AUTOMOTIVE TRANSFORMATION GROUP

# Key2Key System Anatomy

## System Dashboard

# 1 Dashboard Overview

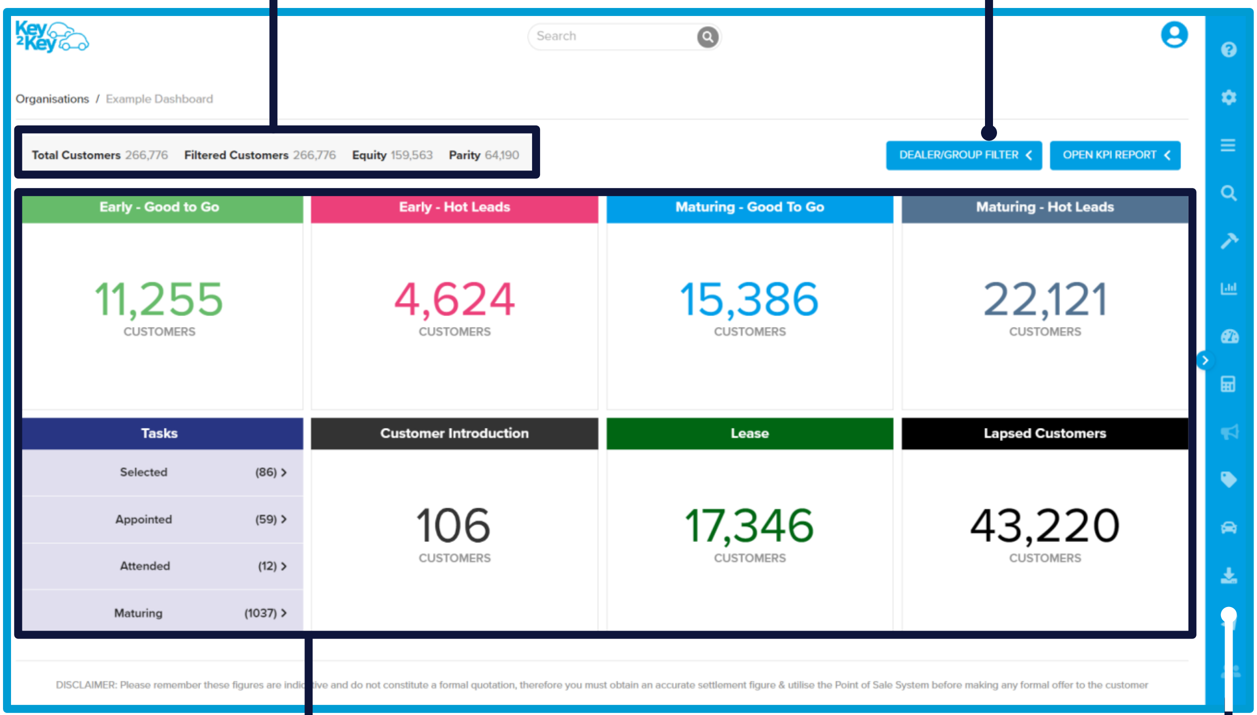
The Key2Key dashboard offers a comprehensive summary of your customer database, divided into easy categories and subdivisions, to give you an overview at a glance.

## What does it show?

Your dashboard offers you a lot of information straight away, with access to all sorts of different areas of the system and ways to interpret your data.

Customer counts show you a breakdown of your full database, those in Equity, and those in Parity (please note: some users may only see the Total Customers count on the dashboard).

The dealer/group filter lets you choose which groups or dealerships in your access you would like to view (multi-site users only).



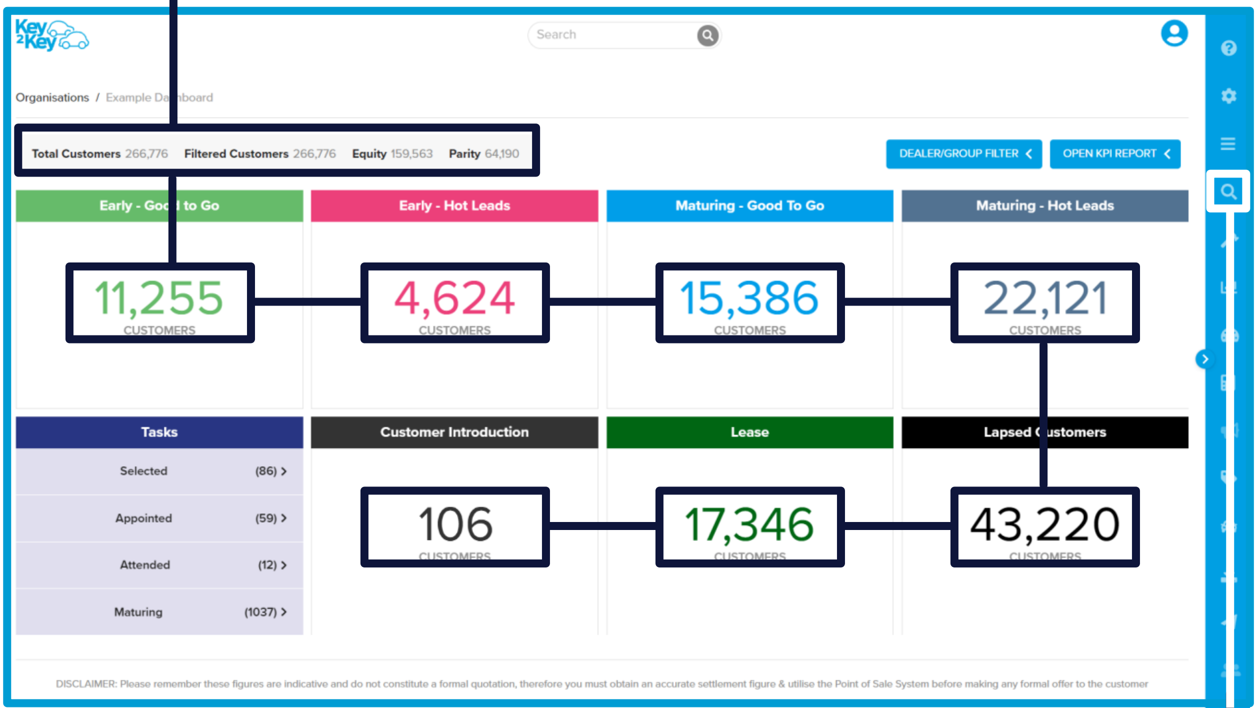

The dashboard pods are sub-categories of your customer database, divided by pre-set brand parameters, for easy investigation of your customer list. Clicking the dashboard pod will take you to that cohort of customers.

The dashboard taskbar gives you quick access to searches, the calculator, campaigns and offers, as well as the Go-To menu and links to the Key2Key Support platforms.

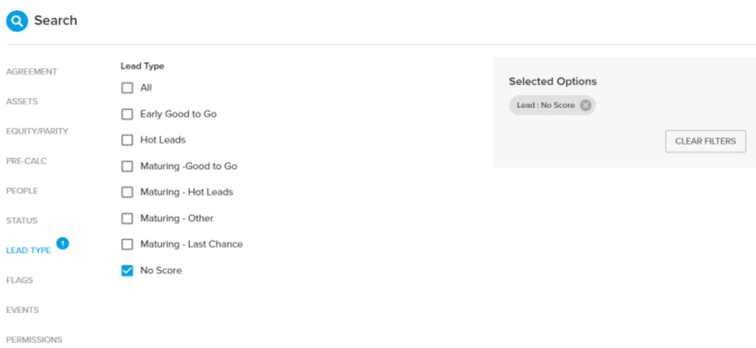
# 2 Dashboard Pods

The dashboard pods segment your customer database into a series of categories for easy classification. The parameters used to define pod groupings are specific to each network, so your dashboard pod layout and configuration may vary, depending on your access. However, there are some aspects of the dashboard pods which are universal.

It is important to note that the totals displayed in the dashboard pods will not add up to the total of your database, or the Equity and Parity totals. The dashboard pods present groups of customers who meet certain brand-defined criteria, but there will be several customers who do not meet these criteria, and so are not yet eligible for inclusion in one of the pods. Such customers may be too new in their agreement, or may not be in a strong enough Parity position.

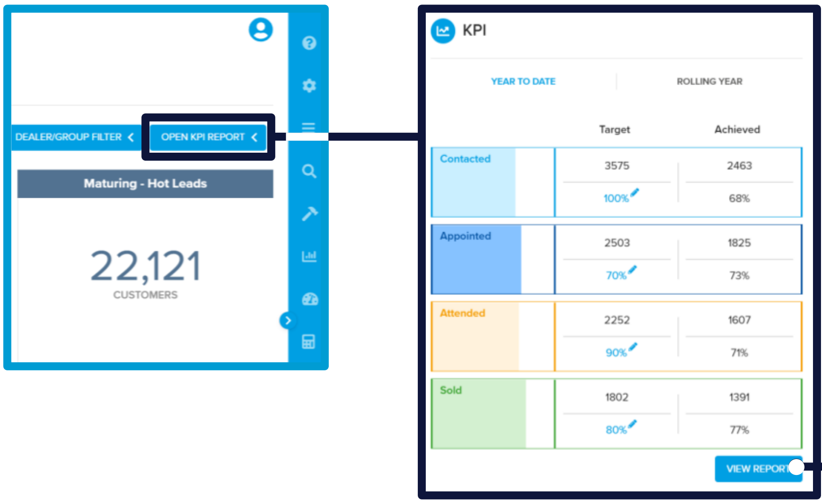



To view the customers in your database who do not fall within the parameters for a dashboard pod, open the search menu and select the No Score option in the Lead Type tab.



# 3 KPI Reporting

The dashboard KPI report offers an overview of system activity over the last twelve months. This takes a count of the customer status updates made to Contacted, Appointed, Attended and Sold, and matches them against best-in-class targets to benchmark your progress. The KPI figures you see are reactive to your system visibility, and are dependent on the system access you have or the dealer/group visibility you have chosen to view.




A more in-depth KPI report can be found in the Reporting Suite.

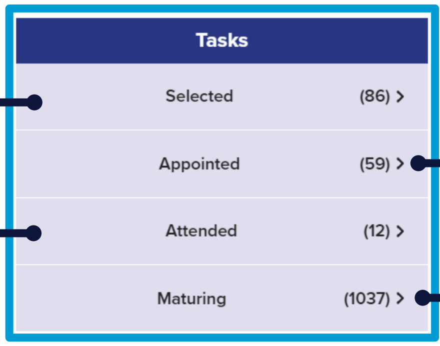
# 4 Tasks Menu

The Tasks menu gives a seven-day reminder of your system activity, and what actions need to be taken to capitalise on the subsequent opportunities. Your tasks view may vary, depending on your brand parameters, and whether your system is set up with the standard Key2Key configuration or our Workflow enhancements.

## Standard:

Customers set to Selected for contact in the last 7 days.

Customers who attended an appointment in the last 7 days.




Customers scheduled for an appointment within the 7 days.

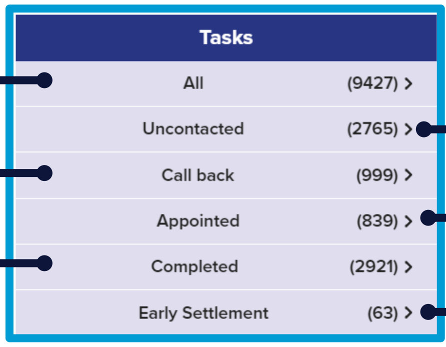
Customers who entered the maturing phase of their agreement within the last 7 days.

## Workflow:

All customers assigned to you or your team.

Those scheduled for repeat contact.

Any marked as sold or who have decided they will not renew their contract.




Customers not yet marked as having received initial contact.

Those scheduled for an in-dealership meeting.

Customers who have requested an Early Settlement calculation in the last week.