

# DEALERMINE | CRM

Know More. Book More. Sell More.

## BDC Report Card

This report was created to help BDC Managers, Service Managers, etc., identify areas of opportunity within their BDC. The BDC Report Card provides details on overall performance and allows the users to utilize a single report rather than running multiple ones. This report has multiple views which will allow the user to see various areas of BDC performance/productivity at ease.

### Running the Report

1. Choose the date range
2. Choose Store/Branch
3. Choose Sort Option
  - By Username
  - By Store
  - By Enterprise
  - By Store By User By Year
  - By Store By Year
  - Enter Username (optional)
  - Enter Role Name (optional)

The BDC Report Card is made up of 5 sections as detailed below.

### 1. Performance Summary

| Performance Summary for ASHLEY-L          |              |                                    |               |             |         |       |         |            |          |                      |              |          |      |                |               |         |               |             |       |              |        |             |    |      |    |   |   |
|---|--------------|------------------------------------|---------------|-------------|---------|-------|---------|------------|----------|----------------------|--------------|----------|------|----------------|---------------|---------|---------------|-------------|-------|--------------|--------|-------------|----|------|----|---|---|
| Date Range from: 01/01/2019 to 01/31/2019 |              |                                    |               |             |         |       |         |            |          |                      |              |          |      |                |               |         |               |             |       |              |        |             |    |      |    |   |   |
| PRODUCTIVITY                              |              |                                    |               |             |         |       |         |            |          | PRODUCTION           |              |          |      |                | EFFECTIVENESS |         |               |             |       | SORT OPTIONS |        |             |    | USRS |    |   |   |
| Activity                                  |              | Recycle Types as % of Tot Recycles |               |             |         |       |         | MLG PER/RO |          |                      | Maint Hrs/RO |          | MLR  | Appointments   |               |         |               |             |       | Rcyl         | RoDate | Star Rating |    |      |    |   |   |
| Days Wkrd                                 | Un Prod. Hrs | Rcvls Per Day                      | Maint Rcyls % | Maint Out % | NS/CA % | CSI % | FETCH % | Pre Book'd | Total RO | BDC % of Total Gross | Pre Book'd   | Total RO | %    | Same Day Bking | Same Day      | Per Day | OAC Appt /Day | OAC RO /Day | OUT % | Show %       | ON     | ON          | NO | HL   | LH |   |   |
| ASHLEY-L                                  | 6            | -1.66                              | 167           | 90%         | 1%      | 3%    | 1%      | 6%         | \$15     | \$84                 | 18%          | 0.49     | 0.67 | 86%            | 2%            | 0.29    | 14.2          | 0           | 0     | 18%          | 86%    | 0           | 1  | 1    | 0  | 0 | 1 |
|   | 6            | -1.66                              | 167           | 90%         | 1%      | 3%    | 1%      | 6%         | \$15     | \$84                 | 18%          | 0.49     | 0.67 | 86%            | 2%            | 0.29    | 14.2          | 0           | 0     | 18%          | 86%    | 0           | 1  | 1    | 0  | 0 | 1 |

### PRODUCTIVITY – How Productive is your BDC?

**Days Worked:** Is the count of days in the reporting time frame in which the user recorded greater than 10 or more recycles, including No Show, Confirm, Maintenance, CSI, SPORD, Sales, Marketing, and Recalls. This count excludes: Batch Emails, Marketing Email Blasts, Marketing sent to Excel recycles, and Marketing Letters.

**Unproductive Hrs:** The total number of hours that the user/store have been unproductive, meaning no recycling, appointment booking etc.

**Recycles Per Day:** Total # of recycles per day.

See which contact types are making up the recycles per day based on a percentage.

## PRODUCTION – What Results are being Produced by your BDC?

**\*Based on Appointment Date**

### MLG PER/RO

- Pre Booked
- Total RO
- BDC % of Total Gross

### Maint/Hrs/RO

- Pre Booked
- Total RO
- MLR – Maintenance lines retained

## EFFECTIVENESS – How effective is your BDC?

### APPOINTMENTS

Same Day Booking %

Same Day

Per Day

OAC Appt/Day

OAC RO/Day

OUT %

Show %

## SORT OPTIONS – How is your BDC choosing contacts?

Recycle

RO Date

Star Rating

## Users – How many

How many users are contributing towards each store.

## 2. Productivity

| Productivity - for ASHLEY-L                  |              |              |              |                     |                   |            |      |                  |            |      |                 |            |   |                        |            |     |               |            |     |                                    |            |      |                         |                        |  |
|--|--------------|--------------|--------------|---------------------|-------------------|------------|------|------------------|------------|------|-----------------|------------|---|------------------------|------------|-----|---------------|------------|-----|------------------------------------|------------|------|-------------------------|------------------------|--|
| Double click this report to view more detail |              |              |              |                     |                   |            |      |                  |            |      |                 |            | Date Range from: 01/01/2019 to 01/31/2019 |                        |            |     |               |            |     | Printed on: 1/10/2019 - 12:33:43PM |            |      |                         |                        |  |
|  | Days<br>Wrkd | Proficiency  |              |                     | Appts Booked 2.10 |            |      | Emails Sent 0.50 |            |      | Texts Sent 0.50 |            |   | Profile Views 1.00     |            |     | OutBound 1.48 |            |     | InBound 2.28                       |            |      | Call Select Counts      |                        |  |
|  |              | Avail<br>Hrs | Prod.<br>Hrs | Un<br>Alloc.<br>Hrs | Appts<br>Bkd      | Per<br>Day | Hrs  | Email<br>Sends   | Per<br>Day | Hrs  | Text<br>Sent    | Per<br>Day | Hrs                                       | Unq<br>Rcvlcl<br>Total | Per<br>Day | Hrs | Out<br>Rcvlcl | Per<br>Day | Hrs | In<br>Rcvlcl                       | Per<br>Day | Hrs  | Maint<br>Calls<br>Avail | Maint<br>Calls<br>Left |  |
|  |              |              |              |                     |                   |            |      |                  |            |      |                 |            |   |                        |            |     |               |            |     |                                    |            |      |                         |                        |  |
| ASHLEY-L                                     | 6            | 7.45         | 9.11         | -1.66               | 85                | 14.2       | 0.50 | 13               | 2.2        | 0.02 | 0               | 0.0        | 906                                       | 151                    | 2.52       | 78  | 13.0          | 0.32       | 909 | 129.9                              | 5.76       | 2331 | 2121                    |                        |  |
| Total  | 6            | 7.45         | 9.11         | -1.66               | 85                | 14.2       | 0.50 | 13               | 2.2        | 0.02 | 0               | 0.0        | 906                                       | 151                    | 2.52       | 78  | 13.0          | 0.32       | 909 | 129.9                              | 5.76       | 2331 | 2121                    |                        |  |

### PROFICIENCY

Avail Hrs: Each section contains a Per Day value. The Per Day value is multiplied by the time in the header section and divided by 60 to show the value in hours.

Prod Hrs: The total of hours from each section shown in blue, will give the total of Prod Hrs. Unalloc Hrs: This stands for Unallocated hours and is the difference between Available & Productive.

### IMPORTANT

-This report does not take into consideration each stores unique scheduling set up, this may be an item to consider when looking at this report. i.e Lunch, Breaks, etc.

-When running this report by Enterprise the Days Worked may exceed the maximum working days for the month if you have multiple AC's focusing on one dealership. This will help to show you which stores require more attention.

### APPTS BOOKED

Appts Booked: This is the number of appts booked for the reporting time frame.

Per Day: The number of appts booked during the reporting time frame divided by the number of days worked.

Hrs: Based on the allotted time to perform each action the Hrs calculation tells you how much time each day is spent on that task.

### EMAILS SENT

Email Sends: This is the number of sent for the reporting time frame. (does not include Batch emails)

Per Day: The number of emails sent during the reporting time frame divided by the number of days worked.

Hrs: Based on the allotted time to perform each action the Hrs calculation tells you how much time each day is spent on that task.

### TEXTS SENT

Texts Sent: This is the number of sent for the reporting time frame. (does not include Batch texts)

Per Day: The number of texts sent during the reporting time frame divided by the number of days worked.

Hrs: Based on the allotted time to perform each action the Hrs calculation tells you how much time each day is spent on that task.

### PROFILE VIEWS

UNQ RECYCL TOTALS: The number of unique profiles that were viewed and recycled during the time frame.

PER DAY: The number of unique profiles viewed and recycled during the reporting time frame divided by the number of days worked.

HRS: Based on the allotted time to perform each action the Hrs calculation tells you how much time each day is spent on that task.

### OUTBOUND

OUT RECYCLS: This is the number of "live" calls presented to the user from DealerMine i.e. a call that has been pulled from the Call Select Screen.

PER DAY: The number of out recycles during the reporting time frame divided by the number of days worked.

HRS: Based on the allotted time to perform each action the Hrs calculation tells you how much time each day is spent on that task.

## INBOUND

IN RECYCLS: Any customer calling, emailing, or texting the BDC and is located by using the customer search Action Button to inquire.

PER DAY: The number of in recycles during the reporting time frame divided by the number of days worked.

HRS: Based on the allotted time to perform each action the Hrs calculation tells you how much time each day is spent on that task.

## CALL SELECT CONTACTS

Maint Calls Available: The average number of Maintenance Contacts available on the Call Select Screen at the beginning of the day.

Maint Calls Left: The average number of Maintenance Contacts left on the Call Select Screen at the end of the day.

\*\*This is a good way to measure the number of outbound maintenance contacts that are being made by your BDC Team.

\*\*IF YOU WOULD LIKE TO SEE A VIEW OF EACH DAY SIMPLY DOUBLE CLICK ON THE USER YOU WOULD LIKE TO SEE A MORE INDEPTH VIEW OF\*\*

### Calculating Productive Hours under Proficiency

Each sections hours, are totaled to give the correct total of productive hours as follows:

- Appts Booked = 0.50
- Emails Sent = 0.02
- Texts Sent = 0.00
- Profile Views = 2.52
- OutBound = 0.32
- InBound = 5.76

When added together we get a daily Productive Hours of **9.11**

### 3. Financial Summary

| Financial Summary - for ASHLEY-L     |              |             |          |       |           |            |        |                         |            |   |                   |                   |                    |                 |                                    |                        |                       |               |               |
|--------------------------------------|--------------|-------------|----------|-------|-----------|------------|--------|-------------------------|------------|---|-------------------|-------------------|--------------------|-----------------|------------------------------------|------------------------|-----------------------|---------------|---------------|
| Double click to view more details... |              |             |          |       |           |            |        |                         |            | Date Range from: 01/01/2019 to 01/31/2019 |                   |                   |                    |                 | Printed on: 1/10/2019 - 12:33:43PM |                        |                       |               |               |
|                                      | Appointments |             |          |       | Retention |            |        | Maintenance Labor Sales |            |   |                   |                   | Total CP Lbr Sales |                 |                                    |                        |                       |               |               |
|                                      | Days Wkrd    | Total Appts | OC Appts | Out % | PCR       | Closed ROs | Show % | Maint Lines Retaine     | MLG PER RO | Maint Hrs Per RO                          | Maint Labor Sales | Maint Labor Gross | MNT Hrs Sold       | RO's With Maint | CP LBR Sales From Appt             | CP LBR Gross From Appt | CP Ro Count From Appt | Tot Lbr Gross | Tot Lbr Sales |
| ASHLEY-L                             | 6            | 65          |          | 18%   | 39%       | 56         | 86%    | 86%                     | \$15       | 0.49                                      | \$1,279           | \$837             | 18                 | 37              | \$5,224                            | \$3,878                | 46                    | \$4,725       | \$6,939       |
|                                      | 6            | 65          |          |       |           | 56         |        |                         |            |   | \$1,279           | \$837             | 18                 | 37              | \$5,224                            | \$3,878                | 46                    | \$4,725       | \$6,939       |
| Total                                | 6            | 65          |          | 18%   | 39%       | 56         | 86%    | 86%                     | \$15       | 0.49                                      | \$1,279           | \$837             | 18                 | 37              | \$5,224                            | \$3,878                | 46                    | \$4,725       | \$6,939       |

This section has been designed to show the financial contribution made by the BDC. The information is similar to the AM Summary, although it's based on Appt Date, not RO Close Date and does NOT care about the Booked Date.

#### APPOINTMENTS

TOTAL APPTS: Is the count of the appointments with an appointment date(s) included in the reporting time range.

#### IMPORTANT

- It is important to note that this appointment count will not match the Appointment count in the Productivity section because the former is based on 'Booked Date' and the latter is based on 'Appointment Date'.
- Appointments will only display if the appt date is within the date range of the report. Ie. Running the report for Jan 1 – Jan 15, the Financial Summary will only show an appointment count for appointments in that 15 day time frame.
- Appointments will be one day behind, not counting the current day's bookings as these will update on the nightly download.

OC APPTS: Count of appointments that were booked by someone other than the user which is set up in user setup as outbound connect within 14 days after a voicemail or call recording was completed by an outbound connected user using click to call. \*\*NOTE this may not be applicable to your store and if not this column will be blank.

OUT %: Percentage of total appointments booked as a result of outbound efforts.

PCR (Productive Close Rate): Ratio of appointments booked to productive recycles. This measure does not include contact attempts where the AC did not interact with the decision maker. Ie. Voice mail

#### RETENTION

CLOSED ROs: Count of RO's closed on total appointments.

SHOW %: Percentage of total appointments that resulted in a closed RO.

MAINT LINES RETAINED: Percentage of maintenance lines booked that were on the closed RO

#### MAINTENACE LABOR SALES

MLG PER RO: Maintenance labour gross sold on each RO by original booker.

MAINT HRS per RO: Maintenance hours sold by by original booker on closed RO.

MAINT LABOUR SALES: Total labour sales on maintenance items sold by the original booker. This does not include parts or upsell by an Advisor.

MAINT LABOUR GROSS: Total labour gross on maintenance items sold by the original booker. This does not include parts or upsell by an Advisor.

MNT Hrs Sold: This will show you the number of Maintenance Hours sold by the AC ROs with Maintenance: This will show you the number of ROs that were closed that had at least one linked Maintenance Opcode.

#### TOTAL CP LABOR SALES

CP LBR Sales From Appt

CP LBR Gross From Appt

CP RO Count From Appt

Tot Lbr Gross

Tot Lbr Sales

## 4. Contact Analysis

| Contact Analysis - for ASHLEY-L                                      |    |     |    |     |     |    |    |    |     |   |    |    |      |    |    |    |    |     |    |                                    |    |    |    |    |    |    |     |     |     |                  |     |     |
|--|----|-----|----|-----|-----|----|----|----|-----|---|----|----|------|----|----|----|----|-----|----|------------------------------------|----|----|----|----|----|----|-----|-----|-----|------------------|-----|-----|
| Double click for more details... The % row indicates Outbound Effort |    |     |    |     |     |    |    |    |     | Date Range from: 01/01/2019 to 01/31/2019 |    |    |      |    |    |    |    |     |    | Printed on: 1/10/2019 - 12:33:43PM |    |    |    |    |    |    |     |     |     |                  |     |     |
| Recycles (Phone Calls)   |    |     |    |     |     |    |    |    |     | Transactional Emails                      |    |    |      |    |    |    |    |     |    | Transactional Texts                |    |    |    |    |    |    |     |     |     | Per Day Recycles |     |     |
| Days   | MA | CS  | CA | NS  | FT  | SP | SL | RC | TOT | MA  | CS | CA | NS   | FT | SP | SL | RC | TOT | MA | CS                                 | CA | NS | FT | SP | SL | RC | TOT | Rcl | Eml | Txt              | Ltr | Tot |
| ASHLEY-L   | 6  | 896 | 5  | 6   | 19  | 60 | 0  | 1  | 0   | 987                                       | 7  | 0  | 0    | 5  | 0  | 0  | 0  | 1   | 13 | 0                                  | 0  | 0  | 0  | 0  | 0  | 0  | 0   | 165 | 2   | 0                | 2   | 167 |
| Inbound  |    |     |    |     |     |    |    |    | 909 |   |    |    |      |    |    |    |    |     |    |                                    |    |    |    |    |    |    |     |     |     |                  |     |     |
| Outbound   |    |     |    |     |     |    |    |    | 78  |   |    |    |      |    |    |    |    |     |    |                                    |    |    |    |    |    |    |     |     |     |                  |     |     |
| Outbound %   | 1% | 0%  | 0% | 74% | 85% | 0% | 0% | 0% | 8%  | 0%  | 0% | 0% | 100% | 0% | 0% | 0% | 0% | 38% | 0% | 0%                                 | 0% | 0% | 0% | 0% | 0% | 0% | 0%  | 0%  | 0%  | 0%               | 0%  | 0%  |
| Total  | 6  | 896 | 5  | 6   | 19  | 60 | 0  | 1  | 0   | 987                                       | 7  | 0  | 0    | 5  | 0  | 0  | 0  | 1   | 13 | 0                                  | 0  | 0  | 0  | 0  | 0  | 0  | 0   | 165 | 2   | 0                | 2   | 167 |
|  | 1% | 0%  | 0% | 74% | 85% | 0% | 0% | 0% | 8%  | 0%  | 0% | 0% | 100% | 0% | 0% | 0% | 0% | 38% | 0% | 0%                                 | 0% | 0% | 0% | 0% | 0% | 0% | 0%  | 0%  | 0%  | 0%               | 0%  | 0%  |

This section is designed to allow you to see the Who, What, When, and How your agents are reaching out to your customers.

\*\*If you see a percentage (%) that is over 100% that is because the "Batch Email" recycle code was used on a contact type that was presented. Batch Email contact types are not included in the totals for Recycles.

RECYCLES (PHONE CALLS): All recycles that were not letters, emails or texts.

TRANSACTIONAL EMAILS: The user has manually selected send an email

TRANSACTIONAL TEXTS: The user has manually selected to send a text

**MA:** Maintenance

**CS:** CSI

**CA:** Confirm Appointments

**NS:** No Show

**FT:** Fetch/Marketing

**SP:** Special Order Parts

**RC:** Recalls

**TOT:** Total Contacts Attempted

PER DAY RECYCLES:

Total of all recycles made as follows:

- Recycles
- Emails
- Texts
- Letters

## 5. Batch Email Statistics – By Store

This section will allow you to see by store how many Batch emails were sent by Contact Type and how many Batch emails are going out by day.

MA - Maintenance

CS - CSI

CA – Confirm Appt

FT – Fetch/Marketing