



Clean Up Your Records

CRM Solutions for ERA[®]

U.S. and Canada

Name File Maintenance Consulting Project for ERA[®]

Improve communication efforts by keeping your name file clean and up-to-date with expert consulting from Reynolds.

A Complete, Accurate Name File

Increase marketing ROI and improve Customer Relationship Management (CRM) by polishing one of your dealership's most important assets – your database of customer contact information. By keeping your name file clean and accurate, you can:

- Reduce duplicate mail to the same person and wasted printing and postage expenses.
- Simplify accounting and eliminate confusion between departments.
- Improve service speed and efficiency during service write-up.
- See a clearer picture of a customer's value to your business.
- Improve customer service by helping to ensure that all sales and service records are linked to a single customer number.

* Reynolds Name File Maintenance Consulting Project is different from and complements the Reynolds Name File Services offering. The Name File Maintenance Consulting Project can prepare you and your staff to fully maximize the benefits of Name File Services.

Save Time, Money, and Effort

Because of the ERA system's integration, your entire dealership shares the same name file, so accuracy is vital. During this consulting project, Reynolds experts will help you cleanse your existing name file of errors and duplicates and work with you to define best practice defaults and conventions for all departments. The process helps you with these tasks:

- Define dealership-wide conventions and defaults to standardize the name file.
- Help you cleanse your existing data to remove errors and duplicates.
- Develop a sustainable maintenance process, such as forced searches.
- Train appropriate staff members on Name File Maintenance and processing of Name File Services inbound data files for de-duplication, Do Not Call, and address and phone updates.*

Why Reynolds Consulting Services Make a Difference

Gain a fresh perspective on common challenges. Our consultants will:

- Help dealerships optimize tools, resources, and practices for maximum results.
- Provide one of the most comprehensive and thorough consulting services in the automotive industry.
- Reynolds Consulting Services can help you gain a fresh perspective on common challenges and improve your business. With an average 25 years of combined automotive retailing and Reynolds experience, our professional consultants have the knowledge, desire, and tools necessary to help you succeed.
- Provide the most seasoned and highly-trained system expertise available. There are no "solo acts" or out-of-date trainers.
- Base all consulting projects on professionally-built, instructionally-solid curricula that get you results.

Name File Maintenance Consulting Project for ERA®

ERA Name File Maintenance Agenda

Pre-visit Activities

- Introduce consultant; discuss engagement purpose, benefits, and agenda.
- Schedule meeting time and attendees.
- Validate usage and/or subscription to Name File Services.

Day 1 – Assessment and Cleanup

Meeting(s) with Dealer/Management Team

- Review visit objectives and value to be delivered to your dealership.
- Discuss dealer/management expectations of visit.
- Identify key staff members to work with during the visit.
- Review agenda and schedule.

Defining Conventions/Defaults

- Work with key staff to define appropriate conventions and defaults that will be used throughout the dealership for setup and name file data entry.
- Define which key data entry points will require forced searching (e.g., RO write-up, Sales, F&I, Parts Counter).

Maintenance Process Improvement

- Review name file maintenance best practices and update system specs.
- Revise name file maintenance practices based on key staff input and train staff on new processes for searching and maintenance.

Day 2 – Name File Maintenance Procedures and Ongoing Best Practices

Maintenance Process Improvement (continued)

- Work with appropriate staff on manual processes for Name File Maintenance.
- Work with staff on processing Name File Services inbound data files.
- Validate that de-duplication and update procedures are correctly completed.
- Observe and coach staff on appropriate data entry techniques to help maintain the integrity of the ERA Name File for your store.

Dealer/Management Team Exit Meeting

- Review what has been accomplished during the visit.
- Establish your dealership's action plan for sustaining processes.
- Review additional steps your dealership can take to help maintain the integrity of your name file and the effectiveness of your marketing.

For more information on the Name File Maintenance Consulting Project, please contact Reynolds Consulting Services at 866.850.8194 (option 2) or e-mail consulting@reyrey.com.



MAKING BUSINESS BETTER.