

**vitalSoftware**

# ContactTracker

## Powerful Solutions for the Automotive Industry

- ✓ Lead Management, Prospecting and Milestone Tools
- ✓ Bi-Directional Data Integration With All Leading DMS Systems
- ✓ iPad, Safari, Chrome, Mozilla and Other Browsers
- ✓ Detailed Marketing Services - Letter, HTML Email, SMS and Calls
- ✓ Service Bookings, Post-Service Follow-Up and CSI Management
- ✓ Comprehensive Prospect Sales, Service and Parts Reporting

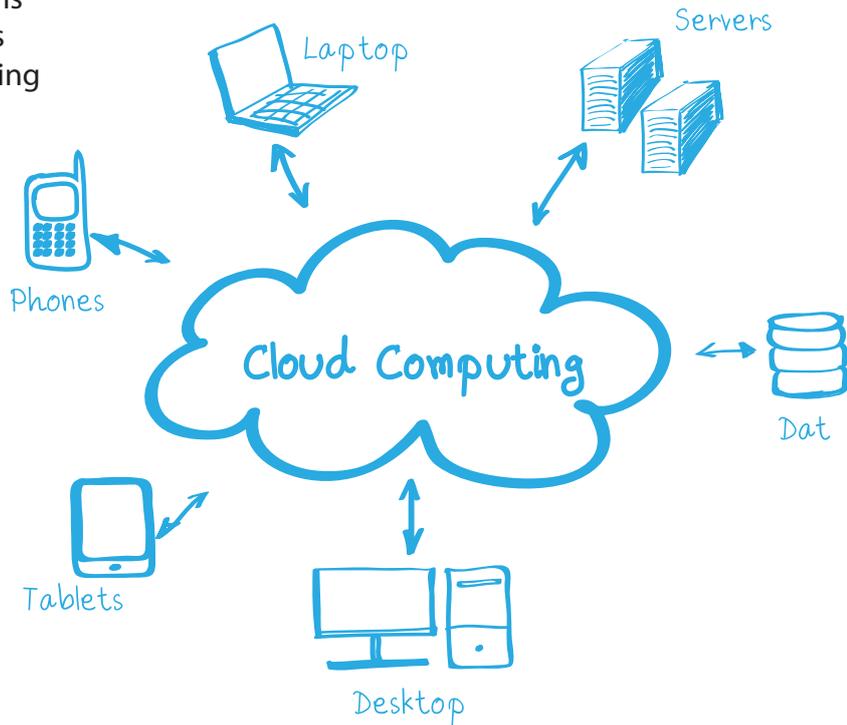
[www.vitalsoftware.net](http://www.vitalsoftware.net)

# Who We Are and What We Do

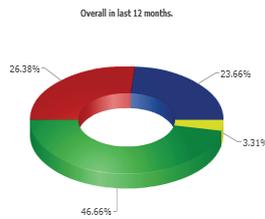
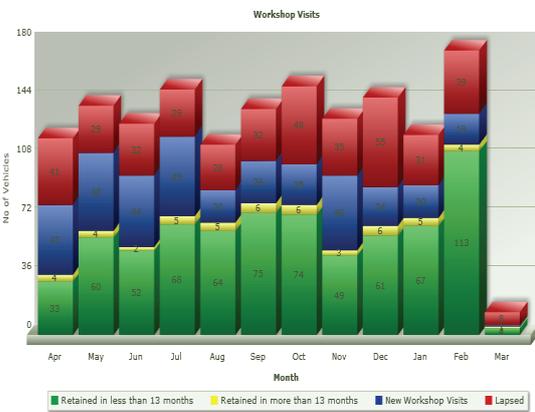
Vital Software is the developer of data driven solutions for the automotive industry. It specializes in solutions for automotive OEMs and dealers which assist in driving profitability, reducing marketing waste, preventing prospect leakage, and more.

The company has extensive experience with data integration, in particular Dealer Management System (DMS) data, Head-office databases, and various third-party lead sources. Its recent success is the addition of bi-directional functionality with Pentana's ERA product set.

Its flagship product, ContactTracker offers functionality in several areas - prospect and lead management and tracking; targeted customer marketing activities using direct mail, email, SMS and telephone; outbound call list management; inbound call, case and concern management plus parts and service bookings and reporting.

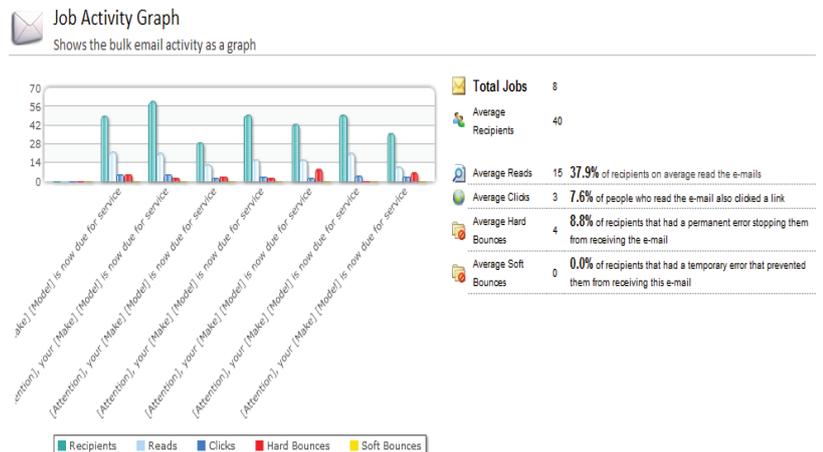


## Reporting

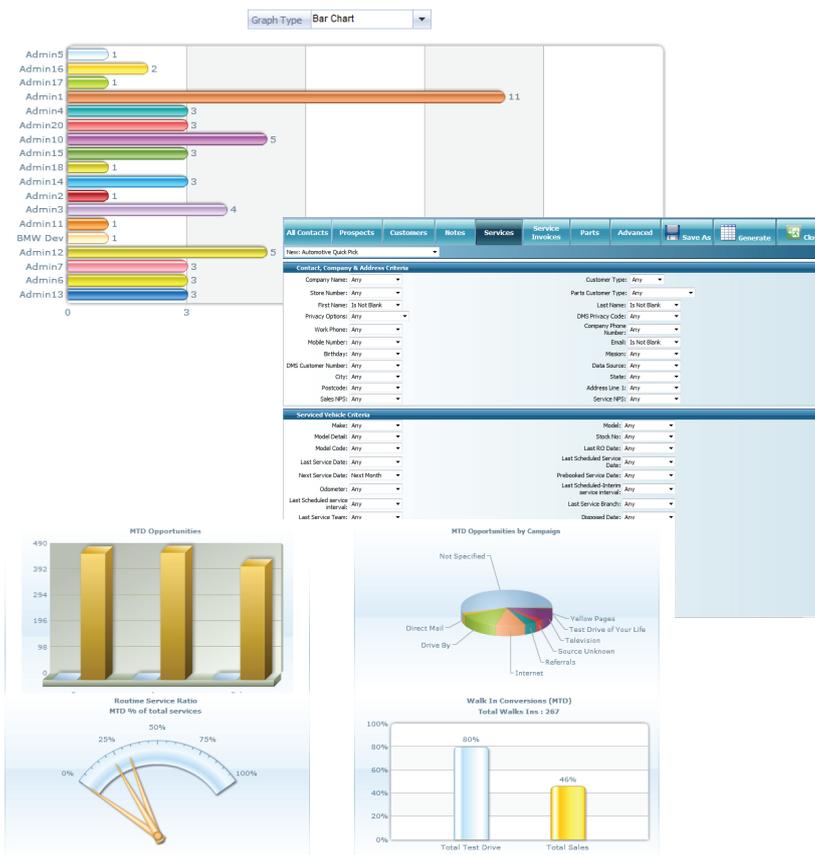


- ✓ **Service & Parts** Instant access to detailed service and parts information; including labor costs, profit analysis, parts sales and in-depth repair order analysis.
- ✓ **Service Customers** Instant reporting on retained service customers and lapsed service customers.
- ✓ **Prospect** Report on opportunities by salesperson, make, model, milestone, lead source and more.

- ✓ **Management** Manage sales person activity, floor traffic, campaigns, and more with reports in summary and **Drill Down** for detailed information.
- ✓ **Benchmarking** Manage performance against group average or manufacturers KPI's.
- ✓ **Comparisons** Up-to-date information on current month vs prior year month; and year-to-date vs prior-year-to-date.
- ✓ **Custom** Our developers can plan, define, design and create any report to specification



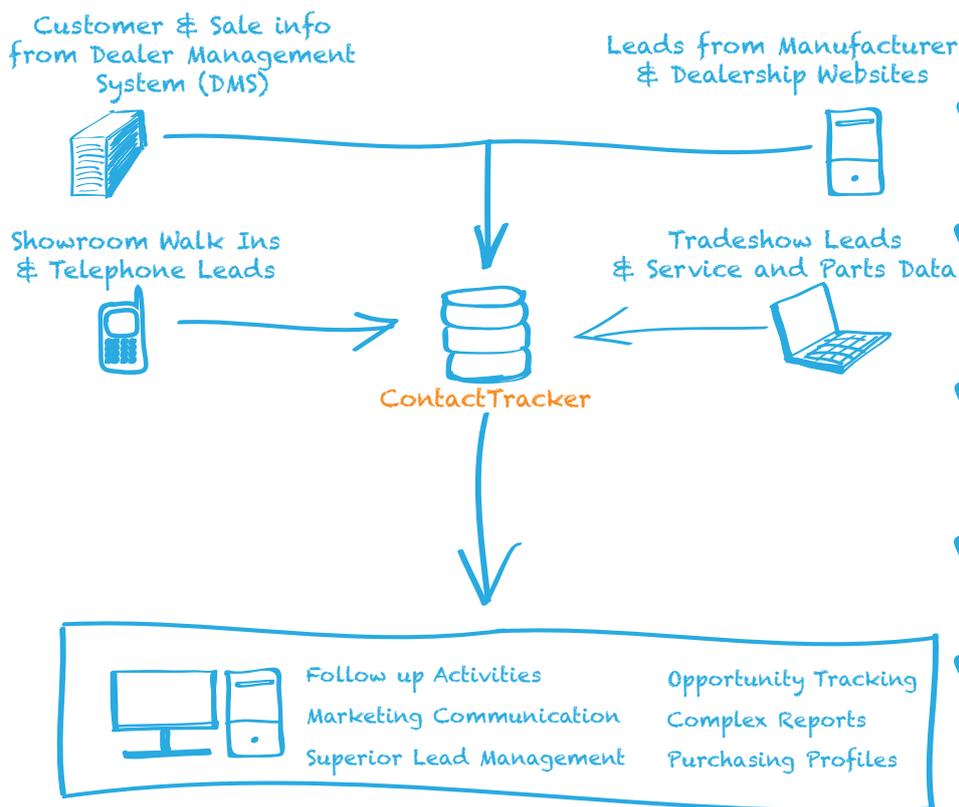
# Lead Management



- ✓ **Leads** Capture, track, assign and manage all leads in one central system. Customer data at your fingertips allows for rapid responses.
- ✓ **Opportunities** Monitor all the milestones leading to a sale. Increase organisation efficiency by standardising processes.
- ✓ **Pipeline** View and report on the sales pipeline to assist with financial planning.
- ✓ **Productivity** Manage sales staff activity levels and eliminate wasted effort.
- ✓ **Floor Traffic** Just a couple of clicks to determine how effective any campaign has been.
- ✓ **Planning** Information captured in a central system can be used to make data driven decisions.
- ✓ **Sales Cycle** Manage customers from first point of contact to making a sale. Track ratios of phone calls to appointments to test drives to sales... and more!

# Data Integration

ContactTracker's unique data extraction methods allow for data from all lead sources in the one SQL database.



- ✓ **Dealer Management System Integration** ContactTracker is the world's first CRM to integrate with all major DMS systems.
- ✓ **Bi-Directional** Keep your customers and prospects details synchronized between the DMS and ContactTracker.
- ✓ **De-Duplication** Intelligent de-duplication technology ensures service customers are data matched with sales and prospect customers providing a holistic view of the record.
- ✓ **Additional Data Sources** Enterprise level systems including Oracle and SAP, web services and even manufacturer systems can be integrated into ContactTracker.
- ✓ **Multi Site** Consolidate data from multiple sources and assign privileges to view data by brand, branch, group or salesperson.
- ✓ **Security** Apply security rules to determine which permissions and/or restrictions each user should be allocated.

# Sales, Service and Parts Marketing

**Email Campaign Overview**  
Shows the statistics of the bulk email job

[Attention], your [Make] [Model] is now due for service!  
Sent Monday, February 18, 2013 at 1:01 PM  
by Marketing Coordinator

Delivered To  
SVC: Reminder Email NI (Non-Harrier)

**Total e-mails** 43

- Unsubscribes: 16 (37.2% of all recipients have opened so far)
- Hard Bounced: 9 (20.9% of all recipients bounced)
- Unopened: 18 (41.9% of all recipients have not yet opened the email)
- Out of Office: 0 (0.0% of all recipients)
- Unsubscribed: 0 (0.0% of all recipients)

**eMail Templates**

Brochure.mht Day21, Brochure.mht Day30, Day1.mht Day7, Day21.mht, Day30.mht, Day7.mht, Demo Template, Email Follow Up - Chr, Email Tracking

Document Title: Day7  
Document Download: [Download Day7.mht](#)  
Recurring Services:  
Rules:

Add Edit Remove

**Overall booked**

Category	Value	Percentage
Total Eligible Customers		
Total Letters Sent		
Bookings from Letters		
% of bookings from Letters		
Total Emails Sent		
Bookings from Emails		
% of bookings from Emails		
Total SMS's due to be sent	821	675
Total SMS's Sent	513	477
Bookings from SMS's	92	76
% of bookings from SMS's	17.93%	15.93%
Total Phone Calls due to be made	729	599
Total Phone Calls Made	645	397
Bookings from Phone Calls	183	72
% of bookings from Phone Calls	28.37%	18.14%
Total Bookings	397	259
Booking Percentage	42.10%	32.95%
RECALLS		
Total Recalls Made	75	17
Bookings from Recalls	26	5
% of bookings from Recalls	34.67%	29.41%

- ✓ **ContactTracker** is the ideal solution to **Plan, Deliver** and **Report** on marketing efforts. One of the view of all integrated data!
- ✓ **Campaigns** Create, Manage and analyse results from campaigns.
- ✓ **Target Marketing** Select customers according to specific demographics using our intuitive "Quick Pick" data filtering wizard.
- ✓ **Wizards** Launch mail, email and SMS wizards at the click of a button to send personalised communications.
- ✓ **Recurring Letters** Save time with setting up repetitive letters. Print on schedule with ease!
- ✓ **Service Reminders** Helps with customer retention and ensures maximum revenue from the relationship.
- ✓ **Service Marketing** Maximise customer retention and increase service revenue through enhanced customer relationship.
- ✓ **Privacy** Conforms to government regulatory requirements providing privacy flags for all communication methods.

# Post Sales & Post Service Follow-up

Issue Description	Trigger Value	Change Order
Courtesy	5	⬆️ ⬇️ ⬇️
Knowledge of Salesperson	3	⬆️ ⬇️ ⬇️
Cleanliness of Vehicle	5	⬆️ ⬇️ ⬇️
Condition of Vehicle	2	⬆️ ⬇️ ⬇️
Finance and Insurance	3	⬆️ ⬇️ ⬇️
Showroom Experience	0	⬆️ ⬇️ ⬇️

Call Lists

Department: Pre Service | Make: All | Call List: Recall

List Type: All Calls | Suggested Call Count: 3748 | Already Called Count: (Today/Week/Month) 1 / 1 / 1

- ✓ **Dealer Standards** Designed to seamlessly improve Customer Satisfaction Index (CSI) results. The Dealer Standards module allows for easy customer follow-up and continuous improvement.
- ✓ **Configurable** Schedule customer contact points based on your own business processes and measure customer satisfaction against CSI scorecards.
- ✓ **Trend Reports** View data-driven graphical reports that allows drill down functionality into individual customer problems.
- ✓ **Process Improvements** Report on trends affection CSI and follow a 4-step process improvement worksheet from root cause analysis through to success measurement.

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