AUTOMOTIVE TRANSFORMATION GROUP

Commercial in Confidence

# Key2Key System Anatomy

Campaigns

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### 1 Campaigns



Campaigns allow you to group cohorts of customers together and save or share them for targeted prospecting. These campaigns can be shared with your colleagues or partner-retailers so you can work together to target a list of customers and monitor progress.

## 2 Creating your Campaign

Begin by creating a list of customers using the search and filter options. When you have your list complete, click the Campaign option in the taskbar icons.

Ke	y <b>2Key</b>	1	Search	0			9	0
Organis	ations / Example C	Prganisation / Customers						≡
Total C	ustomers 236,991	Filtered Customers 153,004 Selected 4 Parity 28,433						٩
	Name $\psi$	Vehicle $\psi$		Equity $\psi$	Parity 1	Status $\psi$	Flags Contact	
	Customer Name	N I 2019 I MERCEDES-BENZ I GLC COUPE I GLC 250 4Matic AMG Line Prem Tronic I VRM361295 I 2019-07-31	ium 5dr 9G-	£9,112	£1,001	Not Set	0	1
	Customer Name	U I 2019 I MERCEDES-BENZ I A CLASS HATCHBACK I A220 AMG Line Prem Auto I VRM514213 I 2019-11-11	ium 5dr	£4,367	£1,000	Not Set	0	
	Customer Name	U I 2017 I MERCEDES-BENZ I GLC DIESEL COUPE I GLC 350d 4Matic AMG L Tronic I VRM154957 I 2022-01-26	ine Prem Plus 5dr 9G-	£9,385	£1,001	Not Set	0	<u>ତ</u> କ
	Customer Name	U   2014   MERCEDES-BENZ   C CLASS DIESEL SALOON   C220 CDI AMG S Auto   VRM966873   2017-06-09	port Plus 4dr	£3,600	£1,001	Not Set	• •	*
	Customer Name	U   2017   MERCEDES-BENZ   GLC DIESEL COUPE   GLC 220d 4Matic AMG L Tronic   VRM608709   2019-03-30	ine 5dr 9G-	£9,961	£1,000	Not Set	0	
	Customer Name	U I 2015 I MERCEDES-BENZ I GLC DIESEL ESTATE I GLC 250d 4Matic AMG I Tronic I VRM212365 I 2018-05-16	Line Prem Plus 5dr 9G-	£18,080	£1,000	Not Set	0	
D	Customer Name	U   2018   MERCEDES-BENZ   C CLASS CABRIOLET   C300 AMG Line Premiu Auto   VRM915394   2018-08-16	ım Plus 2dr	£3,173	£1,000	Not Set	0	
D	Customer Name	U I 2016 I MERCEDES-BENZ I E CLASS DIESEL SALOON I E220d SE 4dr 9G- Tronic I VRM333318 I 2019-11-28		£11,173	£1,001	Not Set	0	

If you wish to add specific customers from your list then select their record row. If you plan to add the whole list, leave those tick-boxes blank.

#### **Customer Cohorts**

When adding your customer list to a campaign you have the choice whether to create a brand new campaign for this customer cohort, or to add them to a pre-existing campaign you have already built.



Decide whether to create a new campaign, or add these leads to one you have made previously. You can also choose whether to add the entire list or customers you have manually selected.



#### **Campaign Designation**

Give your campaign a name and a time-frame to run from/to. You can also decide whether this campaign should be private or visible to others.

📢 Create Campaign 🥑	Chose Camp	aign	2	Campa Details	aign s	3	Dealer Selection	
Campaign Name		- End	Date -					Give your campaign an name No two campaigns can have the same name, so ensure that yours is unique.
02/03/2022		02	/04/2	022			Ö	
Description	<		Ap	oril 20	22	-	>	Give your campaign a date-
Customer Selection	Sun	Mon	Tue	Wed	Thu	⊦n 1	2 Sat	Please note that once a
Select	3	4	5	6	7	8	9	cannot be recovered, so
Permissions	10 17	11 18	12 19	13 20	14 21	15 22	16 23	ensure it has plenty of run- time to achieve your goals.
Exclude do not call     Exclude do not email     Exclude do not mail	24	25	26	27	28	29	30	
Make Campaign private?								Choose to make this campaign public or private. Public campaigns can be viewed by any user within the assignment (see below), whereas private campaigns are only visible to your login

#### Campaign Description and Customer Selection

Additional options are also available to help refine your campaign list. These are not mandatory for campaign creation to operate, but may be beneficial to you in getting the best out of the campaign you have built.

Campaign Chose Chose Campaign Dealer	Campaign descriptions are not mandatory, but can be added if they may be helpful to your planning and administration.
Example Campaign Name  Start Date  02/03/2022  Description  Example campaign description  Customer Selection  Letter Sent	You have the option to set all the customers in your campaign to a particular status. Please note: this will only affect customers with no status currently set, and will not overwrite statuses which have been previously set.
Permissions         Exclude do not call       Exclude do not email         Exclude do not mail         Make Campaign private?         Yes       No	You can choose to exclude customers based on their indicated contact preferences. This is particularly useful if you are creating a campaign for a specific contact method (such as email or SMS) to exclude unsuitable candidates.



## 3 Assigning your Campaign

Once you've named and dated your campaign, and decided on the optional elements, choose who will have visibility of it.

This default option will make your	Create Campaign Chose Campaign -	1
campaign visible for only those retailers who have customers contained in it.	Only make campaign visible to dealers with qualifying customers. Select Dealer	
	QX	
Alternatively specific	Group Name	
retailers may be	Dealer Group 1 Dealer 1	
options of dealerships	Dealer Group 2 Dealer 2	
within your system visibility	Dealer Group 3 Dealer 3	
visibility.	Dealer Group 4 Dealer 4	

## 4 Exporting your Campaign

Campaigns you have created, or ones that have been assigned to you, can be exported to an Excel format to allow offline use and the opportunity to share with your colleagues.





To reach your exports, click the Exports icon on the taskbar (see left). From the subsequent menu, choose the export you would like to download and select the Download option.

Name 🚽	Created At 1	Status 4	Actions 🔸
Example Export	02/03/2022	Available	DOWNLOAD



## 5 Auditing Changes to Campaign Criteria

When adding new customers to a campaign, you may wish to track the additions, along with any changes that have been made to your campaign search parameters with the changes. To do this, simply load a campaign list of customers, and open the search menu from the taskbar on the right and click the Search Criteria option at the bottom of the search menu.

AGREEMENT 7	Type			Selected search options v
IDENTIFIERS	L Fleet L R	etali		appear here.
ASSET 6	Finance			Payments Made From : 18 🚫
ASSET	CH, HP, PCP		-	Payments Left From : 6
PRE-CALCULATED OFFERS				Agreement Term From : 24 🛞
EQUITY	>= OTRP =<	То	>=OTRP=<	Agreement Term To : 36 🛞
PEOPLE	-> Dest Made de			Product Type : CH
TATUS	- ⇒ Pmt Made <=	То	=>Pmt Made<=	Product Type : HP
LEAD TYPE				Product Type : PCP
3	6	То	=>Pmt Left<=	Brand : BMW 🛞 Brand : HO
FLAGS -	_ >= Term =<		_ >=Term=<	Brand : MERCEDES-BENZ
EVENTS	24	То	26	

By default, the criteria presented in the search menu when you open the campaign list will be the ones entered when the campaign was initially created. However, any updated search criteria, made when additional leads have been added, can be seen under the list of Search Criteria Amendments in this auditing option.

Search criteria amendments	Close
Search criteria amendments 1	
Payments Made From : 18 Payments Left From : 6	
Agreement Term From : 24 Agreement Term To : 36 Product Type : CH	
Product Type : HP Product Type : PCP Brand : BMW Brand : HONDA	
Brand : MERCEDES-BENZ Brand : SKODA Brand : VOLKSWAGEN	
Brand : VOLVO Contract Modifled : exclude Lapsed : exclude	
Do Not Contact : exclude	
Search criteria amendments 2	
Payments Made From : 12 Payments Left From : 4 Agreement Term From :	: 18
Agreement Term To : 42 Product Type : HP Product Type : PCP	
Product Type : CH Brand : JEEP Brand : VOLKSWAGEN Brand : VOLK	/0
Brand : MERCEDES-BENZ Contract Modified : exclude Lapsed : exclude	
Do Not Contact : exclude	



## 6 Tracking Campaign KPI and Activity

Specific reporting is available within your Key2Key campaigns, to help you chart how actively your campaigns are being engaged with by your team, and how successfully your contacts are resulting in sales. Next to each campaign you will find two drop-down options containing breakdowns of your campaign engagement information.

Name $\downarrow$	Start Date $\psi$	End Date $~~\psi$	Created By $\qquad \psi$	Created Date	↑	Status	$\downarrow$	Contact Status	$\downarrow$	Show KPI Data	Activity
Example Campaign	2022-11-25	2022-11-27	Example User	2022-11-25		Active					

#### What does each report do?



#### **CAMPAIGN KPI**

The Campaign KPI report shows you the sales-funnel progress of your campaign. All statuses will back-fill, so if a customer is set to Sold then Key2Key will populate Attended, Appointed and Contacted statuses for this report. This helps you track your contact-to-sale ratio, within the lifetime of your campaign, and to identify whether there are any areas of contact breakdown (eg: customers were successfully appointed but very few attended that appointment, or customers attended but these meetings didn't result in completed sales).



The Campaign Activity report shows you the status changes made to the customers in your campaign, during its lifetime. Statuses will not back-fill, so this report is recording only the activity you and your team have taken in changing customer statuses.

Any status changes for customers attached to your campaign will register, and you do not need to have reached the customer through the campaign menu for updates to qualify.

Total Customers - 28 Total Live Customers - 28 Contacted - 1 Appointed - 3 Attended - 0 Sold - 0 Parity Count - 17 Equity Count - 26

#### Which figures should match across reports?

The top two rows and bottom two rows in each report will always be the same, as they deal with the customers who were built into a campaign when it was originally created. The middle four rows will not match, as this is where they two reports record status activity differently.

The Total Customers (those added to the campaign when it was built), Total Live Customers (the number still active after your campaign has run for some time), Equity count and Parity count will match on both reports.

Show KPI Data	Activity
Total Customers - 28 Total Live Customers - 28	Total Customers - 28 Total Live Customers - 28
Contacted - 3	Contacted - 1
Appointed - 3	Appointed - 3
Attended - 0	Attended - 0
Sold - 0	Sold - 0
Parity Count - 17	Parity Count - 17
Equity Count - 26	Equity Count - 26
HIDE A	



The Contacted,

Appointed,

Attended and

