activities & Timeline

There is a section, in the middle of the opportunity form, where user can find all relevant activities such as Phone Calls, Appointments, Emails, and Tasks etc.

We introduced two specific custom activities "Offer Activity" and "Vehicle Activity" to track all the possible action within the opportunity.

4.2.1 Offer Activity

This activity is designed to maintain offers, which we provided to the customer. You can create as much offers as you like. All of them will be displayed on the timeline so the user will have a good overview of current status. Creation of this activity you can see on the image below.

OFFER
Offer for Mr. Pavera

General Related

Subject	* Offer for Mr. Pavera
Regarding	5 - Series Interest
Make	BMW
Model	5-Series
Vozidla na prodej	BMW 530i xDrive G30 Saloon
Celková částka	1 596 000,00 Kč
Currency	česká koruna
Datum zaslání nabídky	25.03.2019

On the picture below you can find (highlighted by blue lines) that the currently created offer is shown in the timeline section of the opportunity

Timeline

+
...

Enter a note...

TODAY

↓
ⓘ

RP

Offer from Roman Berger - Just now
Offer for Mr. Pavera

Assign Delete ...

LAST WEEK

RP

Task modified by Roman Berger - středa 14:36
Prepare all necessary paper work for this case

Assign Delete ...

4.2.2 Vehicle Activity

Special custom activity to cover industry-specific activities such as test drive, vehicle handover, car rent etc. More about this activity you can find in chapter 6 - Handling of Test Drives.

4.3 Closure of Opportunity

Sales Person have standard options how to close the opportunity and that is Win/Lose furthermore we introduce third way how to close opportunity so-called "Soft-close".

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4.3.1 Win

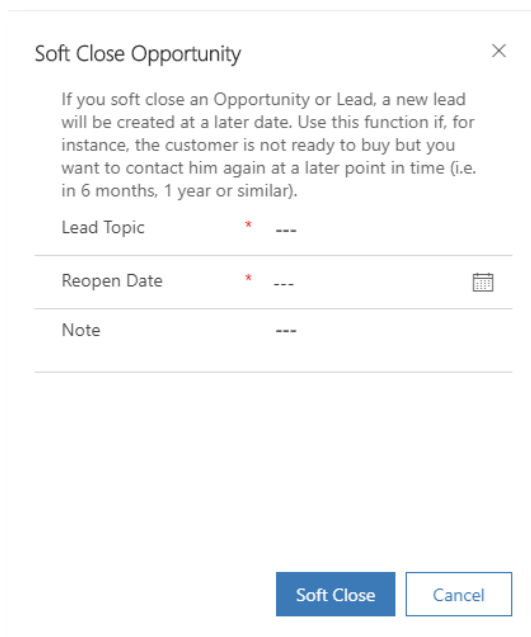
In this scenario, the salesperson can fill Status Reason, Actual Revenue, Close Date, Description.

4.3.2 Lose

In this scenario, in addition to the, all fields described in the previous chapter can also fill field Competitor.

4.3.3 Postpone (softclose)

The salesperson is in touch with the potential customer from the opportunity. This opportunity is already in some advanced stage. The customer decides that he will not buy the car immediately, but he will have the interest again in the future after some declared time (e.g.: 3 months long business trip, half a year of waiting for the internal changes in the company etc.). In this case, the salesperson does not want to lose this opportunity but also can't win it. He also doesn't want to have this opportunity set as open due to forecasting, reporting etc. so he perform soft close of the opportunity. When he does that he can specify reopen date as well as a new topic for this future opportunity.



Soft Close Opportunity

If you soft close an Opportunity or Lead, a new lead will be created at a later date. Use this function if, for instance, the customer is not ready to buy but you want to contact him again at a later point in time (i.e. in 6 months, 1 year or similar).

Lead Topic * ---

Reopen Date * ---

Note ---

Soft Close Cancel

5 Vehicle Search and Reservations

5.1 Search functionality

One of the key functionality of automotive CRM is Vehicle Search. With this tool, Salesperson is able to find fast and effectively desired vehicle, based on customer specification to fulfill their needs. Search can be



performed with various criteria such as model specification, availability, status, price range, colour, included options, transmission, fuel type etc. Search is available directly from the menu or from opportunity form. In this case, are searching criteria prepopulated based on known information from opportunity (mainly from “Vehicle Interest” section”).

VEHICLE QUERY

New Vehicle Query

Query ID

Owner

Roman Berger

General

Related

Make	BMW	Model Type	---	Upholstery Type	Combined
Model	5-Series	Transmission Type	Manual	Min. Price	---
Model Body	5-Series saloon (F10) 2010-2017, 5-Series touring (F11) ...	Fuel Type	Gasoline	Max. Price	---
Vehicle Status	---	Vehicle Options	---		

Convert To Lead

Convert To Opportunity

Edit

...

✓	Status Reason	Vehicle Status	Make	Model	Model Body	Model Type	Transmission ...	Fuel Type	Upholstery ty...	Mileage	Poptávana ce...
✓	Stock	---	BMW	5-Series	5-Series saloon ...	528i xDrive	Manual	Gasoline	Combined	---	---
	Stock	---	BMW	5-Series	5-Series saloon (...)	535i xDrive	Manual	Gasoline	Combined	---	---
	Stock	---	BMW	5-Series	5-Series saloon (...)	550i xDrive	Manual	Gasoline	Combined	---	---

After finding the right vehicle, Sales Person can easily continue with the sales process by following actions directly from search tool such as:

- Create Lead
- Create Opportunity

These new records will be prepopulated with the result of the vehicle search.

In case that Vehicle search is done from already existing opportunity, the salesperson is able to select the desired vehicle and add it to the opportunity straight away by clicking on the button “Add to Opportunity”. It is allowed to add multiple vehicles at once. The salesperson can also mark one vehicle per opportunity as a primary one. Added vehicles can be found on the tab “Opportunity Lines”

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5.2 Reservations

A user with an active reservation can change the status of this reservation to the “hard book”. This status means that the customer is willing to buy the car but he only waiting for the financing or so, in this case, no one else can create a new reservation. Each reservation can be cancelled. Both of these actions, mention above, can be performed from the menu like this – Vehicle Reservation – Select and open his reservation – on the ribbon click on button Cancel respectively Hard Book.

Save Save & Close New Hard Book Cancel Delete Refresh Assign Share Email a Link Flow Word Templates

VEHICLE RESERVATION
BMW X5 sDrive25d (3/27/2019-3/2...

Status Reason
Waiting

General Related

Name	* BMW X5 sDrive25d (3/27/2019-3/29/2019)
Owner	* Roman Berger
Vehicle	* BMW X5 sDrive25d
Customer	* Pavera BI Consulting a.s.
Start Date	* 27.03.2019
Expiration Date	* 29.03.2019

Each reservation can be also prolonged but only with appropriate managerial security role.
Current reservation status is displayed on the Sales Vehicle form so is clearly visible for all users.

6 Handling of Test Drives

Enhanced functionality of the Test Drives allows to schedule the activity directly from the opportunity form via embedded Scheduler.

Lead to Opportunity Busi... Active for 47 days

Initiation Assign Test Drive (47 D) Offer Contract










Summary Vehicle Search Opportunity Lines Quotes Scheduler Related

Test Drive Quick filter Refresh

today 25.03.2019 - 31.03.2019

	MARCH 25							MARCH 26							MARCH 27							MARCH 28							MARCH 29							MARCH 30							MARCH 31									
	08	10	12	14	16	18	20	08	10	12	14	16	18	20	22	24	08	10	12	14	16	18	20	22	24	08	10	12	14	16	18	20	22	24	08	10	12	14	16	18	20	22	24	08	10	12	14	16	18	20	22	24
II																																																				
II																																																				
1-Series hatchback (E81, E87) 2004-2011																																																				
2-Series Cabrio (F23) 2015-present SA5-2222 Red																																																				
2-Series Gran Tourer (F46) 2015-present 7AD-8852 Barberra Metallic Red only 22 character desc																																																				
3-Series Coupé (E92) 2006-2013																																																				
5-Series touring (G31) 2017-present Barberra Metallic Red																																																				
BMW 1-Series hatchback (E81, E87) 2004-2011																																																				

The Salesperson is able to book a vehicle for a test drive/courtesy or showroom for handing over as well.

Title	<input type="text"/>
Contact	Lukáš Pavera 
Regarding	5 - Series Interest 
Start	3/27/2019 12:00 PM  
End	3/27/2019 2:00 PM  
Description	<div><div></div></div> 
Vehicle	BMW 1-Series hatchback (E81, E87) 2004-2011 - ... 
Type	Test Drive 
<div> <div>Save</div> <div>Cancel</div> <div>Open detail</div> </div>	

The comprehensive Test Drive Business Process involves a whole life cycle from gathering initial information from a potential customer to handing-over and automatic follow-up activity creation.



Initial information about the contact (driving license information) and the vehicle (initial mileage, defects) are auto pre-fulfilled.

The process allows to control mileage, fuel level and defects of the vehicle and the distance of the test drive/rental is auto-calculated for the analytical purposes.

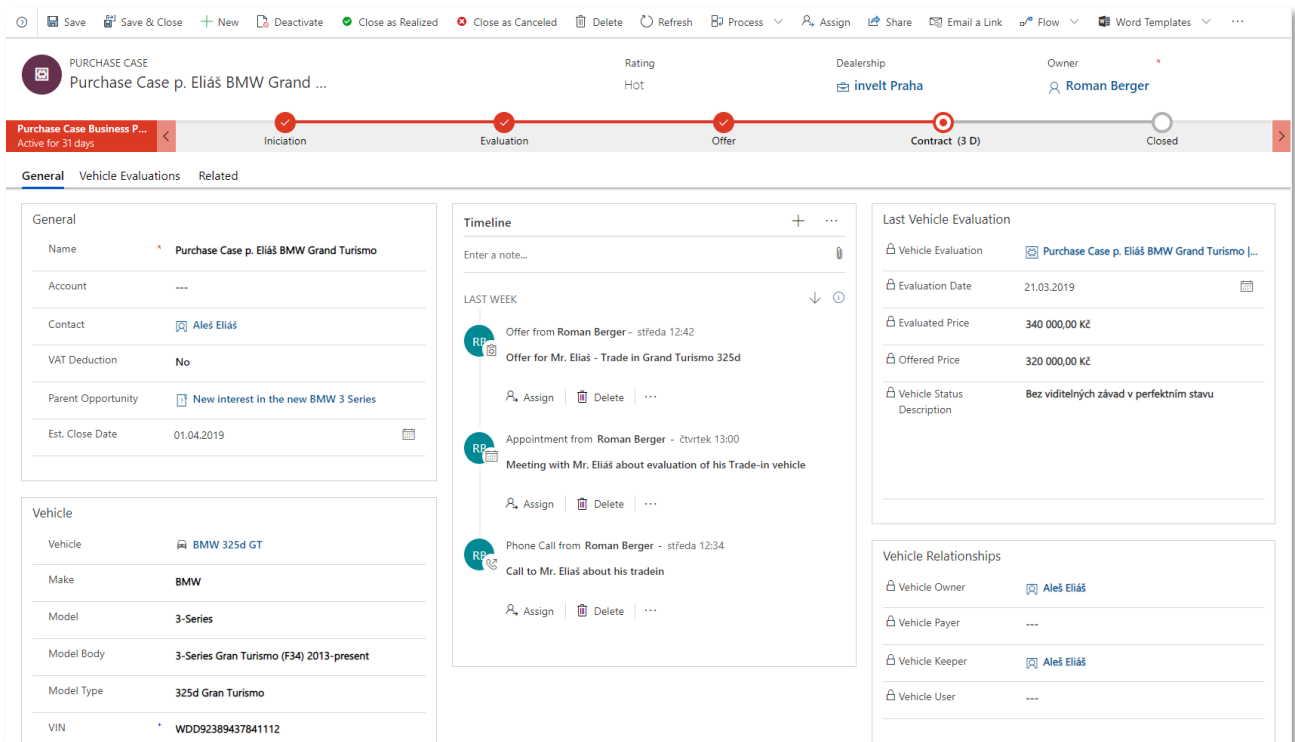
7 Handling of Vehicle trade-ins

Purchase case is agenda implemented for the handling of purchasing used customer's vehicles so-called trade-in. Based on our industry knowledge we created a business process flow, which should cover this business scenario from start to end.

Purchase case can be created via lead qualification with specific option more about this topic in chapter 3 - Handling of Leads or from the "Purchase Case" area from a list of Purchase Cases clicking on the button "New".

The form is designed for comfortable daily work of car purchaser. He can see all relevant information divided into several sections. General section about this case, timeline showing all relevant activities to this case,

vehicle evaluation section where the last vehicle evaluation is displayed and last not least section about the vehicle itself to store vehicle information such as make, model, mileage, VIN, production year etc.



7.1 Business process flow

Business process flow that we delivered is supporting a user during the whole purchase process from initiation through the evaluation process and making an offer to signing contract.

- **Initiation**

The first stage is about Contact and Account creation and settling general information about the case.

- **Evaluation**

Evaluation is the core stage of this business process flow. In this stage, a user should collect as much information about the vehicle as is possible. There should be first, only visual, optical inspection followed by 360° inspection performed by an internal or external specialist.

We created the special entity to maintain vehicle evaluation records more about this agenda you can find later in this chapter.

- **Offer**

Stage supporting the creation of the final offer. The vehicle should be also created in our system by now. The purchaser can easily create new vehicle record from purchase case by clicking to the lookup

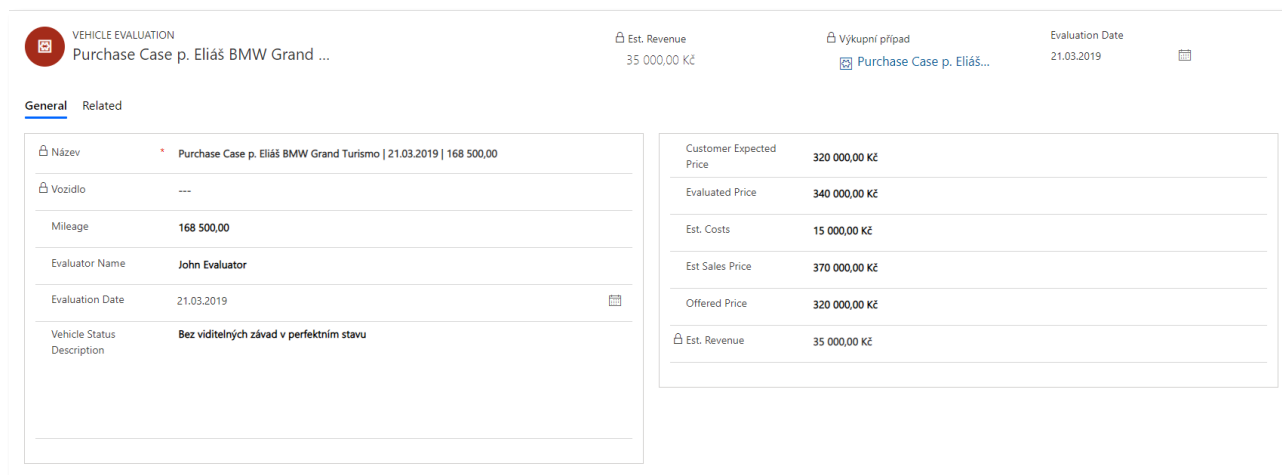
field “Vehicle” and then clicking to the “New”. New vehicle record inherits vehicle relevant data from purchase case.

- **Contract**

Contract signing should happen in this stage.

7.2 Vehicle Evaluation

Vehicle evaluation is an important phase of purchasing case, thus we decided to maintain this agenda in the separated child entity. Vehicle purchaser user can effectively put all information about evaluation.



VEHICLE EVALUATION		Est. Revenue	Výkupní případ	Evaluation Date
Purchase Case p. Eliáš BMW Grand ...		35 000,00 Kč	Purchase Case p. Eliáš...	21.03.2019

General		Related	
Název	Purchase Case p. Eliáš BMW Grand Turismo 21.03.2019 168 500,00	Customer Expected Price	320 000,00 Kč
Vozidlo	---	Evaluated Price	340 000,00 Kč
Mileage	168 500,00	Est. Costs	15 000,00 Kč
Evaluator Name	John Evaluator	Est Sales Price	370 000,00 Kč
Evaluation Date	21.03.2019	Offered Price	320 000,00 Kč
Vehicle Status Description	Bez viditelných závad v perfektním stavu	Est. Revenue	35 000,00 Kč

The Last Vehicle Evaluation is displayed on the relevant Purchase Case form. List of all Vehicle Evaluations related to the purchase case are displayed on the Purchase Case form on the tab “Vehicle Evaluations”. This two feature gives purchaser overview about price evolution through the whole purchase process.

For effective work, we implement a small enhancement. If there already is some old vehicle evaluation for the purchase case new vehicle evaluation record inherits the old data to the purchaser has a clear overview about the last evaluation, which he can simply update with a new data.