

Proactive Dealer Solutions (PDS) has been monitoring calls to dealerships for decades. Based on millions of those customer calls to sales, parts, service, and finance departments, Proactive Dealer Solutions has built predictive models that score, almost in real time, every inbound call for people performance metrics, lead quality metrics, call abandons, and missed opportunities. Uniquely, this analytic technology identifies the four most common types of call abandons that happen at a dealership: IVR/voicemail abandons, ring transfer abandons, call hold abandons, and unanswered abandons. In addition, the technology can identify high value, missed opportunities. The AI measures a host of other outcomes and topics about each call, achieving a 90%+ accuracy rate in its evaluation. Today's mobile-friendly websites and apps make it easier to quickly call the dealership simply by tapping a finger. As a result, Proactive Dealer Solutions has seen inbound calls to dealerships spike 12% from 2017 to 2018 - another reason that dealerships should make effective phone procedures a priority.

Equal in importance to *identifying* phone problems is *applying* a long-term successful fix. Employee performance is automatically addressed through a comprehensive training package that the AI can deliver to the struggling employee. The customer service team at Proactive Dealer Solutions has decades of practice in evaluating phone data, pinpointing areas for quick improvement, and helping dealers maximize the marketing dollars they spend to drive customers to call their dealership.

The Problem:

Many dealerships aren't even aware they have a problem. They don't know how many calls come into their facility, the reason for the call, and if an appointment was not set. Sometimes, a dealership's current process can't handle the call volume. Data says that 1 out of 5 calls are not connected to the correct person. Why do call connections fail? According to PDS, 46% are IVR/voicemail abandons, 27% are ring transfer abandons, 21% are unanswered calls. And how does a dealership go about putting their finger in the dike and recapturing lost revenue?

Business Intelligence

Call Management CallerCX

AI-powered speech analytics and call abandon technology used to automatically score calls for performance, lead quality, and missed opportunities in sales, service, or finance



"In our sales dept, we have a 96% connection rate. If I want to go in and look at the 11 failed calls, it's one click. It's something that I look at every hour. My BDC managers are in CallerCX throughout the day."

Brad Warren
Director of Dealer Technology
Healey Auto Group



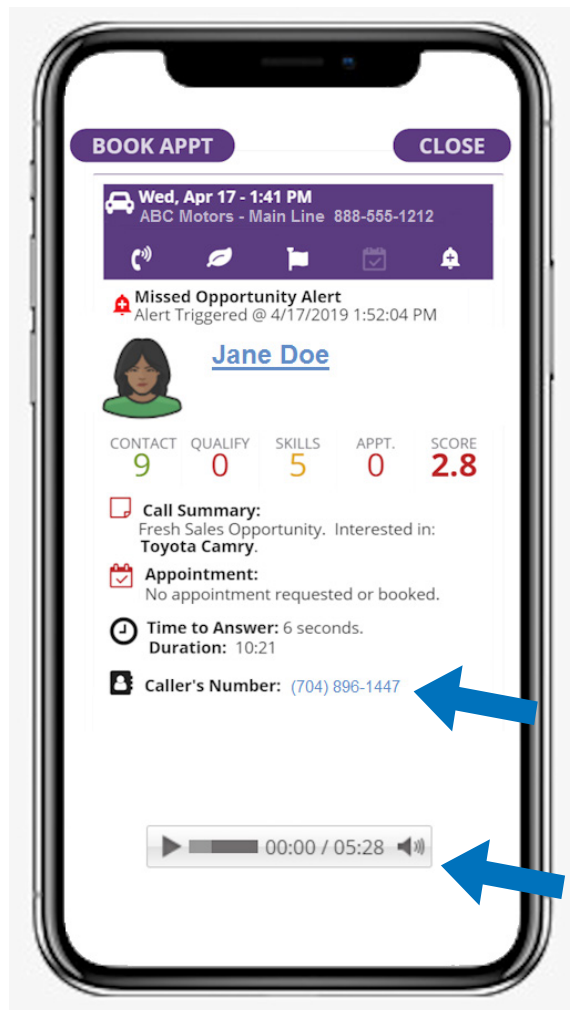
www.bdcexperts.com

"Our clients are amazed how accurately our speech analytics can identify important coaching opportunities that happen on a call. This technology is generating massive culture changes at dealerships."

Jason Beckett
General Manager
Proactive Dealer Solutions

How It Works:

CallerCX tracks and records every inbound call made to the dealership. Call abandons and voicemail abandons are red flags that are captured and immediately addressed. For each sales and service call where an appointment is NOT made and the AI determined one should have been booked, an alert is created and sent via text to a manager in less than four minutes. This creates an opportunity to salvage the appointment, repair any irritated customer relationships, and identify a coaching moment for the employee. The system is adept at identifying calls that represent true opportunities so the number of text alerts sent is conservative. In order to fix and master the phones, CallerCX creates a profile of each employee handling calls that will help the manager determine who should or shouldn't be handling inbound calls. Individual coaching alerts and a tailored coaching process is generated. The goal is for the employee to perform better on their next call from a customer. That training is coupled with the Biz Dev online training university that is focused on teaching great process and objective setting that is guaranteed to improve results.



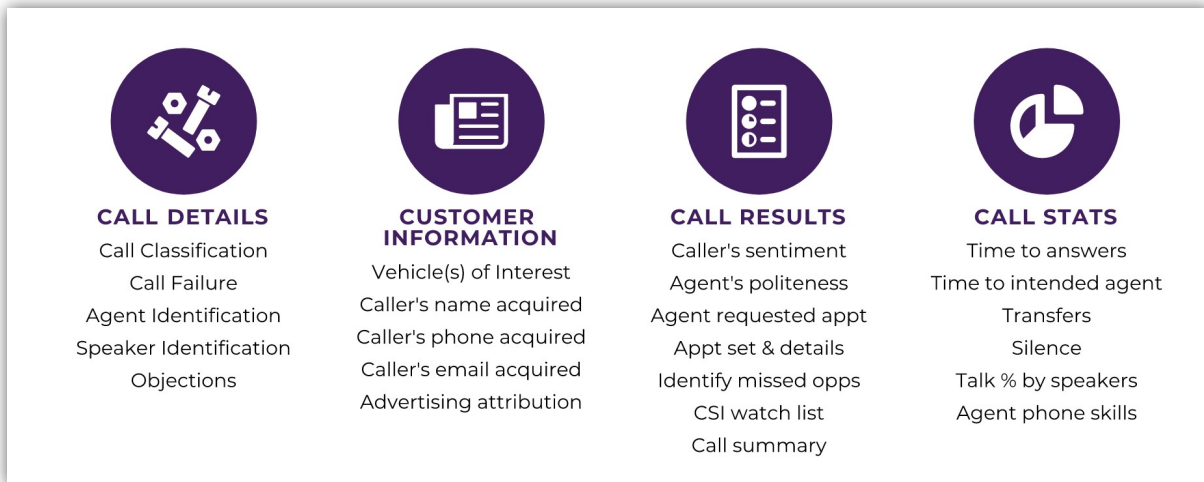
This mobile alert is delivered to a manager when the AI determines that a missed opportunity occurred with a highly qualified customer; this one was interested in a Toyota Camry. Although the call lasted over 5 minutes, the salesperson never asked any qualifying questions and didn't ask for the appointment. The alert was triggered within one minute after the call ended. The customer's contact number is provided as a click-to-call and the manager can easily listen to the call by clicking the play button.

CallerCX is designed to deliver for the dealership:

1. Increased marketing ROI by knowing which advertising campaigns generate calls
2. More connected calls
3. Automated phone call lead entry to fill the CRM
4. Improved employee phone skills which result in increased traffic
5. More 'saved' deals by identifying mishandled opportunities
6. Improved customer experience

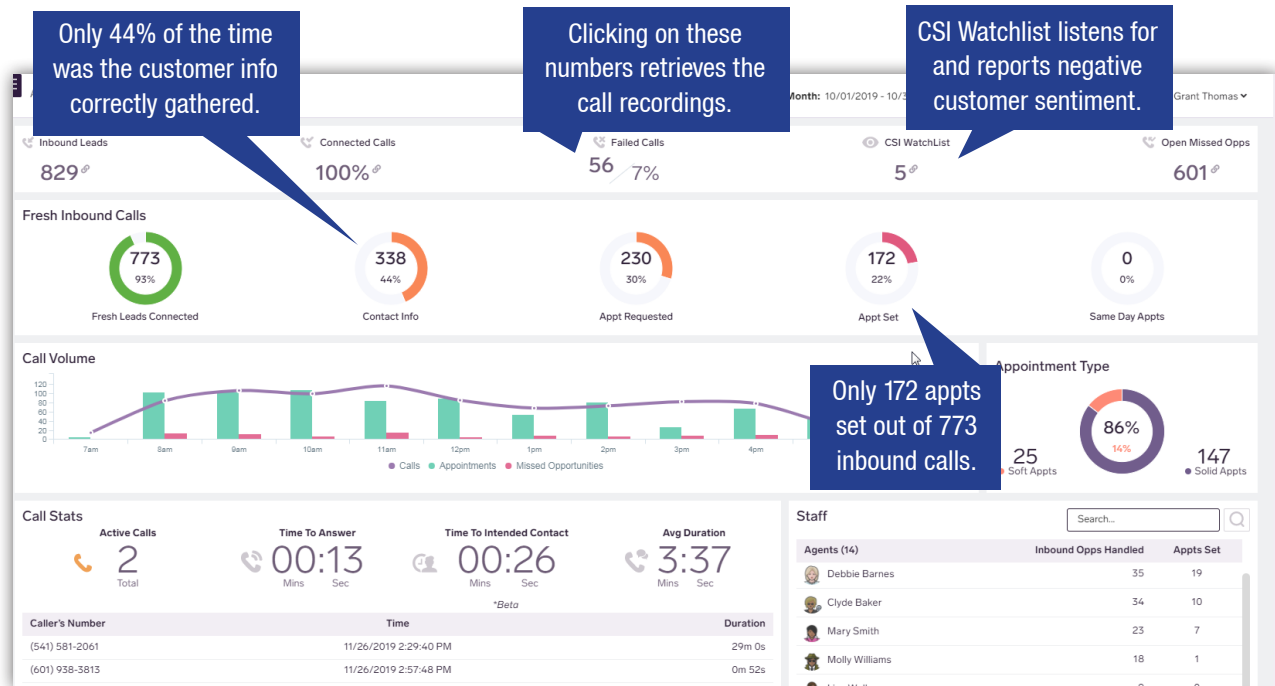
CallerCX is integrated with DealerSocket and VinSolutions so that call information on all of the leads processed is pushed directly into the CRM.

CallerCX Provides In-depth Call Data. Each inbound call is recorded, evaluated, and documented with the following information:



Natural Language Processing (NLP). If the dealership is interested in tracking particular words or data, the AI can be customized to provide that information.

Dashboard. CallerCX is designed to be time-efficient and user friendly for managers; no need to login. All of the critical information needed will bubble up onto the dashboard, as shown below. The information displayed is time-sensitive; showing that day's activities in real-time. The AI separates each call into different buckets – sales, service, parts, body shop, and finance. Multi-brand storefronts can further filter their calls and even designated tracking lines can be delineated.

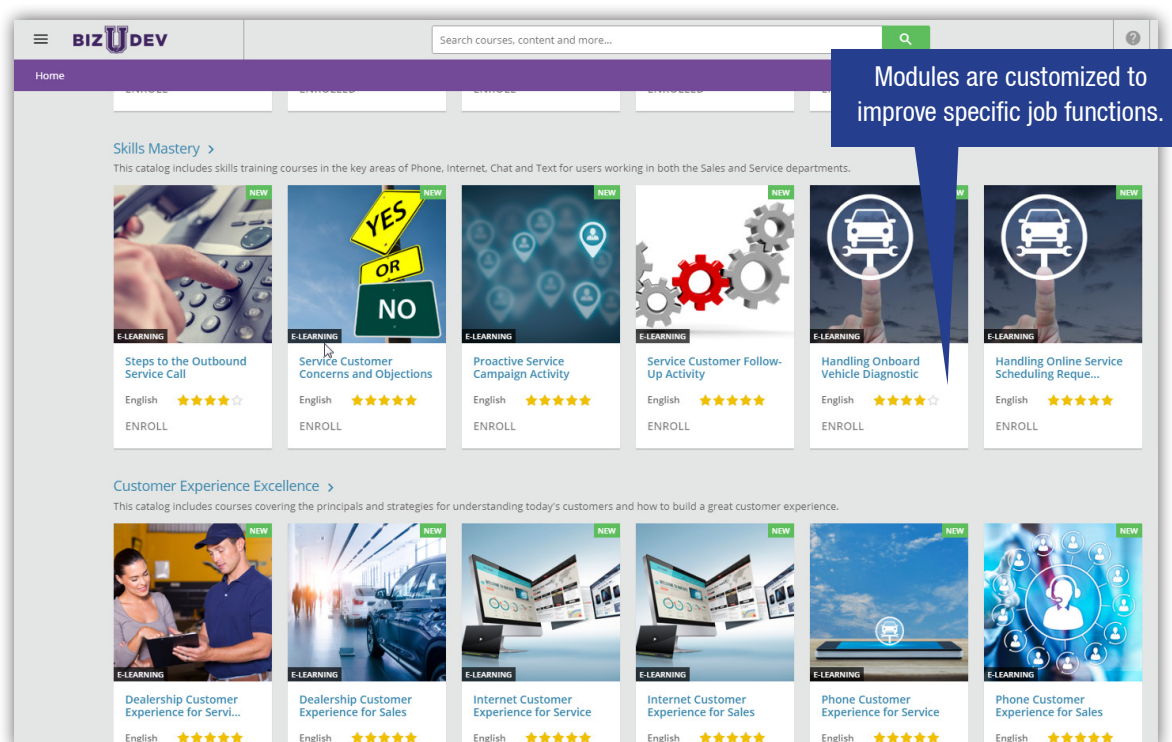


Call Logs. An employee's 'voice fingerprint' is used to assign the call to the agent, salesperson, or service advisor who handled the call opportunity with a 98%+ accuracy. The individual's phone skills are evaluated: *Did they correctly ask for customer contact info? Did they mention special promotions, or check for recalls in service? Are they asking for and then setting the appointment?* As the conversation is evaluated, the program automatically creates a profile for the group, for the store, and on the individual. Reporting is provided in very granular detail to define areas of improvement.



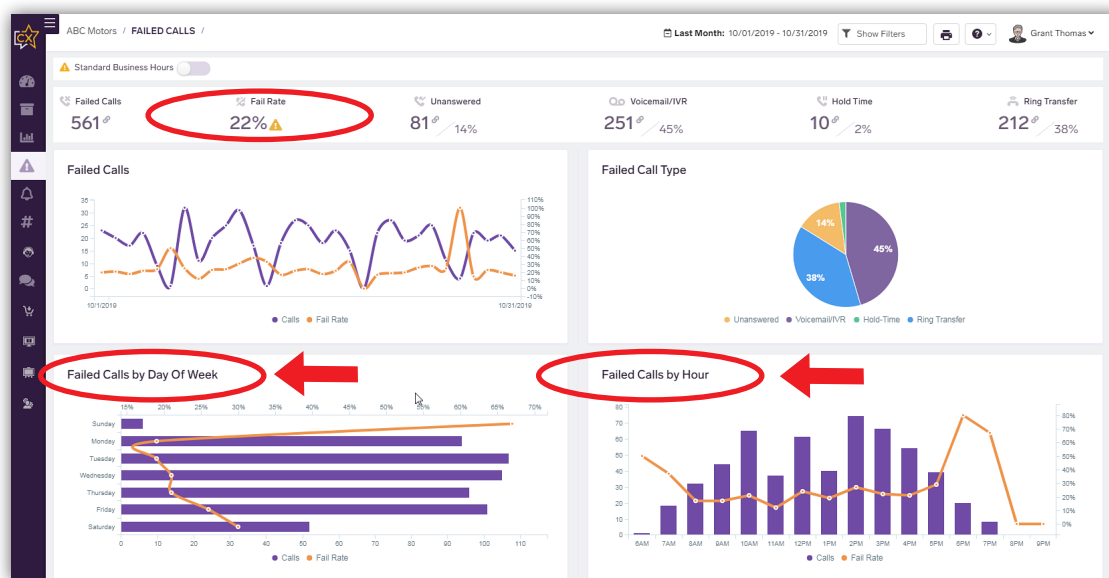
Employees can view their own call profiles. As the artificial intelligence detects a deficient performance pattern on specific users, it will automatically push out coaching alerts to those people which include micro-training videos on topics such as: Professional Greeting, Taking Control of the Conversation, Acquiring the Customer's Contact Information, Qualifying the Customer's Purchase Needs, etc. These 1.5 minute micro-training videos help employees understand what actions need to change and the benefits those changes will produce. In this regard, the AI acts as an automated training assistant to the management team.

Biz Dev University. Broken down by the skillsets which are required in the various areas of the dealership, different training modules focus on improving performance to meet KPIs. These Biz Dev courses will be recommended by the software to reinforce the micro-training.

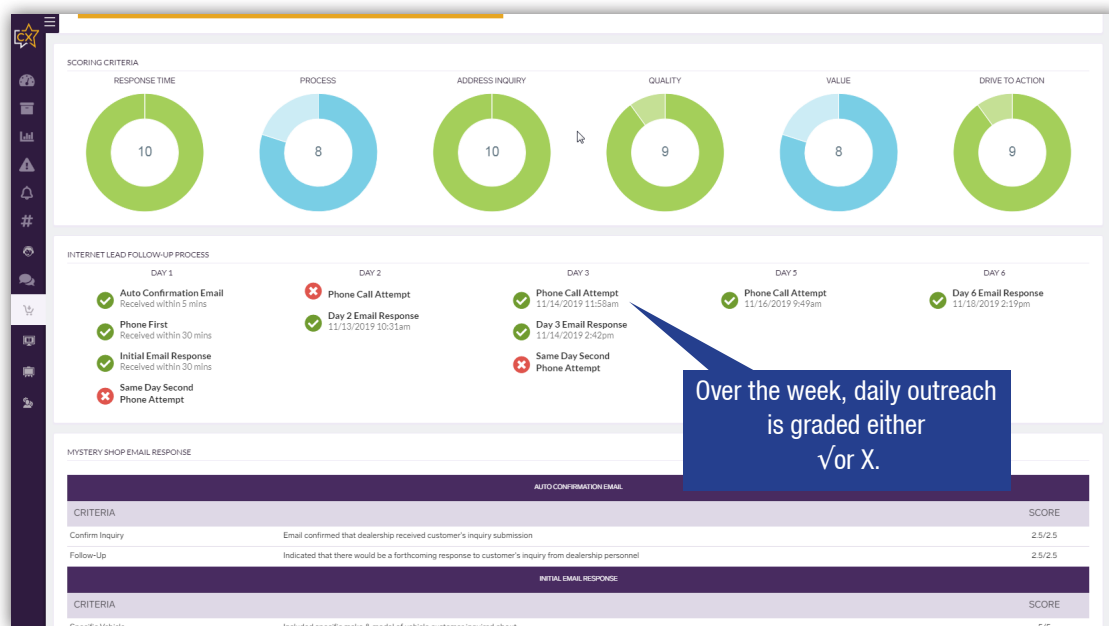


Onboarding and Customer Support. During the first 30 days of onboarding, the CallerCX team spends significant time helping the dealership embrace how to effectively use the reports. They explain how those numbers are impacting their bottom line and how lost revenue can be recaptured. Timely training is a key component, and the team helps develop strategies to meet KPIs. Performance goals are set and dealers hold their managers accountable for reaching those goals. Conversion rates for CallerCX clients are expected to be ~ 65% - inbound call to appointment set – based on dealers using CallerCX. The average dealer they onboard is converting at about 18%.

Reporting. *How many calls do I get? What is my conversion rate to appointment?* The overwhelming number of calls that fail are going to voicemail. When the fail rate spikes, as shown below, is it a staffing issue? Lunch time spikes? Failed calls can also be viewed by their tracking line. Perhaps the Autotrader calls are being delivered to an employee that is no longer employed.



Mystery Shops. The CallerCX program includes two mystery shops of the dealer's website per month, per store. Third-party vendors where the dealer has listings are also shopped. The internet process is evaluated during the first week of outreach. *Is there a process? Is the dealership successfully executing the process?* Phone attempts and emails are tracked. The evaluator listens to the calls and scores them on established criteria: vehicle, value proposition, invitation to visit, motivating questions, complete customer contact information, test drive, trade in, etc.



Over the week, daily outreach is graded either ✓ or X.

Meeting Privacy Requirements. The Federal Government announced new security and privacy requirements for redaction of all credit card information; a differentiator for CallerCX who is certified to redact that info in both recordings and transcripts.

Customer Look-ups. Now, increased information about the caller is being added: their address, and their median income/credit worthiness. This additional data will be delivered almost instantaneously to the customer file.

What do dealers say about CallerCX?

"My anxiety increases when I don't have visibility or accurate information. CallerCX has given me a comfort in an area that I didn't even know existed. When we first got on this program, we had received 46,000 phone calls - and 18,000 we didn't even pick up. We were wasting money by burying our heads in the sand. Now, our service numbers are great. Our dollars and retention have grown. Just do it. Auto dealers can no longer just turn the lights on and open the door. Industry has to address disruption."

Todd Lalonde
COO
Drive Auto Group

"Because of our (CallerCX) findings, we changed the process flow for our inbound calls. We heard customers call in and ask for a specific person and get nobody. We saw times that our staffing was light and we were missing calls so we added another receptionist. Listening to calls, you can hear comments by annoyed customers who are on hold. The customer experience is important, and we take that seriously."

Brad Warren
Director of Dealer Technology
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