

Reminder: Learn How to Increase ROI with Care Connect - Register Today!

TO: SDC EST CEN WST
FROM: Subaru of America, Inc.
DEPARTMENT: Marketing
DATE: 04/07/2015
CATEGORY: Veh Sales/Mktg

Understanding Care Connect successes and failures can bring you recognizable business benefits. Join us for a webinar to learn how Care Connect key metrics can help identify what is working right for you and what your business challenges are.

Tuesday, April 14 @ 1PM EST – [**Register Now!**](#)

[**Click here**](#) for a Quick Reference Reporting Guide which is a great tool to help you get the most out of Care Connect reports.

Dealer-facing Reports in Care Connect

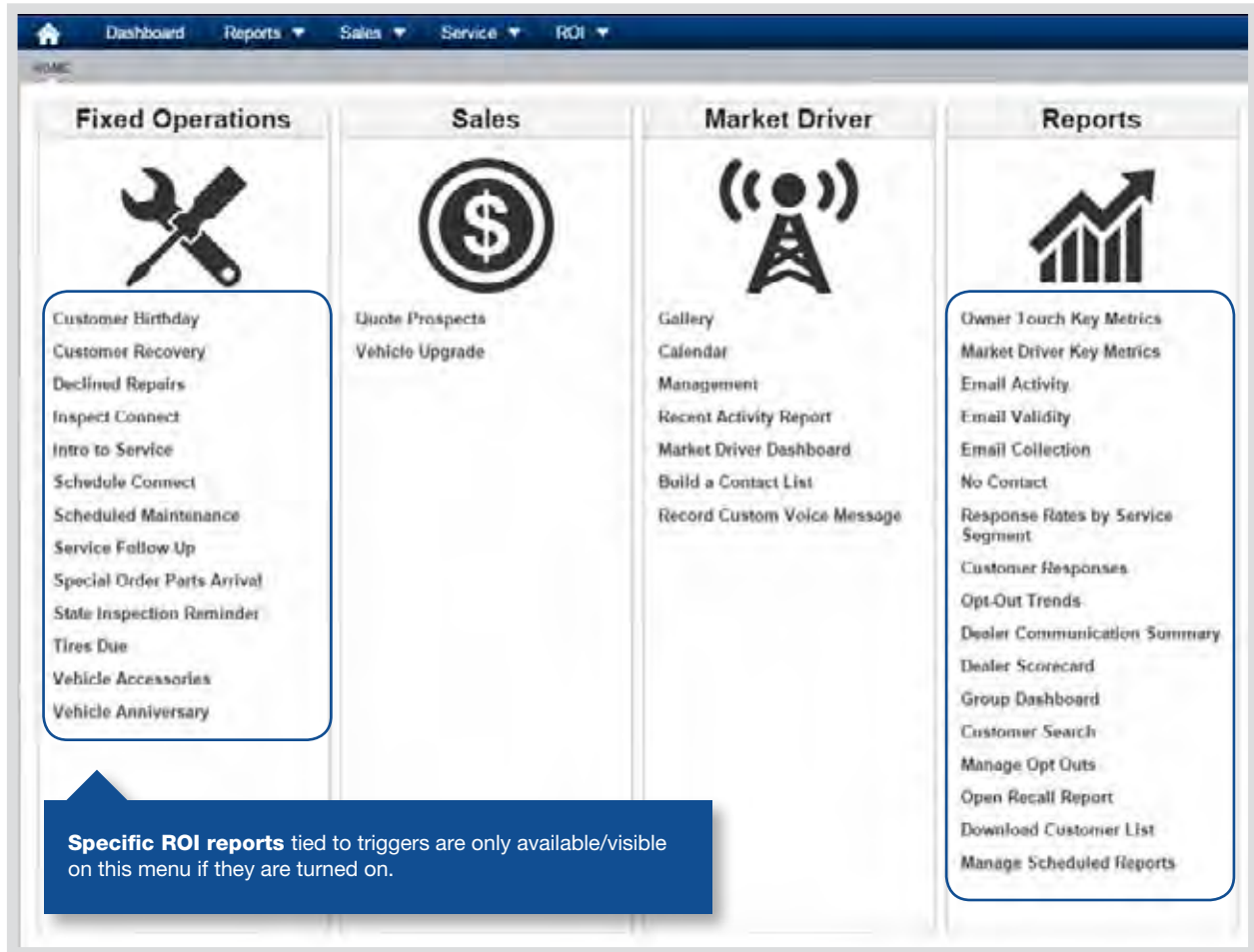
How to access reports in Care Connect	2
Schedule Reports to be delivered to your inbox	3

Sales & Service Reports

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Service-specific Reports

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The screenshot shows the Subaru Care Connect dashboard with a navigation bar at the top containing: Dashboard, Reports, Sales, Service, and ROI. The main content area is divided into four columns: Fixed Operations, Sales, Market Driver, and Reports. The Reports column is highlighted with a blue box and contains a list of report options. A blue callout box points to the Reports menu.

Fixed Operations

- Customer Birthday
- Customer Recovery
- Declined Repairs
- Inspect Connect
- Intro to Service
- Schedule Connect
- Scheduled Maintenance
- Service Follow Up
- Special Order Parts Arrival
- State Inspection Reminder
- Tires Due
- Vehicle Accessories
- Vehicle Anniversary

Sales

- Quote Prospects
- Vehicle Upgrade

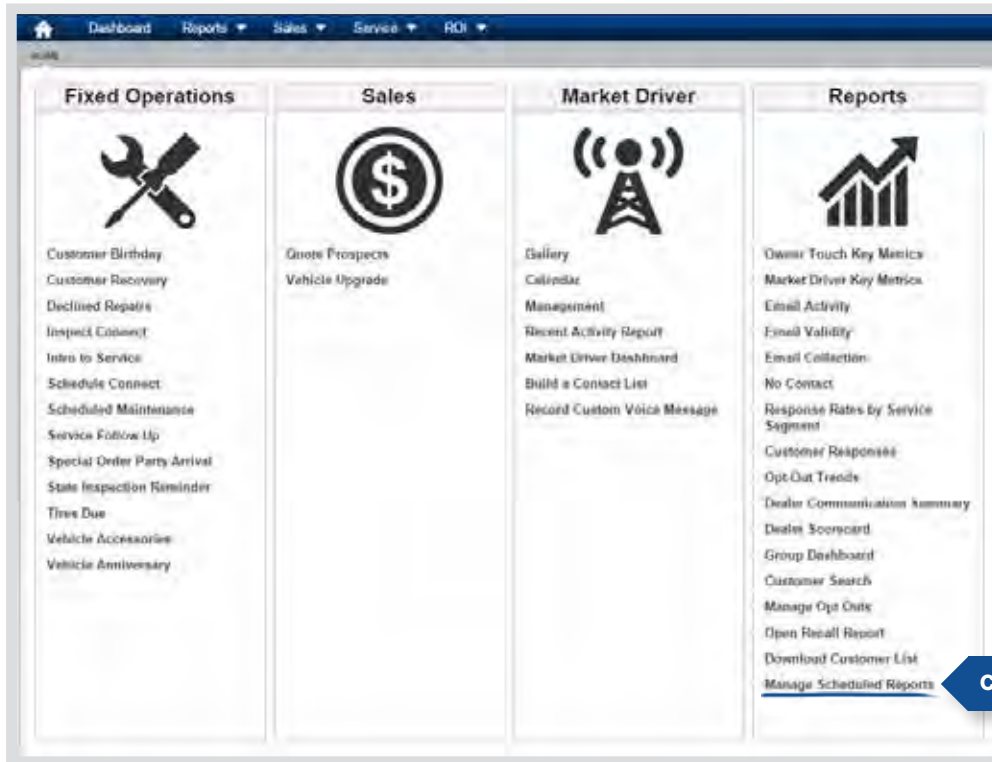
Market Driver

- Gallery
- Calendar
- Management
- Recent Activity Report
- Market Driver Dashboard
- Build a Contact List
- Record Custom Voice Message

Reports

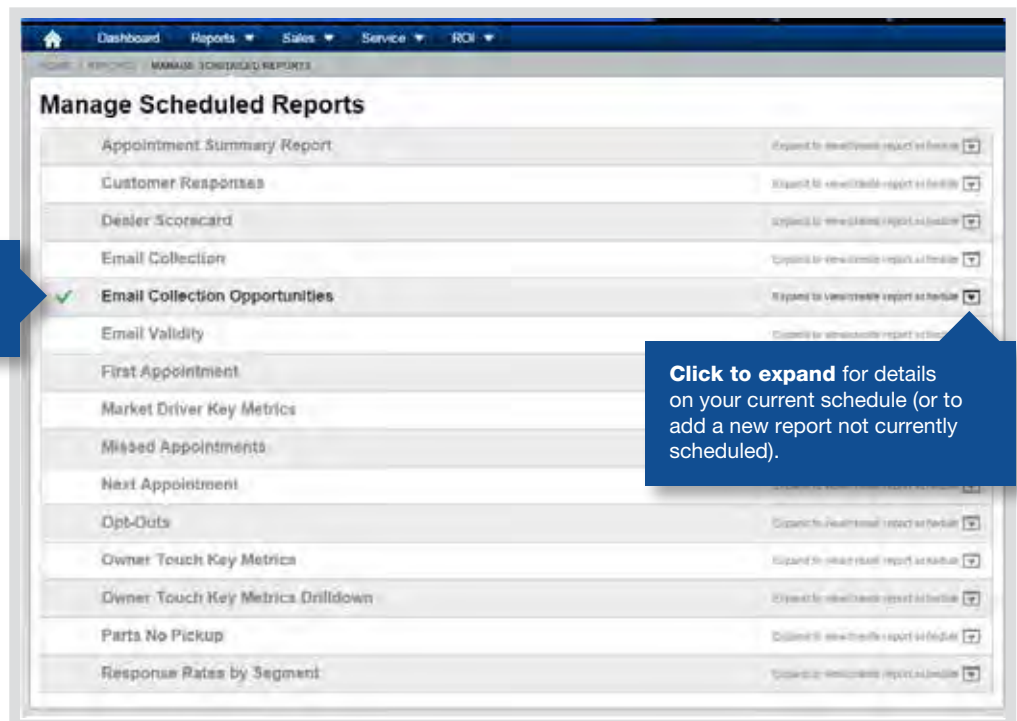
- Owner Touch Key Metrics
- Market Driver Key Metrics
- Email Activity
- Email Validity
- Email Collection
- No Contact
- Response Rates by Service Segment
- Customer Responses
- Opt-Out Trends
- Dealer Communication Summary
- Dealer Scorecard
- Group Dashboard
- Customer Search
- Manage Opt Outs
- Open Recall Report
- Download Customer List
- Manage Scheduled Reports

Specific ROI reports tied to triggers are only available/visible on this menu if they are turned on.



You can now schedule reports directly to your inbox on a timeline that works to stay informed & track successes.

[Click here](#) to go to Manage Scheduled Reports



Any reports that are currently scheduled will show up in bold with a green check next to them.

Click to expand for details on your current schedule (or to add a new report not currently scheduled).

✓ **Email Collection Opportunities** Expand to view/create report schedule

Enabled	Schedule Name	Frequency	Recurrence	Format	Actions
☒	Email Collection Opportunities TEST	Monthly	1st	X	Edit Delete

For reports currently scheduled, you can choose to turn off the current delivery schedule without changing or deleting any parameters.

[Go to report to add new schedule](#)

To edit an existing report, click edit and you will be able to update the name of the report, the frequency (monthly, weekly or daily) and the exact delivery day during that timeframe.

Schedule Report

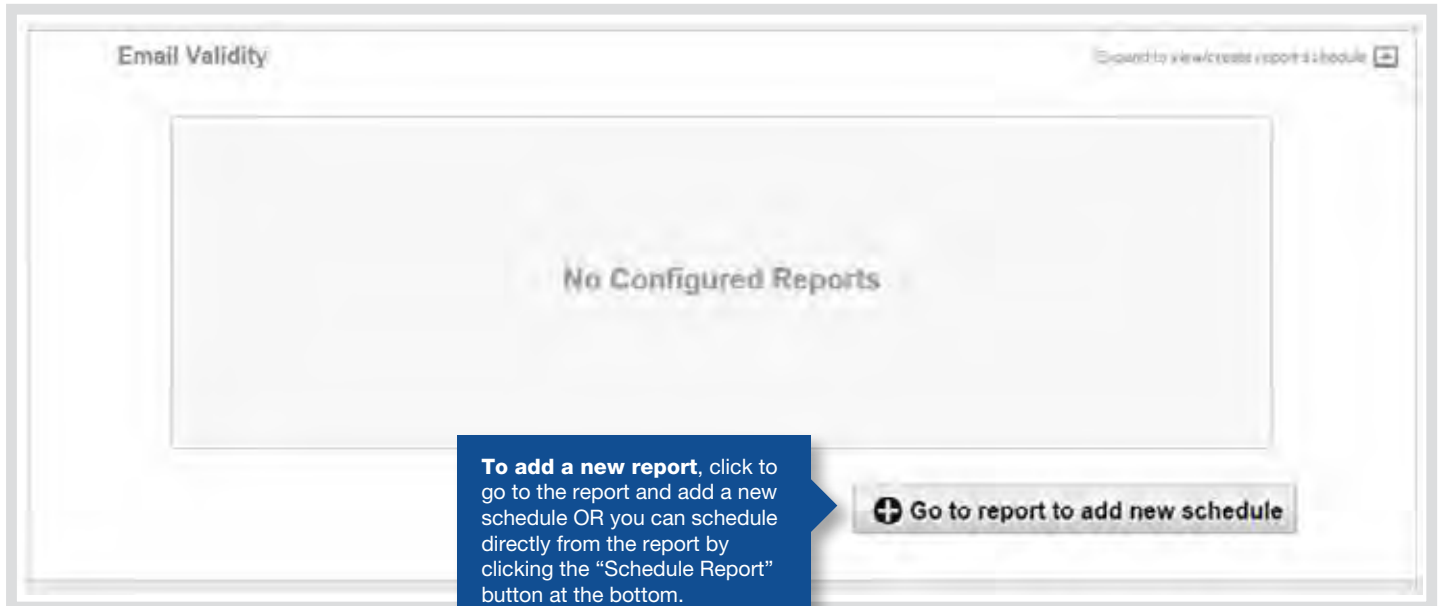
Schedule Name:

Frequency:

Recurrence:

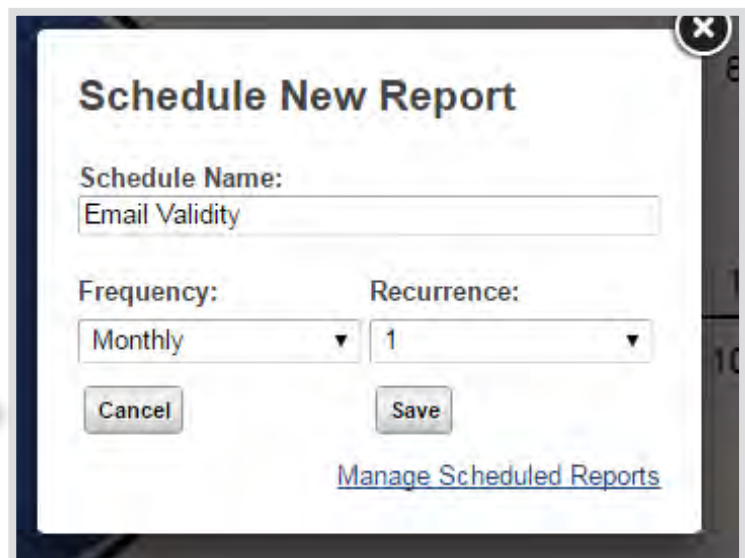
[Cancel](#)

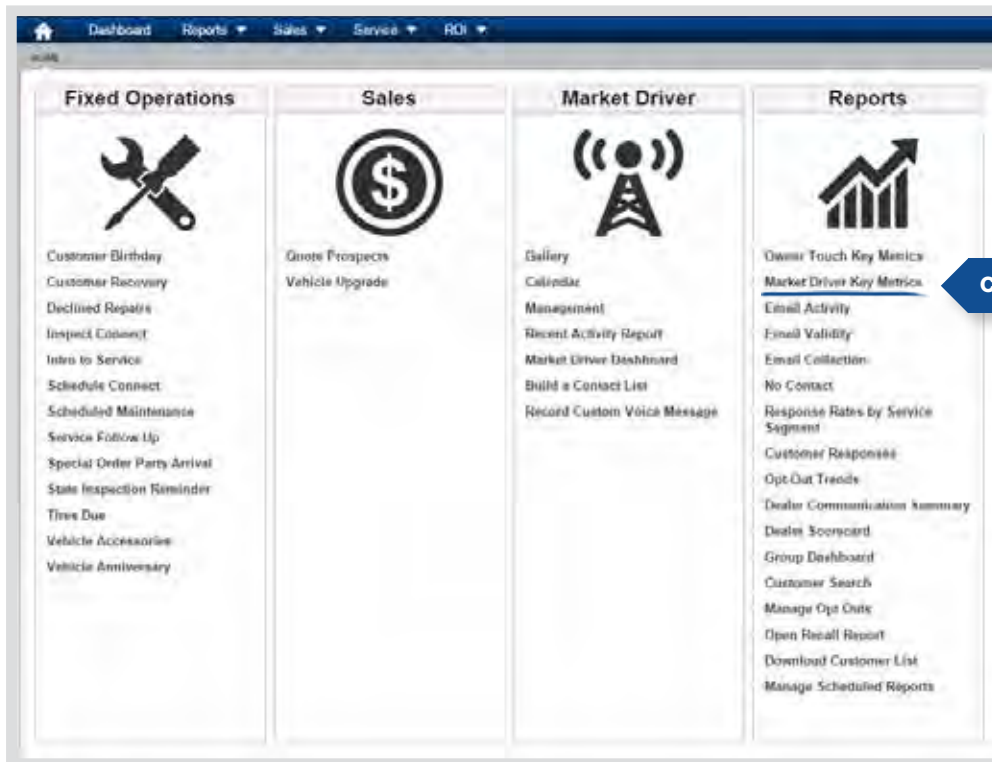
[Go to report to add new schedule](#)



NOTE: Scheduled reports will be delivered in excel format as an email attachment (one per retailer per report) and will include the parameters that were in place at the time you scheduled the reports.

The same pop-up box will appear to schedule a new report as you would see if you were to edit an existing report. You can also click the link to go directly to the Manage Scheduled Reports page and make any other changes.





Learn more about the effectiveness of Market Drivers including breakdown by channel and segment (for Service).

[Click here](#) to go to Market Driver Key Metrics

Select the Sales OR Service Market Driver & Launch date, then click Run Report. For pieces with multiple launches, select results for 1 launch, or a combined results over multiple launches.



For Service, see results by segment or overall.

Look at results by channel, and then compare them to others.

Click to preview the Market Driver that was sent out.

Toggle between key metrics and compare to Nation, Region, Zone & District.

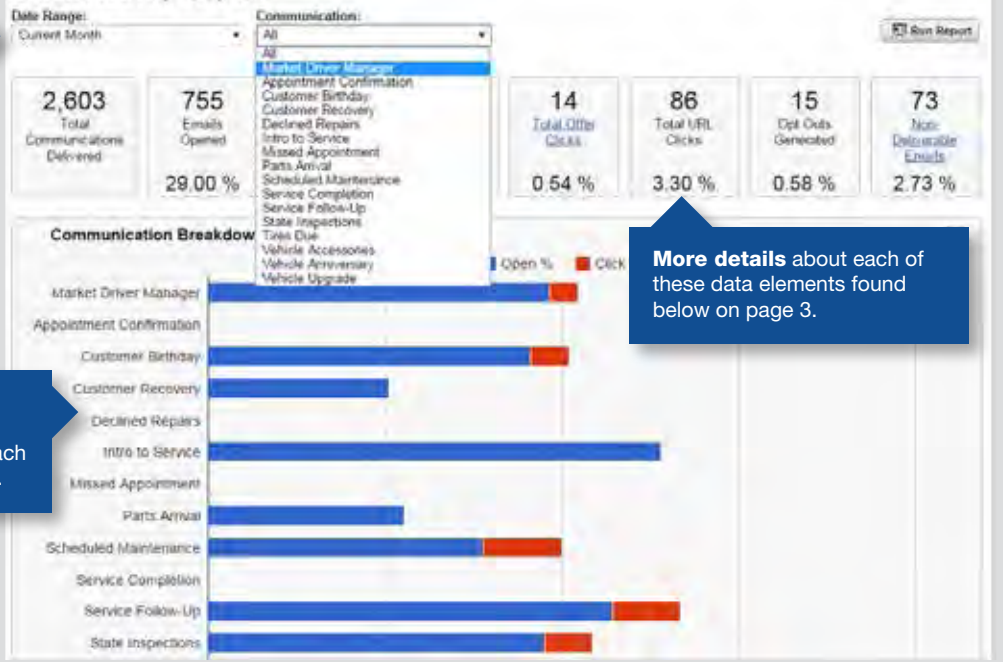


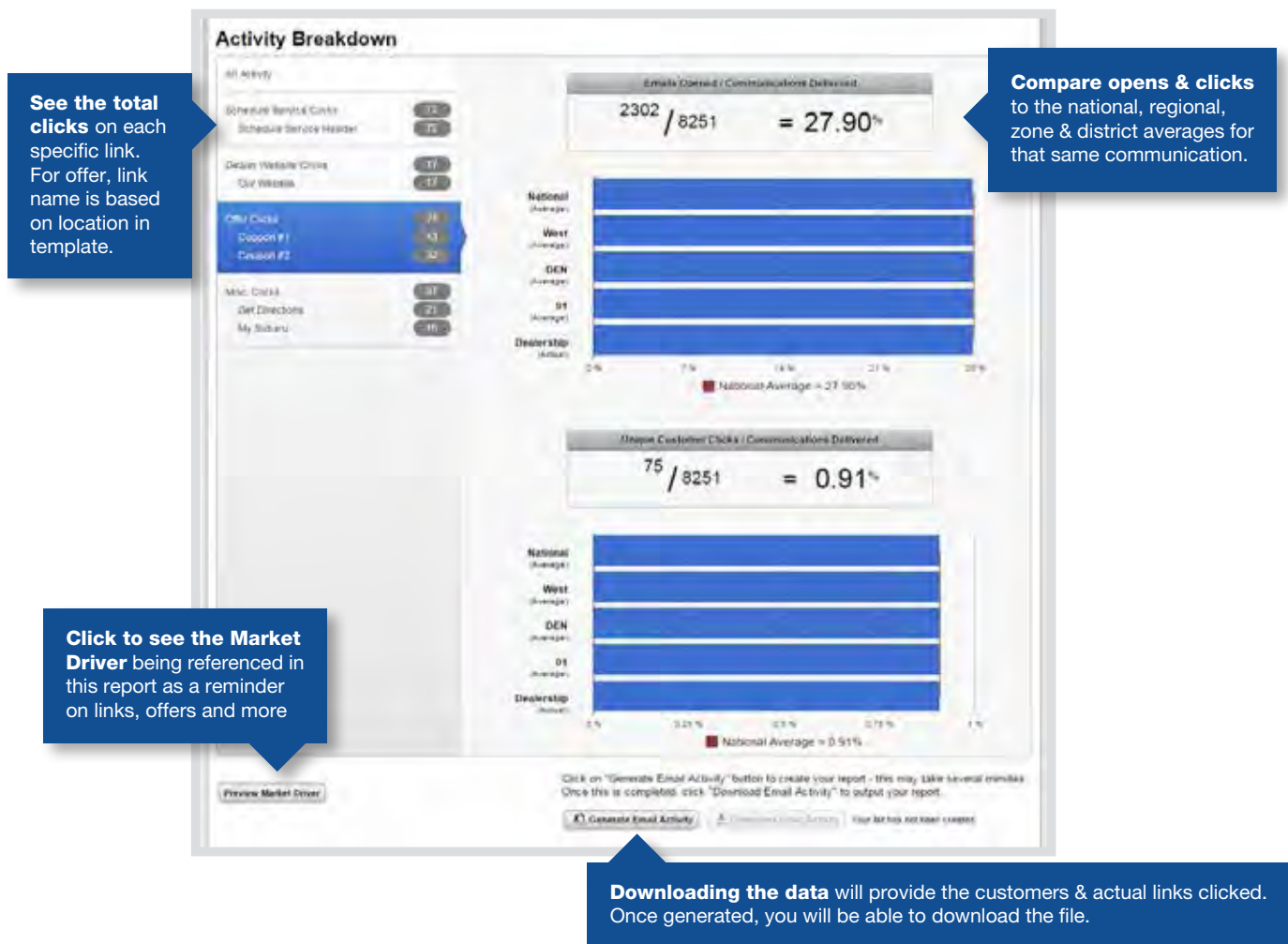
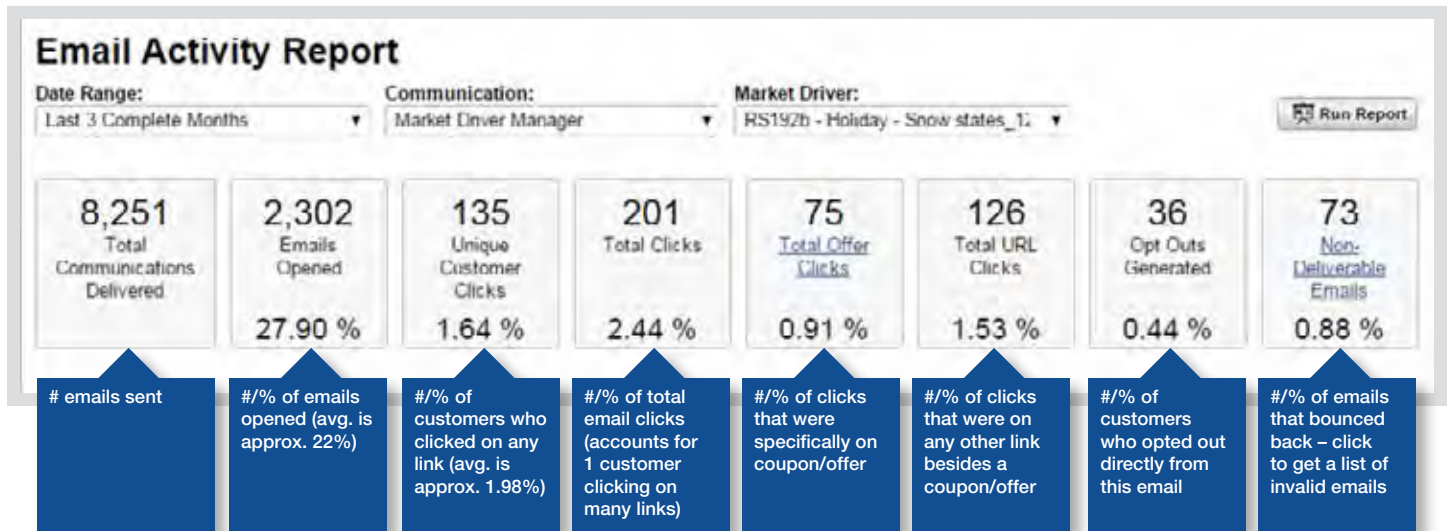
Get deeper insight into open & click activity on any emails sent out, and check success of specific coupons or offers!

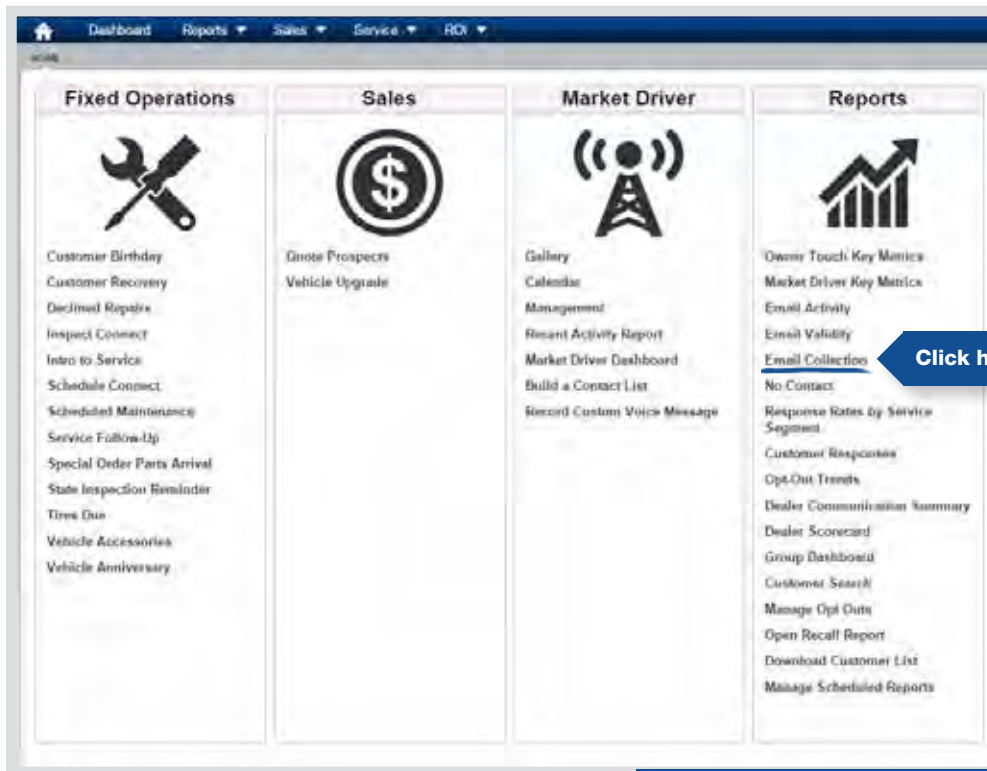
[Click here](#) to go to Email Activity

Select the date range and then the Owner Touch Trigger or Market Driver you'd like to learn more about.

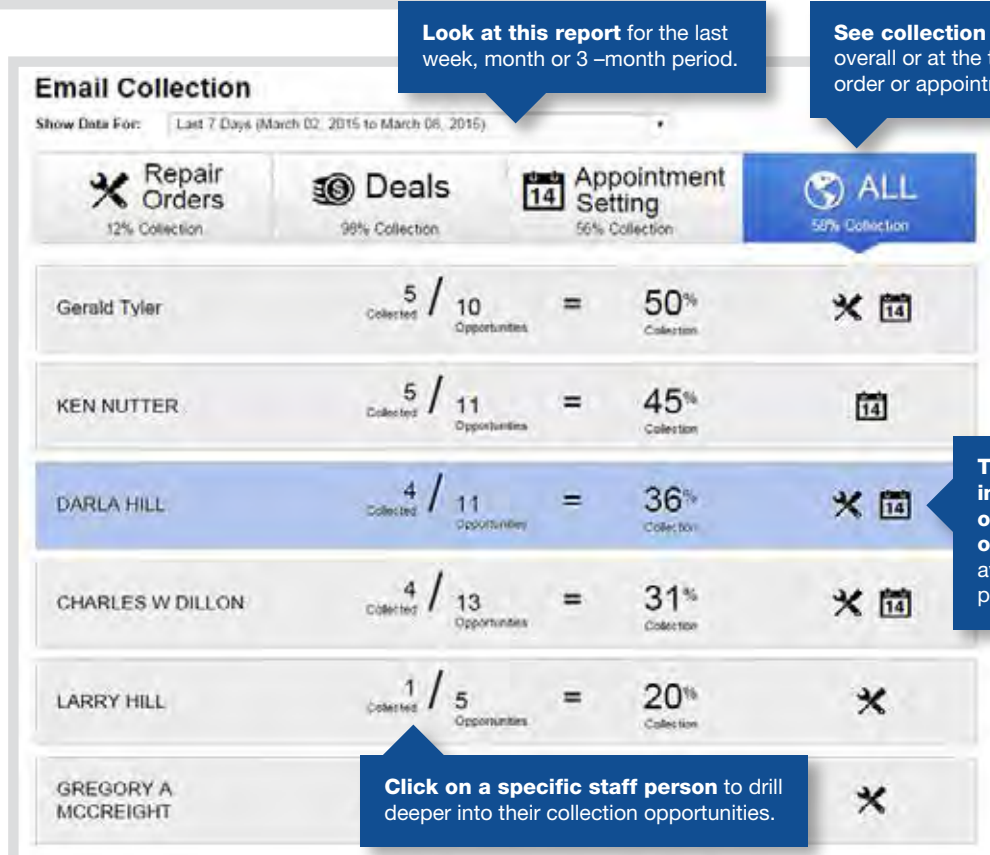
Email Activity Report







Track how staff is doing collecting email addresses. For every 50 new valid email addresses, a retailer can make an additional \$1,000 per year.



Email Collection Opportunities

Date Range: Last 7 Days (March 02, 2015 to March 08, 2015) **Employee:** DARLA HILL (Service Advisor) **Collection Status:** Select Some Options

Email Status: Select Some Options **Opportunity Type:** Select Some Options

Run Report

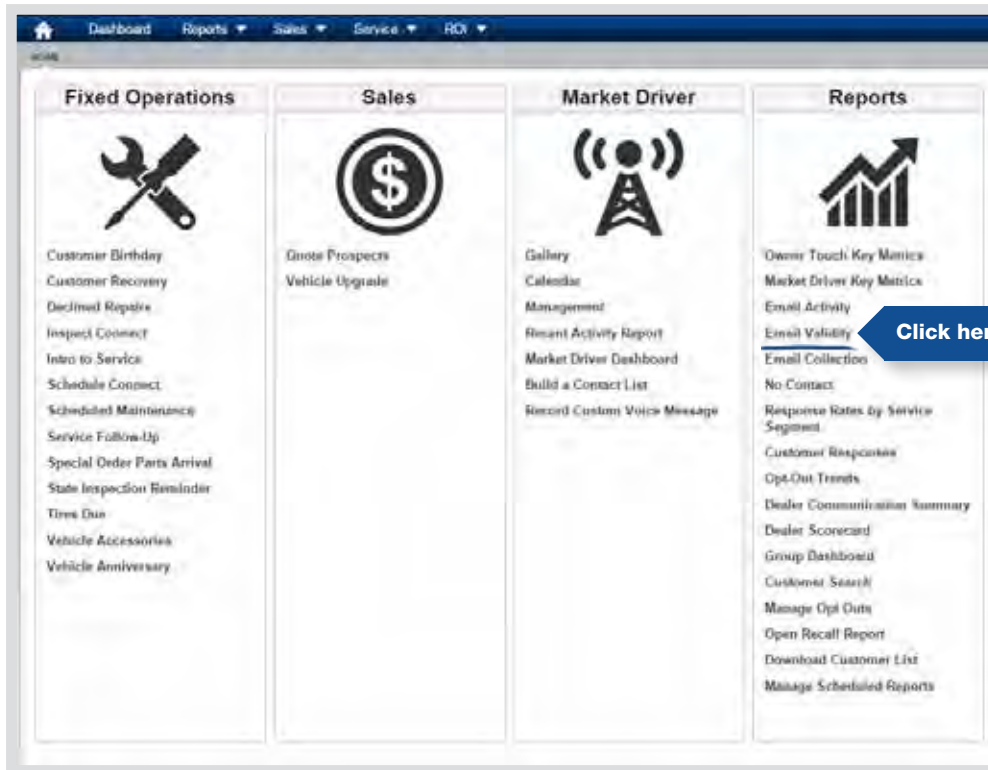
Last 7 Days (March 02, 2015 to March 08, 2015)

Employee Name	Customer Name	Email	Date	Opportunity	Email Status	Collection Status
DARLA HILL	SHERA LUNDGREN	DLH@A.COM	3/4/2015 10:06:22 AM EST	Repair Orders	Refused	Missed
DARLA HILL	DONNA BRUMBY		3/2/2015 11:21:34 AM EST	Repair Orders	None	Missed
DARLA HILL	KRISTIN DESIMONE		3/2/2015 4:42:43 PM EST	Repair Orders	None	Missed
DARLA HILL	JEANNE DALY		3/5/2015 1:50:56 PM EST	Repair Orders	None	Missed
DARLA HILL	ELEEN DUNN	ELEENDUNN1@ERIZON.NET	3/2/2015 9:30:40 AM EST	Appointment Settings	Good	Changed
DARLA HILL	LORI SCHULCH	DLH@A.COM	3/2/2015 11:04:46 AM EST	Appointment Settings	Refused	Missed
DARLA HILL	BRIAN TANNER		3/5/2015 4:05:41 PM EST	Appointment Settings	None	Missed
DARLA HILL	EDWARD KICHO		3/5/2015 3:05:41 PM EST	Appointment Settings	None	Missed
DARLA HILL	GERALD LOBIANCO	GLB1@ANDREW-CMU.EDU	3/5/2015 5:31:43 AM EST	Appointment Settings	Good	Changed
DARLA HILL	ELIZABETH ADAMS	lyemypirekmi@gmail.com	3/5/2015 4:21:34 PM EST	Appointment Settings	Good	Changed
DARLA HILL	TIMOTHY FRISCO	JACQUE FRISCO@BIG HEARTPET.COM	3/3/2015 9:03:14 AM EST	Appointment Settings	Good	New

The timeframe will carry over from the top report when you click through on a specific staff person, but you can also adjust your view to see a different employee, timeframe, and more.

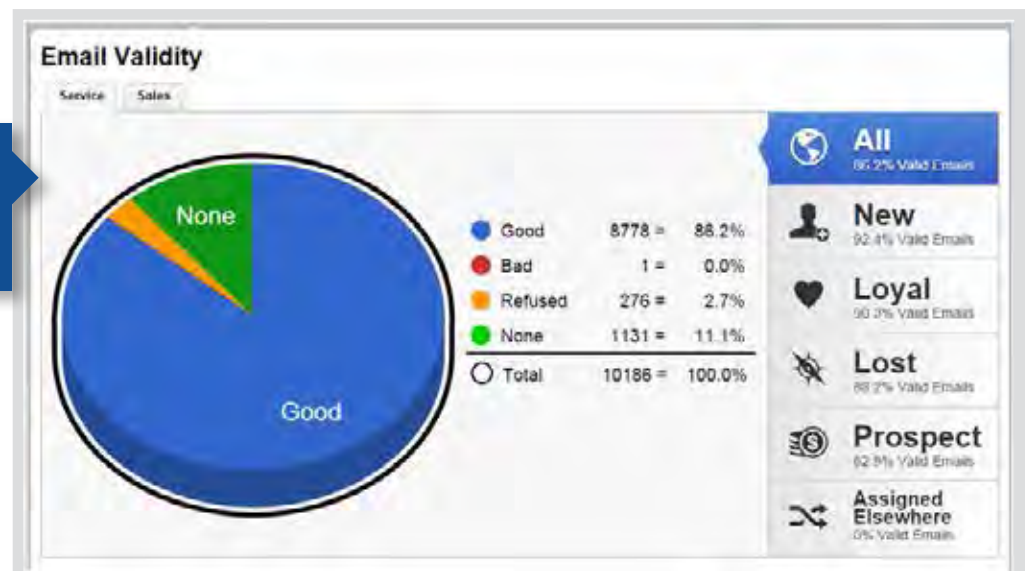
You can link directly to the customer's profile where you can find a customer's phone number and follow up if necessary.

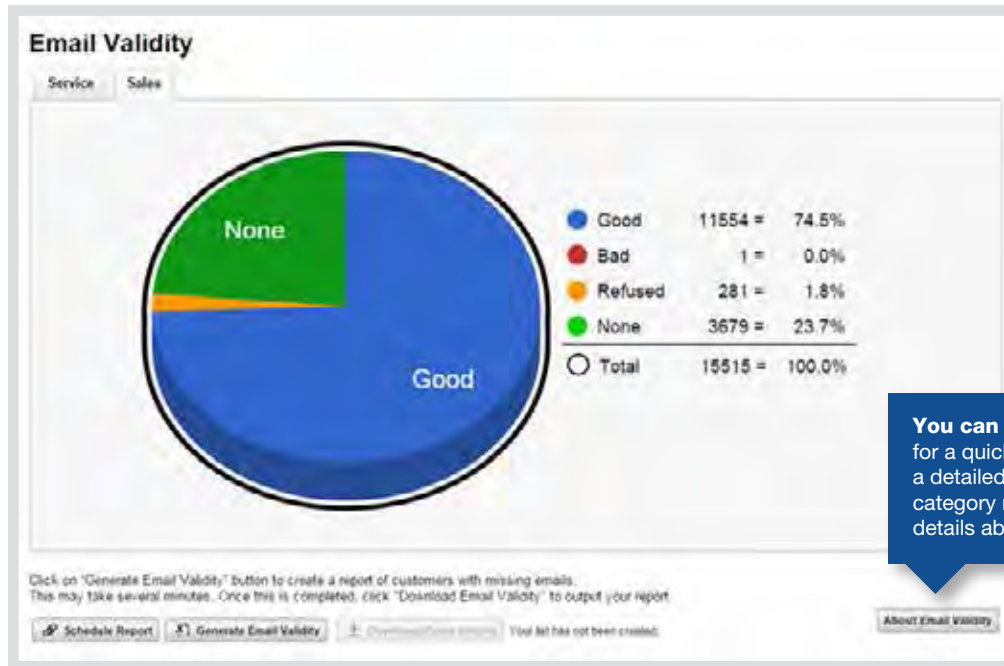
Email Status Definitions are carried over from the Email Validity Report.



Track the % of valid emails. For every 50 new valid email addresses, a retailer can make an additional \$1,000 per year.

At a glance, see the current % of valid email addresses for service or sales (NOTE – there is no segment breakdown when looking at the sales tab).





You can roll over each category for a quick tool tip, or click here for a detailed description of what each category means as well as other details about this report.

This pop-up is available to save or print when you click "About Email Validity" as outlined above.

CARECONNECT

About Email Validity

How are my email addresses categorized?

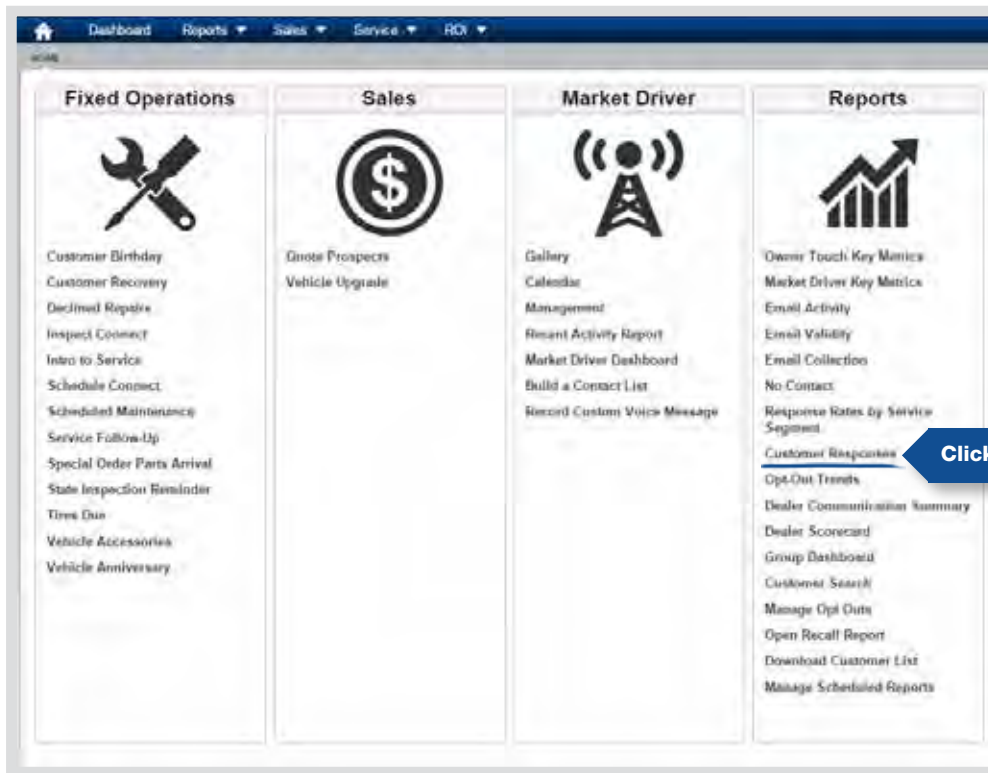
Email addresses are categorized into four buckets:

- Good** – This is the number of your assigned customers with valid email addresses¹.
- Bad** – This is the number of your assigned customers with invalid email addresses. It may be a customer to which you've previously sent an email communication and it came back as undeliverable. Or it may be an email address that is improperly formatted (e.g. missing the "@").
- Refused** – These are your assigned customers with an email address that matches one of the fake addresses configured in your Care Connect settings. The fake email address setting allows you to specify what you commonly use when a customer does not want to give you their email address. Common fake emails include wng@a.com (wng stands for "will not give") and dnh@a.com (dnh stands for "does not have"). You can list as many fake email addresses as needed in your Care Connect settings. Contact your CCAM or Care Connect support (support@SubaruCareConnect.com) to check or edit your settings.
- None** – These are your customers for which you do not have any email address information.

Why are my numbers for Service and Sales different?

In the Service view, the Email Validity Report shows the number of customers in your DMS that are service-assigned to you via the Care Connect business rules. These include your New, Loyal, Lost and DMS Prospect customers. It does not include your non-DMS Prospect customers.

In the Sales view, the Email Validity Report shows the number of customers in your DMS that are sales-assigned to you via the Care Connect business rules. These include customers that are service-assigned to you as well as customers that have previously purchased a vehicle from you.



See how your customers are responding (or NOT) to communications and follow up to get the most from your communications.

[Click here](#) to go to Customer Responses

Customer Responses

#1 Cochran Subaru's communications sent in January 2016

Showing Data For:

Declined Repairs
Appointment Confirmation
Customer Birthday
Customer Recovery
Declined Repairs
Intro to Service
Market Driver
Missed Appointments
Scheduled Maintenance
Service Completion
Service Follow-Up
Special Order Parts Arrival
State Inspection Reminder
Tires Due
Vehicle Accessories
Vehicle Anniversary

Select any specific communication and timeframe, then decide if you want to see customers who responded already, or have yet to generate an RO or deal.

No RO or Deal

Run Report

Create Excel

Download CSV

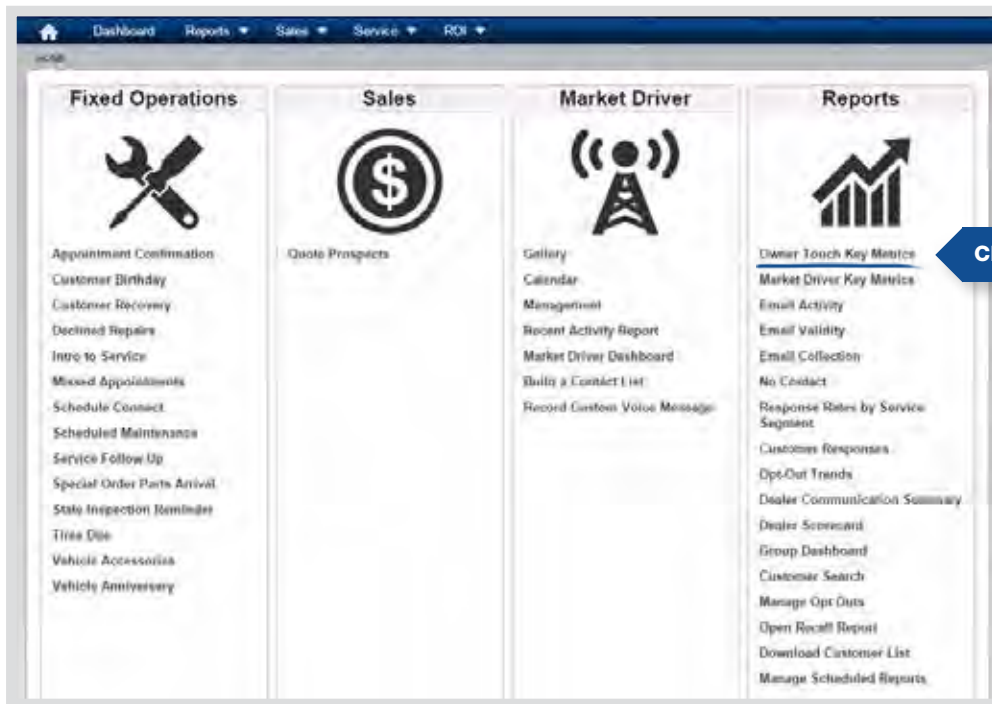
Your file has not been created.

Total Records: 14

Name	Contact Date	Respond Date	Days	RO	Customer Pay	Warr. Pay	Deal	Profit
SEVER, DAVID	1/10/2016				\$0	\$0	\$0	\$0
WONTE, JUDY	1/31/2016				\$0	\$0	\$0	\$0
EMERY, CORTY	1/10/2016				\$0	\$0	\$0	\$0
ROBIN, JAMES	1/31/2016				\$0	\$0	\$0	\$0
FRANK, GARY	1/13/2016				\$0	\$0	\$0	\$0
STACEY, SUE	1/10/2016				\$0	\$0	\$0	\$0
WATSON, JAMES	1/11/2016				\$0	\$0	\$0	\$0
SARA, JULIA	1/10/2016				\$0	\$0	\$0	\$0

For example, this is a list of all customers who have received the Declined Repair trigger but have YET to come in for an RO this month. You can click on a customer's name to be taken to their customer record where you can find their contact information to follow up if desired.

If looking at those who generated a deal or RO, you will see the date they responded to the communication and how many days it took between the initial communication & the response. You can also find the RO or Deal ID which allows you to click through for more details.



Learn more about the effectiveness of Owner Touch Triggers including breakdown by channel and segment (for Service).

[Click here](#) to go to Owner Touch Key Metrics

Owner Touch Key Metrics Report
Communications sent in January 2015

Showing Data For: Jan

Quarter:

Revenue-Generating Owner Touch

Owner Touch	ROs / Customers	Response %	Customer Pay	Channel
Scheduled Maintenance	72 / 332	= 22%	= \$9,922	
Customer Recovery	40 / 817	= 5%	= \$7,568	
Declined Repairs	4 / 22	= 18%	= \$592	
State Inspection Reminders	0 / 0	= 0%	= \$0	
Tire Due	9 / 158	= 6%	= \$690	
Customer Birthday	21 / 283	= 7%	= \$3,439	
Vehicle Anniversary	22 / 253	= 9%	= \$2,426	
Vehicle Accessories	0 / 0	= 0%	= \$0	
Vehicle Upgrade	0 / 0	= 0%	= \$0	

Select preferred timeframe Click on any communication to drill down into more detailed performance metrics.

Revenue-Generating Owner Touch show at the top of the page, with ROs generated within 30 days divided by unique customer communications calculating the response rate.

Select the preferred timeframe to view the data then run the report.

Clicking any arrow will expand the view to include sub-categories, such as:

- Yellow Brakes
- Red Brakes
- Yellow Additional

Triggers or Communication Channels not in use will be grayed out.

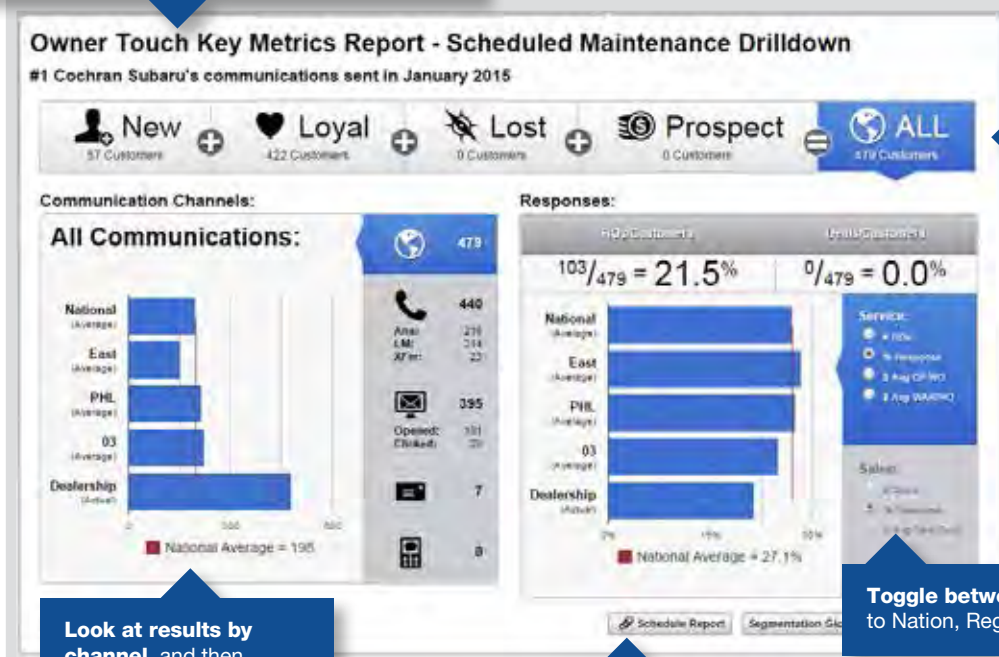
Relationship-Building Owner Touch show at the bottom of the page, with specific unique metrics for each trigger depending on the goal.

Owner Touch	Customers	Unique Metrics	Channels
✓ Appointment Confirmation	629	31% were confirmed	Phone, Email, Text
i Intro to Service	117		Email, Text
📅 Missed Appointments	33	18% rescheduled appointments	Phone, Email
🔧 Special Order Parts Arrival	49	94% of parts picked up	Phone, Email, Text
👤 Service Completion	110		Phone, Email, Text
🕒 Service Follow-Up	852	30% responded	Phone, Email

Schedule Report Download

Export the data to Excel, or schedule the report to be delivered to your inbox on a weekly /monthly basis.

The timeframe from this report follows the timing from the combined Owner Touch Key Metrics Report above.

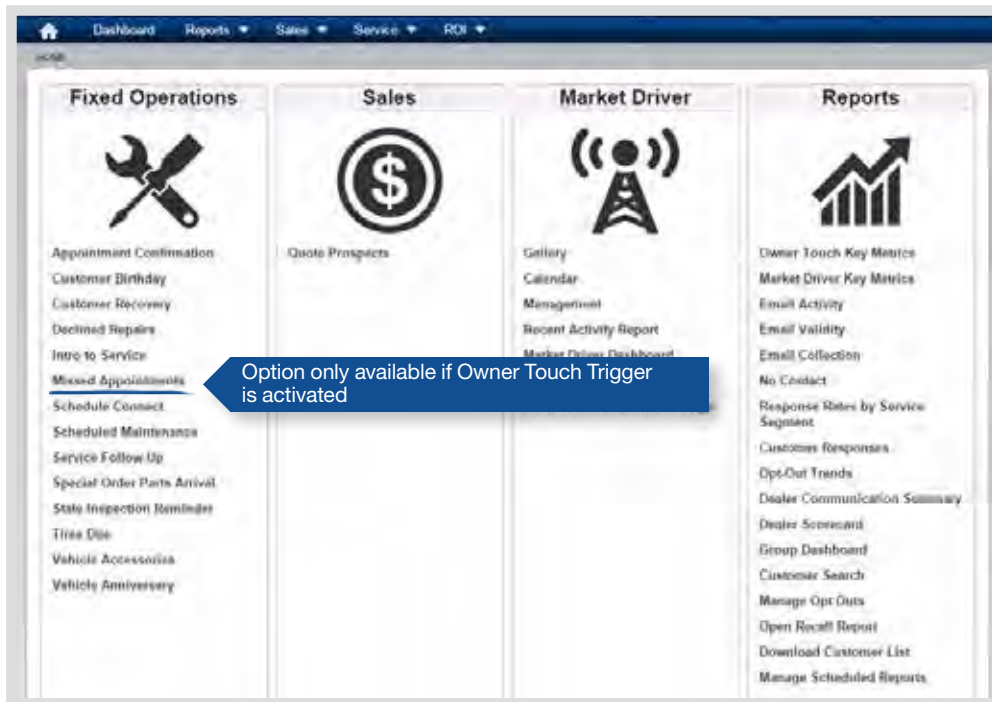


See results by segment or overall.

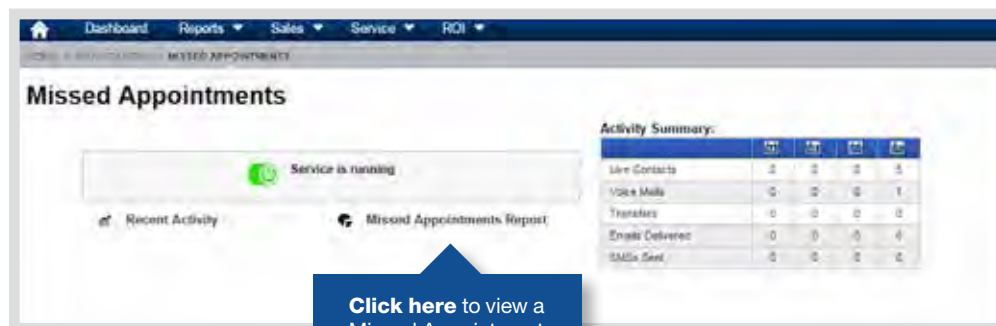
Look at results by channel, and then compare them to others.

Click to download or schedule for daily/weekly/monthly delivery to your inbox.

Toggle between key metrics and compare to Nation, Region, Zone & District.



Follow up with customers who missed their appointments to answer any questions and suggest they reschedule.



Export the data to Excel, download and print a PDF or schedule the report to be delivered to your inbox on a weekly /monthly basis.

Select preferred timeframe of customers who missed their appointment

Missed Appointments

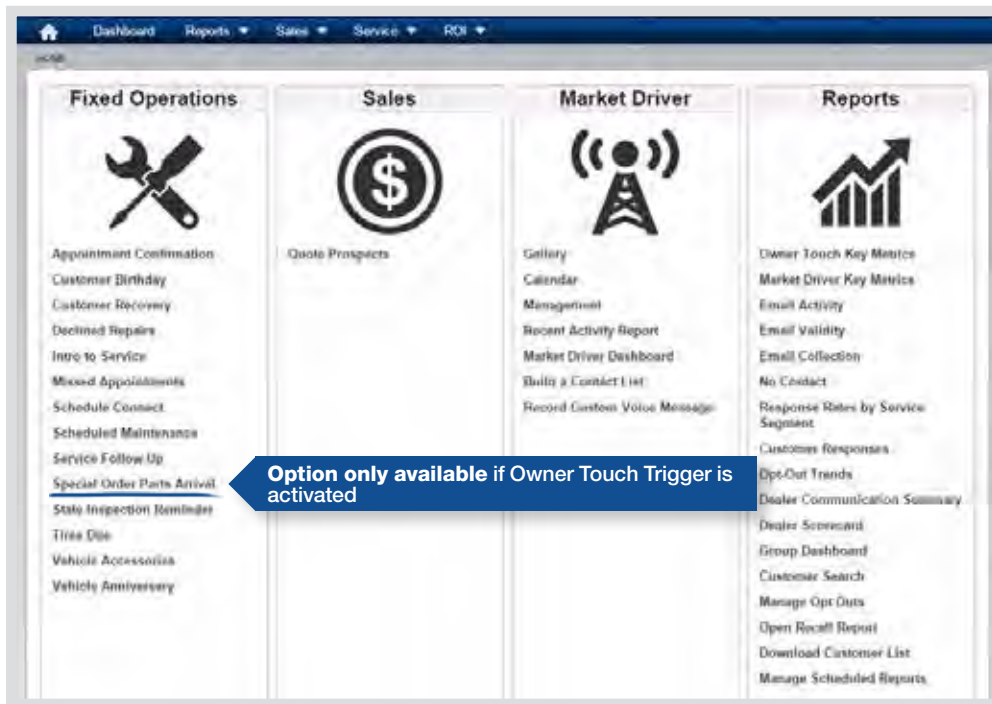
Start: 2/26/2015 End: 3/5/2015

Run Report Export Download PDF Schedule Report

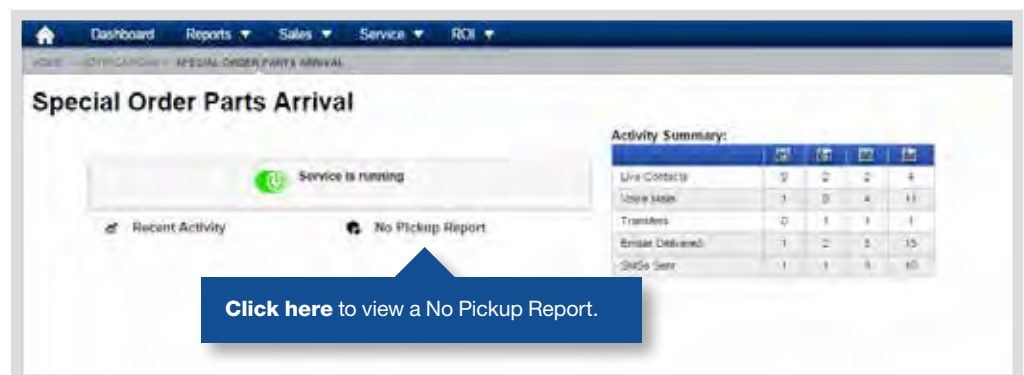
Name	Customer ID	Phone #	Email	Appointment	Op Code
ANNEMARIE GERRING	36484	2162191211	125ANNEMARIE@GMAIL.COM	3/3/2015 2:00 PM EST	F
BERNARD LEVIN	66154	2193088878	LEVINB@ATT.NET	2/26/2015 9:00 AM EST	F
BETHANY LIRA	66114278	7193885540	BALIRA@GMAIL.COM	2/28/2015 9:00 AM EST	RECALL STY MISC
CHRISTIE DEMARCO	3203943	2873962151	REDEMARCO215@COMCAST.NET	3/4/2015 6:00 AM EST	A
CHRISTOPHER AIT	802363	2199001537	CHRISTOPHER.AIT@GAIL.COM	3/2/2015 9:15 AM EST	113548 B
CHRISTOPHER RIZELLI	80042	454005534		3/4/2015 6:15 AM EST	MISC
DAVID LOGAN	97458	2157562674	DAVE@VERIZON.NET	2/10/2015 6:00 AM EST	STI
ELIDA KHOVIN	86442	2154663944	DROBROKMA@YAHOO.COM	3/4/2015 8:00 AM EST	RECALL
ERIC ROGAN	99390	2152844227		2/26/2015 1:00 PM EST	LOPS
IGOR KULTIN	69831	2876545323		2/28/2015 8:30 AM EST	155545 145538 MULTIS
JAY RAMACHANDRAN	69194	3872813442	JAYTHOTTATHIL@GMAIL.COM	2/23/2015 6:00 AM EST	F
KIM JOHNSON	98337	2193010384	KIMKIM@AOL.COM	2/23/2015 2:30 PM EST	F
LELA KULP	97783	6037214755	leelahk@comcast.com	3/2/2015 9:45 AM EST	OPTIONAL
MICHAEL LOPES	99223	2672945037	LOPELMARKE@YAHOO.COM	3/2/2015 9:30 AM EST	MISC
OLGA RIJQUE	94628	2158811390	OLTAZVA@YAHOO.COM	2/26/2015 11:15 AM EST	F
ROBERTA DIVORZIOCHI	60391	2672503815	DIVORZIOCHI@SALLE.EDU	3/3/2015 8:30 AM EST	T SW PSI
RUSSELL LYONS	34647	2153553859	LJAYHOTT@YAHOO.COM	3/2/2015 9:15 AM EST	SLIPS 153543 MULTIS
WILL POLLACK	98916	9544513356	POLLACK.WILL@GMAIL.COM	2/27/2015 8:00 AM EST	

Total Records: 18

Contact information is provided so you can reach out to the customer to see why they missed their appointment – and you can also see the date & Op Code tied to their missed appointment.



Stay up to date on customers who ordered Special Order Parts to make sure they know their parts have arrived.



Export the data to Excel, download and print a PDF or schedule the report to be delivered to your inbox on a weekly /monthly basis.

See a list of all customers who had special parts ordered in the last month but have not yet picked them up.

Dashboard Reports Sales Service ROI

HOME / NOTIFICATIONS / SPECIAL ORDER PARTS ARRIVAL / SPECIAL ORDER PARTS ARRIVAL NO PICKUP

Special Order Parts Arrival No Pickup Report

Export Download PDF Schedule Report

Customer Name	Order #	Part #	Received Date	Notification Date	Employee	Advisor
ANTHONY FRACIOTI	232586	514754L21B	2/9/2015	2/24/2015	BRIAN O MCKINNEY	DARLA HILL
CHRISTOPHER GABIG	M8413	86267AJ11B	2/23/2015	3/1/2015	DEREK MAHON	
CHRISTOPHER WYMER	M8403	577315C030	2/13/2015	2/26/2015	DEREK MAHON	
CURTIS JOSIK	230878	86155AU00A	2/26/2015	2/26/2015	BRIAN O MCKINNEY	CHARLES W DILLON
DAVID ROCCO	M8419	91039AJ03A	2/19/2015	3/2/2015	MICHAEL T HARPER	
DAVID ROCCO	M8410	91059AJ01A	2/19/2015	3/2/2015	MICHAEL T HARPER	
DAVID ROCCO	M8410	91039AJ15B	2/19/2015	3/2/2015	MICHAEL T HARPER	
DAVID ROCCO	M8410	91054AJ11A	2/25/2015	3/2/2015	MICHAEL T HARPER	
DAVID WINTERS	M8406	504591C016W	2/18/2015	2/27/2015	DEREK MAHON	
DAVID WINTERS	M8406	504591C024W	2/18/2015	2/27/2015	DEREK MAHON	
DEBORAH GABOR	M8389	514754L01B	2/7/2015	2/23/2015	MICHAEL T HARPER	
DONALD FELLOWS	M8411	86326FJ030	2/19/2015	2/25/2015	BRIAN O MCKINNEY	
EDWARD CHAVEZ	230849	H0315FJ730	3/2/2015	3/2/2015	BRIAN O MCKINNEY	
JAMES FILLAR	M8392	600115C003U0	2/11/2015	2/26/2015	BRIAN O MCKINNEY	
JEFFREY HARKS	M8401	2330044490R1	2/13/2015	2/13/2015	BRIAN O MCKINNEY	
JOHN CAPOR	230421	914235C000	2/19/2015	2/19/2015	BRIAN O MCKINNEY	DARLA HILL
JOHN CAPOR	230421	914235C010	2/19/2015	2/19/2015	BRIAN O MCKINNEY	DARLA HILL
JUNE MORROCCO	M8417	91054L100	2/26/2015	3/4/2015	BRIAN O MCKINNEY	
MARGARET EMRICK	230071	910295C490	2/12/2015	2/18/2015	BRIAN O MCKINNEY	CHARLES W DILLON
RAIPUDRAJA MADHAN	230918	202019C100	3/3/2015	3/3/2015	BRIAN O MCKINNEY	CHARLES W DILLON

Total Records: 26

You can see the Customer's name, when the part came in (Received Date), the last time the Owner Touch email went out to notify them of the part (Notification Date) and the Employee & Advisor who handled the order.