



# Dealer Intelligence

The Smart Solution to Customer Relationship Management

## Car dealerships are shifting gears with Dealer Intelligence (DI):

Designed with extensive research, knowledge, and *real* experience in the automotive industry, DI simplifies everyday tasks, freeing your team to focus on making the sales.

## What is Dealer Intelligence?

- Dealer Intelligence is a Customer Relationship Management (CRM) system built to meet the demanding needs of busy car dealerships.
- Dealer Intelligence is the product of engineers who combined their expertise in software development with the practical workings of real-life dealerships.
- Dealer Intelligence is:

**EVOLVED:** repeatedly rebuilt and modified based on live user feedback during our testing phase until 100% user satisfaction was achieved.

**PROVEN:** rigorously tested by 6 dealerships in Greater Vancouver with glowing feedback from Managers regarding efficiency and ease of use.

**INTELLIGENT:** transforms dealership activities into intelligent reports your team will use to boost sales.

**COMPATIBLE:** integrates well with existing Auto Dealership Management systems to make optimum use of all information

### KEY FEATURES:

- 100% Web based - No software to download
- Live monitoring of your Sales Team performance 24/7/365
- Analytics on demand providing you real time reports anytime
- All Smart phones supported
- SSL Secure Connection
- Easy, single - point data entry of all prospects
- Smart multiple customer and inventory search lists
- Summary of task items and real-time alerts and notifications to promote follow up
- Customizable Customer Fields and Worksheets
- Centralized email system integrated within DI
- Customizable automated email templates

### **IMPROVE YOUR SALES TEAM:**

- The sales process is STREAMLINED, into a series of customer-focused steps designed to increase win rates.
- Quickly manage and assign tasks to different team members.
- Easily monitor PA progress and customer interactions.
- Enhance team coordination and efficiency, with a single, sharable customer database

### **STRENGTHEN CUSTOMER INTERACTIONS**

- Tools designed to increase customer retention, satisfaction and loyalty
- Easily record and track a growing client database, and add custom notes
- Appropriate customer info collection.
- Built in intelligence ensures that all clients are followed-up systematically according to customized (user-defined) store policies

### **USER FRIENDLY**

- Most systems contain numerous tools that require a high level of time commitment from users. DI is simple, yet it contains all the right tools to accelerate your dealership.
- 100% reported usage rates

### **EFFECTIVE TRAINING AND SUPPORT**

- Because we believe effective training is an essential component to the success of any system, our team at Movidia is dedicated to providing your entire dealership team with the training they need.
- We will provide ongoing support and promote feedback through telephone and web access tools to ensure user satisfaction.

### **USEFUL REPORTS GENERATOR**

- Flexible and rapid method of producing reports using web-based tools, saving you valuable time and giving you insight into all business activities.
- Numerous customizable reports – *Traffic Reports, Showroom vs. Purchased Reports, Client Enquiry Reports, Internet Activity Reports, Client Visit Type Reports, Transfer Activity Reports and Product Advisor Activity Reports.*
- Gain total visibility of store happenings and gauge exactly how well your dealership is performing.
- Capture and leverage the success of the highest performers.
- Discover what works – Identify and correct negative trends, measure efficiencies (or inefficiencies), and make informed decisions.
- Get ahead of the game – predict trends and behaviors and align strategies.

## Dealer Intelligence Screenshots

Outlook Home Screen – View a summary of current and overdue tasks, as well as client Activities.

**DAYS OVERDUE TASKS ON 26 OF SEPTEMBER, 2012 FOR TEST, USER**

Days	Client	Type	Date	Action	User	Notes	Entered by
1	CLIENT_TEST_3	Close Deal	25-Sep-2012 18:39	Scheduled by	TEST, USER		USER TEST
2		Test Drive	24-Sep-2012 18:39	Scheduled by	TEST, USER		USER TEST
4		Phone Call	22-Sep-2012 15:43	Scheduled by	TEST, USER		USER TEST
1	CLIENT_TEST_1	Write up	25-Sep-2012 15:50	Set on hold by	TEST, USER		USER TEST
3	CLIENT_TEST_2	Email	23-Sep-2012 13:00	Scheduled by	TEST, USER		USER TEST

**TASKS ON 26 OF SEPTEMBER, 2012 FOR TEST, USER**

Client	Type	Date	Action	User	Notes	Entered by
Movidia	Email	26-Sep-2012 15:42	Completed by	TEST, USER		USER TEST
CLIENT_TEST	Email	26-Sep-2012 15:42	Completed by	TEST, USER		USER TEST
CLIENT_TEST_2	Email	26-Sep-2012 15:42	Completed by	TEST, USER		USER TEST
	Email	26-Sep-2012 14:41	Completed by	TEST, USER		USER TEST
	Email	26-Sep-2012 14:41	Completed by	TEST, USER		USER TEST
	Email	26-Sep-2012 14:41	Completed by	TEST, USER		USER TEST

**CLIENT ACTIVITY IN THE LAST 5 DAYS FOR TEST, USER**

Date	Client	Phone	Year	Make	Model	Package	Color	EM	TD	WU	SD	TF
02-Oct-2012	CLIENT_TEST	778-288-7277	2011	ACURA	TL		BELLANOVA WHITE PEARL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Click the header for information

You have successfully logged in!

\* Choose to display tasks and activities for 1, 5, 15, 30, or 365 days.

Create Automated Email Templates – Compose messages to include model pictures, vehicle information, store brochures, store links, etc.

**Thank You!**

OPENROAD LEXUS RICHMOND  
5531 Parkwood Way  
Richmond, BC  
V6V 2A6  
<http://www.openroadlexus.com>

Dear Client Test

Thank you for contacting us at OPENROAD LEXUS RICHMOND. Please find some helpful resources while you access new vehicles and options that best meet your needs.

eBrochures — download vehicle brochures at the bottom of this page  
Helpful Resource Links: visit [Useful Links](#) for consumer reviews, Lexus news, safety ratings, fuel efficiency, awards, and more.

For your convenience, we offer extended sales hours: Monday to Thursday 9:00 am to 9:00 pm, Friday to Saturday 9:00 am to 6:00 pm, Sunday 11:00 am to 5:00 pm.

I hope you join us soon. At OPENROAD LEXUS RICHMOND we are very proud that 91% of our clients would recommend us to friends and family. Please contact me if there is any other way I can help you to "Experience the OpenRoad Difference." I look forward to making your car buying experience the start of many years of happy driving and happy memories.

Sincerely,

**USER TEST**  
Product Specialist  
[usertest@movidia.ca](mailto:usertest@movidia.ca)  
123-456-7890 (office)  
123-456-7890 (cell)

**HAPPY BIRTHDAY!**

**ACURA**

12 Demo Street Test  
Richmond, BC  
V5H V5H  
[acura.ca/di/demo](http://acura.ca/di/demo)

Dear Client Test

We at Acura are thinking of you on this important day and hoping it is filled with joy.  
Happy birthday!

Regards,

**USER TEST**  
Product Specialist  
[usertest@movidia.ca](mailto:usertest@movidia.ca)  
123-456-7890 (office)  
123-456-7890 (cell)

\*Set up automated global, store, and product advisor emails to send out to clients.

## Access Store Inventory

Outlook Reports Welcome Messages User status Management Clients **Inventory** Switch user Sign out as USER

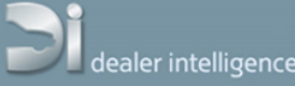
STOCK NO	YEAR	MAKE	MODEL	DESCRIPTION	SERIAL	STORE	TYPE
e.g. C56876	e.g. 2011	e.g. Mazda	e.g. CSX, CIVIC, LX570	e.g. IS 250 RWD MANUAL, HYBRID	e.g. JTHBF5C29A5116950	All stores	All types

Display 5 10 20 50 100 Items      Displaying 1-20 of 277 matches      [Next](#) | [Last](#)

STOCK	YEAR	MAKE	MODEL	DESCRIPTION	SERIAL #	TYPE	DATE	DAYS	STORE
AC0897	2009	HONDA	ACCORD CROSSTOUR	COUPE EXL V6 5AT	1HGCS22889A800897	New	03-Jul-2009	1191	Honda
AC1215	2010	HONDA	ACCORD CROSSTOUR	2D EX-L NAVI 5AT	1HGCS1B87AA801215	New	10-Sep-2010	757	Honda
AR0309	2010	HONDA	ACCORD CROSSTOUR	4D EX-L V6 NAVI 5AT	1HGCP3F81AA800309	New	04-Mar-2010	947	Honda
AR0862	2010	HONDA	ACCORD CROSSTOUR	4D EX-L V6 5AT	1HGCP3F83AA800862	New	10-Jul-2010	819	Honda
AR1009	2010	HONDA	ACCORD CROSSTOUR	4D EX-L V6 NAVI 5AT	1HGCP3F85AA801009	New	20-Jul-2010	809	Honda
AR1074	2010	HONDA	ACCORD CROSSTOUR	4D EX-L V6 NAVI 5AT	1HGCP3F85AA801074	New	04-Aug-2010	794	Honda
AR2097	2009	HONDA	ACCORD CROSSTOUR	SEDAN EXL NAVI 5AT	1HGCP26839A802097	New	16-Oct-2008	1451	Honda
AR3078	2010	HONDA	ACCORD CROSSTOUR	4D EX-L NAVI 5AT	1HGCP2F89AA803078	New	02-Dec-2009	1039	Honda
AR3448	2010	HONDA	ACCORD CROSSTOUR	4D EX 5AT	1HGCP2F76AA803448	New	02-Mar-2010	949	Honda
AR4276	2010	HONDA	ACCORD CROSSTOUR	4D EX-L NAVI 5AT	1HGCP2F87AA804276	New	06-Feb-2010	973	Honda
AR5839	2009	HONDA	ACCORD CROSSTOUR	SEDAN EXL NAVI 5AT	1HGCP26839A805839	New	31-Jan-2009	1344	Honda
AR6871	2010	HONDA	ACCORD CROSSTOUR	4D EX-L 5AT	1HGCP2F89AA806871	New	05-Aug-2010	793	Honda
AR7638	2010	HONDA	ACCORD CROSSTOUR	4D LX 5AT	1HGCP2F32AA807638	New	10-Jul-2010	819	Honda
CS00969	2010	ACURA	CSX	N/A	2HHFD5F74AH200969	New	05-Feb-2010	974	Acura
CS01024	2010	ACURA	CSX	N/A	2HHFD5E74AH201024	New	12-Feb-2010	967	Acura
CS01120	2010	ACURA	CSX	N/A	2HHFD5F72AH201120	New	22-Feb-2010	957	Acura
CS01275	2010	ACURA	CSX	N/A	2HHFD5F79AH201275	New	09-Mar-2010	942	Acura
CS01326	2010	ACURA	CSX	N/A	2HHFD5F70AH201326	New	23-Mar-2010	928	Acura
CS01536	2010	ACURA	CSX	N/A	2HHFD5E79AH201536	New	01-Jun-2010	858	Acura
CS01870	2010	ACURA	CSX	N/A	2HHFD5F71AH201870	New	27-Sep-2010	740	Acura

\* Add search criteria to locate vehicles

## Manage Customer Profiles – Create profiles, set tasks/reminders, transfer activities to Dashboard

 Outlook Reports Welcome Messages User status Management **Clients** Inventory Switch user Sign out as USER

Personal Information Address Email Telephone **Visit** Tasks Activities Loyalty Program

**Last Visit**  
Acura  
User Test  
25-Sep-2012  
[Add new visit](#)

STATUS	STORE	DATE	TYPE	YEAR	MAKE	MODEL	TRIM	COLOR	NOTES	ASSIGNED TO	OPTIONS
ACTIVE	Acura	05-Oct-2012 02:41	Be Back	2010	ACURA	TSX	N/A	PALLANIUM SILVER METALLIC		TEST, USER	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Print new Worksheet</a> <a href="#">Demonstrator Agreement</a>
ACTIVE	Acura	25-Sep-2012 15:45	Walk in	2009	ACURA	TL	N/A	PALLANIUM SILVER METALLIC		TEST, USER	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Print new Worksheet</a> <a href="#">Demonstrator Agreement</a>

TEST CLIENT

\*Input multiple enquiries

**Customize & Print Worksheets** – Our implementation team will work closely with your dealership to design and develop appropriate worksheets.

### TRADE APPRAISAL

NAME: TEST 1 CLIENT P. ADV. VSM.

VEHICLE DETAILS:

YEAR	MAKE	MODEL	TRIM	BODY	COLOUR
Engine Size	AC Cor	Leather	R. Sides	Protection Pkg	Ext. Warranty
Automatic	P. Windows	ABS	CD Player	Crash Control	Trunk Dress
5-SP Manual	Keyless	Sunroof	P. Mirror		
	4WD/AWD	Maps	P. Locks		

NOTES:

RECONDITIONING REQUIRED:

Body		Estimate
Paint		
F. Bumper		
R. Bumper		
License		
Wash		
Grease		
Brake		
Transmission		
Engine		
Steering / Alignment / Suspension		
Brakes		
Tires		
Mobile Point Repair		
Wheel Covers		
Car Wash		
Computer Detail		
Stain Key / Fog		
Back Seat		
Trunk		
Front Panel		
Solar Panel		
Front Bumper		
Hud Cap		
Wipers		
Seat		
Rear Window		
Hud Cap		
Back Panel		
Solar Panel		
Rear Bumper		
Back Seat		

DATE: STICKER #:

### NEW VEHICLE WORKSHEET (WITH TRADE)

DATE: 05-08-12

CUSTOMER INFORMATION:

NAME: TEST 1 CLIENT POSTAL CODE:

ADDRESS:

PHONE #: CELL # 123-456-7890 WORK #:

EMAIL: SOURCE UP | BS | RVN | REF | REPEAT | STAFF:

APPRAISAL:

XL | XR | OOP | HO DECLARATION NO YES \$

YEAR MAKE MODEL COLOUR SFX CYL

SERIAL # KMS

PURCHASE:

NEW  USED  DEMO  DECLARATION

YEAR 2010 MAKE ACURA MODEL ITX MODEL CODE WA SFX CYL

COLOUR PALLADIUM SILVER METALLIC COLOUR CODE BA STOCK #

SERIAL # DELIVERY PRICE \$ PAYMENT METHOD CASH FINANCE LEASE

DEPOSIT \$ PAYMENT METHOD CREDIT DEBIT CASH CHQ

DETAILS / INSTRUCTIONS:

TERMS AGREED TO:

CLIENT ACCEPTANCE

MANAGER ACCEPTANCE

USER TEST PRODUCT ADVISOR

TRADE:

PRICE \$5000

TRADE-IN ALLOWANCE

FREIGHT + PDI

AIR CONDITIONER LEVY \$100

TIRE LEVY \$25

PRICE DIFFERENCE

D.O.C. - FIXED CHARGE

TOTAL PRICE (SUBJECT TO HST)

MARKET VALUE

LESS RECONDITIONING

TRADE VALUE

**Generate Real-Time Reports** - Analytics on demand providing you real time reports anytime.

### CLIENT ENQUIRY

From: 01/01/2012 To: 12/31/2012 Set Dates

Today This Week Last Week This Month Last Month This Year Last Year

Status:  Active  Inactive  Sold  All

Vehicle Type:  New  Demo  Used  All

Year: Unknown

Make: TOYOTA

Model[Model Code]: Unknown

Package: Unknown

Search Clean Form

CLIENT ENQUIRY

Click the header for information

Date	Client	Phone	Year	Make	Model	Package	Color	En	TD	WU	SD	TF
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Print report

\*Client Enquiry Reports

### TMS report

From: 09/01/2012 To: 09/27/2012 Set Dates

Today This Week Last Week This Month Last Month This Year Last Year

	Sep 2012	UPS	PRES	DEMO	WORKSHEET	NEW SLS	USED SLS	SLS TOTAL	SLS TOTAL WITH EMAIL	CLS RATIO	EMAIL CAPTURE	CALL COMPLETED	CALL COMPLETED 48 HOURS						
STAFF	MTD	YTD	MTD	YTD	MTD	%	YTD	%	MTD	%	YTD	%	MTD	YTD	MTD	YTD	MTD	YTD	
TESTUSER.A	8	90	0	0	0	0%	2	2%	0	0%	0	0%	0	0	0	0	0	0	0%
TESTUSER.B	11	112	12	102	4	36%	63	56%	0	0%	21	19%	0	11	3	0	14	0	78%
TESTUSER.C	6	200	6	154	6	100%	123	62%	1	17%	35	18%	1	32	0	4	1	36	0%
TESTUSER.D	24	193	9	146	7	29%	106	55%	1	4%	52	27%	1	33	0	14	1	47	100%
TESTUSER.E	11	72	10	71	8	73%	48	67%	0	0%	6	8%	0	4	0	4	0	8	0
All PAs	60	663	37	473	25	42%	342	52%	2	3%	114	17%	2	80	0	25	2	105	50%

Print report

\*Traffic Management System Reports

**Beat the competition and take the lead with Dealer Intelligence today!**

Contact us for LOG-IN information at 604.278.2773, or visit us at [movidia.ca](http://movidia.ca)