

# CUSTOMER JOURNEY ROADMAP

DICK LOVETT BMW



The Ultimate  
Driving Machine







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DICK LOVETT BMW  
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## INTRODUCTION

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Dick Lovett Marketing Team have introduced a new email broadcast platform that will facilitate personalised communications and follow-up messages to sales prospects for new and used cars. This will be supplemented by Car Alerts, an email-based system which acts as a 'silent salesperson', helping reduce 'lost' sales by keeping customers up-to-date on approved-used vehicle availability. Car Alerts has a proven track record of pulling a significant proportion of 'lost' prospects back into the sales funnel.

The programme will also promote new stock to existing Dick Lovett prospects – allowing re-capture of leads that might otherwise have gone elsewhere. When an enquiry hasn't progressed to a sale after seven days, customers can be auto-subscribed to updates on the latest stock that closely matches their initial enquiry.

In addition, an electronic aftersales retention programme will provide existing Dick Lovett customers with service, MOT and end of warranty reminders including BMW Teleservices as well as facilitate vehicle health check follow-up activity, through a combination of email and SMS messages.

This group-wide CRM project will become a key part of our efforts to optimise sales and service lead generation, as well as achieve the highest standards of customer satisfaction. It will also enable our marketing to be more agile and productive.

This document highlights each customer touch point in this journey for both Sales and Aftersales.



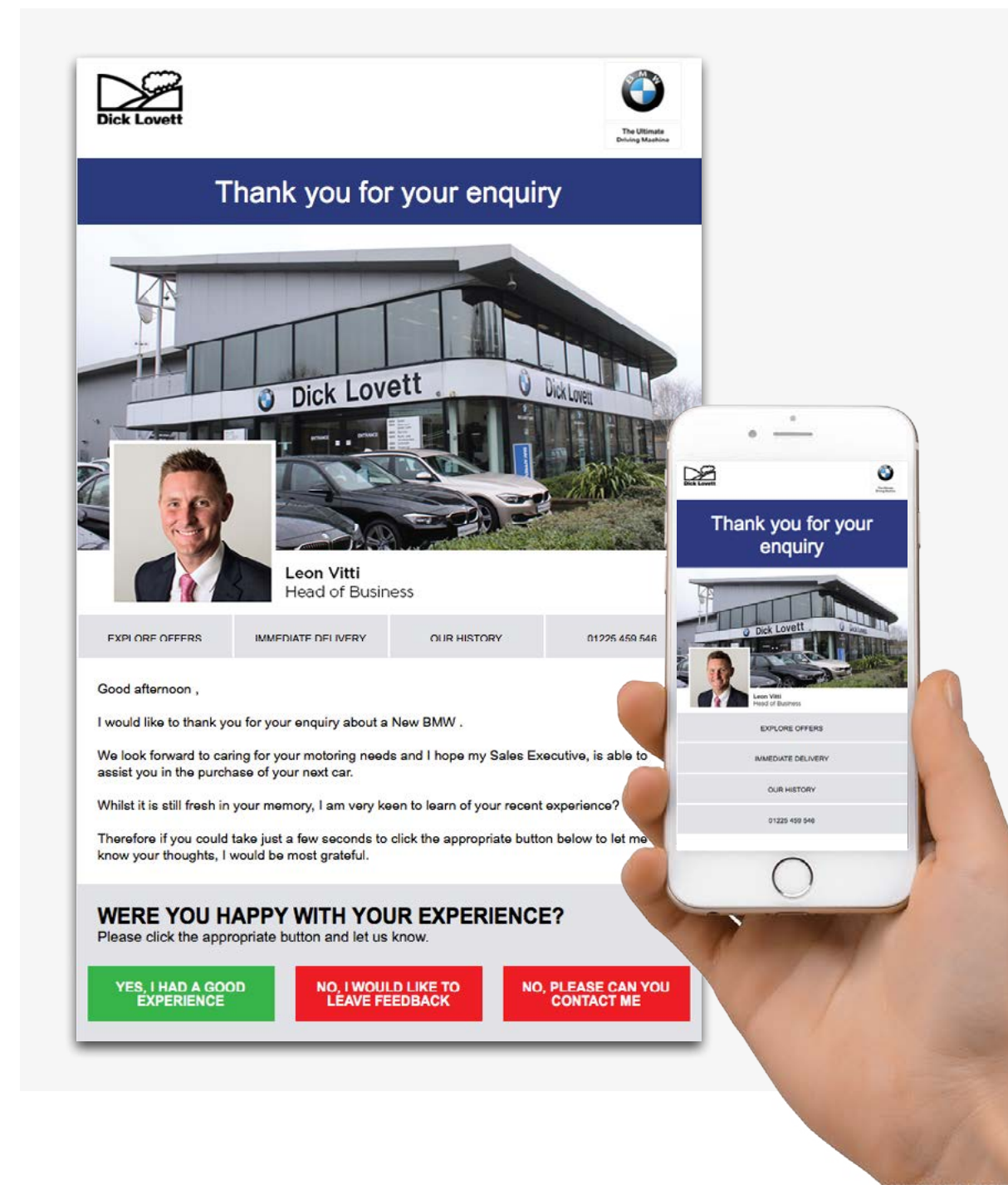
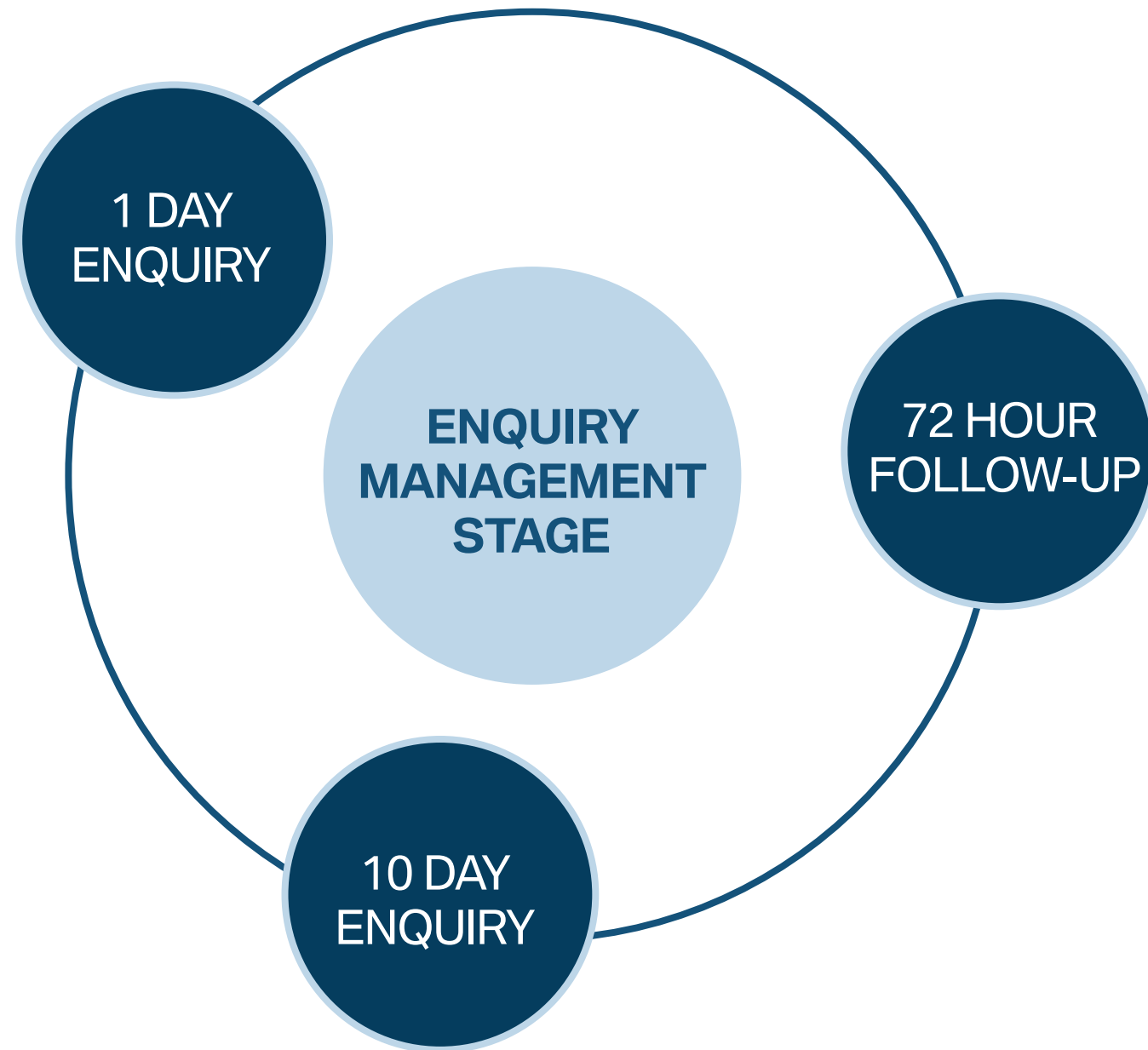
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CUSTOMER JOURNEY

# ENQUIRY MANAGEMENT STAGE



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ENQUIRY  
STAGE



## 1 DAY ENQUIRY.

### Message

- Thank you for your enquiry from HoB
- Header Image - Dealership and HoB photo
- Personalised by HoB, Sales Executive and Model of Enquiry
- Includes Customer Feedback Mechanism

### Rule

1-day after enquiry (if no sale)

### Response Mechanism

Reply Email / Feedback Form / Click to Call

### Criteria for Email / SMS Message

- Within 24 hours of Enquiry
- Exclude if follow-up been made within 24 Hours
- Exclude 'Stop Email Flags'
- Exclude 'Stop Phone Flags'

### Contact Code

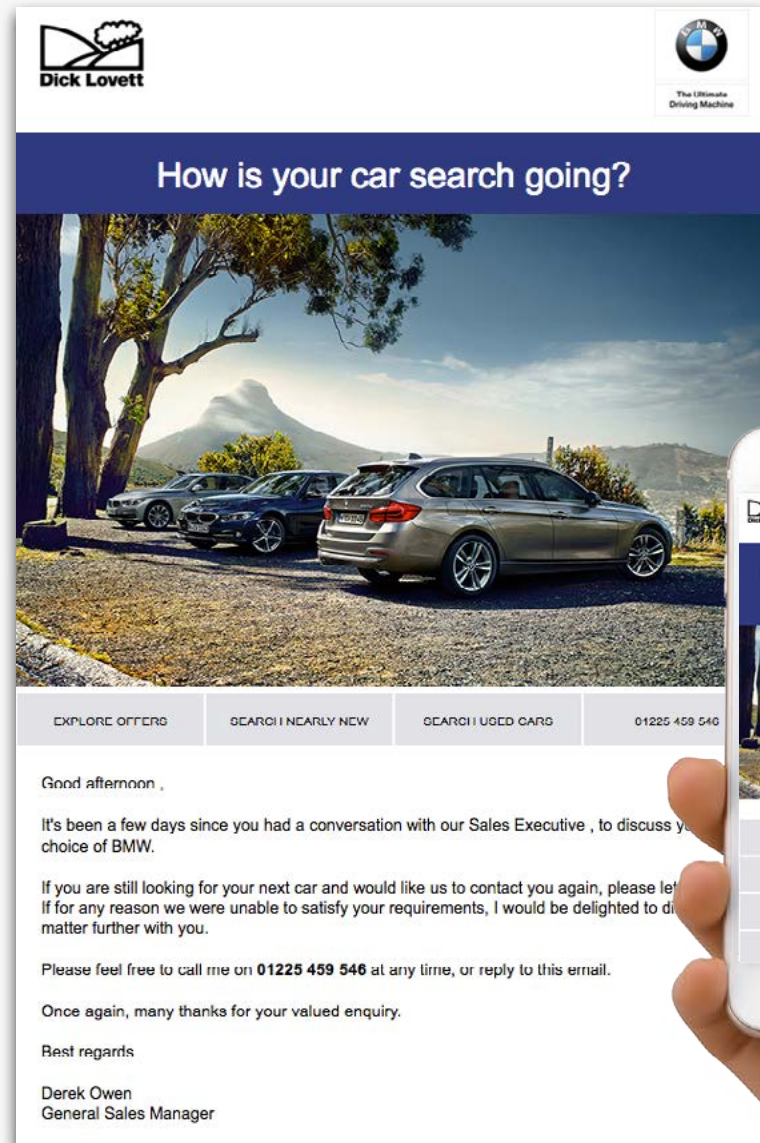
E01



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ENQUIRY  
STAGE





## 72 HOUR FOLLOW-UP

### Message

- How is the search for your next car going? - From Sales Manager
- Dynamic Header Image - Model of Enquiry
- Personalised by Sales Manager, Sales Executive and Model of Enquiry
- Includes Customer Feedback Mechanism

### Rule

3 days after enquiry (if no sale)

### Response Mechanism

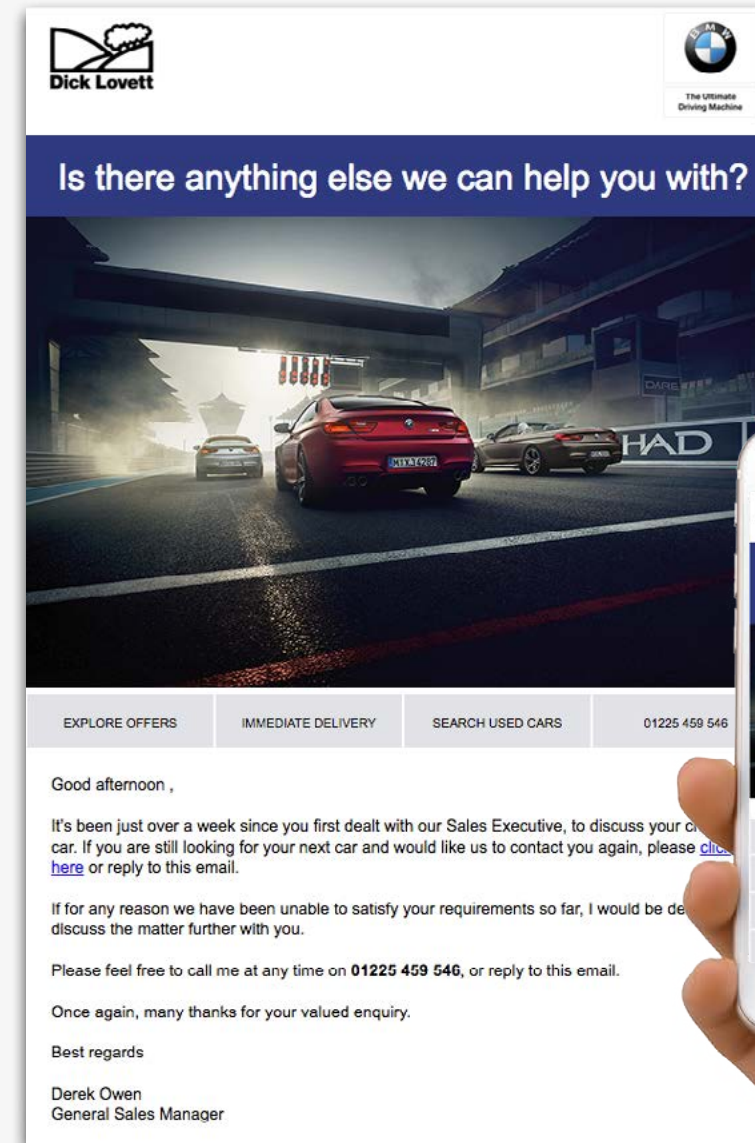
Reply Email / Click to Call

### Criteria for Email / SMS Message

- 72 hours Post Original Enquiry
- If no contact code change
- Exclude 'Stop Email Flags'
- Exclude 'Stop Phone Flags'

### Contact Code

E01



## 10 DAY ENQUIRY.

### Message

- Is there anything else we can help with?
- Dynamic Header Image - Model of Enquiry
- Personalised by Sales Manager, Sales Executive and Model of Enquiry
- Includes Customer Feedback Mechanism

### Rule

10 days after enquiry (if no sale)

### Response Mechanism

Reply Email / Click to Call

### Criteria for Email / SMS Message

- 72 hours Post Original Enquiry
- If no contact code change
- Exclude 'Stop Email Flags'
- Exclude 'Stop Phone Flags'

### Contact Code

E01



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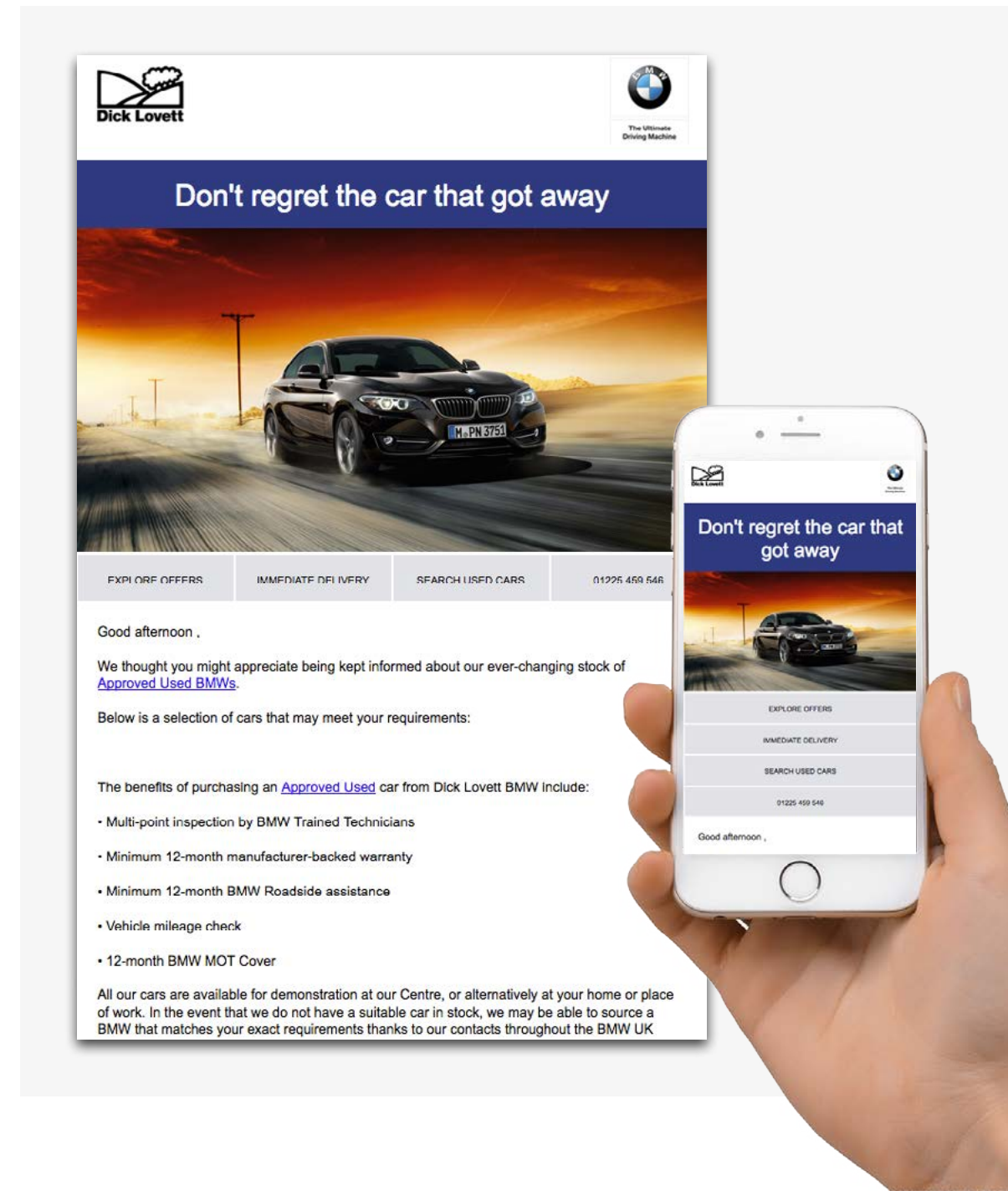
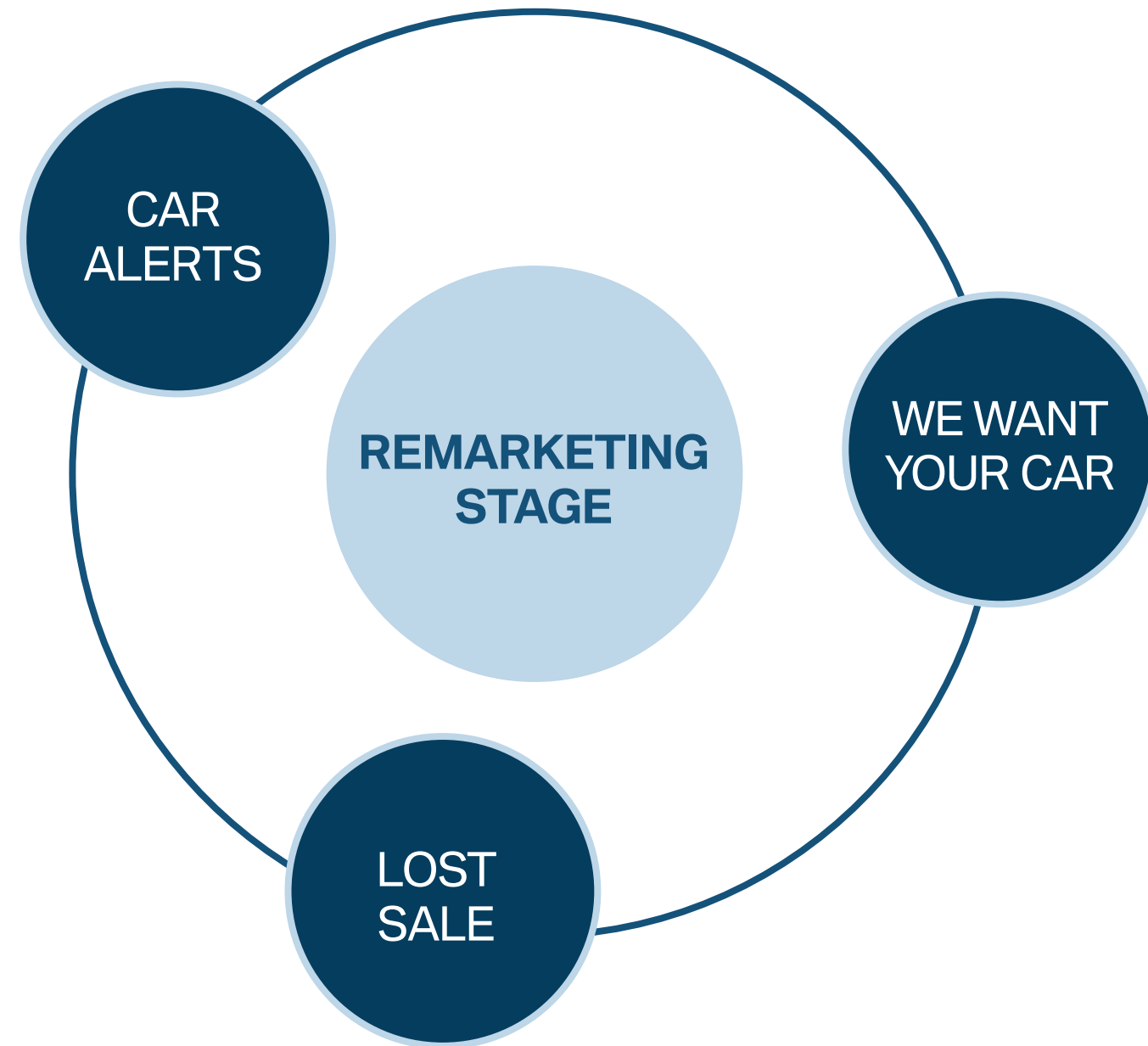
ENQUIRY  
STAGE

# REMARKETING STAGE.



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CUSTOMER JOURNEY

REMARKETING  
STAGE



## CAR ALERTS.

### Message

- Don't regret the car that got away.
- Pulls in stock that matches customer enquiry
- Pulls in stock that has had a price adjustment
- The benefits of buying from Dick Lovett

### Rule

Automatically enrolled after 7 days (if no sale)

### Response Mechanism

Deeplink to Stock Car / Click to Call / Reply to Email / Request Call Back - Triggers alert to Sales Person

### Criteria for Email / SMS Message

- 120 hours after E01
- Stop once Marked with E17 Contact Code (Order)
- Exclude 'Stop Email Flags'
- Exclude 'Stop Phone Flags'

### Contact Code

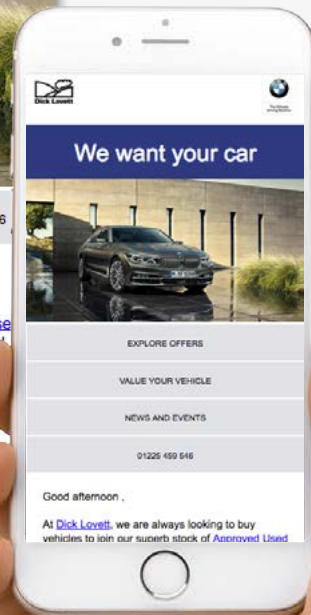
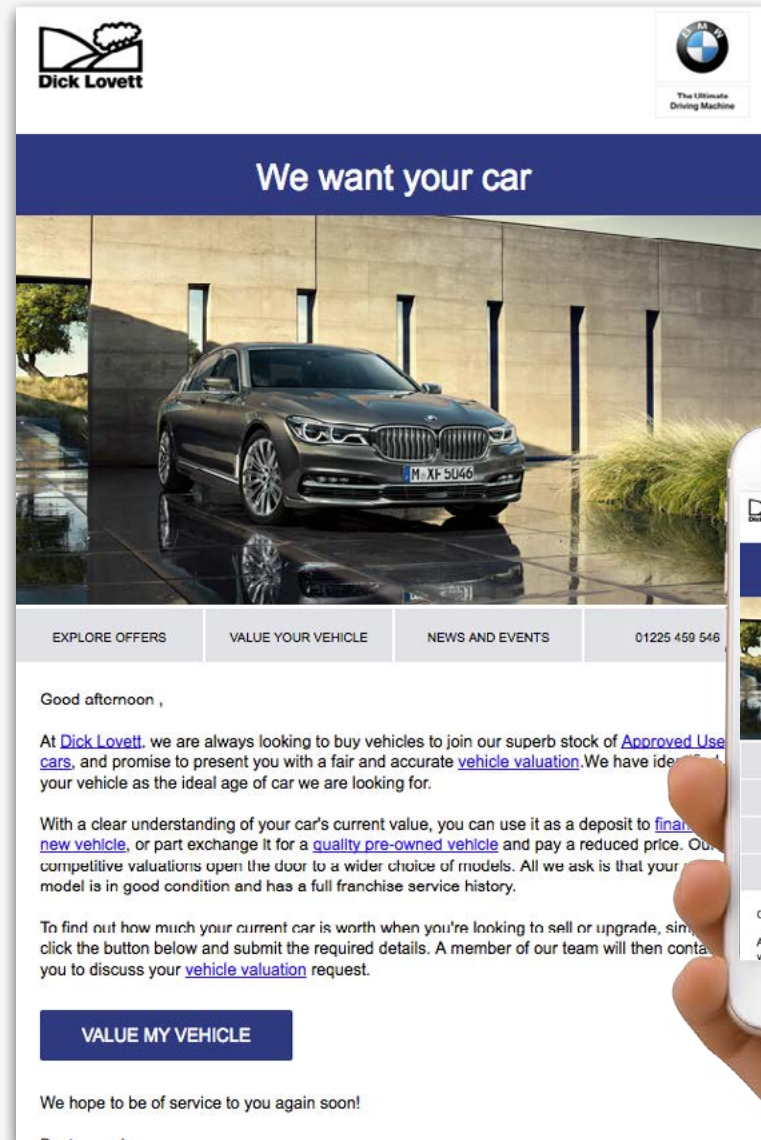
E01



DICK LOVETT BMW  
CUSTOMER JOURNEY

REMARKETING  
STAGE





## WE WANT YOUR CAR.

### Message

- Dick Lovett BMW are eager to replenish our much sought-after used car stock and, with this in mind, we want your car.
- Test Drive Incentive offer on a new model.
- Link to new car offers

### Rule

870 days since delivery date - New Car Retail Only

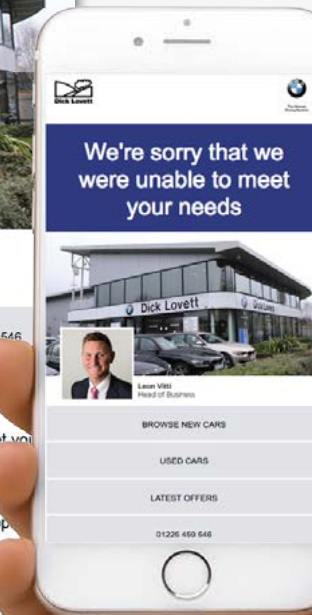
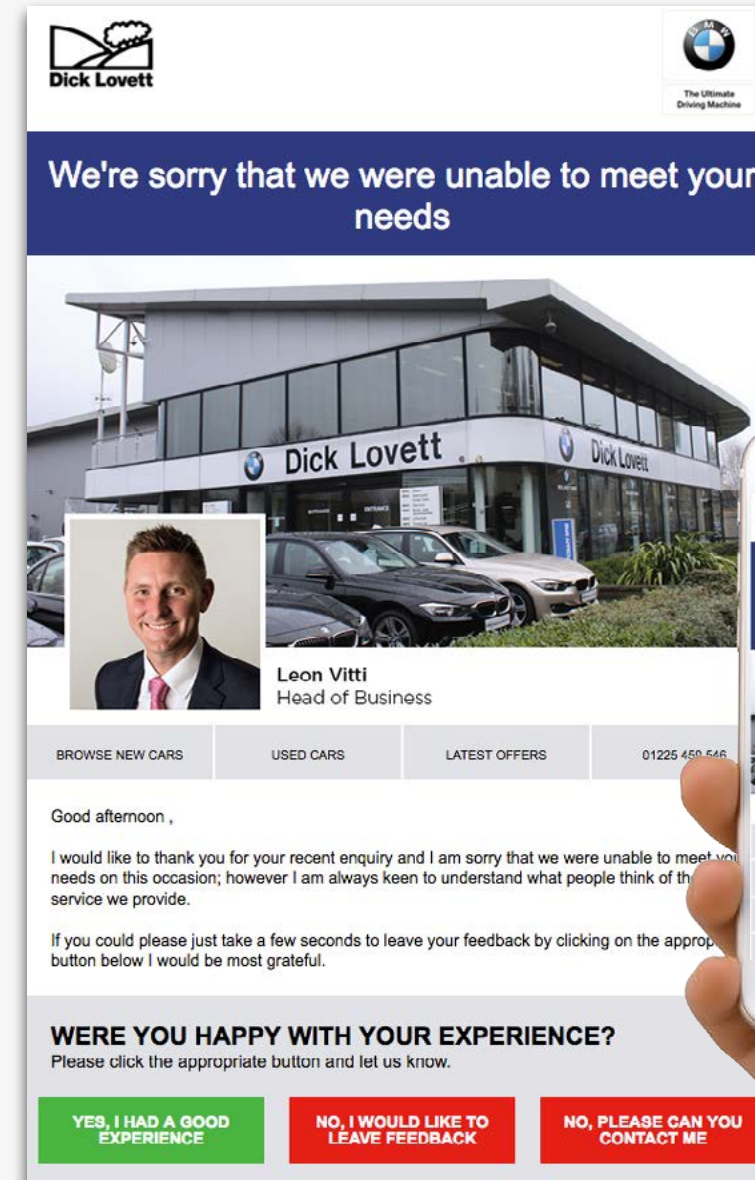
### Response Mechanism

Reply Email / WebForm Pull Through/ Click to Call

### Criteria for Email / SMS Message

- Exclude “stop e-mail” flags

### Contact Code



## LOST SALE.

### Message

- Sorry we were unable to meet your needs from Sales Manager
- Request Customer Feedback
- Copy to offer to deal with Sales Manager directly if they are still in the market
- Include Current Offers Block

### Rule

1 day after set to lost sale

### Response Mechanism

Feedback Form / Reply to Email / Click to Call Sales Manager / Request Call Back - Triggers alert to Sales Manager

### Criteria for Email / SMS Message

- 24 hours after set to lost sale
- Exclude ‘Stop Email Flags’
- Exclude ‘ Stop Phone Flags’

### Contact Code

E14



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REMARKETING  
STAGE

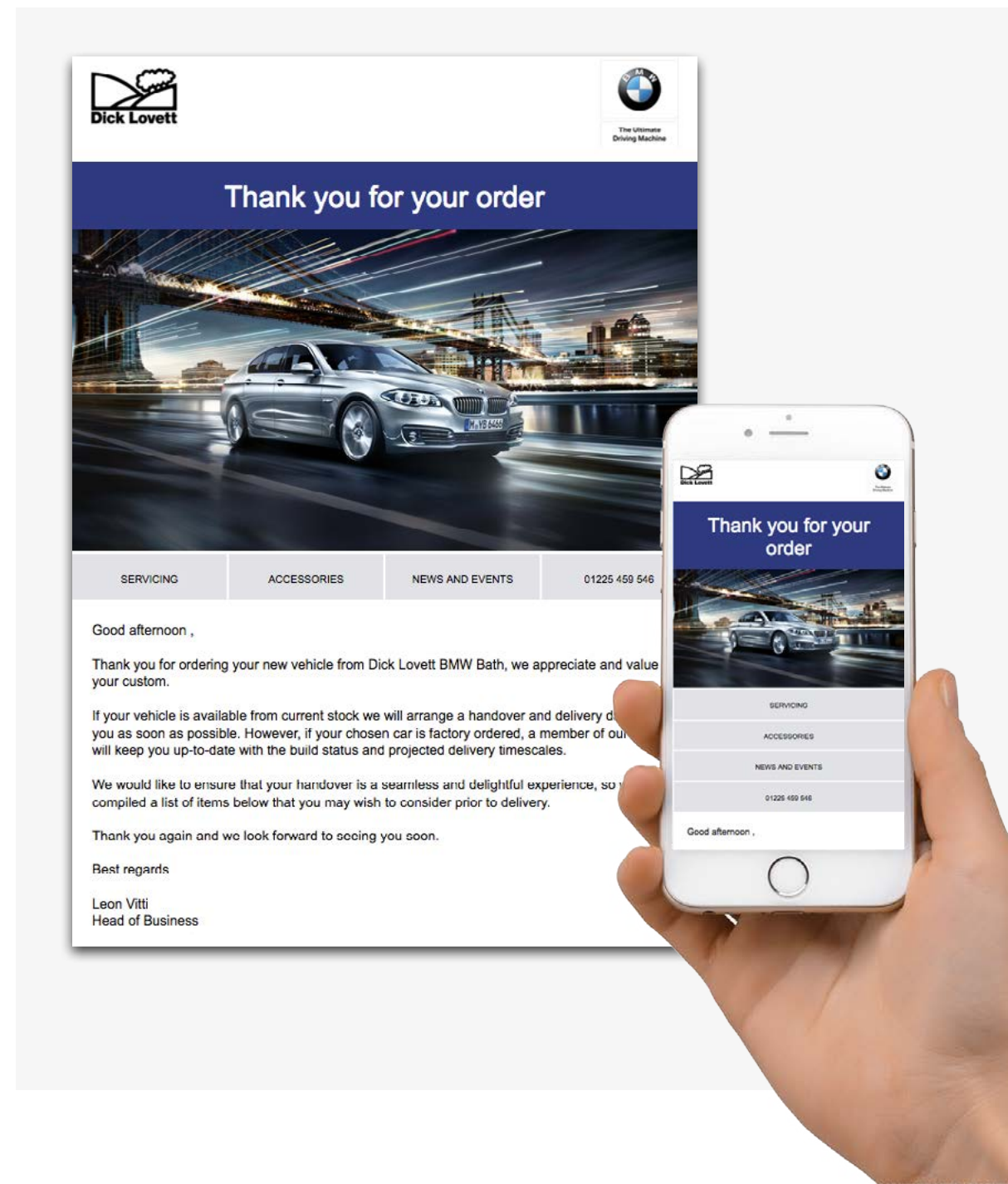
# SALE STAGE.



DICK LOVETT BMW  
CUSTOMER JOURNEY

SALE  
STAGE





## ORDER THANKS.

### Message

- Courtesy contact to thank the customer for their business from Management Team.
- Dynamic Lifestyle Model Image
- Help make the handover of their new car seamless.
- Includes info on Payment, funding and Important Docs with quick contact phone number.

### Rule

1 day after record is confirmed as 'Order' in Drive

### Response Mechanism

Reply Email / Click to call / Request Callback Alert

### Criteria for Email / SMS Message

- 24 hours after Order Confirmed
- Exclude 'Stop Email Flags'
- Exclude 'Stop Phone Flags'

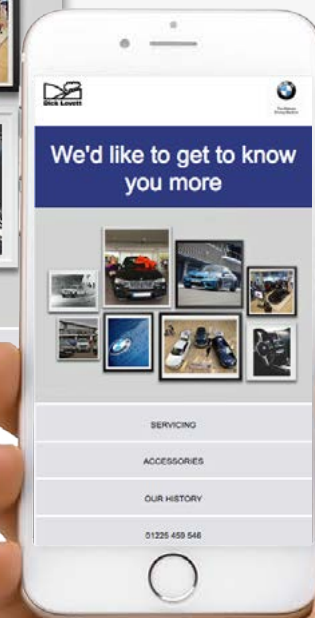
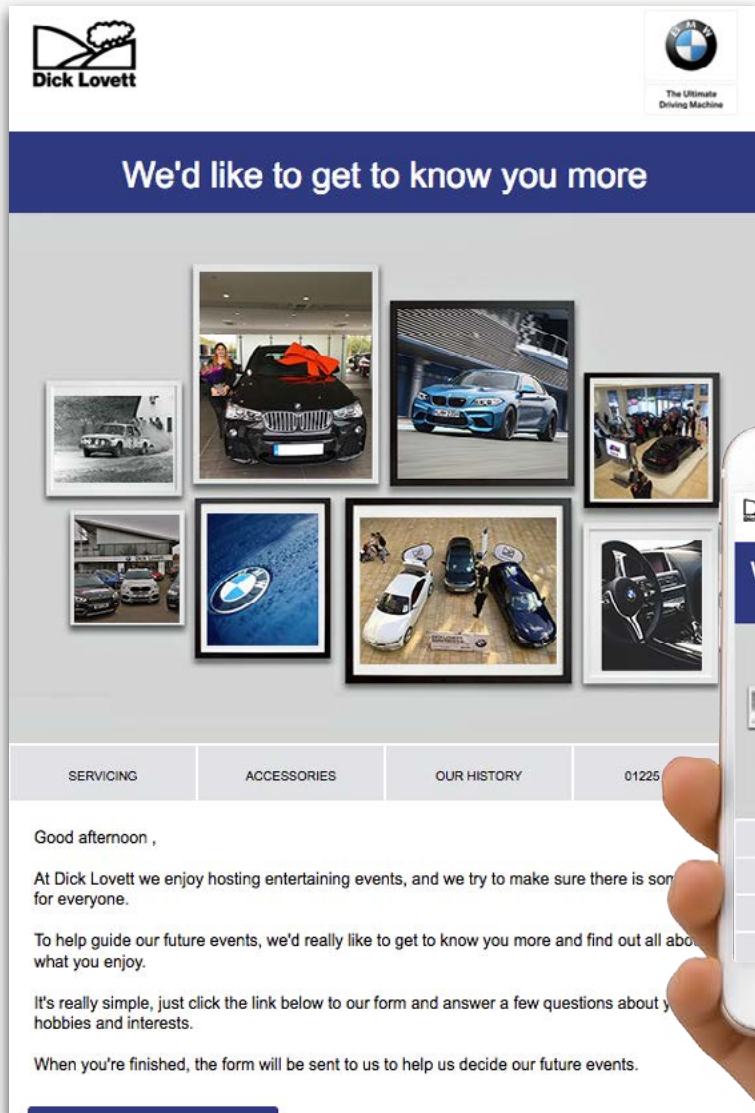
### Contact Code

E17



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SALES



## GET TO KNOW YOU.

### Message

- Introduces the customer events we hold in Dick Lovett.
- Invites customer to complete a simple webform of their interests and hobbies so that when we do hold events that may interest them, they do not miss out.

### Rule

2 day after record is confirmed as 'Order' in Drive

### Response Mechanism

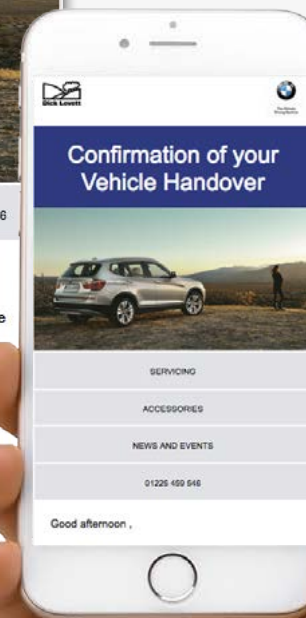
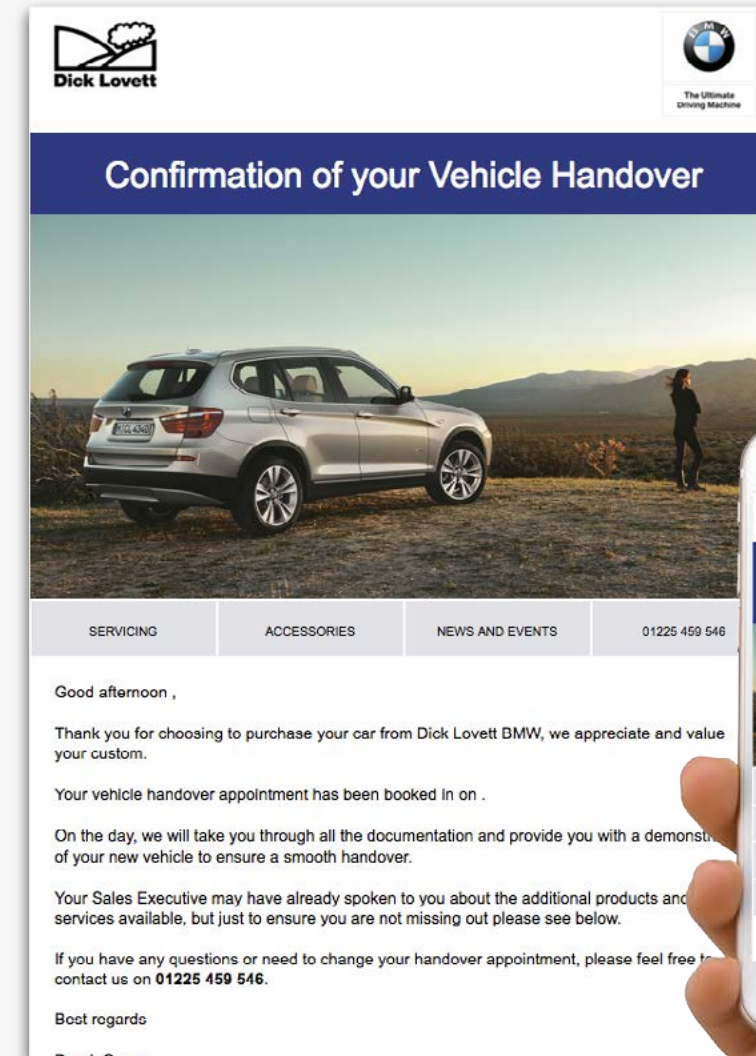
Web Form / Click to Call / Google Review / Reply Email

### Criteria for Email / SMS Message

- 24 hours after Order Confirmed
- Exclude 'Stop Email Flags'
- Exclude ' Stop Phone Flags'

### Contact Code

E17



## HANDOVER APPOINTMENT.

### Message

- Sends confirmation of Handover Appointment
- Reminder of important information and docs to bring.
- Dynamic Lifestyle Model Image
- Help make the handover of their new car seamless.

### Rule

Triggered 1 day after E18 Contact, and if handover dates are completed

### Response Mechanism

Reply Email / Feedback Form / Click to Call

### Criteria for Email / SMS Message

- 24 hours after E18 Contact
- Only send if E19 is completed with Date & Time
- Exclude 'Stop Email Flags'
- Exclude ' Stop Phone Flags'

### Contact Code

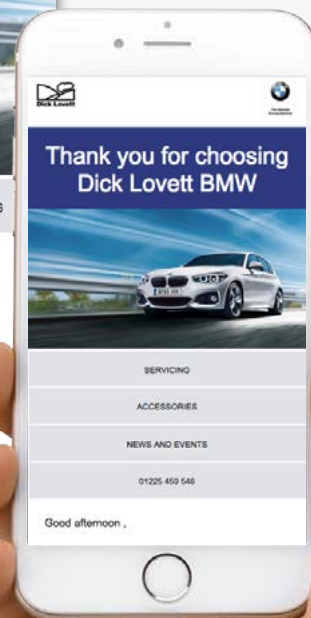
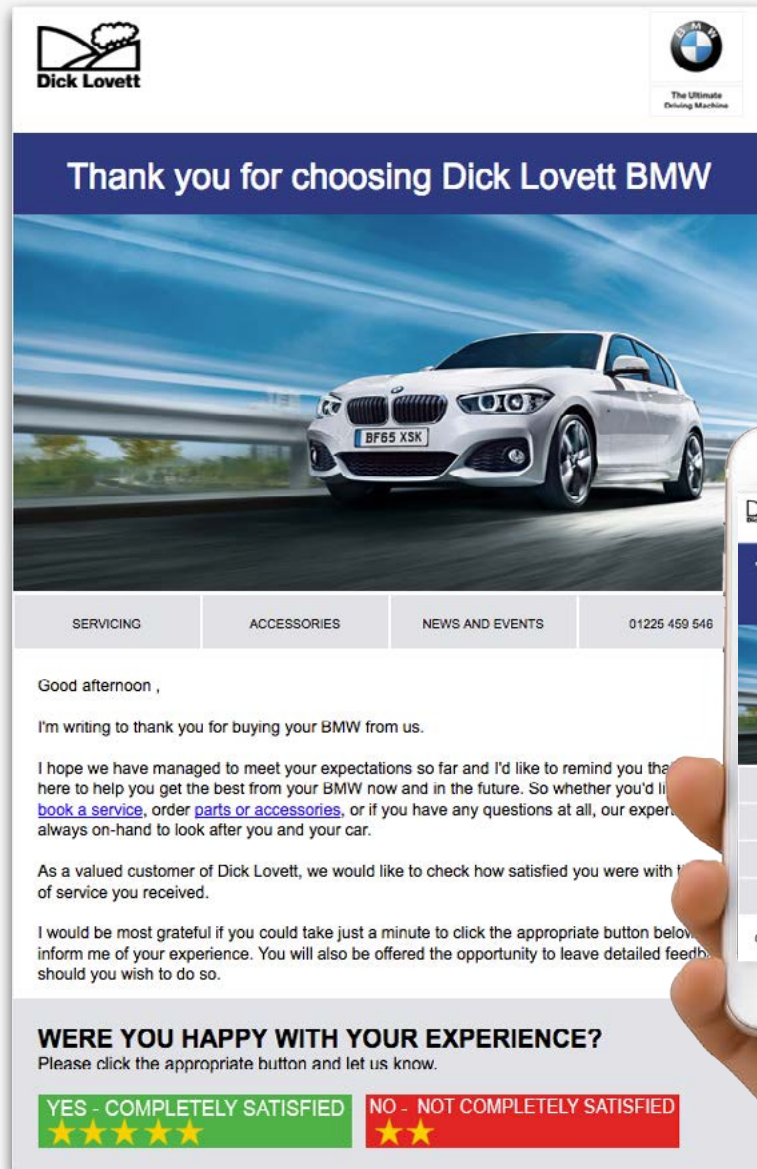
E19



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CUSTOMER JOURNEY

SALES





## POST DELIVERY THANK YOU.

### Message

- Courtesy contact to thank the customer for their business from Management Team.
- Message invites customer to complete a CSI survey about their recent purchase.
- Highlights additional services offered by Dick Lovett BMW

### Rule

Triggered 1 day after Vehicle Delivery

### Response Mechanism

Reply Email / Feedback Form / Click to Call

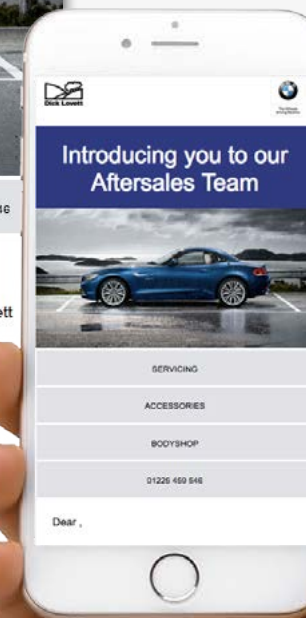
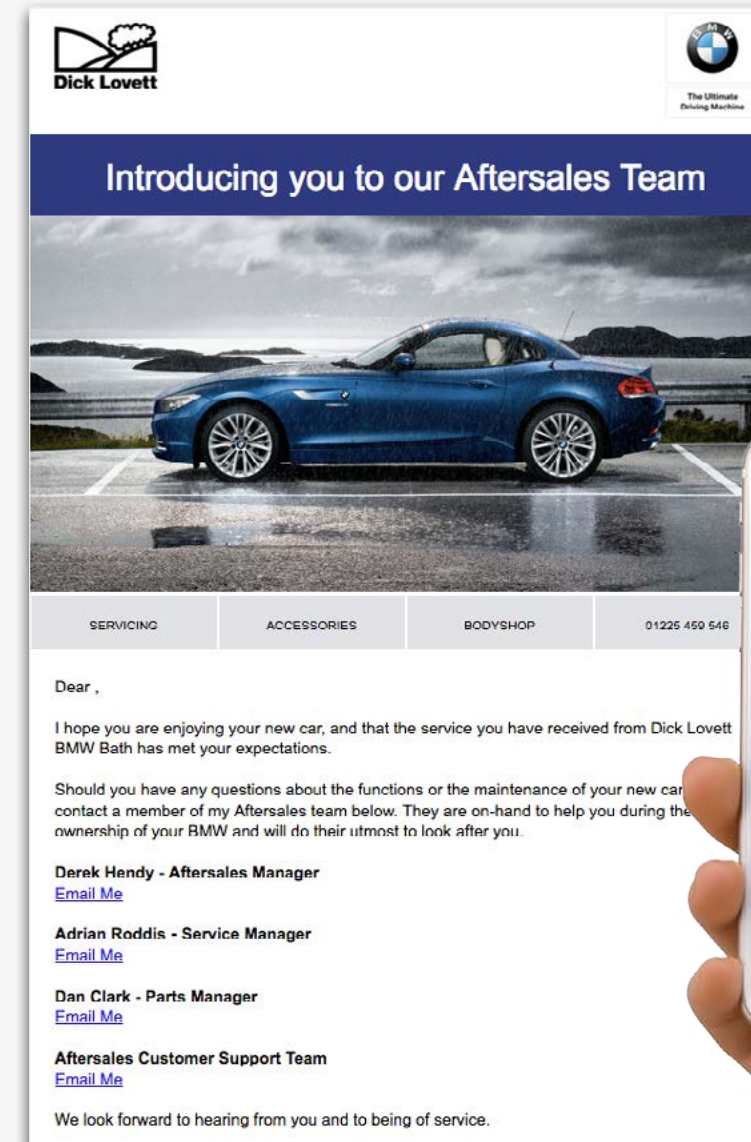
If Customer has @gmail.com address, direct to Google Review for Dealership

### Criteria for Email / SMS Message

- 24 hours after E25 Contact
- Exclude 'Stop Email Flags'
- Exclude 'Stop Phone Flags'

### Contact Code

E25



## AFTERSALES INTRO.

### Message

- Introduces the aftersales team and Customer Support Unit from the Aftersales Manager.
- Includes team photo.
- Highlights the number that will call them to book in future service bookings
- Why Service with BMW?

### Rule

Triggered 30 day after Vehicle Delivery

### Response Mechanism

Reply Email / Feedback Form / Click to Call

### Criteria for Email / SMS Message

- 720 hours after E25 Contact
- Exclude 'Stop Email Flags'
- Exclude 'Stop Phone Flags'

### Contact Code

E25



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CUSTOMER JOURNEY

SALES

# AFTERSALES STAGE.



DICK LOVETT BMW  
CUSTOMER JOURNEY

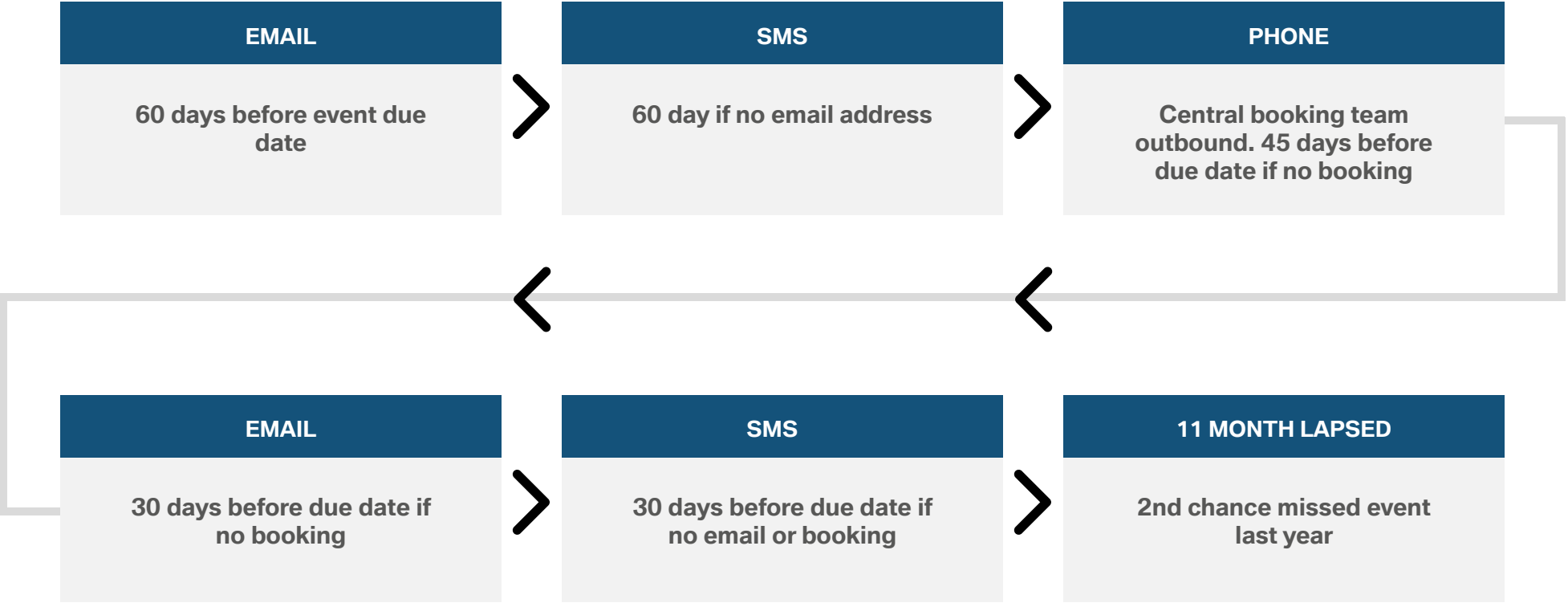
AFTERSALES  
STAGE



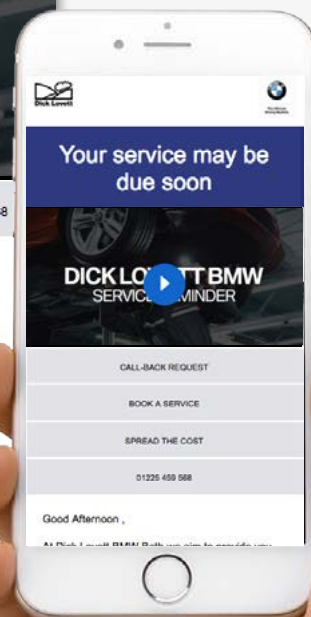
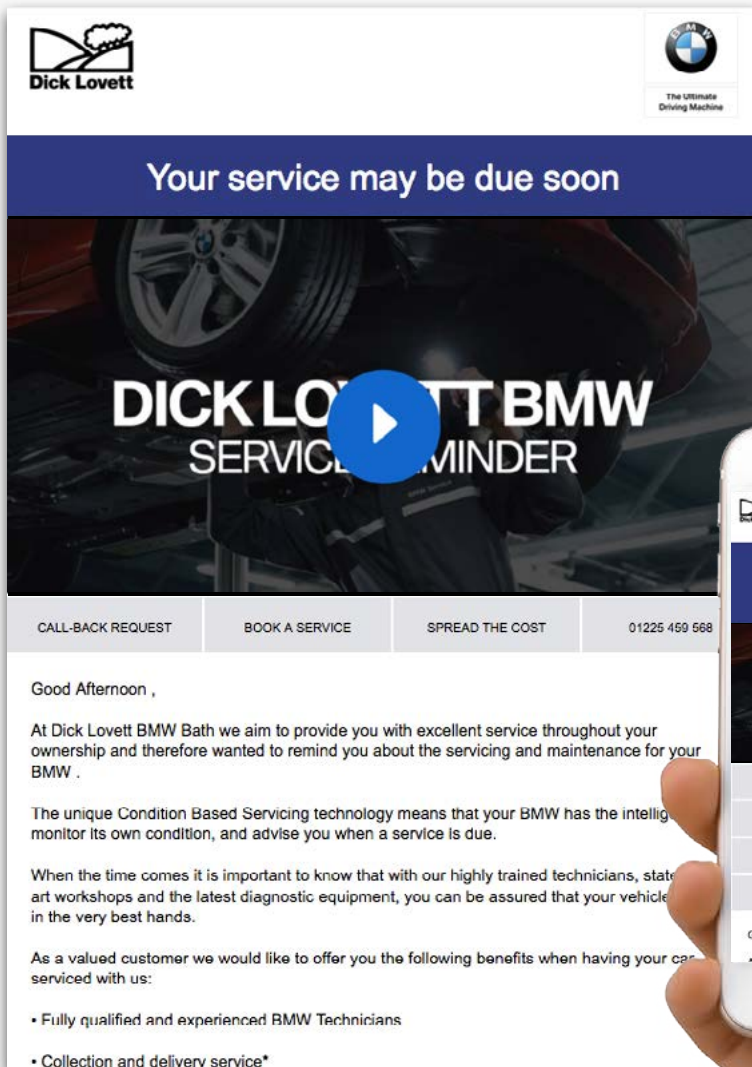
# AFTERSALES CONTACT PLAN

AFTERSALES	Send When
Service -60	Service Rem 60 days prior to 'Service Due' date
Service -60 SMS	SMS
Service -30	Service Rem 30 days prior to 'Service Due' date
Service -30 SMS	SMS
Service +11 months	Service Rem 11 months lapsed
Service CSI	3 days after Last Work
CSI Thank You	30 mins after questionnaire completed - if scored 'YES'
MOT -60	MOT Rem 60 days prior to 'MOT Due' date
MOT -60 SMS	SMS
MOT -30	MOT Rem 30 days prior to 'MOT Due' date
MOT -30 SMS	SMS
MOT 11 months	MOT Rem 11 Months lapsed
Service And MOT -60	Service And MOT Rem 60 days prior to 'Service & MOT Due' date
Service And MOT -60 SMS	SMS
Service And MOT -30	Service And MOT Rem 30 days prior to 'Service & MOT Due' date
Service And MOT -30 SMS	SMS
Service And MOT 11 months	Service And MOT Rem 11 Months lapsed
	*Service & MOT due date within 30 days of each other. Triggered on the due date which is the soonest.
EOWC Warranty Expiry	33 Months after Registration Date. To include MOT and Time to change message
We want your car	MINI 21 months after Sales Date. BMW 29 Months after Sales Date
Vehicle Anniversary	12 months after reg date.
Health Check and Valet - We have missed you...	14 Months after reg Date. WIP is not open. Using the 02R Report on CDK DRIVE
Service Appointment Reminder	2 days before Date Due In. If WIP is open
Service Appointment Reminder SMS	1 day before Date Due In. If WIP is open. No email or email not opened.
M Car Running In Service	Sent 1 Week after Reg Date. To remind customers to book in for 1200 miles running in service

# ECRM PROCESS



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## SERVICE DUE

### Message

- Generic, all about first service reminder
- Needs to be direct and to the point.
- Customer may have service plan, so must say this will be covered as part of your plan.

### Rule

60 Days before Due Date in DRIVE. 30 Day Reminder then sent if no booking has been made and there is no open WIP.

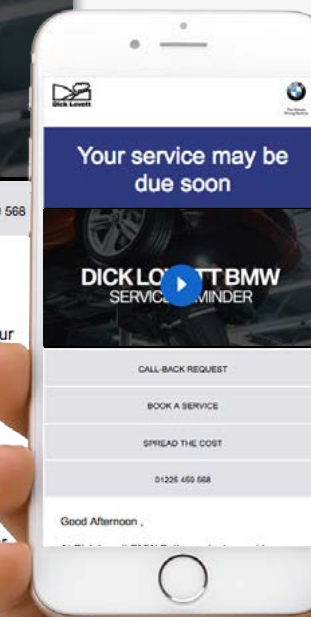
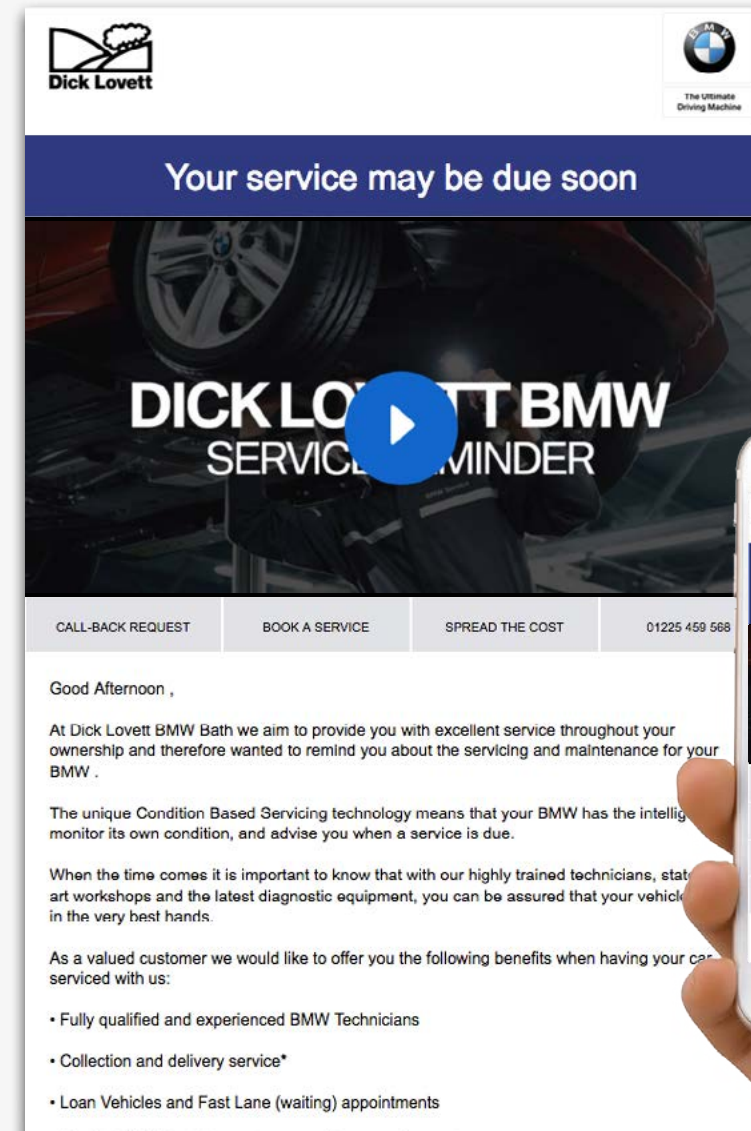
### Response Mechanism

Reply Email / WebForm Pull Through/ Click to Call

### Criteria for Email / SMS Message

- 60 days before Service Due Date on Kerridge
- Reg date between 0-20 months from the Service Due Date
- Exclude any vehicle where there is a future open WIP
- Exclude “stop e-mail” flags

### Contact Code



## SERVICE + 11 MONTHS - SECOND CHANCE

### Message

- Generic, all about first service reminder
- Needs to be direct and to the point.
- Customer may have service plan, so must say this will be covered as part of your plan.

### Rule

Sent 11 months after Service Due Date in DRIVE - Lapsed Customer

### Response Mechanism

Reply Email / WebForm Pull Through/ Click to Call

### Criteria for Email / SMS Message

- 60 days before Service Due Date on Kerridge
- Reg date between 0-20 months from the Service Due Date
- Exclude any vehicle where there is a future open WIP
- Exclude “stop e-mail” flags

### Contact Code



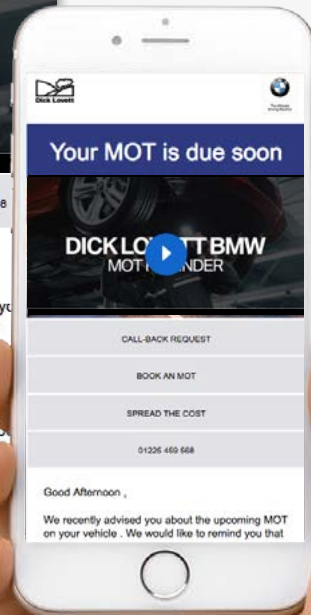
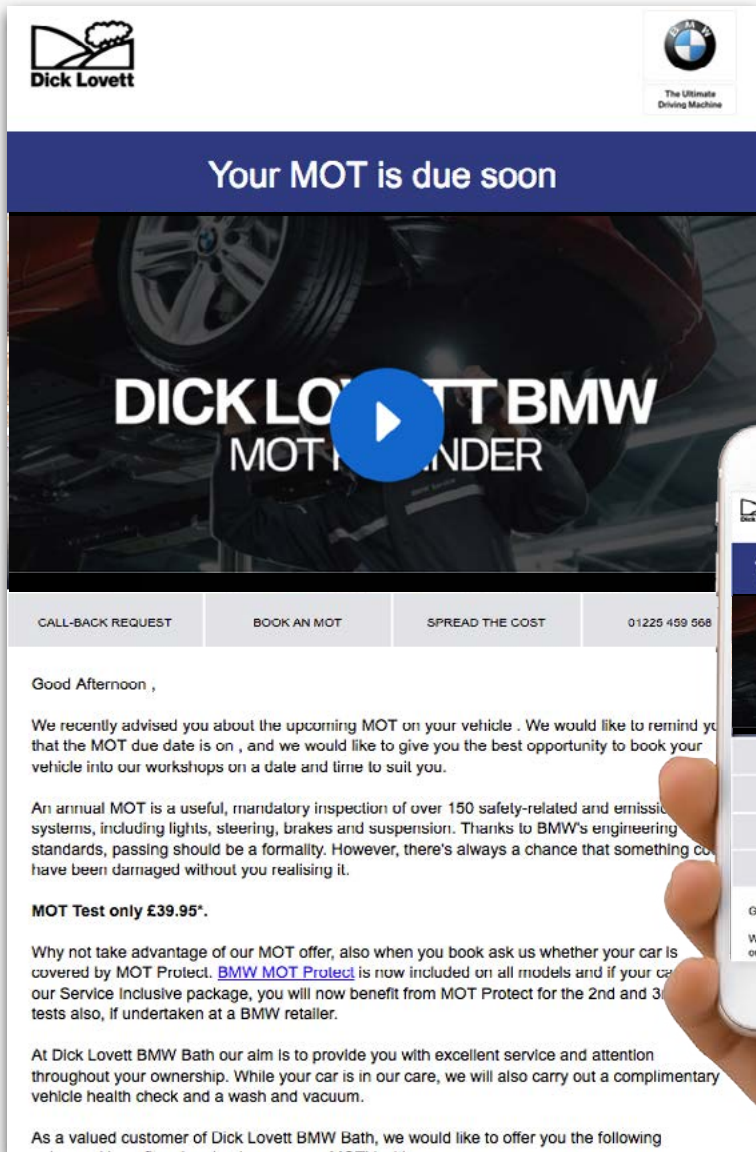
DICK LOVETT BMW  
CUSTOMER JOURNEY

AFTERSALES









## MOT + 11 MONTHS - SECOND CHANCE

### Message

- Lead with MOT now due. Needs to be direct. MOT Protect Reminder.
- Air Conditioning Service and Brake Fluid Service is also promoted in this message.

### Rule

Sent 11 months after Service Due Date in DRIVE - Lapsed Customer

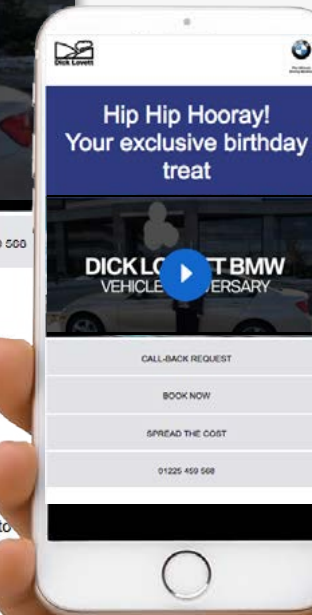
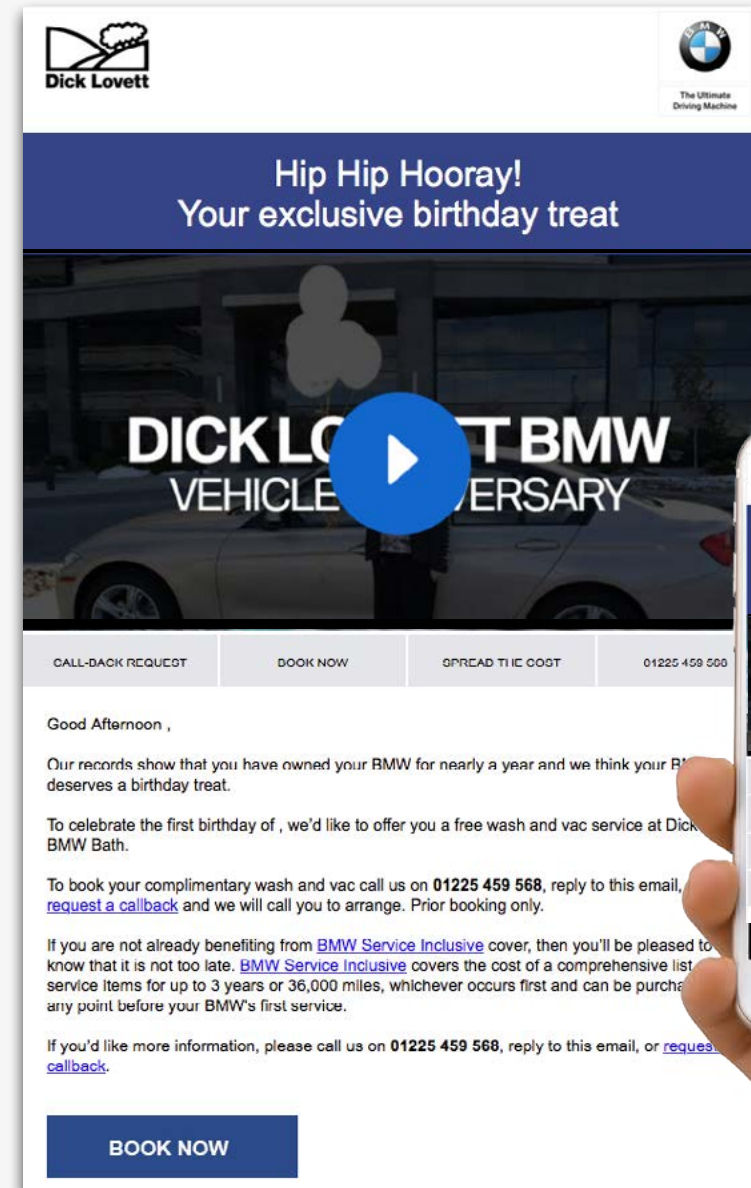
### Response Mechanism

Reply Email / WebForm Pull Through/ Click to Call

### Criteria for Email / SMS Message

- 60 days before MOT Due Date on Kerridge
- Exclude any vehicle where there is a future open WIP
- Exclude "stop e-mail" flags

### Contact Code



## VEHICLE ANNIVERSARY.

### Message

- Happy Birthday Message to customer from Sales person, SM, ASM and HOB.
- Offers a Complimentary VHC and Wash & Vac

### Rule

330 Days after Reg Date

### Response Mechanism

Reply Email / WebForm Pull Through/ Click to Call

### Criteria for Email / SMS Message

- 30 Days before Reg Date on DRIVE

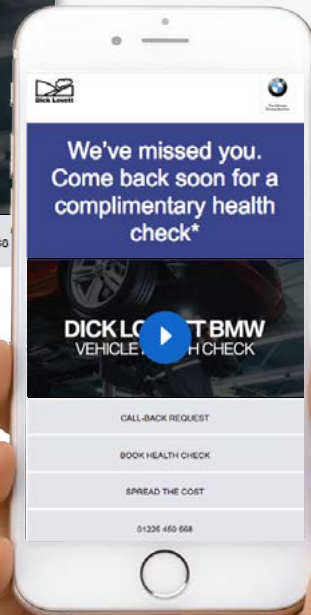
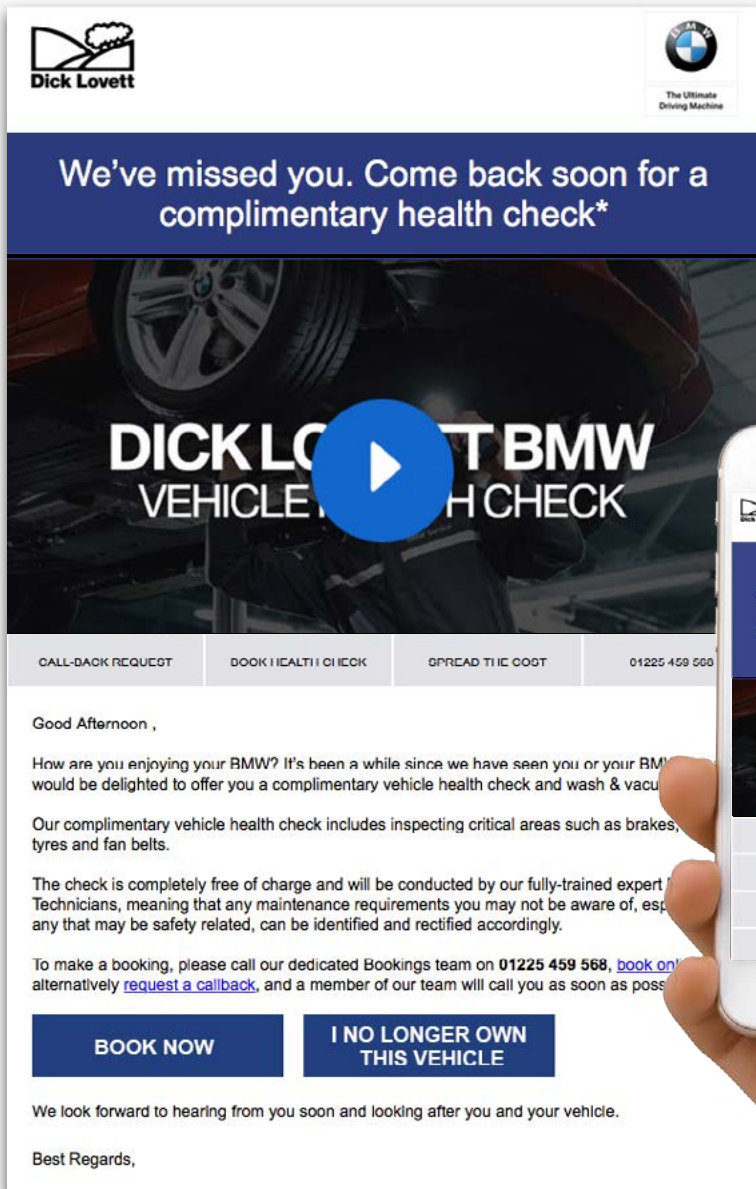
### Contact Code



DICK LOVETT BMW  
CUSTOMER JOURNEY

AFTERSALES





## VEHICLE HEALTH CHECK.

### Message

- Courtesy email to offer complimentary health check and Mini Valet
- How are you enjoying your BMW? We have not seen you for a while, so call in and enjoy some complimentary refreshments.

### Rule

14 months post delivery and no workshop visit logged. Designed to improve Active Service Customers and Retention Rate.

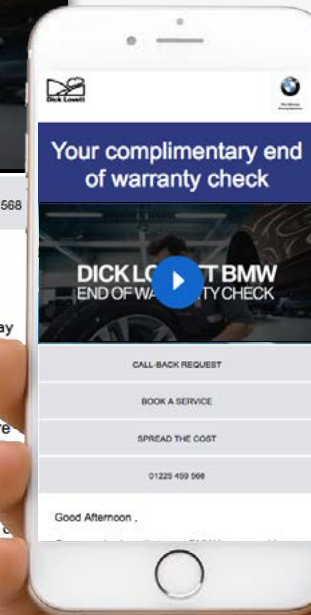
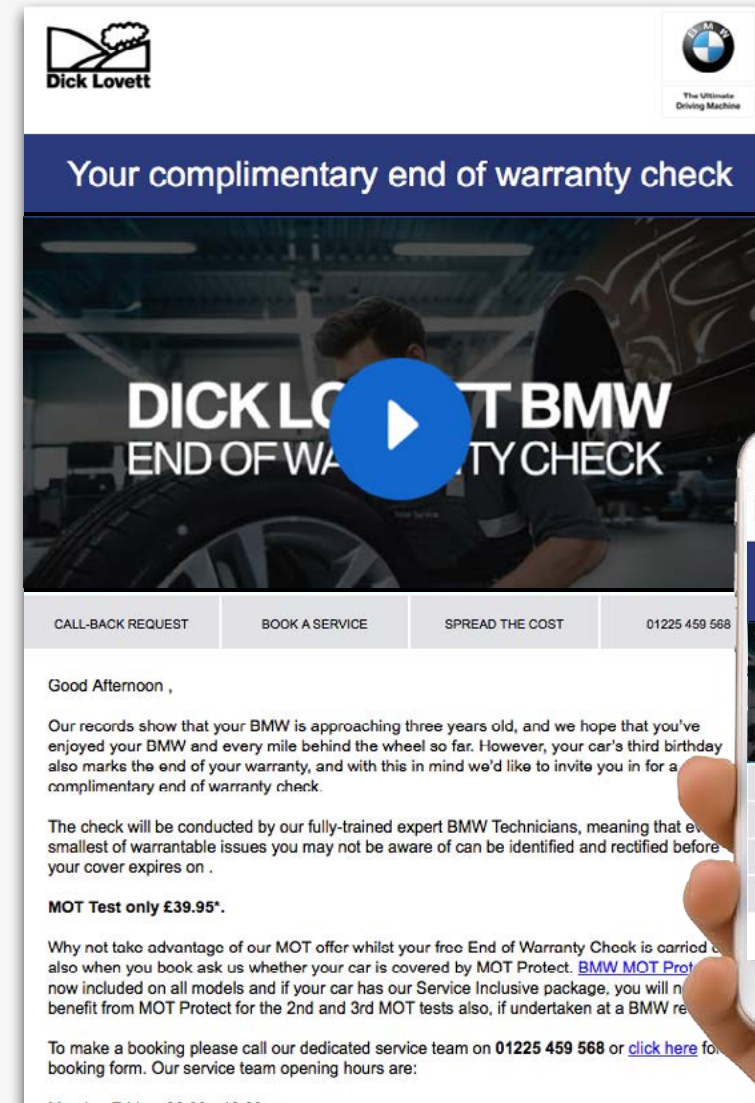
### Response Mechanism

Reply Email / WebForm Pull Through/ Click to Call

### Criteria for Email / SMS Message

- 14 months after last work date on DRIVE
- Exclude “stop e-mail” flags
- Exclude “stop e-mail” flags

### Contact Code



## END OF WARRANTY CHECK.

### Message

- The manufacturer's warranty is coming to an end, and we would like to invite you in for an EOWC.
- Reminder that MOT will shortly be due.

### Rule

\*New Car Only - 990 days since date of delivery

### Response Mechanism

Reply Email / WebForm Pull Through/ Click to Call

### Criteria for Email / SMS Message

- Broadcast 35 days before 33rd month
- Exclude “stop e-mail” flags
- Exclude any vehicle where there is a future open WIP

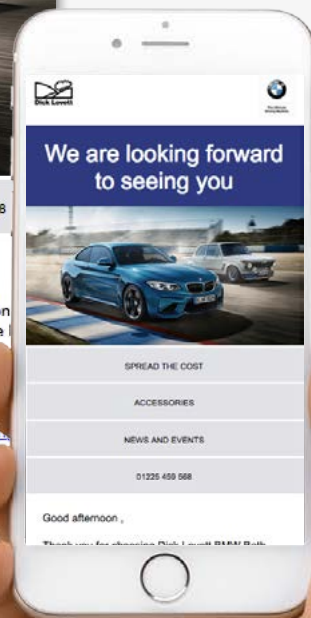
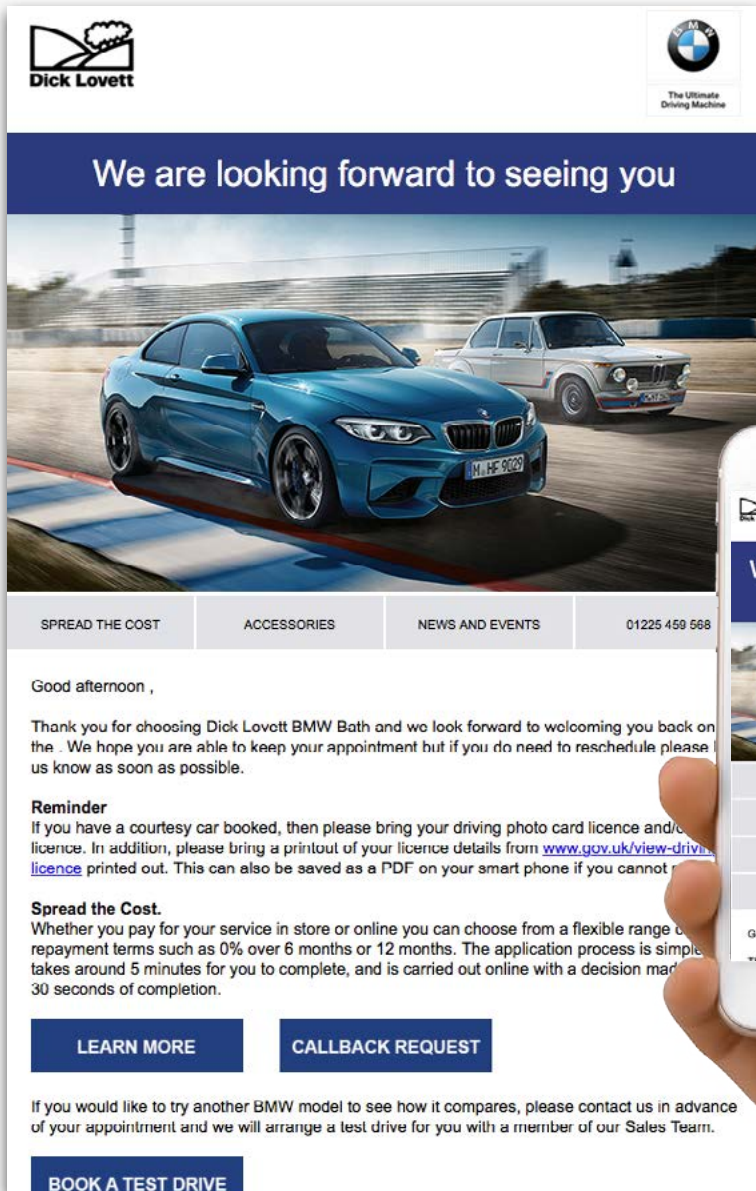
### Contact Code



DICK LOVETT BMW  
CUSTOMER JOURNEY

AFTERSALES





## BOOKING APPOINTMENT REMINDER.

### Message

- Appointment Reminder message broadcast 2 days before appointment.
- Reminds customer of Mobility options and a reminder to bring driving licence.
- Highlights the DIVIDO Offer

### Rule

14 months post delivery and no workshop visit logged. Designed to improve Active Service Customers and Retention Rate.

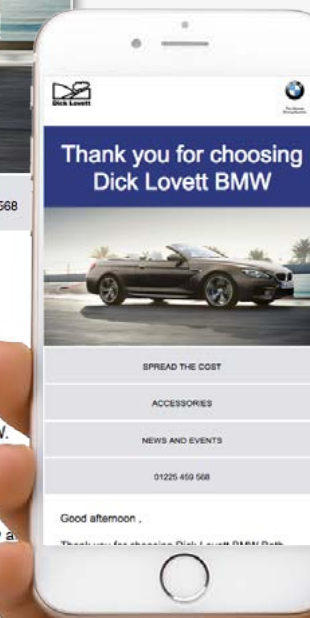
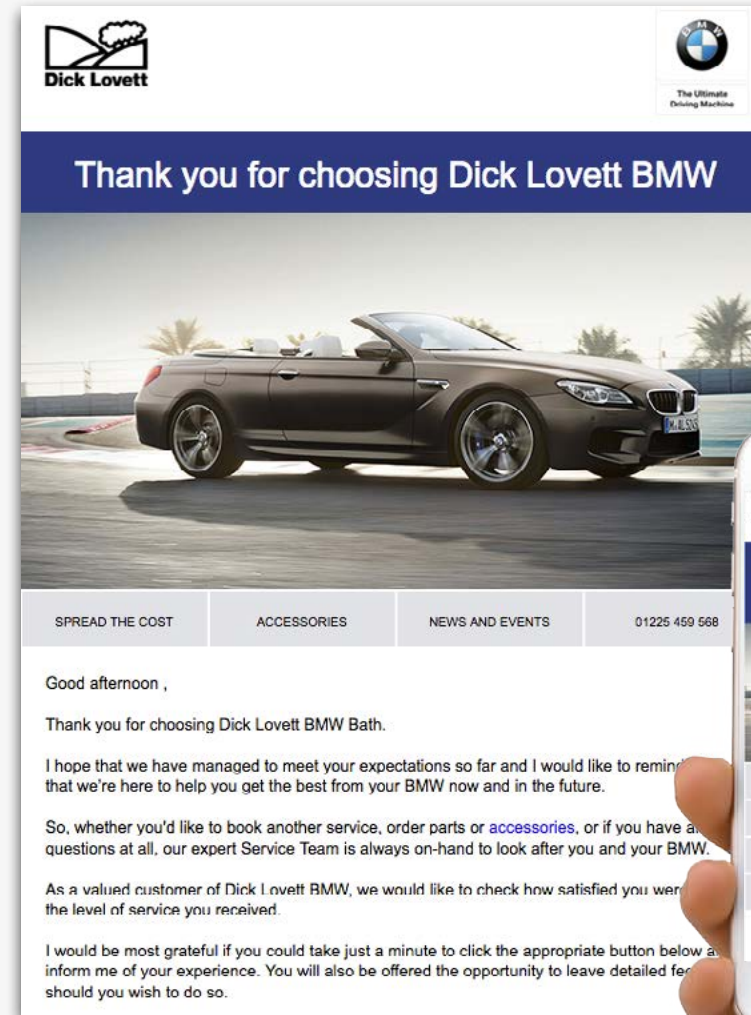
### Response Mechanism

Reply Email / WebForm Pull Through/ Click to Call

### Criteria for Email / SMS Message

- Exclude “stop e-mail” flags
- Exclude any vehicle where there is a future open WIP

### Contact Code



## POST SERVICE THANKS.

### Message

- Thanks the customer for their business
- Link to CSI Survey
- Highlights the DIVIDO Offer

### Rule

14 months post delivery and no workshop visit logged. Designed to improve Active Service Customers and Retention Rate.

### Response Mechanism

Reply Email / WebForm Pull Through/ Click to Call

### Criteria for Email / SMS Message

- Exclude “stop e-mail” flags
- Exclude any vehicle where there is a future open WIP

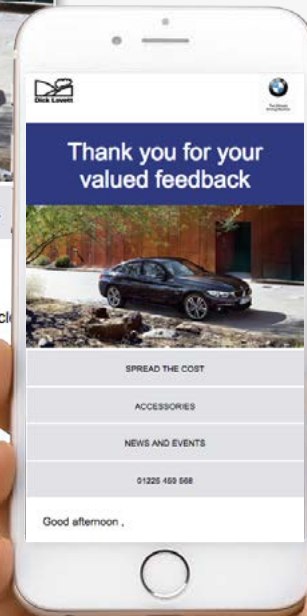
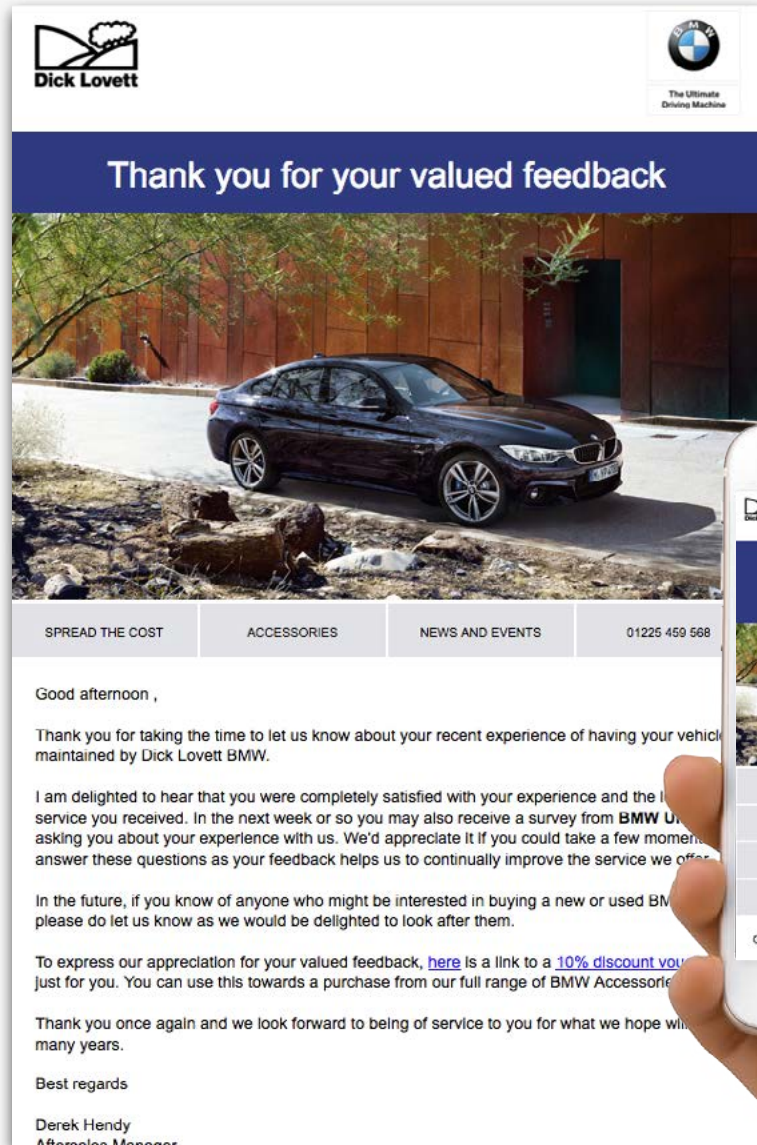
### Contact Code



DICK LOVETT BMW  
CUSTOMER JOURNEY

AFTERSALES





## CSI THANK YOU.

### Message

- Thank you message to those that scored 8 or above on the CSI Survey
- Introduces 10% Accessory Voucher

### Rule

14 months post delivery and no workshop visit logged. Designed to improve Active Service Customers and Retention Rate.

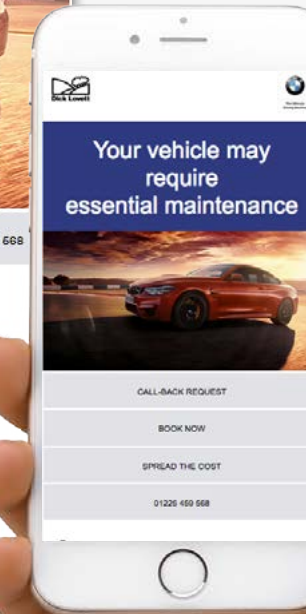
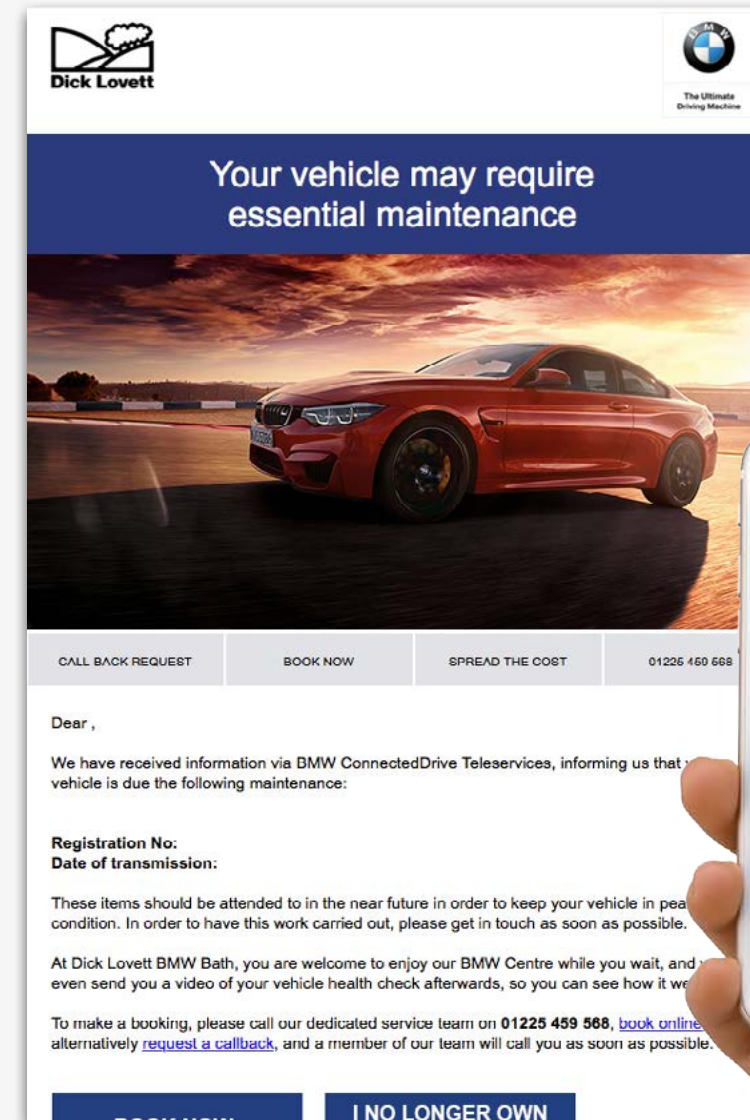
### Response Mechanism

Reply Email / WebForm Pull Through/ Click to Call

### Criteria for Email / SMS Message

- Exclude “stop e-mail” flags
- Exclude any vehicle where there is a future open WIP

### Contact Code



## TELESERVICE REMINDER.

### Message

- Related to the Job Description received in the Teleservices Ticket

### Rule

14 months post delivery and no workshop visit logged. Designed to improve Active Service Customers and Retention Rate.

### Response Mechanism

Reply Email / WebForm Pull Through/ Click to Call

### Criteria for Email / SMS Message

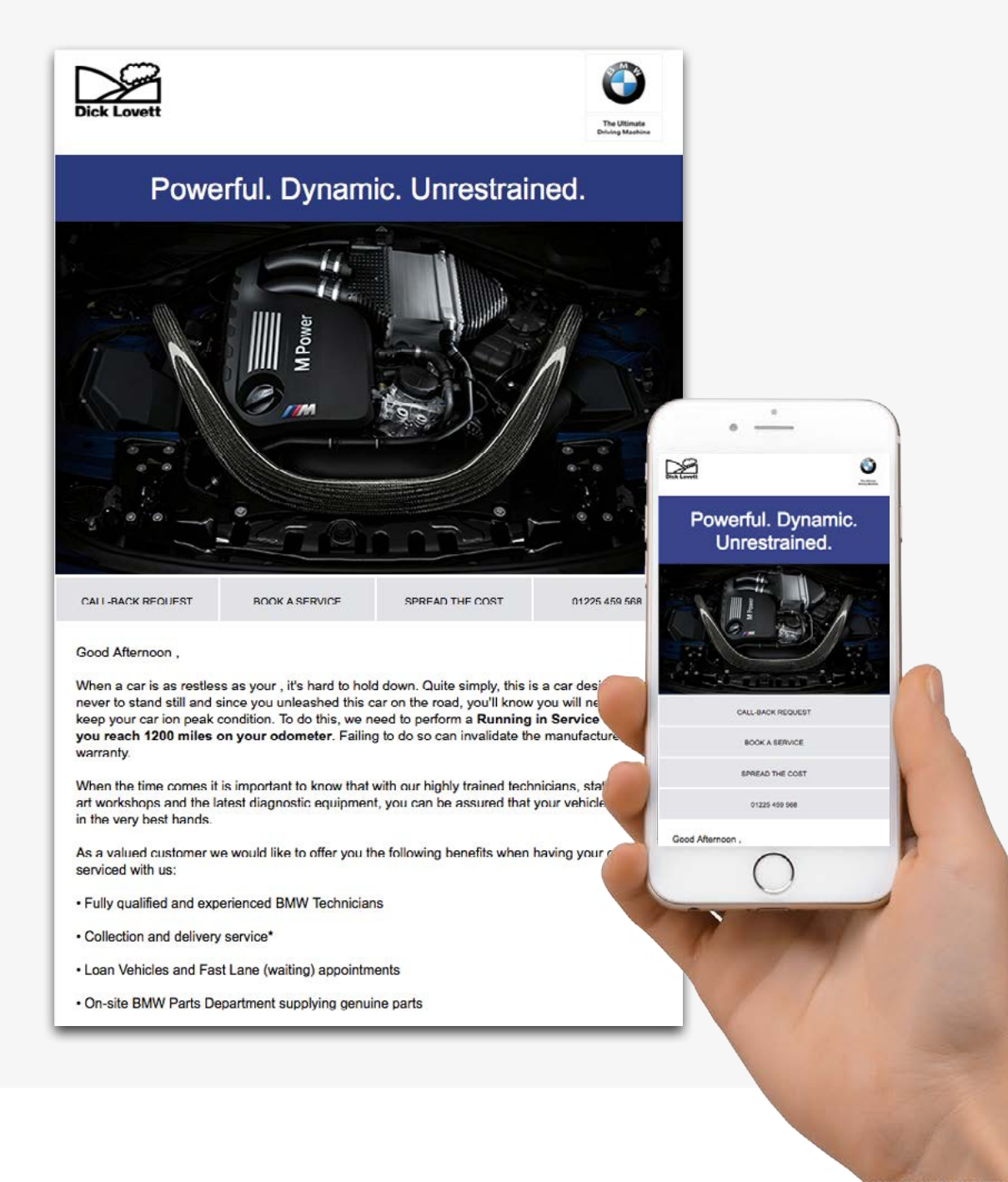
- On receipt of Ticket from Car Connected Drive - Real Time
- Where we are nominated Service Partner
- Exclude “stop e-mail” flags
- Exclude any vehicle where there is a future open WIP

### Contact Code



DICK LOVETT BMW  
CUSTOMER JOURNEY

AFTERSALES



# SOCIAL eCRM JOURNEY

Click below to view our eCRM videos

## M CAR RUNNING IN SERVICE.

### Message

- Book your M Car Running In Service before you reach 1200 miles.

### Rule

Sent 1 Week after Reg Date. To remind customers to book in for 1200 miles running in service

### Response Mechanism

Reply Email / WebForm Pull Through/ Click to Call

### Criteria for Email / SMS Message

- Sent 1 week after delivery date
- Exclude “stop e-mail” flags

### Contact Code



DICK LOVETT BMW  
CUSTOMER JOURNEY

AFTERSALES



# SOCIAL eCRM JOURNEY

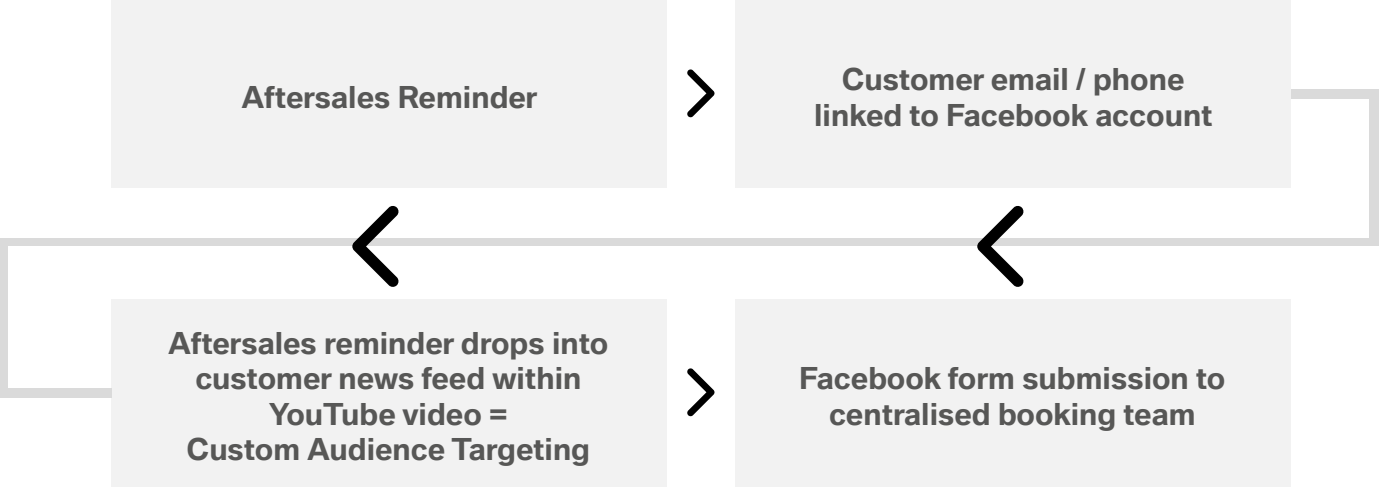


DICK LOVETT BMW  
CUSTOMER JOURNEY

SOCIAL eCRM  
JOURNEY

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Our communications triggered in a personalised way through customer social experience.



DICK LOVETT BMW  
CUSTOMER JOURNEY

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