DAY-4

OneDealer

Service Lead

A service lead can be created in the After Sales Workplace from different entry points:

Walk-In
(known/unknown customer)

The service lead is created by the service advisor directly into ASW either for a known or unknown walk-in customer

Booking an Appointment
(unknown customer)

The service lead is created by an unknown customer in the OSM. Basic information provided: Name, Phone, E-mail, Vehicle, Date for the Service and Service Package. The service advisor receives and works with the service lead in ASW.

Booking an Appointment
(known customer)

The service lead is created by an existing customer with the use of his Account. The customer is redirected to OSM in order to provide the basic information needed such as: in the OSM. Basic information provided: Name, Phone, E-mail, Vehicle, Date for the Service and Service Package. The service advisor receives and works with the service lead in ASW.

Booking an Appointment
(audience)

The customer is provided with a link that redirects him in the OSM to provide the basic information for a service lead: Name, Phone, E-mail, Vehicle, Date for the Service and Service Package. The service advisor receives and works with the service lead in ASW.
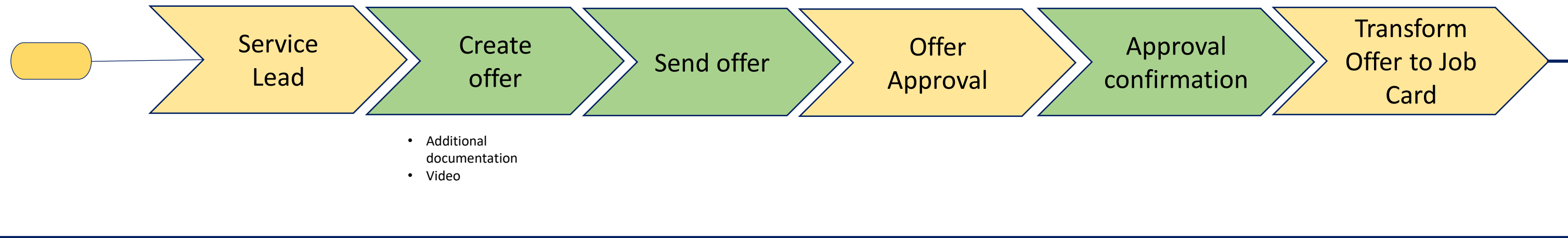
OSM: Online Service Management
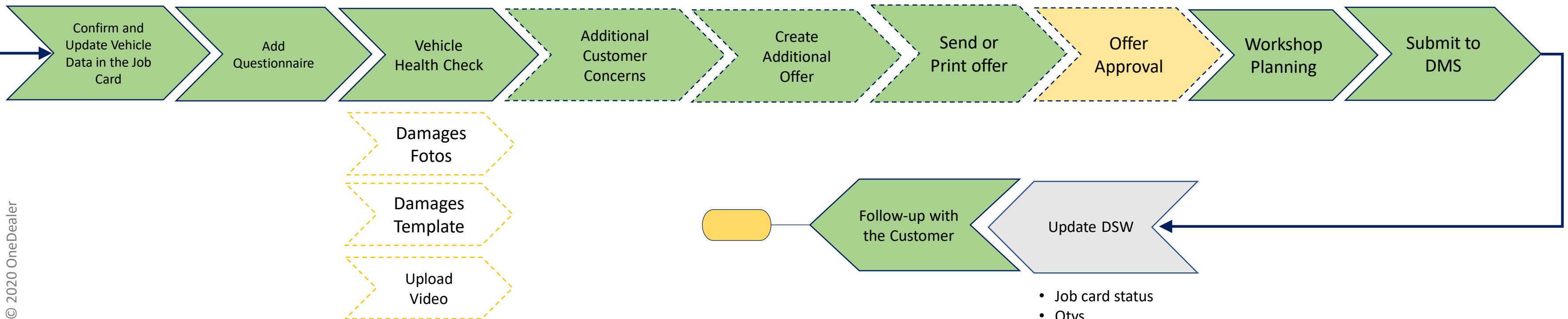**ASW**: After Sales Workplace

| Service Advisor | Customer |

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Maintenance – Repair Vehicle process

Service Lead Offer Process

Service Lead → Create offer → Send offer → Offer Approval → Approval confirmation → Transform Offer to Job Card

- Additional documentation
- Video

Vehicle reception

Confirm and Update Vehicle Data in the Job Card → Add Questionnaire → Vehicle Health Check → Additional Customer Concerns → Create Additional Offer → Send or Print offer → Offer Approval → Workshop Planning → Submit to DMS

Damages Fotos

Damages Template

Upload Video

Follow-up with the Customer → Update DSW

- Job card status
- Qtys
- Prices
- Spare Parts / Labors
- Links to all documents produced by the DMS

Service Advisor | Customer | DMS

Campaign Management – Omni Channel

Terminology

- Contact
- Lists
  - Static
  - Dynamic
- Audience (Static Lists & Dynamic Lists)
- Campaign
  - Channels (Email, SMS, Viber, Mobile Push Notification, Call Center, Google Display Ads, Facebook Ads, HTML Banner)
    - Conditions

Thank you!

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