CUSTOMER
RELATIONSHIP MANAGEMENT (CRM)

⌨ Personalized **Comments**

    🖰   specific **A/R accounts** or **'walk-in'** customers

        personal profile <u>likes</u> and <u>preferences</u>

    🖰   specific **vehicle profiles** (tracked by <u>VIN</u> ID)

        EXAMPLES:

            "right rear door sticks"
            "frame bent"
            "align to xxx"

    🖰   specific **item lines** on <u>specific invoices</u>

        for warranty, or special purposes

    🖰   specific **order ID**s

🖥 Tracked '**Loyalty Points**'

points earned/redeemed based on **purchase history**

🖱 *Option #1*

JMK INTERNAL tracking

Maintain full control from a software module **within** JMK, not through any outside company
(more cost effective and with better features).

🖱 *Option #2*

BAYiQ EXTERNAL tracking

Interface to Bay IQ for **outside** service tracking.

⌨ Customer **Follow-up**

🖱 **automated** <u>TEXT MESSAGE follow-up</u>

automated **after-sale** text message transmitted to customer

✧ *<u>Option #1</u>*

Text//SMART™ - JMK INTERNAL tracking

JMK system initiates this service **internally**–to maintain full control–from a software module <u>within</u> JMK, not through any outside vendor.

This allows for customized messages based on purchased **product type** and **amount**.

✧ *<u>Option #2</u>*

PODIUM EXTERNAL tracking

Interface to Podium messaging platform for **external**-JMK text messaging contact.

🖱 'vehicle **service follow-up**' reminder

✦ *Option #1*

system-level reminder

O/E option 2–**Vehicle Followup screen** option

automated customer reminders, based on salesperson-initiated requests:

←details of VF-Screen comment codes

Data can then be used as a reminder for future service, combined with:

vehicle-service schedule.
←data-as-a-service/
OEM maintenance schedules

✧ *Option #2*

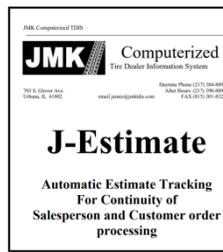**salesperson-level** reminder

Automatically:

✶ save **deleted** proposals for <u>service/part items</u>
from a work order
onto a <u>new **open** estimate</u> . . .

. . . to be used later as a reminder to sales counter staff
when the same customer/vehicle returns for
ANY service to ANY store location in your company.

✶ allow sales counter staff to easily convert previously
declined service (tracked as an outstanding <u>estimate
order</u>) onto the <u>current work order</u>.

Based on that,

✶ any time that same customer/vehicle shop at any store
location in the chain, system will automatically:

➢ remind current salesperson of pending estimate,
and allow for transformation into new work
order.

JMK Computerized TDIS

JMK Computerized
Tire Dealer Information System

705 S. Glover Ave.   Daytime Phone (217) 384-8891
Urbana, IL 61802   After Hours (217) 390-8891
                email james@jmktdis.com   FAX (815) 301-8327

J-Estimate

**Automatic Estimate Tracking
For Continuity of
Salesperson and Customer order
processing**

←details of automated
estimate follow-up

✦ *<u>Option #3</u>*

EXTERNAL **vendor-level** follow-up

with easy export options to outside services for contracted email-text message marketing follow-up

EXAMPLES:

```
MARKETPLACE INSIGHTS, InfoLab, BayIQ,
Podium, CarFAX, MechanicNet
```

🖥 Vehicle Window Smartphone Marketing:

Service//SMART™ customer–specific, **Directed** Data Site

🖱 is an automated **industry exclusive**

🖱 provides access via

✧ *Option #1*

low-cost **smart phone** (via QR code)

✧ *Option #2*

desktop computer

🖱 tethers customer for **repeat service/purchase**

PARALLELS corporate image of professional website presentation available from high-end car dealerships such as:

Porsche, Mercedes, Lexus, Jaguar, Land Rover

🖰 Customer can easily:

◇ **maintain** his own profile

edit his profile (limited), with controls, including:

`name, address, vehicle list`

◇ **review** past transactions

✦ in **full detail**, including document images (as available), eliminating the need for a 'glove box' of receipts

✦ via **dashboard**–past activity reviewed <u>visually</u> as simple <u>pie/bar</u> charts

PARALLELS bank websites for past check/deposits

◇ consider **special offers**

✦ present special offer **coupons** based on:

<u>previous</u> transactions and
<u>projected purchase</u> needs

PARALLELS top e-commerce website marketing, like from:

`Amazon, eBay, Wayfair, LL Bean`

✧ see pending/make new **appointments** for future service, and

✶ automatically create a **verified** <u>appointment</u>

✶ communicate via <u>email</u> or <u>text</u> message regarding an appointment

✶ create a calendar invite

PARALLELS airline websites for plane travel appointment

🖰 Shop staff can easily:

✧ use smartphone to review key service data while the vehicle is in the shop for service.

This saves time to look up data separately in POS desktop system.