

KELLEY

TRANSFERRING A CUSTOMER



NOTE

- ▶ One major difference between ELead and DriveCentric is the absence of an enterprise profile where each customer has one profile across the entire group visible to and capable of working deals from each dealership.
- ▶ In DriveCentric, each customer must have a unique profile in each dealership to work a deal in that dealership
- ▶ Users need to ensure they are working deals with the correct customer in the correct dealership, or the deal will not be able to push to the DMS
- ▶ **UPDATE : Effective April 2024, when transferring deals/customers from store A to store B, the system will automatically dead the deal from Store A.**

WHEN TO TRANSFER

- ▶ Given the recent update to DriveCentric Functionality, it's worth revisiting when to transfer a deal.
- ▶ When to Transfer
 - ▶ If a customer at Store A is working with a Sales & Leasing Consultant and states that they would like to shift their focus with the same Sales & Leasing Consultant to Store B
- ▶ When to Create a New Customer
 - ▶ If a customer is working with a Sales & Leasing Consultant at Store A and leaves the store to visit store B on their own. If the customer does not state that he is working with SLC "A", then SLC "B" should create a new customer at Store B and NOT transfer the customer/deal

EXAMPLE

- ▶ In this example, we are going to take Thomas Dent's profile in Buick GMC (Store A) and transfer it into Decatur (Store B).
- ▶ It is extremely important to note that the profile is not transferred from Store A to Store B. Rather, the profile from Store A is copied into Store B.

Sales Pipeline

+ Add Filter

Thomas Dent
Tom Kelley Buick GMC
tdent@kelleyauto.com

Visit

1 Possible Duplicate

2024 GMC Yukon #2A4489
Showroom / Drive By

Activity

Conversation

Open

Deals

Value

Enterprise

Open Deals Hide (1)

2024 GMC Yukon
#2A4489
Mar 1, 2024
Showroom - Drive By

Visit

Add

\$ New Deal

Vehicles

Trade In

Credit App

Actions

Check In

Roadmap

Documents

Desk

Push

Mark as Sold

Snooze

Dead

Transfer

Genius

Fire Genius

5. Select Transfer

3
Delivered
16

Sales Pipeline

+ Add Filter

61

Eng

35

TD

Thomas Dent

Torn Kelley Buick GMC
tdent@kelleyauto.com

Visit

1 Possible Duplicate

2024 GMC Yukon #2A4489
Showroom / Drive By

Activity

Conversation

Open

Deals

Value

Enterprise

Open Deals

Hide (1)

GMC

2024 GMC Yukon
#2A4489
Mar 1, 2024

Visit

Showroom - Drive By

Add

New Deal

Transfer

Notes

This is where you explain why you're transferring the deal

Store

Kelley Auto Mall of Decatur

Sales 1

Nathan West

Sales 2

BDC

Michele Haines

TRANSFER DEAL

Transfer

Genius

Fire Genius

6. Fill out notes to explain why transfer is taking place

7. Utilize drop downs to select Store, Sales 1, Sales 2, and BDC for new deal in Store B

8. Select Transfer Deal

Navigation bar with icons for various functions.

Sales Pipeline

+ Add Filter

61 Eng

**Thomas Dent**
Kelley Auto Mall of Decatur
tdent@kelleyauto.com

Visit 2 Possible Duplicates

2024 GMC Yukon #2A4489
Showroom / Drive By

Activity Conversation **Open** Deals Value Enterprise

Buyers

Salespeople

BDC

Closer

Interested Vehicles


\$96,805.00
2024 Yukon
2A4489
Tom Kelley Buick GMC

Trade-Ins

8. Work Deal in Store B
Make sure to update
Vehicle of Interest, if
necessary

Add

New Deal

Vehicles

Trade In

Credit App

Actions

Check Out

Roadmap

Documents

Desk

Push

Mark as Sold

Snooze

Dead

Transfer

Genius

Fire Genius

DEADING THE ORIGINAL

- ▶ Once the profile has been successfully copied into Store B, the system will automatically dead the original deal in Store A
- ▶ This is a change (April 2024) from the original functionality in the system

NOTE

- ▶ All activities, deals, and customer information present in store A will continue to live in Store A.
- ▶ However, once split, the customer profiles at Store A and Store B will live independently of one another

Questions?

- ▶ Tommy Dent
- ▶ 260.417.0034
- ▶ Tdent@KelleyAuto.com

