ATG AUTOMOTIVE TRANSFORMATION GROUP

Key2Key System Anatomy

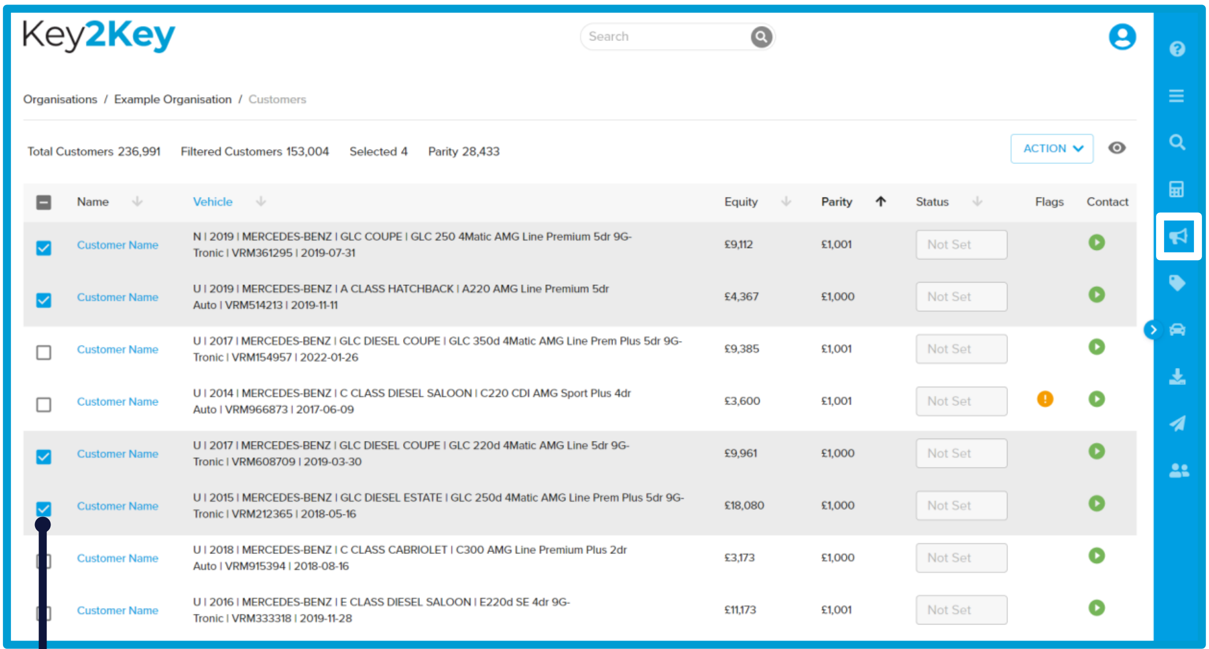
Campaigns

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

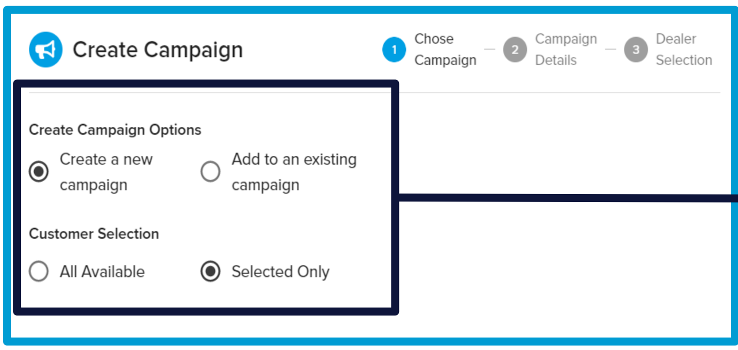
Begin by creating a list of customers using the search and filter options. When you have your list complete, click the Campaign option in the taskbar icons.



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

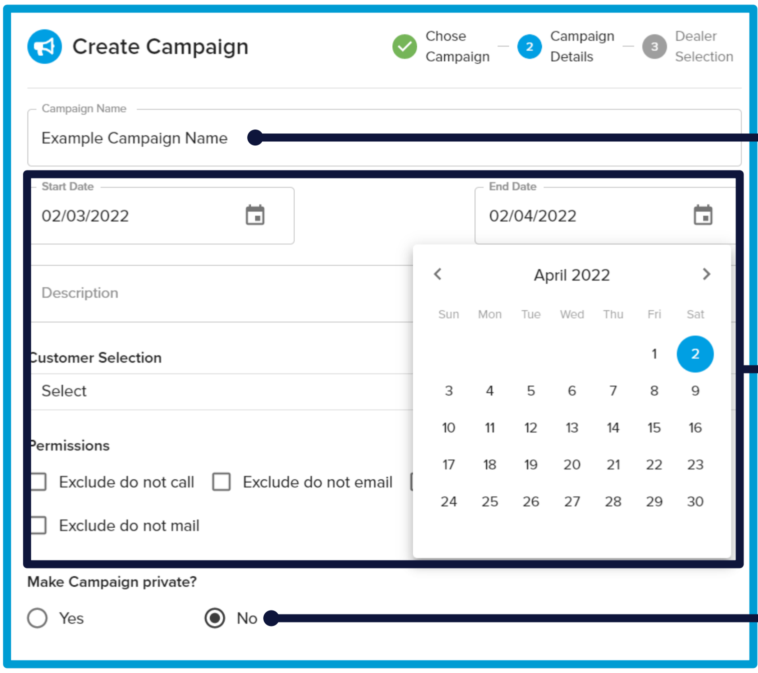
When adding your customer list to a campaign you have the choice whether to create a brand new campaign for this customer cohort, or to add them to a pre-existing campaign you have already built.



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.



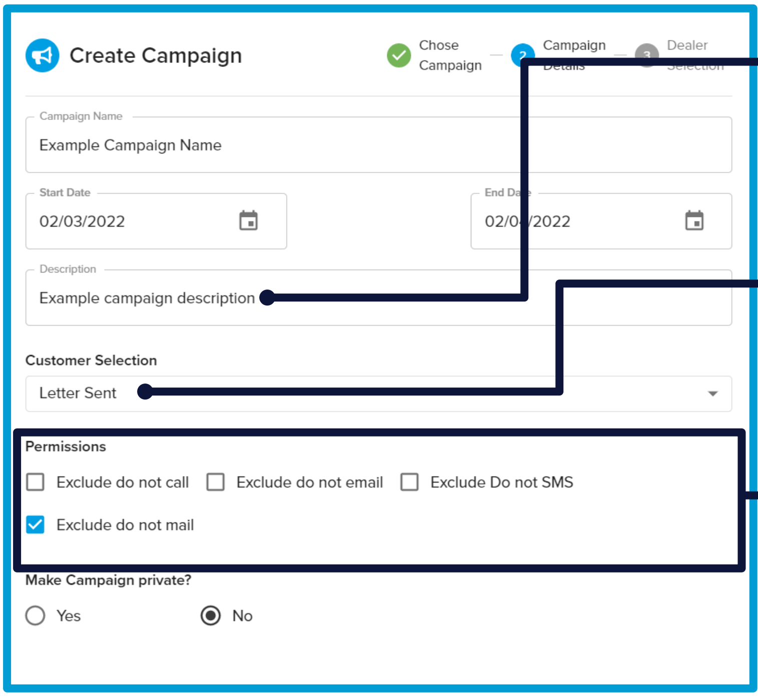
Give your campaign an name. No two campaigns can have the same name, so ensure that yours is unique.

Give your campaign a date-range to run from and to. Please note that once a campaign has expired it cannot be recovered, so ensure it has plenty of run-time to achieve your goals.

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 descriptions are not mandatory, but can be added if they may be helpful to your planning and administration.

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.

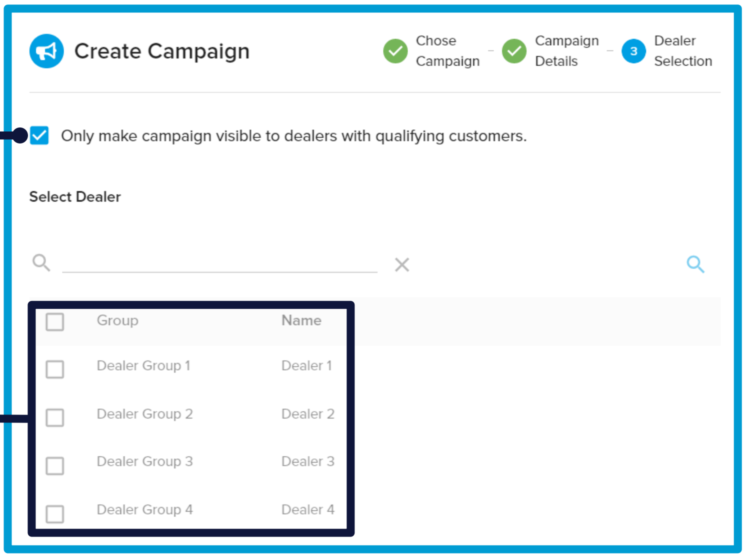
You can choose to exclude customers based on their indicated contact preferences. This is particularly useful if you are creating a campaign for a specific contact method (such as email or SMS) to exclude unsuitable candidates.

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 campaign visible for only those retailers who have customers contained in it.

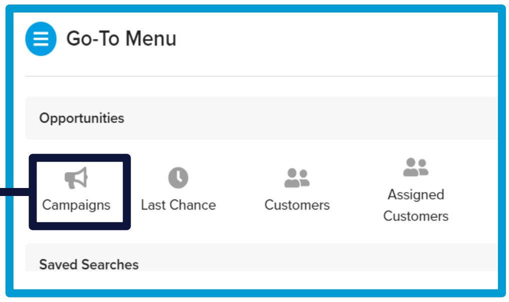
Alternatively, specific retailers may be selected from the options of dealerships within your system visibility.



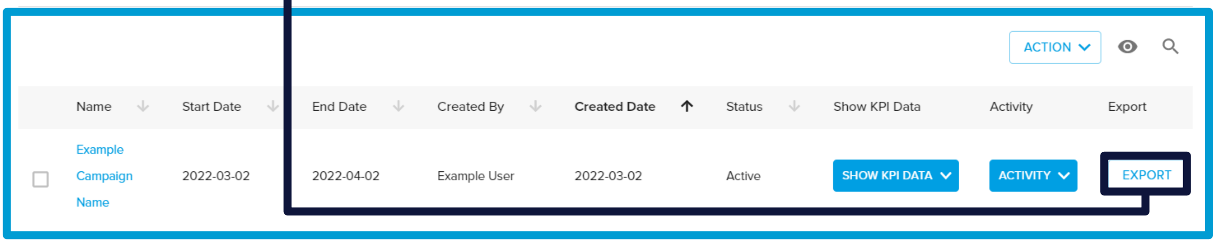
4 Exporting your Campaign

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.

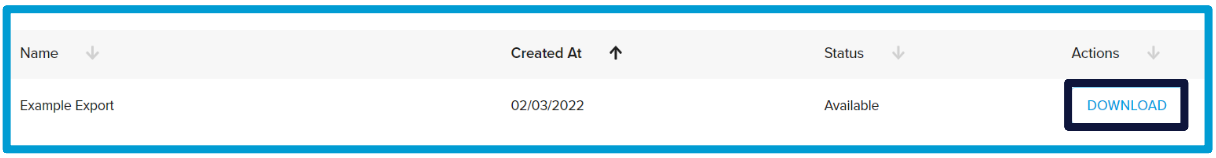
To reach your campaigns, open the Go-To menu and select the Campaigns option.



Choose the campaign you would like to export and select the Export button. Name your export as required and confirm your export choice.

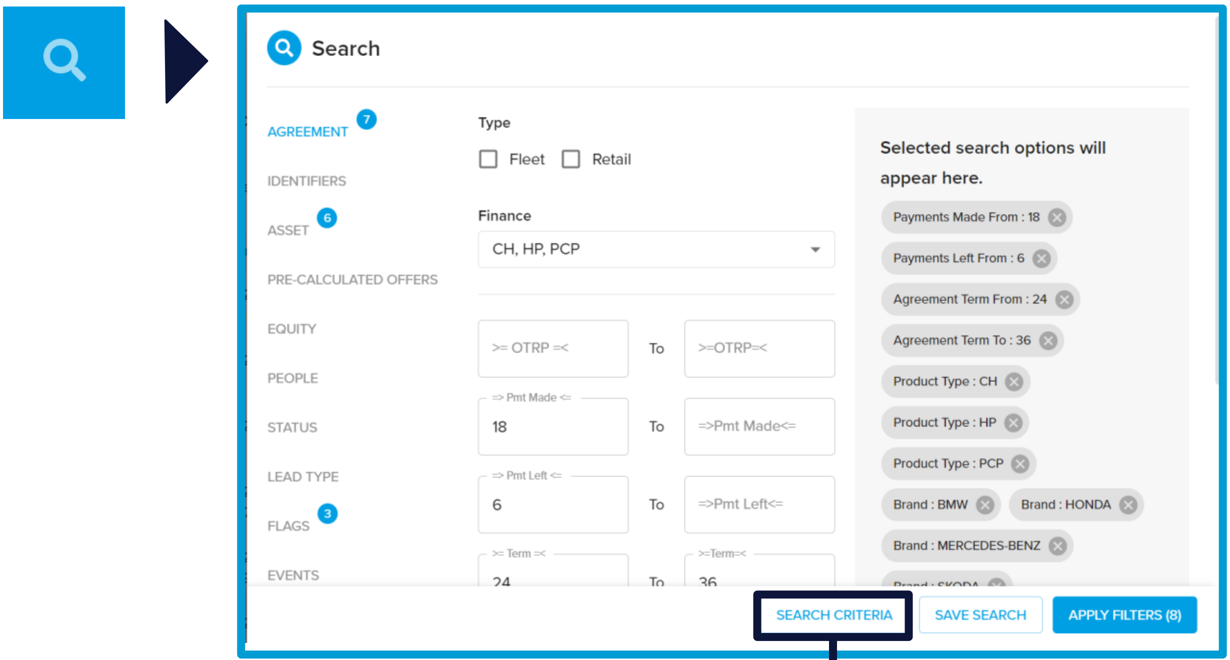


To reach your exports, click the Exports icon on the taskbar (see left). From the subsequent menu, choose the export you would like to download and select the Download option.

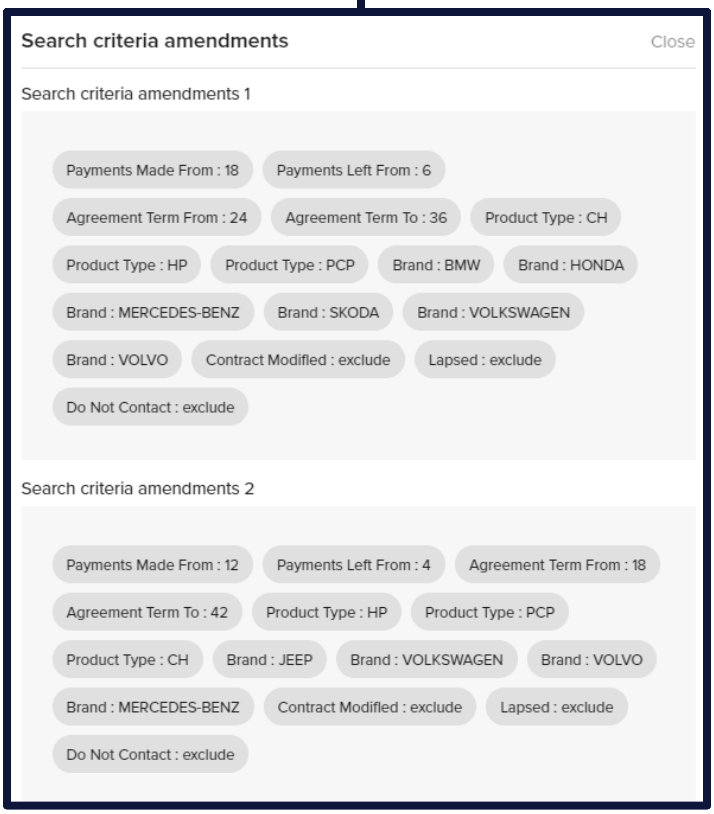


5 Auditing Changes to Campaign Criteria

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.



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.



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	Start Date	End Date	Created By	Created Date	Status	Contact Status	Show KPI Data	Activity
☐	Example Campaign	2022-11-25	2022-11-27	Example User	2022-11-25	Active		SHOW KPI DATA	ACTIVITY

What does each report do?

Show KPI Data

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

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).

CAMPAIGN ACTIVITY

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.

Activity

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

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 Customers - 28
Total Live 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	HIDE

The Contacted, Appointed, Attended and Sold figures are where the two reports will start to diverge in the information that they present.