Widget-Based Dashboards

AutoLoop

Agenda

- Introduction to Dashboards and Widgets
- Pre-Defined Dashboards
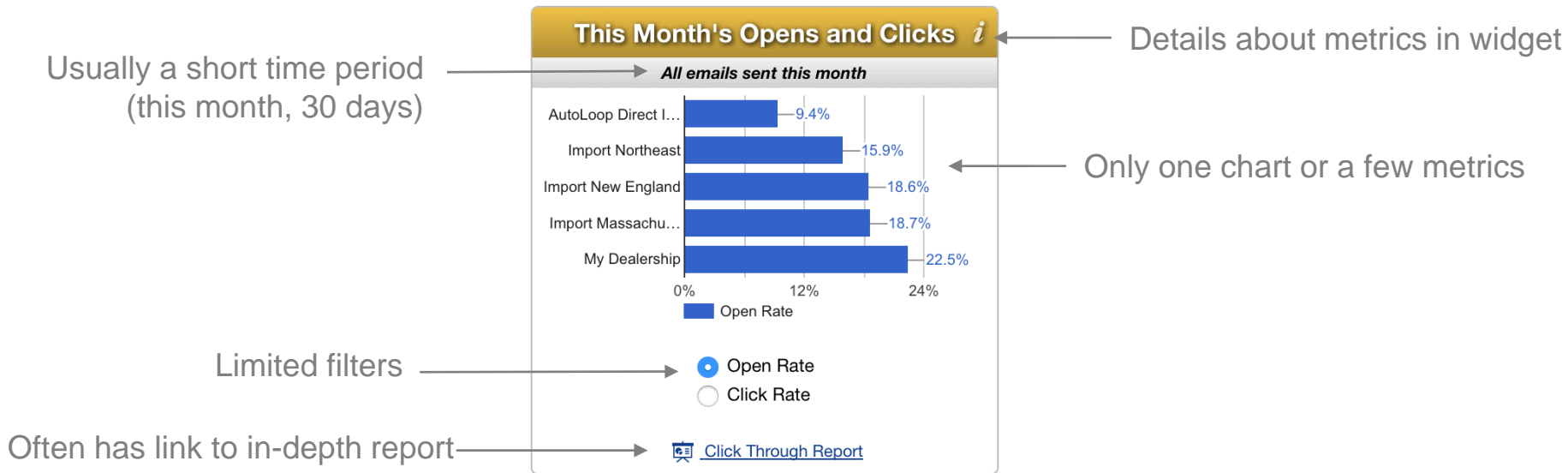- Customizing a Dashboard
- Overview of Each Widget

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Overview

Widget-based dashboards are customizable reports that enable a user to only view charts (widgets) of interest to them from a pre-defined gallery

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Widget Overview

A widget is a small object that can be added or removed to a dashboard (a "mini-report")

Usually a short time period
(this month, 30 days)

Details about metrics in widget

This Month's Opens and Clicks *i*

All emails sent this month

AutoLoop Direct I...	9.4%
Import Northeast	15.9%
Import New England	18.6%
Import Massachu...	18.7%
My Dealership	22.5%

0%   12%   24%

■ Open Rate

Only one chart or a few metrics

Limited filters

● Open Rate
○ Click Rate

Often has link to in-depth report

Click Through Report

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Widget Gallery

17 metric-based widgets are currently available for AutoLoop stores

Sales
MTD Deal Trends
Repurchase Loyalty
Lease Conversion
Sales Responses
Quote Missed Opportunities
Quote Metrics

Engagement
30-Day Reach
Email Collection
This Month's Opens and Clicks
Top Campaigns

Service
MTD RO Trends
Vehicle Loyalty
Declined Repairs
Service Advisor Performance
Service Responses
Customer Booked Appointments
Appointment Trends

*Also available is a "Shortcuts" widget with links to key reports

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Dashboard Overview

The dashboard is now a report containing a collection of widgets

Unlimited dashboards
(represented by tabs)

Fits 3 normal-sized
widgets across

Unlimited number of
rows

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PRE-DEFINED DASHBOARDS

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Dashboard Templates

Pre-defined dashboards are available for different stakeholders at your dealership:

- **Store Performance**: president, general manager, marketing director/manager

- **Sales**: sales director/manager/associate, internet director/manager

- **Service**: service director/manager/advisor

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Store Performance Dashboard
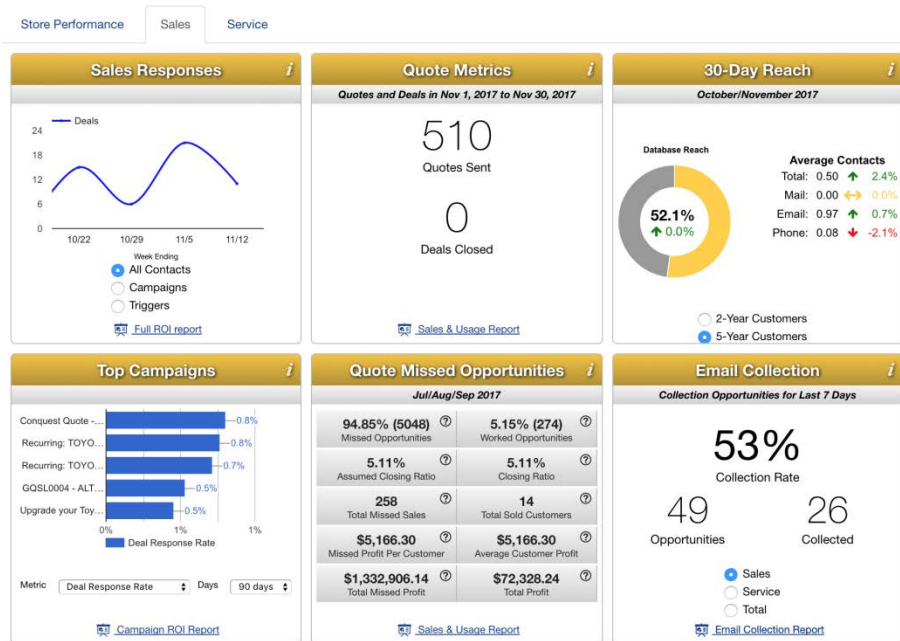
Purpose: to demonstrate how AutoLoop products impact business results

Store performance

Customer loyalty

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Sales Dashboard

Purpose: to show the impact of AutoLoop products on sales results and actionable opportunities

Product performance

Actionable opportunities

Service Dashboard

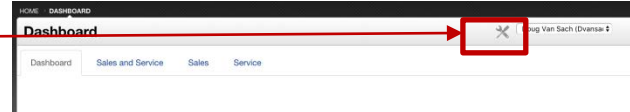Purpose: to show the impact of AutoLoop products on service results and actionable opportunities

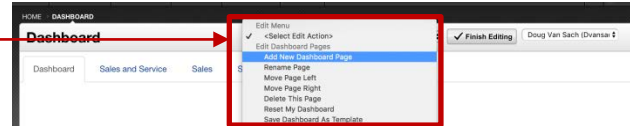Product performance

Actionable opportunities

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CUSTOMIZING A DASHBOARD
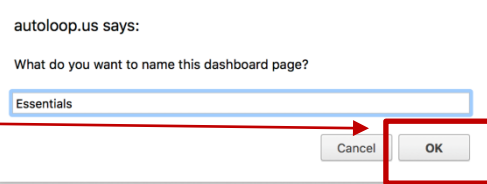
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Adding a Dashboard

1. Click on wrench icon

2. Click on drop-down list and select "Add New Dashboard Page"

3. Enter a name for your dashboard and click "OK"
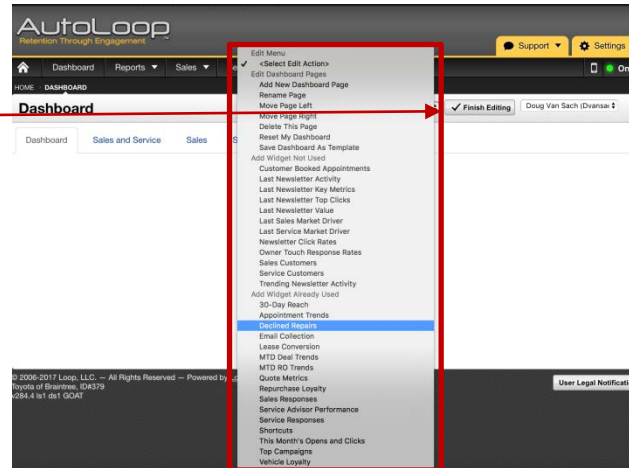

4. Click on "Finish Editing" button

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Adding a Widget

1. Click on wrench icon

2. Click on drop-down list and select the widget to add
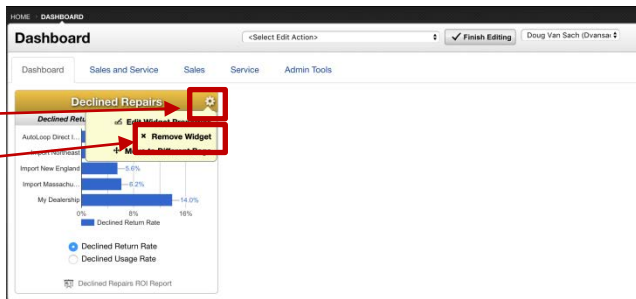

3. Click on "Finish Editing" button

Removing a Widget

1. Click on wrench icon

2. Click on gear icon and select "Remove widget"

3. Click on "Finish Editing" button

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Moving a Widget

1. Click on wrench icon

2. Click anywhere on the widget and hold down the left mouse button. Drag widget to desired location

3. Click on "Finish Editing" button

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OVERVIEW OF EACH WIDGET

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MTD Deal Trends

Purpose: to show deal performance this month vs. the same month of the prior year

Current Year: results for current month as of today

Prior Year: results for same month last year

Projection: projected results for remainder of month based on calculation (avg. daily deals) x (remaining days in month)
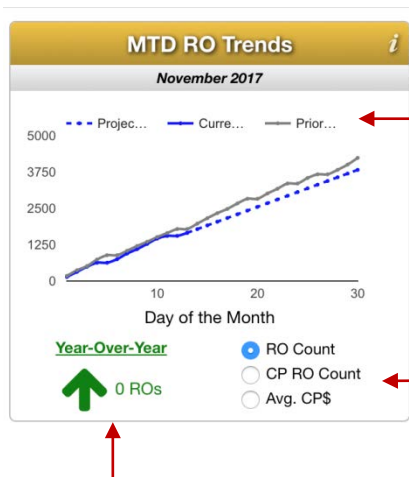
Deal Count: number of deals

Total Deal Gross: front and back end gross from deals

Avg. Deal Gross: avg. front and back end gross per deal

Year-Over-Year: represents difference in actual results this month vs. same month prior year as of today

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MTD RO Trends

Purpose: to show RO performance this month vs. the same month of the prior year

Current Year: results for current month as of today

Prior Year: results for same month last year

Projection: projected results for remainder of month based on calculation (avg. daily ROs) x (remaining days in month)

RO Count: number of ROs (includes customer pay and warranty pay ROs)

CP RO Count: number of ROs with customer pay greater than $0

Avg. CP$: average customer pay dollars from CP ROs

Year-Over-Year: represents difference in actual results this month vs. the same month of the prior year, as of today

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Appointment Trends

Purpose: to show appointment volume last week vs. prior week
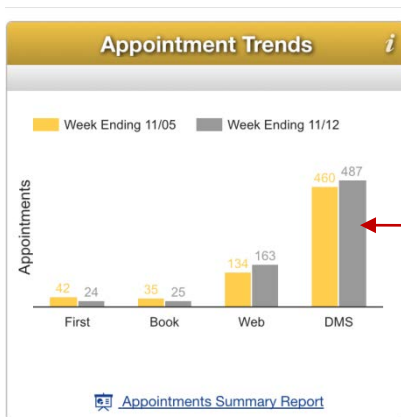
First: number of first appointments created

Book: number of appointments set in Book by an advisor
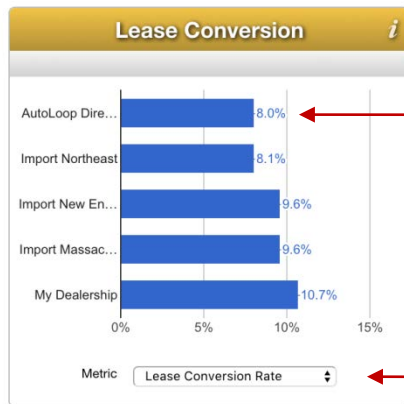
Web: number of online appointments set via OCAS

DMS: number of appointments received from DMS feed

Additional Notes: clients who don't utilize Book will only have appointments assigned to the DMS category

Lease Conversion

Purpose: to measure the dealership's ability to retain lease owners

Peer groups are domestic, import or luxury dealers and are based on dealer brand

$$\text{Lease Conversion Rate} = \frac{\text{Lease customers with expiring lease and return deal in prior 30 days}}{\text{Vehicles with lease expiring in prior 30 days}}$$

Avg. Days Prior to Lease End: days between retained deal transaction and lease end

Additional Notes: Lease conversion may include a vehicle purchase or another lease.

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Vehicle Loyalty

Purpose: to measure the dealership's ability to retain vehicles for service
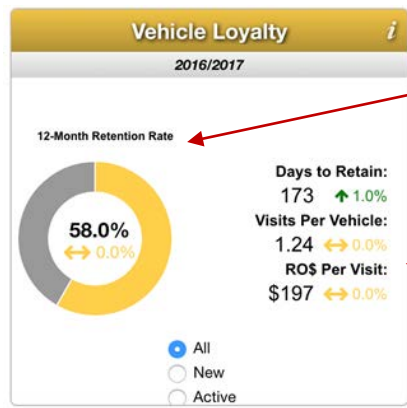
12-Month Retention Rate $=$ $\dfrac{\text{Vehicles with service visit within 12 months of visit, 13-24 months ago}}{\text{Deals and vehicles with service visit 13-24 months ago}}$

Vehicle Loyalty ⓘ
2016/2017

12-Month Retention Rate

58.0% ↔ 0.0%

Days to Retain:
173 ↑ 1.0%
Visits Per Vehicle:
1.24 ↔ 0.0%
RO$ Per Visit:
$197 ↔ 0.0%

- ● All
- ○ New
- ○ Active

Days to Retain: days between visit 13-24 months ago and first retained visit with 12 months

Visits Per Vehicle: avg. visits per vehicle during 12-month retention period

RO$ Per Visit: avg. customer pay and warranty for visits during 12-month retention period

All: service retention rate for deals and service vehicles

New: purchase-to-service conversion rate

Additional Notes: change in retention rate represents difference between current rate and rate calculated one week ago

Active: service retention rate for vehicles with prior service visit

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Repurchase Loyalty

Purpose: to measure the dealership's ability to retain customers for a repeat vehicle purchase

$$\text{5-Year Repurchase Rate} = \frac{\text{Customers with repeat vehicle purchase within 4 years of deal}}{\text{Customers with a deal 5 years ago (49-60 months ago)}}$$

Repurchase Loyalty *i*

2012 to 2017

5-Year Repurchase Rate

24.0%
↔ 0.0%

Days to Repurchase:
681 ↔ 0.0%
Deals Per Customer:
1.32 ↔ 0.0%
Gross Per Purchase:
$3,452 ↓ -2.0%

○ All
○ New
○ Used

Days to Repurchase: days between deal 61-72 months ago and second deal within 5 years by the same customer

Deals Per Customer: avg. number deals per customer during 5-year repurchase period

Gross Per Purchase: avg. front- and back-end gross during 5-year repurchase period

All: customers who purchased a new or used vehicle

New: customers who purchased a new vehicle

Used: customers who purchased a used vehicle

Additional Notes: change in repurchase rate represents difference between current rate and rate calculated one week ago

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Sales Responses

Purpose: to show total unique deals due to AutoLoop Essentials

Deals: total unique deal responders by week over the past month

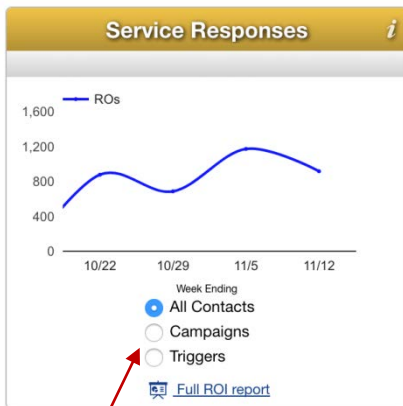**All Contacts**: campaigns and trigger communications

Campaigns: only campaign communications

Triggers: only trigger communications

Additional Notes: communications may have been delivered in a different week than the week when response occurred. Results are based on when the response occurred.

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Service Responses

Purpose: to show total unique ROs due to AutoLoop Essentials

ROs: total unique RO responders by week over the past month

All Contacts: campaigns and trigger communications

Campaigns: only campaign communications

Triggers: only trigger communications

Additional Notes: communications may have been delivered in a different week than the week when response occurred. Results are based on when the response occurred.

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30-Day Reach

Purpose: to show percentage of customers reached by AutoLoop Essentials

Database Reach: % of 2-year or 5-year customers with Essentials contact in prior 30 days

Total: average contacts per customer across all media channels

Mail: average mail contacts per customer

Email: average email contacts per customer

**Phone**: average automated phone contacts per customer

2-Year Customers: customers with deal or service in past 2 years

5-Year Customers: customers with deal or service in past 5 years

Additional Notes: change in database reach represents difference in current rate and 30 days reach from prior week.

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Declined Repairs

Purpose: to measure effectiveness of declined repair process
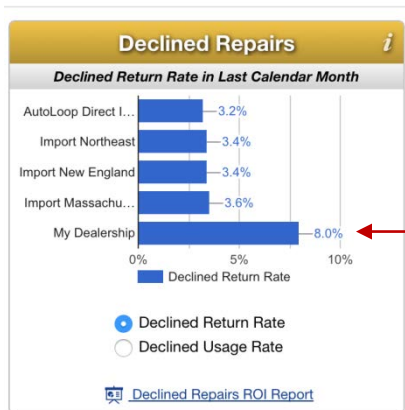
Declined Return Rate: % of ROs with declined repair in prior month with a return visit within 30 days of the declined repair

Declined Usage Rate: % of ROs with declined repair op code in prior month

Additional Notes: results are for ROs in prior calendar month. Declined return rate may change over the course of the month since the prior month doesn't close until 30 days after month end.

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Service Advisor Performance

Purpose: to measure effectiveness of top service advisors

Declined Repairs Usage Rate: % of ROs with declined repair op code

Email Collection Rate: % of emails collected from transactions where customers had no prior email collected

Month To Date: results for current month

Year To Date: results for current year

Additional Notes: widget only shows top 5 service advisors

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Top Campaigns

Purpose: to show top-performing campaigns

Total Responses: total deal and RO responders

Response Rate: combined deal and RO response rate

Number of Deals: total deals from responders

Deal Response Rate: vehicle purchase rate from campaigns

Average Deal Profit: avg. front and back-end gross from responders

Number of ROs: total ROs from responders

RO Response Rate: RO response rate (customer or warranty pay)

Average Customer Pay: avg. CP$ from service responders

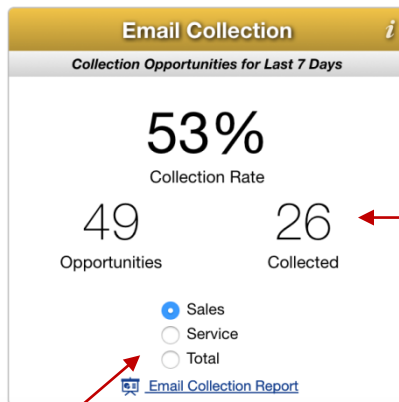**Average Warranty Pay:** avg. WP$ from service responders

90 Days: results from campaigns in past 90 days

180 Days: results from campaigns in past 180 days

365 Days: results from campaigns in past year

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Email Collection

Purpose: to show effectiveness in capturing email addresses

Email Collection ⓘ
Collection Opportunities for Last 7 Days

53%
Collection Rate

49   26
Opportunities   Collected

● Sales
○ Service
○ Total
📧 Email Collection Report

Collection Rate: % of emails collected in last 7 days from transactions where customers had no prior email collected

Opportunities: number of transactions from customers with no prior email collected

Collected: number of emails captured during collection opportunities

Sales: collection rate during deal transactions

Service: collection rate from service transactions

Total: collection rate from deal and service transactions

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Quote Metrics

Purpose: to show deals resulting from AutoLoop Quote

Quotes Sent: number of quotes delivered to customers in current month

Deals Closed: deals resulting from quotes delivered in current month

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Quote Missed Opportunities

Purpose: to show effectiveness in converting quotes to deals

Missed Opportunities: % of quoted customers in lane with no contact

Assumed Closing Rate: % of quoted customers in lane with deal

Total Missed Sales: (assumed closing ratio) x (missed opportunities)

Missed Profit Per Customer: avg. gross based on opportunities closed

Total Missed Profit: (total missed sales) x (missed profit per customers)

Worked Opportunities: % of lane customers receiving contact

Closing Ratio: % of quoted lane customers with a deal

Total Sold Customers: total quoted lane customers with a deal

Average Customer Profit: avg. profit from sold opportunities

Total Profit: total gross profit from sold opportunities

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