

## CRM for Work Trucks Invaluable in Creating Repeat Customers

# 5X

Studies have found that it cost 5 times more to attract a new customer than keep an existing one.

### The Secret to Getting Repeat Customers (\*)

- Let customers know what you are doing for them. ...
- Write old customers personal, handwritten notes frequently. ...
  - Keep it personal. ...
  - Remember special occasions. ...
  - Pass on information. ...

The common denominator in creating repeat customers is timely, and personal, follow-up. Our CRM for Work Trucks system was built for this purpose, providing everything needed to achieve this follow-up goal. The system offers a way to easily find buyer's purchases, while providing detailed truck and upfit body information used for making an effective and relevant follow-up contact.

Our CRM for Work Trucks system is made up of 4 integrated components:

- **Archive Inventory** – This is an inventory of sold upfit vehicles. It includes the vehicle information and images from the original vehicle's detail page. This information is accessed through the Sales History Report.
- **Buyers Database** – This is the buyer's information, the information needed for follow-up contact. This information is accessed through the Sales History Report.
- **Electronic Document Storage** – Any documents originally associated with the vehicle, (i.e. invoices) remains associated with the vehicle through the Archive inventory. This information can be accessed through the Archive Inventory.
- **Sales History Database** – This is the database of upfit sales transactions and is the basis for the Sales History Report that ties the CRM system together.

(\*) Entrepreneur article "The Secret of Getting Repeat Customers" March 24, 2015



Below is the Sales History Report. This report shows the sales transactions created through the Sold routine. These transactions include the Date Sold, Salesman, VIN, Vehicle Category, Title, Buyer Information and Comments.

From:  To:  Or  Show All Sales History

Salesperson:  Company Name:  Customer Number:

Status Choices:  => Status Search For:

Date Sold	Status	Salesmen	VIN	Category	Title	Buyer Info	Customer#	Contract#	Days Viewed	Comments
11/13/20	**	n/a	<u>1FDBW5PMXKKB12420</u>	Covered Utility Van	2019 Ford TRANSIT 350 XL KNAPHEIDE ULTRA LOW COVERED UTILITY VAN	Michael O Jamar Michael O Jamar mike.jamar73@gmail.com 9132197376	<u>488928</u>		247	112

The report can be run for a date range, or for all sales transactions. The report can also be set to include all buyers or a single buyer. The same is true for salespeople. Once the report is generated, it can be sorted by Category Type, Buyer, Salesmen, or VIN.

This report provides valuable information for post sales contacting, which is key to creating repeat customers.

Two key components that make this report so valuable is the VIN and Customer Number.

If the VIN is underlined that means it is in the Archive (Sold) inventory and by clicking on the VIN you will see its Detail Page in the Archive. This will include a link to any associated documents for the vehicle, like invoices.

If the Customer Number is underlined, and it should always be underlined, by clicking on it the customer detail information page will show.

From this one report you have vehicle details and customer contact information for that sells transaction.

