

**IN THE UNITED STATES PATENT AND TRADEMARK OFFICE
BEFORE THE PATENT TRIAL AND APPEAL BOARD**

Petition for CBM Review of	§	Customer No. 97149
United States Patent No. 8,396,791, for	§	
<i>System and Method for Assessing and Managing</i>	§	Attorney Docket No: D1164.00024
<i>Financial Transactions</i>	§	
	§	Petitioner: DealerSocket, Inc.
Patent Owner: AutoAlert, Inc.	§	

DECLARATION OF DAVID L. KRIER

David L. Krier declares:

1. In 1995, a partner and I founded Loyalty Strategies International, or LSI. The primary business of LSI was developing customer retention software for automobile dealers.

2. In 1996, LSI was purchased by the Half-a-Car group ("HAC"), which was in turn acquired by The Reynolds and Reynolds Company ("Reynolds") in 2000. I stayed with LSI, through each of its acquisitions and incarnations, until early 2005, when I left Reynolds. I continued to consult for Reynolds until the end of 2005 at which time I started another company (Guest Concepts, Inc.).

3. Through HAC and Reynolds, LSI was widely implemented in Ford Motor Company dealerships nationwide, ultimately as part of Ford's Lease Retention efforts and Retail Trade Cycle Management ("RTCM") program. Attached as Exhibits A, B, and C hereto are PowerPoint presentations that I prepared and used to roll LSI out to Ford dealerships across the United States and Canada (easily more than 100 dealerships, altogether) in 2000, January 2002, and August 2002, respectively.

The PowerPoints accurately (though not exhaustively) exhibit the LSI software and process, as they existed and were used as of the dates indicated. There were no formal requirements or informal expectations of confidentiality associated with the presentations I gave using the PowerPoints.

4. As illustrated in the attached PowerPoints, LSI worked from periodic reports that Ford provided to its dealers of customers “in equity”—that is, customers who, by ending their current financing arrangements, would thereby accrue some amount they could put toward the acquisition of another car. LSI helped dealers use that information to identify, contact, and pitch customers to trade in their current vehicles for new ones. That is, Ford used its computers to mine the data, in order to identify customers “in equity”; and LSI helped dealers translate the results into sales.

5. Again as illustrated in the attached PowerPoints, the computerized LSI system had different aspects, two of which were the LSI Renewal Center and the LSI Comparison Center. The Renewal Center tracked and managed contact with prospects identified by Ford’s computers as in equity. The Comparison Center used that equity and other inputs to calculate payments for a potential replacement vehicle.

I declare under penalty of perjury under the laws of the United States of America that the foregoing is true and correct.

Executed on this 7th day of May, 2014, at Las Vegas, Nevada.

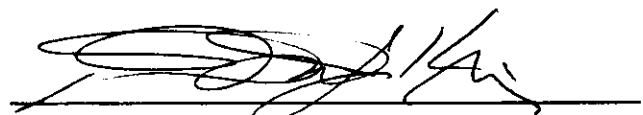

David L. Krier

EXHIBIT A

Open up to a

Whole NEW World



Loyalty Strategies



LS



LSI Renewal Center

**Renew and
Retain the
Customer!**

Option Screen for JONES, JOHN

File

Edit

Lookup

Write

Reports

Setup

Tools

Help

New

Recall

Save

Recap

Huddle

Write

VScan

ToDo

Exit

QuickCalc

Deal Info

Orig. Terms

Keep the Car

Joy of New

Activities

Notes

Termination

CUSTOMER (Last, First)

JONES, JOHN

Year

1998

Make

FORD

Model

TAURUS

Mod. Yr.

Start Date

05/19/1999

Source

FMCC LEASE

Tax Profile

6% TAX

DEAL INFO

1 Payment Lease

☐

Term

24

Months Elapsed

☐

15

Base Payment

37

Residual Value

10,335.00

Net Cap Cost

17,300.00

Cap Reduction

1,500.00

FEES

Licensing Fee

0.00

Trade Cr (for Tax)

0.00

PAYOFF

Estimated Payoff

13100.00

Recap/Print

Estimate Only: Does not include
Title, License Fees, Unpaid Payments
and other Charges and Fees.



LSI Renewal Center

Leasing – Dealer Benefit

“The Customer **MUST** Make a **Buying Decision** at Lease End!”

They have 3 Choices:

- 1) Buy/Lease a New One**
- 2) Buy Their Old One**
- 3) Buy a Bus Pass**

This Decision Represents Opportunity!



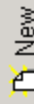
LSI Renewal Center

Finance – Dealer Benefit

“We know: Who they are, Where they are, What they are driving and When they’re in a position to Trade”

The LSI Renewal Center Tracks these Customers so they don’t fall through the cracks

This Knowledge Represents Opportunity!



New



Recall



Save



Recap



Huddle

QuickCalc

Deal Info

Orig. Terms

Keep the Car

Joy of New

Leases

Notes

Termination

CUSTOMER (Last, First)

JONES, JOHN

Year

1998

Make

FORD

Model

TAURUS

Vehicle

Start Date

05/19/1999

▼

Source

FMCC LEASE

▼

Tax Profile

6% TAX

▼

DEAL INFO

1 Payment Lease

☐

Term

24

Base Payment

369.97

Residual Value

10,335.00

Net Cap Cost

17300

Cap Reduction

0.00

Basic Numbers

FEES

License Fee

0.00

Doc/Other Fee

0.00

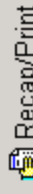
Trade Cr (for Tax)

0.00

PAYOFF

Early Termination

☐



Recap/Print

A Presentation is just a few entries away...

LSI automatically calculates and updates Estimated Payoffs for all deal types

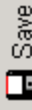
Option Screen for JONES, JOHN

File Edit Lookup Write Reports Setup Tools Help

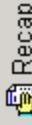
New



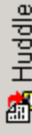
Recall



Save



Recap



Huddle

QuickCalc

Deal Info

Orig. Terms

Keep the Car

Joy of New

Activities

Notes

Termination

CUSTOMER (Last, First)

JONES, JOHN

Year

1998

Make

FORD

Model

TAURUS

Body

GL

Start Date

05/19/1999

Source

FMCC LEASE

Tax Profile

6% TAX

DEAL INFO

1 Payment Lease

Term

24

Base Payment

369.97

Residual Value

10,335.00

Net Cap Cost

17,300.00

Cap Reduction

1500

FEES

License Fee

0.00

Doc/Other Fee

0.00

Trade Cr (for Tax)

0.00

PAYOFF

Early Termination

of Payments Elapsed

15

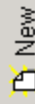
Estimated Payoff

13100.00

Estimate Only: Does not include Termination Fees, Unpaid Payments or Other Charges and Fees.

Est. Payoff

Recap/Print



New



Recall



Save



Recap



Huddle

QuickCalc

Deal Info

Orig. Terms

Keep the Car

Joy of New

Activities

Notes

Termination

CUSTOMER (Last, First)

JONES, JOHN

Year

1998

Make

FORD

Model

TAURUS

Body

GL

Start Date

05/19/1999



Source

FMCC LEASE



Tax Profile

6% TAX



DEAL INFO

1 Payment Lease



Term

24

Base Payment

369.97

Residual Value

10,335.00

Net Cap Cost

17,300.00

Cap Reduction

1,500.00

FEES

License Fee

0.00

Doc/Other Fee

0.00

Trade Cr (for Tax)

0.00

PAYOFF

Early Termination



of Payments Elapsed

15

Estimated Payoff

13100.00

Estimate Only: Does not include
Termination Fees, Unpaid Payments
or Other Charges and Fees.



Recap/Print



Recap/Print

Now we're ready to look at the
Recap

This is a sample of the Recap Screen that let's us review the numbers before we Print

Recap Screen

AutoSolve

Undo

Print

Preview

JOHN JONES - 1998 FORD T

ORIGINAL ALTERNATIVES

FINANCED PURCHASE

Payments of 60 @ 407

Obligation 36 @ 14,652

RED CARPET LEASE

Payments of 24 @ 392.17

Options on 10,335

BUYOUT

Financed Buyout Payment (including maintenance) 48 @ 399

Cash Buyout Effective Payment (incl. maint / investment) 24 @ 373

JOY OF NEW

- N/A -

AUTOSOLVE SUGGESTIONS

The Buyout Payment is low when compared to the current lease payment. A shorter Buyout Term will probably result in a more realistic presentation.

Pages to Print

☒ Original Terms - Finance vs Lease Pymts
 ☐ Original Terms - Cash vs Lease Pymts
 ☒ Keep The Car / Buyout

☐ Value Added Worksheet

Buyout Type

☒ Dealer Financing
 ☐ Cash Buyout

☐ Outside Financing

Maintenance Type

☒ 0 - 30,000 Miles
 ☐ 0 - 60,000 Miles



LSI Renewal Center

Options Analysis

**The Options Analysis Presentation is Crucial...
It helps us Re-Establish a Positive Relationship
with the Customer**

- ✓ Why they did what they did
- ✓ That Leasing worked for them
- ✓ The effect of Taxes on Down Payment
- ✓ How Maintenance affects the Cost of Driving
- ✓ Shows them they saved Money
- ✓ They made the Right Choice – They're Smart!

The Top Section shows the Down Payment and Payment comparisons

07/26/2000 8:00 AM

HOMETOWN FORD
OPTIONS ANALYSIS
JOHN JONES - 1998 FORD TAURUS GL
2 YEARS AGO

FINANCED PURCHASE

1,590	Advanced Down Payment. (8%)	1,590
1,128	Less Tax	90
462		1,500

07/26/2000 8:00 AM

Page 1

HOMETOWN FORD OPTIONS ANALYSIS JOHN JONES - 1998 FORD TAURUS GL

2 YEARS AGO

FINANCED PURCHASE

1,590
1,128
462

Advanced Down Payment. (8%)	1,590
Less Tax	90
Net Advanced / Down Payment	1,500
Base Payment	370
Tax	22

RED CARPET LEASE

407

@ 60 Payments 24 @

392.17

Open in the next 30 days
\$100 - \$125 Per Month (507)

After 60,000 Miles ... REPAIR CYCLE
• Valves • Trans • Air-Cond
• Radiator • CV Joints • Body Work

THE BEST OF BOTH

WHICH MAKES MORE SENSE

07/26/2000 8:00 AM

HOMETOWN FORD
OPTIONS ANALYSIS
JOHN JONES - 1998 FORD TAURUS
2 YEARS AGO

FINANCED PURCHASE

1,590	Advanced Down Payment. (8%)	1,590
1,128	Less Tax	90
462	Net Advanced / Down Payment	1,500
	Base Payment	370
	Tax	22
407	@ 60 Payments	24 @ 392.17

The Middle Section shows the
Position based upon the end of the
Lease Term

2 YEARS LATER

9,768

.....Total Payments.....

9,412

CUMULATIVE CASH FLOW SAVINGS

Monthly Savings.....
Total Savings.....

15
356

Most People Would Agree ...
The best part of any new/used car's life is
0 - 30,000 Miles - Gas/Change Oil

After 30,000 Miles ... MAINTENANCE CYCLE

- Tires
- Belts
- Brakes
- 30K Service
- Warranty Expires
- Alignment
- Hoses
- Exhaust
- Flushes
- Rentals

\$2,400 to \$3,000
Spent in the next two years
\$100 - \$125 Per Month (507)

After 60,000 Miles ... REPAIR CYCLE

- Valves
- Radiator
- CV Joints
- Trans
- Air-Cond
- Body Work

1) BUY TO TRADE OR SELL
THE JOY OF NEW
(KEEP THE PROFIT)

2) WHAT IF ...
MARKET CONDITIONS
CHANGE? - RETURN
AVOID A LOSS!

3) BUY / KEEP IT (LOVE)

THE BEST OF BOTH

WHICH MAKES MORE SENSE

07/26/2000 8:00 AM

HOMETOWN FORD
OPTIONS ANALYSIS
JOHN JONES - 1998 FORD TAURUS
2 YEARS AGO

FINANCED PURCHASE

1,590 Advanced Down Payment. (8%) 1,590

The Bottom Section reinforces the Maintenance story and shows the Options vs. Obligations

**CONVENTIONAL
STILL OWE
36 PAYMENTS**

14,652

**AFTER COMPLETING AGREEMENT
YOU DON'T OWE ANYTHING
YOU HAVE 3 GREAT OPTIONS**

10,335

O B L I G A T I O N S

Most People Would Agree ...
The best part of any new/used car's life is
0 - 30,000 Miles - Gas/Change Oil

After 30,000 Miles ... MAINTENANCE CYCLE

- Tires
- Belts
- Brakes
- Hoses
- 30K Service
- Flushes
- Warranty Expires

\$2,400 to \$3,000
Spent in the next two years
\$100 - \$125 Per Month (507)

After 60,000 Miles ... REPAIR CYCLE

- Valves
- Radiator
- Trans
- CV Joints
- Air-Cond
- Body Work

O P T I O N S

1) BUY TO TRADE OR SELL
THE JOY OF NEW
(KEEP THE PROFIT)

2) WHAT IF ...
MARKET CONDITIONS
CHANGE? - RETURN
AVOID A LOSS!

3) BUY / KEEP IT (LOVE)

THE BEST OF BOTH

WHICH MAKES MORE SENSE

[illegible]

The Right Presentation Produces the Right Result



LSI Renewal Center

Keep the Car

The Keep the Car Presentation is also Crucial because it sets the stage for the New Payment

- ✓ Shows Taxes and Fees that are often forgotten
- ✓ Shows the effect of Maintenance on Payment
- ✓ Emphasizes the Two Year Cost of Driving
- ✓ Helps resolve the “Payment Walk” issue
- ✓ Eliminates the Ownership/Equity Myth by showing the true Two Year Equity Position
- ✓ Proves that a New Vehicle actually costs Less

The Keep the Car Presentation
helps our Customer understand
that a New Vehicle may actually
cost Less

07/26/2000 8:00 AM

Page 2

HOMETOWN FORD

OPTIONS ANALYSIS

JOHN JONES - 1998 FORD TAURUS GL

KEEP THE VEHICLE - DEALER FINANCING

Option Price.....	10,335.00	
Sales Tax	620.10	
Balance.....	10,955.10	
Payments..... (36 months)	373.89	*
Maintenance..... (2,400)	100.00	
Average Monthly Payout.....	473.89	(Was 392)
Gross Payout (24 months)	11,373.30	
After 24 months still owe, 12 Payments that Total.....	4,488.00	
Estimated 2 year Value ???.....	5,600.00	
Estimated Equity ???.....	1,112.00	

* Payments based upon 13.90% APR. Payments and APR may vary based upon credit history and terms.
Subject to credit approval.



LSI Renewal Center

Keep the Car Presentation

11/25/1993 5:10 PM

Homestead Ford Lincoln Mercury OPTIONS ANALYSIS JOHN & SUSAN MADDEN - 1988 FORD WIN

KEEP THE VEHICLE - DEALER FINANCING

Option Price	14,725.00
Sales Tax	882.50
License	86.25
Balance	15,693.75
APR	8.50 %
Payments	(42 months)
Maintenance	436.30
Average Monthly Payout	100.00
Gross Payout	4,200.00
Net Payout	13,777.65
After 24 months still owe	8,532.00
Estimated 2 year Value ???	8,000.00
Estimated Equity ???	-532.00

* Payments based upon 13.90% APR. Payments and APR may vary based upon credit approval.

Dealer
Finance

11/25/1993 5:12 PM

Homestead Ford Lincoln Mercury OPTIONS ANALYSIS JOHN & SUSAN MADDEN - 1988 FORD WIN

KEEP THE VEHICLE - OUTSIDE FINANCING

Option Price	14,725.00
Sales Tax	882.50
License	86.25
Balance	15,693.75
APR	8.50 %
Payments	(42 months)
Maintenance	436.30
Average Monthly Payout	100.00
Gross Payout	4,200.00
Net Payout	12,711.18
After 24 months still owe	7,848.00
Estimated 2 year Value ???	8,000.00
Estimated Equity ???	152.00

Credit Union
Or Bank

11/25/1993 5:10 PM

Homestead Ford Lincoln Mercury OPTIONS ANALYSIS JOHN & SUSAN MADDEN - 1988 FORD WIN

KEEP THE VEHICLE - DEALER FINANCING

Option Price	14,725.00
Sales Tax	882.50
License	86.25
Balance	15,693.75
APR	8.50 %
Payments	(42 months)
Maintenance	436.30
Average Monthly Payout	100.00
Gross Payout	4,200.00
Net Payout	13,777.65
After 24 months still owe	8,532.00
Estimated 2 year Value ???	8,000.00
Estimated Equity ???	-532.00

* Payments based upon 13.90% APR. Payments and APR may vary based upon credit approval.

Buyout with
Down Payment

11/25/1993 5:10 PM

Homestead Ford Lincoln Mercury OPTIONS ANALYSIS JOHN & SUSAN MADDEN - 1988 FORD WIN

KEEP THE VEHICLE - CASH BUYOUT

Option Price	14,725.00
Sales Tax	882.50
License	86.25
Balance	15,693.75
2 YEAR POSITION	
Cash Price incl. Fees	15,693.75
Maintenance Cost	2,400.00
2 Year Investment	2,853.47
Estimated 2 year Value ???	8,000.00
2 Year Net Cost	11,979.02
24 Month Effective Payment	499.13 (Was 442)

Cash
Buyout

The Right Presentation Produces the Right Result



LSI Renewal Center

Joy of New

Overcomes the major Renewal Hurdle...
“I don’t want to put any Money Down and I want to lower my Payments”

- ✓ Resolves the “Payment Walk” issue by Matching the Original Payment with just one Click
- ✓ The “Tailor Your Own Payment” Presentation helps us establish the relationship between Monthly Payment and Down Payment



LSI Renewal Center

Joy of New Presentation

We compare the New Payment to the Cost of Driving on their Old Car

We show our Customer the Relationship between Down Payment and Monthly Payment

11/05/1995 5:07 PM

Homtown Ford Lincoln Mercury

Page 1

OPTIONS ANALYSIS

HOMETOWN BROADCASTING CO. - 1997 LINCOLN CONTINENTAL

JOY OF NEW - RED CARPET LEASE

1999 LINCOLN TOWNCAR

24 Payments @ 634.55

Less Tax 57.11

Total Payment 681.66

(9% Down Payment / Equity 3,500.00 (plus 1st Payment & Deposit)

Monthly Savings 19.88 (Versus Payments/Maint. to Keep Old Car)

Total Savings 477.01

Total of Payments 16,599.95

Options based on 21,000.00

TAILOR YOUR OWN PAYMENT

Down Payment (+1st Deposit) 5,500 Monthly Payment 692

Less Desired Down Payment Adjustment

Difference Estimated New Payment

Adjustment Factor (0.043) (100 Down = Approx. 4.30 in Payment)

Payment Adjustment (1000 Down = Approx. 43.00 in Payment)

Joy of New w/
Tailor Your
Own Payment

The Right Presentation Produces the Right Result



New



Recall



Save



Recap



Huddle

QuickCalc

Deal Info

Orig. Terms

Keep the Car

Joy of New

Activities

Notes

Termination

CUSTOMER (Last, First)

JONES, JOHN

Year

1998

Make

FORD

Start Date

05/19/1999

DEAL INFO

1 Payment Lease

Term

Base Payment

Residual Value

Net Cap Cost

Cap Reduction

36

10,33

17,30

1,50

Find Deal

Lookup By:

Customer

Enter the Customer to be found.

TIMES

OK

Cancel

F3

Recalling a Customer is easy – just press the F3 Key

We are now positioned on that Customer's Deal in the Recall Screen. Just press the Enter Key to Recall the Deal

Recall Screen

File Edit Lookup Query Write Export

Open Deal

Delete

Recap

Huddle

Exit

NAME	YEAR	MAKE	MODEL	BODY	PAYMENT	DATE
KRIER, DAVID	1999	LEXUS	GS400		711	37,100 11/29/1998 36 0 11/29/2001
LABARA, WILLIAM	1998	LINCOLN	CONTINENT		720	33,500 12/22/1999 24 12/22/2001
LION, JAMES	1998	FORD	EXPLORER		453	20,700 12/27/1998 24 12/27/2000
LONG, MARY	1998	FORD	ESCORT		216	0 24 02/10/2
MADDEN, JOHN & SUSAN	1999	FORD	WINDSTAR		442	15,300 10/07/1998 24 10/07/2000
MERKEY, WILLIAM	1999	FORD	CONTOUR		321	10,800 10/31/1998 24 10/31/2000
MONTICELLO, BARBARA	2000	MERCURY	SABLE		376	9,000 10/14/1999 48 12/14/2001
PAULS, DENNIS	1999	FORD	CONTOUR	SDN	281	0 10/29/1998 24 10/29/2000 02/15/2
PRATT, KAREN	1999	HONDA	ACCORD	EX-V6	364	22,100 05/25/1999 54 0 11/25/2003
RCO DEAL, JOE	1998	FORD	TAURUS		246	10,500 05/12/1998 24 0 05/12/2000
RICHARDS, BILL	1996	MERCURY	GRAND MAF		330	0 60
ROBINSON, SAMUEL	1999	MERCURY	VILLAGER	SW	214	0 09/08/1998 25 10/08/2000 02/10/2
ROTHARMEL, BILL & JAN	1998	MERCURY	MYSTIQUE		351	0 08/08/1998 24 08/08/2000 02/05/2
ROWE, SHAWN	1998	FORD	ESCORT		142	7,100 12/29/1998 24 12/29/2000
SCHRUMP, CHARLES	2000	FORD	EXPLORER		382	16,100 04/06/2000 24 0 04/06/2002
SHOCKNEY, HEATHER	2000	MERCURY	COUGAR		430	12,203 03/02/2000 24 0 03/02/2002
SMITH, BILL	1998	LINCOLN	TOWN CAR		751	19,300 01/01/1998 24 4 05/01/2000
SMITH, JOE	1998	MERCURY	GRAND MAF		453	0 24 3
SWEDA, BARBARA	1998	CADILLAC	SEDAN DEV		783	26,000 09/15/1998 27 12/15/2000
TIMES, NEIL	1998	LINCOLN	CONTINENT	SDN	395	0 02/15/1998 36 02/15/2001 02/05/2
TOM SCOTT	1998	TOYOTA	AVOLON	XLS	404	0 24 0
WALLACE, WILLIAM AN	1997	FORD	TAURUS		382	0 24 0 12/30/1899
WALSH, JOSEPH	1999	FORD	F-150	SC	300	20,200 10/29/1998 24 10/29/2000
WILLIAMS, BILL	1998	FORD	TAURUS		382	8,600 01/01/1998 24 01/01/2000
WILLIAMS, RUDY	1999	FORD	TAURUS		403	12,300 10/08/1998 24 10/08/2000

RecordCount: 41

This is the Write screen showing a sample of what a Letter would look like for this Customer

Write Screen
File

Letter **120 Day Letter**

Print

Preview Template

July 26, 2000

John Jones
1234 Fifth St.
Hometown, CA 91301

Dear John;

How time flies! The lease on your 1998 Ford Taurus GL is getting very near to the time where we need to review the options available to you at the end of your lease.

Please contact our office at 800-555-1212 at your earliest convenience for an appointment to go over your options.

Sincerely,

Hometown Ford

You can easily create custom Letters... LSI automatically creates the structure for a Mail Merged Letter

NEW LETTER

File Edit View Insert Format Page Setup Merge Fields



Times New Roman



11



B



U



1 2 3 4 5 6 7 8

{TODAY'S DATE}

{CUSTOMER}
{ADDRESS1}
{ADDRESS2}
{ADDRESS3}

Dear {SALUTATION};

Sincerely,

{DEALER NAME}

{DEALER CONTACT NAME}
{DEALER CONTACT TITLE}

NUM



Times New Roman

Merge Fields

{TODAY'S DATE}

{CUSTOMER}
{ADDRESS1}
{ADDRESS2}
{ADDRESS3}

Dear {SALUTATION};

Thank you for thinking of ABC Ford when you decided to Lease your new |

Sincerely,

{DEALER NAME}

{DEALER CONTACT NAME}
{DEALER CONTACT TITLE}

LSI can automatically insert Merge Fields for personalized letters

. . . 7 8 . .

. 1 2 3 4 5 6 7 8 . .

COMMENT

CUSTOMER

DEAL NUMBER

DEALER CONTACT NAME

DEALER CONTACT TITLE

DEALER NAME

DEALER PHONE

HOME PHONE

LEASE DATE

MILEAGE ALLOW

OPTION PRICE

PAYMENT

SALESPERSON1

SALESPERSON2

SALUTATION

SCHED TERM DATE

SECURITY DEPOSIT

STATE

TERM

TERMINATION DATE

TODAY'S DATE

VEHICLE

VEHICLE BODY

VEHICLE MAKE

VEHICLE MODEL

VEHICLE VIN

VEHICLE YEAR

WORK PHONE

NUM

Hometown Ford

Sample Letter on Dealer Letterhead

February 10, 2000

Hometown Broadcasting Co
Rt 72 North
Hometown, PA 12345

Dear Bill Williams;

How time flies! The lease on your 1998 Lincoln Continental is getting very near to the time where we need to review the options available to you at the end of your lease.

Please contact our office at 800-555-1212 at your earliest convenience for an appointment to go over your options.

Sincerely,

Hometown Ford

John Jones
Options Specialist

12345 Easy St. Hometown, PA 19090 610-555-1010 Fax 610-555-1012

Select Phone Number, click "DIAL" to start call. When ringing starts, pick up Handset and click "RELEASE" to send call to handset.

OK

Cancel

NUMBERS

☒ Home: 555-555-1212

☐ Work: 555-555-1345

☒ Dial 1 ☒ Include Area Code

 Dial

1-555-555-1212

 Schedule Activity

CALL RESULT

☐ Call Completed

☐ Left Message

☐ Line Busy

☐ No Answer

☐ Wrong Number

NOTE

Date/Time User Note

02/22/2000 10:33 AM	DAVID	Huddle Printed
02/08/2000 6:07 PM	DAVID	Huddle Printed
02/08/2000 5:41 PM	DAVID	Bill came in today to talk about getting a new Lincoln Continental.
12/03/1999 10:25 AM	DAVID	Salesperson #1: "JONES,JIM" changed to Salesperson #2: "WILLIAMS,BILL"
11/05/1999 4:52 PM	DAVID	Huddle Printed
09/20/1999 5:45 PM	ROGER	1 MONTH EXT.OK SHEILA
12/30/1899	DAVID	This is a test

Calling and Following-up on your Customers has never been easier. LSI dials the number and tracks the results with a simple click...



LSI Renewal Center

Results!

“Accountability is the Core of Success”

When we know the Score, we know how we did... and what it takes to Improve!

We can Track Results by Dealership or by individual Salesperson to uncover issues and Opportunities

Easy to read Graphical Reports let us analyze results at a glance

This is an example of the Report Menu. LSI comes with a number of Reports that let track results and follow-up on Customers

LSI 2000 -- Reports

Preview Print Exit

Report: Actual Termination Report

DATE Choose Actual Termination Report Scheduled Termination Rep Extensions Pending Activity (follow-up) Pending Actual Presentation Report Renewal Results by Salesperson Customer/Vehicle List Cycle Slide

From

REPORT OPTIONS

Include Comment ☒ Include Notes ☐ Include Blank Lines ☐ Group By Salesperson ☐

Show Graph ☒

Detail ☒ Summary ☐

RESULT ORDER BY Customer ☒ Vehicle ☐

VEHICLE SEARCH

Year Make

Model Body

Color

OTHER

Source

Deal Type ALL

New/Used/Demo

ADVANCED SEARCH

Customer To Search For

Word To Search For

Salesperson To Search For

Dealer Id

07/26/2000 9:56 AM

Renewal Results from 01/01/2000
Actual Term - Custom.

This is a sample of the Actual Term
Report Detail

Customer	Vehicle	Term	Ext.	Sch	Term	Term Date	Gross Front	Gross Back	Cust Result	Vehicle Result
ROTHARMEL,BILL & JAN	1998 Mercury Mystique	24		08/08/2000	02/05/2000		250.00	632.00	BUYOUT	BUYOUT
VIN:										
Salesperson 1:	WILLIAMS,BILL									City: HOMETOWN
Salesperson 2:										

1 BUYOUT - Customer Bought Leased Vehicle 14.29% 250 632 Total GP = 882

Customer	Vehicle	Term	Ext.	Sch	Term	Term Date	Gross Front	Gross Back	Cust Result	Vehicle Result
DILGER,TOM	1999 Ford Explorer	24		10/08/2000	02/01/2000		2,425.00	305.00	NEWLEASE	TRADE-IN
VIN:										City: HOMETOWN
Salesperson 1:	SMITH,JOE									
Salesperson 2:	JONES,JIM									
TIMES, NEIL	1998 Lincoln Continental SD	36		02/15/2001	02/05/2000		1,325.00	0.00	NEWLEASE	TRADE-IN
VIN:	12312312312312312									City: HOMETOWN
Salesperson 1:	SMITH,JOE									
Salesperson 2:										
3 Time Repeat										
ROBINSON,SAMUEL	1999 Mercury Villager SW	25		10/08/2000	02/10/2000		1,607.67	86.00	NEWLEASE	RETLESSR
VIN:										City: HOMETOWN
Salesperson 1:	JONES,JIM									
Salesperson 2:										

3 NEWLEASE - Leased a New Vehicle from Us 42.86%

Customer	Vehicle	Term	Ext.	Sch	Term	Term Date
HUEY,DAVID	1998 Ford Explorer	36		10/14/2000	02/05/2000	
VIN:						
Salesperson 1:						
Salesperson 2:						

Source: FMCC LEASE

Results can be tracked by Entire
Dealership, Salesperson or even
by Lease or Finance Source

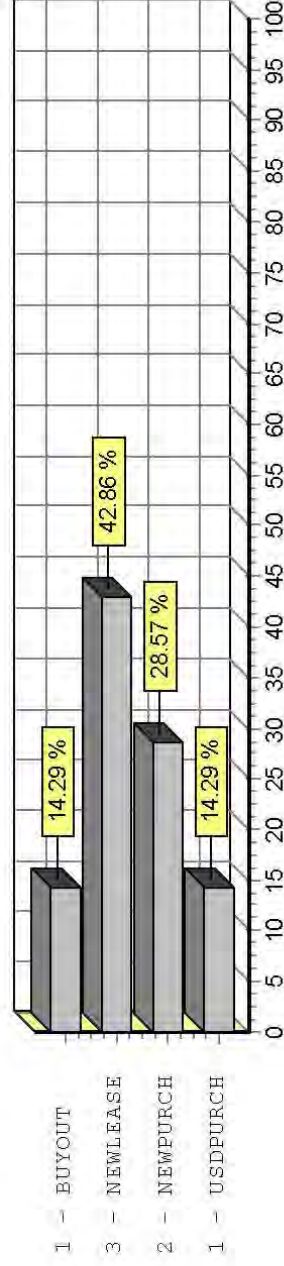
07/26/2000 9:56 AM

Renewal Results from 01/01/2
Actual Term - Custon

7 8,641 3,233 Total GP = 11,874

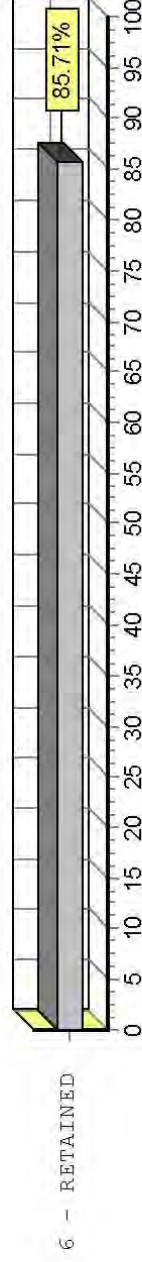
The last page gives us a Graph
that instantly shows us how we are
doing

CUSTOMER RENEWAL RESULTS



RETENTION %

7 Total Terminations
0 Excluded (No Result, Dead File, Moved Far, or Repo)
7 Eligible For Retention





LSI Comparison Center

Sell the Car!

New

Recall

Save

Recap

Exit

Quick Calc

Misc

Notes

Customer (Last, First)

JONES, JOHN

Salesperson

SMITH, STEVE

Veh Stock

1234

Year

2000

Make

FORD

Model

FJRL

Body

MSRP

20,000.00

Sell Price / Cap

20,000.00

Accessories

0.00

Tax Profile

6% TAX

Source #1

FMCC LEASE

Program

SEL 24

Term (1-60)

24

Rate (APR)

6.2500

Residual

0.00.00

Excess Miles

.12

License/Title

(Cap ☐)

75.00

Doc Fee

(Cap ☐)

0.00

Rebate

(Cap ☐)

0.00

Trade Allow

(Cap ☒)

0.00

Trade Payoff

(Cap ☐)

2,000.00

Security Deposit

(Cap ☐)

0.00

Due On Delivery

1,616.49

Payment

421.49

Source #2

FMCC FINANCE

Program

CASH+60APR

Term

60

Rate (APR)

6.9000

License/Title

(Cap ☐)

75.00

Doc Fee

(Cap ☐)

0.00

Rebate

(Cap ☐)

0.00

Trade Allow

(Cap ☐)

0.00

Trade Payoff

(Cap ☐)

0.00

Due On Delivery

1,195.00

Payment

376.91

The LSI Computer Center



LSI Comparison Center

Presentations Sell Cars!

The Customer “Wants” to Buy or they wouldn’t be in Our Showroom!

- **We need to give them a Reason and the Justification to Buy Now!**
- **A Good Presentation takes the Mystery out of Buying a Vehicle**
- **An “Informed” Customer has the Confidence to make a Buying Decision**

With the LSI Comparison Center
we can quickly enter just a few
items....

Comparison Screen --- New Deal
File Lookup Setup Reports Tools Help

New Recall Save Recap

Quick Calc Misc Notes

Customer (Last, First)
JONES, JOHN

Salesperson
SMITH, STEVE

Veh Stock **1234**

Year **2000**

Make **FORD**

Model **TAURUS**

Body **SEL**

MSRP **20000**

Sell Price / Cap **0.00**

Accessories **0.00**

Tax Profile **6% TAX**

Customer

Vehicle

Price



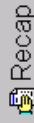
New



Recall



Save



Recap

Quick Calc

Misc

Notes

Customer (Last, First)

JONES, JOHN

Salesperson

SMITH, STEVE

Veh Stock

1234

Year

2000

Make

FORD

Model

TAURUS

Body

SEL

MSRP

20,000.00

Sell Price / Cap

20,000.00

Accessories

0.00

Tax Profile

6% TAX

Source #1

FMCC LEASE

Program

Term

(1-Pay ☐)

24

Rate (APR)

10.2500

Resid.

50

Adj.

0

10,000.00

Excess Miles

.12

0

License/Title

(Cap ☐)

0.00

Doc Fee

(Cap ☐)

0.00

Bank/Acq

(Cap ☐)

0.00

Service Contract

0.00

Rebate

(Cap ☒)

0.00

Trade Allow

(Cap ☒)

0.00

Trade Payoff

0.00

Cap Reduction

2,000.00

Security Deposit

500.00

Due On Delivery

3,098.74

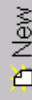
Payment

478.74

Source #2

Instant Deal!

Instant Deal



New



Recall



Save



Recap

Quick Calc

Misc

Notes

Customer (Last, First)

JONES, JOHN

Salesperson

SMITH, STEVE

Veh Stock

1234

Year

2000

Make

FORD

Model

TAURUS

Body

SEL

MSRP

20,000.00

Sell Price / Cap

20,000.00

Accessories

0.00

Tax Profile

6% TAX

Source #1

FMCC LEASE

Program

Term

(1-Pay ☐)

24

Rate (APR)

10.2500

Resid. 50

Adj. 0

10,000.00

Excess Miles

.12

0

License/Title

(Cap ☐)

0.00

Doc Fee

(Cap ☐)

0.00

Bank/Acq

(Cap ☐)

0.00

Service Contract

0.00

Rebate

(Cap ☒)

0.00

Trade Allow

(Cap ☒)

0.00

Trade Payoff

0.00

Cap Reduction

2,000.00

Security Deposit

500.00

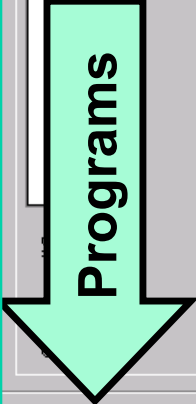
Due On Delivery

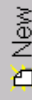
3,098.74

Payment

478.74

The Programs Feature allows you to load in Rate/Residual/Rebate information for any Source

Programs



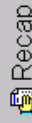
New



Recall



Save



Recap

Quick Calc

Misc

Notes

Customer (Last, First)

JONES, JOHN

Salesperson

SMITH, STEVE

Source #1

FMCC LEASE

Program

Term

24

(1-Pay ☐)

Rate (APR)

10.2500

Source #2



Veh Stock

Year

Year

2000

Make

FORD

Model

TAURUS

Make

Ok

Cancel

Add

Edit

Delete

Clone

Model

Body

MSRP

Sell Price / Cap

Accessories

Tax Profile

6% TAX

Due On Delivery

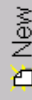
Payment

The Program Window Pops up when you click in the Program Field

Programs can be quickly Added, Cloned (copied) or Edited in the Programs Window or in Setup

Programs

Program	Term	Rate	Residual	Rebate	Dir. Adj.	Expire
LX 24	24	6.25	49	1,000		10/02/2000
LX 36	36	7.25	39	1,000		10/02/2000
SE 24	24	6.25	52	1,000		10/02/2000
SE 36	36	7.25	41	1,000		10/02/2000
SE WGN 24	24	6.25	51	1,000		10/02/2000
SE WGN 36	36	7.25	40	1,000		10/02/2000
SEL 24	24	6.25	51	1,000		10/02/2000
SEL 36	36	7.25	40	1,000		10/02/2000
SES 24	24	6.25	52	1,000		10/02/2000
SES 36	36	7.25				



New



Recall



Save



Recap

Quick Calc

Misc

Notes

Customer (Last, First)

JONES, JOHN

Salesperson

SMITH, STEVE

Veh Stock

1234

Year

2000

Make

FORD

Model

TAURUS

Body

SEL

MSRP

20,000.00

Sell Price / Cap

20,000.00

Accessories

0.00

Tax Profile

6% TAX

Source #1

FMCC LEASE

Program

SEL 24

Term

(1-Pay ☐)

24

Rate (APR)

6.2500

Resid.

51

Adj.

0

10,200.00

Excess Miles

.12

0

License/Title

(Cap ☐)

0.00

Doc Fee

(Cap ☐)

0.00

Bank/Acq

(Cap ☐)

0.00

Service Contract

0.00

Rebate

(Cap ☒)

1,000.00

Trade Allow

(Cap ☒)

0.00

Trade Payoff

0.00

Cap Reduction

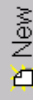
2,000.00

Security Deposit

Source #2

We selected a Program and LSI automatically entered the Term, Rate, Residual % and Rebate

The numbers can be quickly customized for an individual deal (i.e. a Loyalty Incentive Rebate)



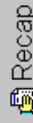
New



Recall



Save



Recap

Quick Calc

Misc

Notes

Customer (Last, First)

JONES, JOHN

Salesperson

SMITH, STEVE

Veh Stock

1234

Year

2000

Make

FORD

Model

TAURUS

Body

SEL

MSRP

20,000.00

Sell Price / Cap

20,000.00

Accessories

0.00

Tax Profile

6% TAX

Changes are Instantly Calculated
and displayed when you go to the
next field

Source #1

FMCC LEASE

Program

SEL 24

Term

(1-Pay ☐)

24

Rate (APR)

6.2500

Resid.

51

Adj.

0

10,200.00

Excess Miles

.12

0

License/Title

(Cap ☐)

0.00

Doc Fee

(Cap ☐)

0.00

Bank/Acq

(Cap ☐)

0.00

Service Contract

0.00

Rebate

(Cap ☒)

1,000.00

Trade Allow

(Cap ☒)

0.00

Trade Payoff

0.00

Cap Reduction

2,000.00

Security Deposit

375.00

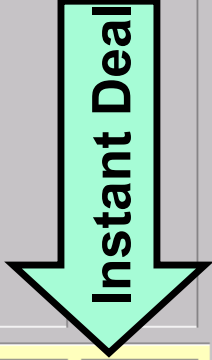
Source #2

Due On Delivery

2,869.64

Payment

374.64

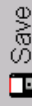
Instant Deal



New



Recall



Save



Recap

Quick Calc

Misc

Notes

Customer (Last, First)

JONES, JOHN

Salesperson

SMITH, STEVE

Veh Stock

1234

Year

2000

Make

FORD

Model

TAURUS

Body

SEL

MSRP

20,000.00

Sell Price / Cap

20,000.00

Accessories

0.00

Tax Profile

6% TAX

Source #1

FMCC LEASE

Program

SEL 24

Term

(1-Pay ☐)

24

Rate (APR)

6.2500

Resid.

51

Adj.

0

10,200.00

Excess Miles

.12

0

License/Title

(Cap ☐)

0.00

Doc Fee

(Cap ☐)

0.00

Bank/Acq

(Cap ☐)

0.00

Service Contract

0.00

Rebate

(Cap ☒)

1,000.00

Trade Allow

(Cap ☐)

0.00

Trade Payoff

0.00

Cap Reduction

2,000.00

Security Deposit

375.00

Due On Delivery

2500

Payment

374.64

Source #2

To change the Due on Delivery,
Click on the Due on Delivery and
Enter the New Amount

Roll Down

**Tell LSI where to Adjust and LSI
will quickly calculate the New
Numbers**

Comparison Screen --- New Deal
File Lookup Setup Reports Tools Help

New Recall Save Recap

Quick Calc Misc Notes

Customer (Last, First)
JONES, JOHN

Salesperson
SMITH, STEVE

Source #1 **FMCC LEASE** Source #2
Program **SEL 24**
Term (1-Pay ☐) **24**

Veh Stock **1234**
Year **2000**
Make **FORD**
Model **TAURUS**
Body **SEL**

MSRP **20,000.00**
Sell Price / Cap **20,000.00**
Accessories **0.00**

Tax Profile **6% TAX**

Trade Allow (Cap ☒) **0.00**
Trade Payoff **0.00**
Cap Reduction **2,000.00**
Security Deposit **375.00**

Due On Delivery **2500**
Payment **374.64**

Roll Adjustment Screen

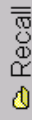
Roll To:
Payment
Accessories
Sell Price
Payment

OK Cancel

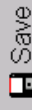
Where To?



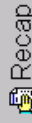
New



Recall



Save



Recap

Quick Calc

Misc

Notes

Customer (Last, First)

JONES, JOHN

Salesperson

SMITH, STEVE

Veh Stock

1234

Year

2000

Make

FORD

Model

TAURUS

Body

SEL

MSRP

20,000.00

Sell Price / Cap

20,000.00

Accessories

0.00

Tax Profile

6% TAX

Source #1

FMCC LEASE

Program

SEL 24

Term

(1-Pay ☐)

24

Rate (APR)

6.2500

Resid.

51

Adj.

0

10,200.00

Excess Miles

.12

0

License/Title

(Cap ☐)

0.00

Doc Fee

(Cap ☐)

0.00

Bank/Acq

(Cap ☐)

0.00

Service Contract

0.00

Rebate

(Cap ☒)

1,000.00

Trade Allow

(Cap ☐)

0.00

Trade Payoff

0.00

Cap Reduction

1,551.25

Security Deposit

400.00

Due On Delivery

2,500.00

Payment

350

Source #2

We can also “Roll” the Monthly Payment

Roll Payment

Tell LSI where to make the adjustment and LSI will quickly calculate the New Numbers

Comparison Screen --- New Deal
File Lookup Setup Reports Tools Help

New Recall Save Recap

Quick Calc Misc Notes

Customer (Last, First)
JONES, JOHN

Salesperson
SMITH, STEVE

Veh Stock **1234**

Year **2000**

Make **FORD**

Model **TAURUS**

Body **SEL**

Source #1 **FMCC LEASE**

Program **SEL 24**

Term **24** (1-Pay ☐)

Source #2

Roll Adjustment Screen

Roll To:

- Down Payment
- Accessories Sell Price
- Down Payment Rate
- Trade Allowance

MSRP **20,000.00**

Sell Price / Cap **20,000.00**

Accessories **0.00**

Tax Profile **6% TAX**

Trade Allow (Cap ☒) **0.00**

Trade Payoff **0.00**

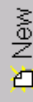
Cap Reduction **2,000.00**

Security Deposit **375.00**

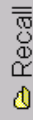
Due On Delivery **2,869.64**

Payment **350**

Where To?



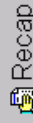
New



Recall



Save



Recap

Quick Calc

Misc

Notes

Customer (Last, First)

JONES, JOHN

Salesperson

SMITH, STEVE

Veh Stock

1234

Year

2000

Make

FORD

Model

TAURUS

Body

SEL

MSRP

20,000.00

Sell Price / Cap

20,000.00

Accessories

0.00

Tax Profile

6% TAX

Source #1

FMCC LEASE

Program

SEL 24

Term

(1-Pay ☐)

24

Rate (APR)

6.2500

Resid.

51

Adj.

0

10,200.00

Excess Miles

.12

0

License/Title

(Cap ☐)

0.00

Doc Fee

(Cap ☐)

0.00

Bank/Acq

(Cap ☐)

0.00

Service Contract

0.00

Rebate

(Cap ☒)

1,000.00

Trade Allow

(Cap ☐)

0.00

Trade Payoff

0.00

Cap Reduction

2,525.75

Security Deposit

350.00

Due On Delivery

3,437.30

Payment

350.00

Instant Deal

The Results are Calculated in an
Instant....

Source #2

To Calculate a Second Deal, just choose the new Source. Either Deal can be any Source

2nd Source

Source #2

FMCC FINANCE
CASH
FINANCE
FMCC 1-PAY LEASE
FMCC FINANCE
FMCC LEASE
FMCC RCO
GMAC LEASE
GMAC SMARTBUY

LSI allows an unlimited number Dealer Defined Sources of any type
– Lease, Finance, Balloon or Cash

What Can LSI Compare?

Quick Calc

Misc

Notes

• **Lease vs. Finance**

Customer

JONES, JOHN

• **Lease vs. Finance**

Salesperson

SMITH, STEVE

Program

24

• **Finance vs. Finance**

Rate (APR)

7.0000

Residual

60,600.00

• **Lease vs. Balloon**

Year

20

Make

0

Extra Miles

12

Service Contract

0.00

• **Cash vs. 1-Payment Lease**

Model

TA

Body

0.00

Bank Acq Fee

0.00

Rebate

0.00

• **Different Monthly Terms**

MSRP

20,000.00

Sell Price / Cap

20,000.00

• **Different Down Payments**

Account

0.00

Product

0.00

License Fee

0.00

Security Deposit

375.00

• **Different Sources**

Tax Profile

6% TAX

Due On Delivery

3,922.14

Payment

367.14

• **1 Deal at a Time...**

**Whatever
It
Takes**

0.00

0.00

0.00

3,922.14

468.91



New



Recall



Save



Recap

Quick Calc

Misc

Notes

Customer (Last, First)

JONES, JOHN

Salesperson

SMITH, STEVE

Veh Stock

1234

Year

2000

Make

FORD

Model

TAURUS

Body

SEL

MSRP

20,000.00

Sell Price / Cap

20,000.00

Accessories

0.00

Tax Profile

6% TAX

Your second Deal instantly displays based upon the Source you Select

Source #1

FMCC LEASE

Program

SEL 24

Term

(1-Pay ☐)

24

Rate (APR)

6.2500

Resid.

51

Adj.

0

10,200.00

Excess Miles

.12

0

License/Title

(Cap ☐)

0.00

Doc Fee

(Cap ☐)

0.00

Bank/Acq

(Cap ☐)

0.00

Service Contract

0.00

Rebate

(Cap ☒)

1,000.00

Trade Allow

(Cap ☒)

0.00

Trade Payoff

0.00

Cap Reduction

2,000.00

Security Deposit

375.00

Due On Delivery

2,869.64

Payment

374.64

Source #2

FMCC FINANCE

Program

...

Term

60

Rate (APR)

11.7500

License/Title

0.00

Doc Fee

0.00

Service Contract

0.00

Rebate

0.00

Trade Allow

0.00

Trade Payoff

0.00

Due On Delivery

2,120.00

Payment

424.08



New



Recall



Save



Recap

Quick Calc

Misc

Notes

Customer (Last, First)

JONES, JOHN

Salesperson

SMITH, STEV

Source #1

FMCC LEASE

Source #2

FMCC FINANCE

Programs

Source

FMCC FINANCE

Year

2000

Make

FORD

Model

TAURUS

Ok

Cancel

Add

Edit

Delete

Clone

Veh Stock

Year

Make

Model

Body

MSRP

Sell Price / Cap

Accessories

Tax Profile

6% TAX

Cap Reduction

Security Deposit

Due On Delivery

Payment

2,000.00

375.00

2,869.64

374.64

Due On Delivery

Payment

2,120.00

424.08

Programs can also apply to Finance Deals

X

Program	Term	Rate	Rebate	Dlr. Adj.	Expire
CASH+36APR	36	0.90	1,000		10/02/2000
CASH+48APR	48	5.90	1,000		10/02/2000
CASH+60APR	60	6.90	1,000		10/02/2000
CUSTOMER CASH			1,000		10/02/2000

60

11,7500

0.00

0.00

0.00

0.00

0.00

0.00



New



Recall



Save



Recap

Quick Calc

Misc

Notes

Customer (Last, First)

JONES, JOHN

Salesperson

SMITH, STEVE

Veh Stock

1234

Year

2000

Make

FORD

Model

TAURUS

Body

SEL

MSRP

20,000.00

Sell Price / Cap

20,000.00

Accessories

0.00

Tax Profile

6% TAX

Source #1

Program

SEL 24

Term

(1-Pay ☐)

24

Rate (APR)

6.2500

Resid.

51

Adj.

0

10,200.00

Excess Miles

.12

0

License/Title

(Cap ☐)

0.00

Doc Fee

(Cap ☐)

0.00

Bank/Acq

(Cap ☐)

0.00

Service Contract

0.00

Rebate

(Cap ☒)

1,000.00

Trade Allow

(Cap ☒)

0.00

Trade Payoff

0.00

Cap Reduction

2,000.00

Security Deposit

375.00

Due On Delivery

2,869.64

Payment

374.64

Source #2

Program

CASH+60APR

Term

60

Rate (APR)

6.9000

License/Title

0.00

Doc Fee

0.00

Service Contract

0.00

Rebate

1,000.00

Trade Allow

0.00

Trade Payoff

0.00

Due On Delivery

2,120.00

Payment

358.18

Now we see the Deal based upon the Program (Term, Rate and Rebate) we selected



New



Recall



Save



Recap

Quick Calc

Misc

Notes

Customer (Last, First)

JONES, JOHN

Salesperson

SMITH, STEVE

Veh Stock

1234

Year

2000

Make

FORD

Model

TAURUS

Body

SEL

MSRP

20,000.00

Sell Price / Cap

20,000.00

Accessories

0.00

Tax Profile

6% TAX

Source #1

FMCC LEASE

Program

SEL 24

Term

(1-Pay ☐)

24

Rate (APR)

6.2500

Resid. 51 Adj. 0

10,200.00

Excess Miles

.12

0

License/Title

(Cap ☐)

0.00

Doc Fee

(Cap ☐)

0.00

Bank/Acq

(Cap ☐)

0.00

Service Contract

0.00

Rebate

(Cap ☒)

1,000.00

Trade Allow

(Cap ☒)

0.00

Trade Payoff

0.00

Cap Reduction

2,000.00

Security Deposit

375.00

Due On Delivery

2,869.64

Payment

374.64

Source #2

FMCC FINANCE

Program

CASH+60APR

Term

60

Rate (APR)

6.9000

License/Title

0.00

Doc Fee

0.00

Service Contract

0.00

Rebate

1,000.00

Trade Allow

0.00

Trade Payoff

0.00

Due On Delivery

2,120.00

Payment

358.18

This shows the Screen with Both Deals Displayed



New



Recall

Quick Calc

Misc

Notes



Recap

Customer (Last, First)

JONES, JOHN

Salesperson

SMITH, STEVE

Veh Stock

1234

Year

2000

Make

FORD

Model

TAURUS

Body

SEL

MSRP

20,000.00

Sell Price / Cap

20,000.00

Accessories

0.00

Tax Profile

6% TAX

Source #1

Program

SEL 24

Term (1-Pay ☐)

24

Rate (APR)

6.2500

Resid. 51

Adj. 0

10,200.00

Excess Miles

.12

0

License/Title

(Cap ☐)

0.00

Doc Fee

(Cap ☐)

0.00

Bank/Acq

(Cap ☐)

0.00

Service Contract

0.00

Rebate

(Cap ☒)

1,000.00

Trade Allow

(Cap ☒)

0.00

Trade Payoff

0.00

Cap Reduction

2,000.00

Security Deposit

375.00

Due On Delivery

2,869.64

Payment

374.64

Source #2

Program

CASH+60APR

Term

60

Rate (APR)

6.9000

License/Title

0.00

Doc Fee

0.00

Service Contract

0.00

Rebate

1,000.00

Trade Allow

0.00

Trade Payoff

0.00

Due On Delivery

2,120.00

Payment

358.18

Now we are ready to review a
Recap of our Deal

Now it's time to Print

Comparison Screen --- New Deal
File Lookup Setup Reports Tools Help

New Recall Save Recap

Quick Calc Misc Notes

Customer / Last First

JOHN JONES - 2000 FORD TAURUS SEL #1234

Print Preview Exit

Alternatives

	FMCC FINANCED PURCHASE	RED CARPET LEASE
60 Payments @	358.18	24 Payments @ 374.64
Due on Delivery	2,120.00	Due on Delivery 2,869.64
OBLIGATION.....	12,894.48	OPTIONS 10,200.00

Pages to Print
☒ Comparison
☐ Writeback
☒ Tailor Your Down Payment
☒ Recap

Mileage
☒ 0 - 30,000 Miles
☐ 0 - 60,000 Miles

Tax Profile 6% TAX

Security Deposit 375.00

Due On Delivery 2,120.00
Payment 358.18

Due On Delivery 2,869.64
Payment 374.64



LSI Comparison Center

Comparison Example

The Comparison Example Presentation is Powerful... It helps us share the numbers in a Customer Friendly format

- ✓ Differentiates our Dealership and Process
- ✓ Shows Alternatives in a Comparison Format
- ✓ Shows the Effect of Taxes on Down Payment
- ✓ Shows the Maintenance effect on Cost of Driving
- ✓ Shows the True Cost of either alternative
- ✓ Helps our Customer make an Informed Decision!

HOMETOWN FORD

JOHN JONES - 2000 FORD TAURUS SEL
FINANCE-2-LEASE EXAMPLE 08/31/2000

FMCC FINANCED PURCHASE

20,000.00	Vehicle Price	20,000.00
1,200.00	Taxes and Fees	120.00
21,200.00	Total	20,120.00
1,000.00	Rebate	1,000.00
2,120.00	Down Payment	2,120.00
	Security Deposit	375.00

HOMETOWN FORD

Steve Smith

JOHN JONES - 2000 FORD TAURUS SEL #1234
FINANCE-2-LEASE EXAMPLE 08/31/2000 1:34 PM

FMCC FINANCED PURCHASE

20,000.00	Vehicle Price	20,000.00
1,200.00	Taxes and Fees	120.00
21,200.00	Total	20,120.00
1,000.00	Rebate	1,000.00
2,120.00	Down Payment	2,120.00
	Security Deposit	375.00
	1st Payment	374.64

	Base Payment	353.43
	Sales / Use Tax	21.21

358.18 @ 60

Total Payment

24 @

374.64

RED CARPET LEASE

	Vehicle Price	20,000.00
	Taxes and Fees	120.00
	Total	20,120.00
	Rebate	1,000.00
	Down Payment	2,120.00
	Security Deposit	375.00
	1st Payment	374.64

	Base Payment	353.43
	Sales / Use Tax	21.21

Total Payment

24 @

374.64

HOMETOWN FORD

JOHN JONES - 2000 FORD TAURUS SE
FINANCE-2-LEASE EXAMPLE 08/31/200

FWCC FINANCED PURCHASE

20,000.00	Vehicle Price	1,000.00
1,200.00	Taxes and Fees	2,120.00
21,200.00	Total	1,000.00
1,000.00	Rebate	Down Payment
2,120.00	Security Deposit	1st Payment
	Base Payment	353.43
	Sales / Use Tax	21.21
	Total Payment	374.64

358.18 @ 60

24 @

The Middle Section shows our
Customer their two Year Position

24 MONTHS LATER

8,596.32

Total Payments

8,991.36

Obligation vs Options
Maintenance Savings ???

Most People Would Agree ...

The best part of any new car's life is
0 - 30,000 Miles - Gas/Change Oil

After 30,000 Miles ... MAINTENANCE CYCLE

- Tires
- Belts
- Brakes
- Hoses
- Rentals
- Flashes
- Warranty Expires

\$2,400 to \$3,000

Spent in the next two years
\$100 - \$125 Per Month (458)

* Based upon an Annual Percentage Rate of
6.90%, Total Finance Charge of \$3,411.
Approval, rates and payments are subject to
change based upon credit history and terms.

1) BUY TO TRADE OR SELL
THE JOY OF NEW
(KEEP THE PROFIT)

2) WHAT IF ...
MARKET CONDITIONS
CHANGE? - RETURN
AVOID A LOSS!

3) BUY / KEEP IT (LOVE)
THE BEST OF BOTH

* This is a Lease. Mileage and wear and tear
guidelines apply. Approval, rates and payments
are subject to change based upon credit history
and terms.

WHICH MAKES MORE SENSE?

The Bottom Section is Dynamic depending on the Deal Type and Term (i.e. two Leases with the same Term both have Options)

HOMETOWN FORD

JOHN JONES - 2000 FORD TAURUS SE
FINANCE-2-LEASE EXAMPLE 08/31/200

FMCC FINANCED PURCHASE

20,000.00	Vehicle Price
1,200.00	Taxes and Fees
21,200.00	Total
1,000.00	Rebate

1,000.00

**YOU'RE NOT FINISHED ...
STILL OWE 36 MORE PAYMENTS**

12,894

OBLIGATION

Most People Would Agree ...

**The best part of any new car's life is
0 - 30,000 Miles - Gas/Change Oil**

After 30,000 Miles ... MAINTENANCE CYCLE

- Tires
- Brakes
- Rentals
- Warranty Expires
- Belts
- Hoses
- Exhaust
- 30K Service

**\$2,400 to \$3,000
Spent in the next two years
\$100 - \$125 Per Month (458)**

* Based upon an Annual Percentage Rate of 6.90%, Total Finance Charge of \$3,411. Approval, rates and payments are subject to change based upon credit history and terms.

**AFTER COMPLETING AGREEMENT
YOU DON'T OWE ANYTHING
YOU HAVE 3 GREAT OPTIONS**

10,200

OPTIONS

**1) BUY TO TRADE OR SELL
THE JOY OF NEW
(KEEP THE PROFIT)**

**2) WHAT IF ...
MARKET CONDITIONS
CHANGE? - RETURN
AVOID A LOSS!**

**3) BUY / KEEP IT (LOVE)
THE BEST OF BOTH**

* This is a Lease. Mileage and wear and tear guidelines apply. Approval, rates and payments are subject to change based upon credit history and terms.

WHICH MAKES MORE SENSE?



LSI Comparison Center

Comparison Example Presentations

Category	Finance	Lease
Net Present Value	100.00	100.00
Internal Rate of Return	10.00%	10.00%
Payback Period	3.00	3.00
Profitability Index	1.00	1.00
Net Income	100.00	100.00
Net Cash Flow	100.00	100.00
Net Present Value	100.00	100.00
Internal Rate of Return	10.00%	10.00%
Payback Period	3.00	3.00
Profitability Index	1.00	1.00
Net Income	100.00	100.00
Net Cash Flow	100.00	100.00

**Finance
Vs. Lease**

Category	Lease	Lease
Net Present Value	100.00	100.00
Internal Rate of Return	10.00%	10.00%
Payback Period	3.00	3.00
Profitability Index	1.00	1.00
Net Income	100.00	100.00
Net Cash Flow	100.00	100.00
Net Present Value	100.00	100.00
Internal Rate of Return	10.00%	10.00%
Payback Period	3.00	3.00
Profitability Index	1.00	1.00
Net Income	100.00	100.00
Net Cash Flow	100.00	100.00

**Lease
Vs. Lease**

Category	Finance	Finance
Net Present Value	100.00	100.00
Internal Rate of Return	10.00%	10.00%
Payback Period	3.00	3.00
Profitability Index	1.00	1.00
Net Income	100.00	100.00
Net Cash Flow	100.00	100.00
Net Present Value	100.00	100.00
Internal Rate of Return	10.00%	10.00%
Payback Period	3.00	3.00
Profitability Index	1.00	1.00
Net Income	100.00	100.00
Net Cash Flow	100.00	100.00

**Finance
Vs. Finance**

Category	Cash	1-Pay Lease
Net Present Value	100.00	100.00
Internal Rate of Return	10.00%	10.00%
Payback Period	3.00	3.00
Profitability Index	1.00	1.00
Net Income	100.00	100.00
Net Cash Flow	100.00	100.00
Net Present Value	100.00	100.00
Internal Rate of Return	10.00%	10.00%
Payback Period	3.00	3.00
Profitability Index	1.00	1.00
Net Income	100.00	100.00
Net Cash Flow	100.00	100.00

**Cash Vs.
1-Pay Lease**

Category	Internal	Recap
Net Present Value	100.00	100.00
Internal Rate of Return	10.00%	10.00%
Payback Period	3.00	3.00
Profitability Index	1.00	1.00
Net Income	100.00	100.00
Net Cash Flow	100.00	100.00
Net Present Value	100.00	100.00
Internal Rate of Return	10.00%	10.00%
Payback Period	3.00	3.00
Profitability Index	1.00	1.00
Net Income	100.00	100.00
Net Cash Flow	100.00	100.00

**Internal
Recap**

The Right Presentation Produces the Right Result



LSI Comparison Center

Tailor your Payment Presentation

**Customers often don't understand how
Down Payment affects Payment**

- ✓ We want the Customer to “Discover” the Relationship between these numbers because it's More Believable when they see it for themselves
- ✓ The Presentation Helps establish the Relationship between Monthly Payment and Down Payment

The Tailor Your Own Payment
Presentation helps our Customer
see the relationship between Down
and Payment

RED CARPET LEASE

Down Payment **2,120.00**
+1st +Deposit
Less Desired Down _____
Difference _____
Adjustment Factor **0.047**
Payment Adjustment _____

24 Payments @ **374.64**
Payment Adjustment _____
Estimated New Payment _____
(100 Down = Approx 4.70 in Payment)
(1000 Down = Approx 47.00 in Payment)

Each Deal is handled independently
so we can Tailor the Payment on the
Deal the Customer Selects



Tailor your Payment Presentation

**It's Effective
It's Non-Confrontational
It Really Works!**



The Right Presentation Produces the Right Result

HOMETOWN FORD

JOHN JONES - 2000 FORD TAURUS

*Internal Use Only

RECAP - 08/31/2000 1:34

Tax Profile: 6% TAX

An Internal Use Recap gives us the exact structure of both deals

FMCC FINANCED PURCHASE

CASH+60APR

Sell Price / Cap Cost	20,000.00
Sales / Use Tax	1,200.00

Total	21,200.00
Rebate	1,000.00
Down Payment	2,120.00

Total	3,120.00
Amount Financed	18,080.00
Finance Rate (APR)	6.900%
Payment 60 @	358.18

RED CARPET LEASE

SEL 24

Sell Price / Cap Cost	20,000.00
Cap Reduction	-2,000.00
Cap Reduction - Rebate	-1,000.00

Total	17,000.00
MSRP	20,000.00
Residual (51%)	10,200.00
Lease Rate/Factor	6.250%
Calculation Type	LEASE_FMCC
Base Payment	353.43
Tax (6.00%)	21.21
Total Payment 24 @	374.64
Cap Reduction	2,000.00
Cap Reduction - Rebate	1,000.00
Sales / Use Tax	120.00
Security Deposit	375.00
1st Payment	374.64
Total	3,869.64
Rebate	-1,000.00

Due On Delivery	2,869.64

Loyalty Strategies

Install the Software

Install
LSI Renewal Center

Install
LSI Comparison Center

How it Works

LSI Renewal Center
Demo

LSI Comparison Center
Demo

Why We Need It

LSI Renewal Center
PowerPoint Presentation

LSI Comparison Center
PowerPoint Presentation

Print

LSI Installation
Agreement

Exit

Installation is as simple as clicking a Button...
The InstallShield® Wizard does the rest



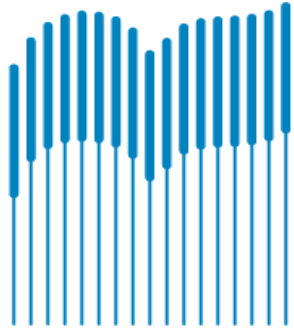
Loyalty Strategies

Q & A

- **What's in it for Me?**
- **Customer Base**
- **Pricing**
- **Installation Policy**



Loyalty Strategies



**Reynolds
Transformation
Services®**

***and LSI
Thank You***

EXHIBIT B

Ford Motor Company



**RETAIL TRADE CYCLE
MANAGEMENT**



LSI Renewal Center Customer Retention Process

Ford Motor Company



**RETAIL TRADE CYCLE
MANAGEMENT**



Phase One

Get Ready

Next →

YOUR SOURCE FOR AUTOMOTIVE KNOW HOW™

Ford Motor Company DealerDirect

Home Program List Help Email



This web site requires
Microsoft Internet
Explorer.

Click the button below
to get it.



Hello, HOMETOWN FORD

Welcome to **Ford Motor Company DealerDirect!**
Your web connection for dealership prospecting

- [Click Here](#) for prospect lists for follow-up, available in both manuscript and "downloadable" formats.
- [New](#) [Click here](#) for the 2002 Explorer Owner Communication Program.
- [Click here](#) to be notified by email when you have new prospects.

plus, when available...

- Easy ordering opportunities for turn-key follow-up mailings personalized to your dealership,
- Other program marketing materials,
- And current sales by program for your dealership.

If you have questions with regards to the Ford Motor Company DealerDirect web site, feel free to contact our help-line at 1-888-819-1136 Monday-Friday 9:00 AM to 5:00 PM Eastern Standard Time,

We go to the Dealers "Ford DealerDirect"
Website and select prospect lists...



DealerDirect Program List

- VINCENT Programs
 - [3121 - 2001 New Business Affinity Program](#)
(new prospects 10/2/2001)
 - [3201 - Ford Credit Customers in Equity 2002 - Sample](#)
(Updated 1/15/2002)
 - [2001 E-Series Cardholder Clearance Priority](#)
(Posted 8/30/2001)
 - [3195 - 2001 3Q F-Series National Owner Retention Program](#)
(Updated 9/11/2001)
 - [3191 - 2001 3Q Taurus Owner Loyalty](#)
(posted 7/30/2001)
 - [3169 - Undergraduate Purchase Program](#)
(posted 5/14/2001)
 - [3152 - High School Senior Recognition Program](#)

We select the program that we want to download...



PROSPECTS

Ford Credit Customers in Equity

The prospect count for HOMETOWN FORD is:

379

- [Click here](#) to obtain a list of your prospects.
- **Click Here** to get your list in a comma-separated file, which can be used in Microsoft Excel or other programs.
- [Ford Dealer](#) letter
- [Lincoln Mercury Dealer](#) letter

Note: Larger prospect lists will take longer to come up after you click.

the above
for free.

We select the comma-separated, importable
format for the listing...

Next →

Ford Credit Customers in Equity 2001 3Q

- **Click Here** to get a comma-separated file of your prospects.
- This file can be used in Microsoft Excel, Access, or any other program which can import a comma-separated (CSV) file.
- The name of each field is given on the first line of the file.
- The file downloaded to your computer will be named 124216_17123425.csv.
- If the data opens in your web browser instead of saving to a file on your PC, or if you have problems downloading, you can download the data by right-clicking on the "Click here" link above, then select "Save Target As".

[Go Back](#)

We click here to get the file...

[Next](#)

Save As

Save in:

Desktop

My Documents
My Computer
My Network Places



My Recent Documents



Desktop



My Documents



My Computer



My Network

We specify a location and click
on Save...

File name:

CustInEquity4thQtr.csv

Save as type:

Microsoft Excel Comma Separated Values File

Save

Cancel

Next →

Download complete



Download Complete

Saved:

CustInEquity4thQtr.csv from C:\Retail Renewal Training\CustInEquityDenr



Downloaded: 77.0 KB in 1 sec

Download to: C:\Document...\CustInEquity4thQtr.csv

Transfer rate: 77.0 KB/Sec

☐ Close this dialog box when download completes

Open

Open Folder

Close

The Customer in Equity information is now saved and ready to be Imported into the LSI Renewal Center...

Next →

LSI Renewal Center

Please Log In:

User Name:

Version: 8.29

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Unauthorized use is strictly prohibited and subject to both
Civil and Criminal Prosecution.

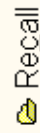
We open the LSI Renewal Center...

Next →

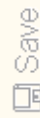
We select Tools, Import Options Records...



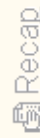
New



Recall



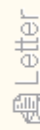
Save



Recap



Huddle



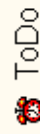
Letter



VScan



Call



ToDo



Exit

QuickCalc

Deal Info

Orig. Terms

Keep the Car

Joy of New

Activities

Notes

Results

CUSTOMER (Last, First)

Year

1999

Start Date

DEAL INFO

1 Payment Le

Term

Base Payment

Residual Value

Net Cap Cost

Cap Reduction

LSI Import Window



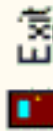
Open File



Start



Halt



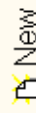
Exit

FILE TYPE

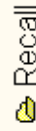
FILE DESCRIPTION

We specify a file or import type...

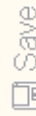
Next →



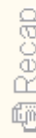
New



Recall



Save



Recap



Huddle



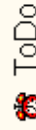
Letter



VScan



Call



ToDo



Exit

QuickCalc

Deal Info

Orig. Terms

Keep the Car

Joy of New

Activities

Notes

Results

CUSTOMER (Last, First)

Year

1999

Start Date

DEAL INFO

1 Payment Le

Term

Base Payment

Residual Value

Net Cap Cost

Cap Reduction

LSI Import Window

Open File

Start

Halt

Exit

FILE TYPE

FORD_CUST_IN_EQUITY

ADP

FORD_CUST_IN_EQUITY

RETAIL_RENEWAL

REYNOLDS

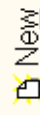
TERM_TRACKER_CFM

TERM_TRACKER_CSV

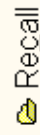
UCS

We select the Customer in Equity format. LSI can import from many different types of files...

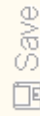
Next →



New



Recall



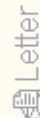
Save



Recap



Huddle



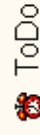
Letter



VScan



Call



ToDo



Exit

QuickCalc

Deal Info

Orig. Terms

Keep the Car

Joy of New

Activities

Notes

Results

CUSTOMER (Last, First)

Year

1999

Start Date

DEAL INFO

1 Payment Le

Term

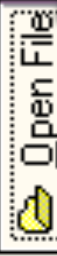
Base Paymen

Residual Valu

Net Cap Cost

Cap Reduction

LSI Import Window



Open File



Start



Halt



Exit

FILE TYPE

FORD_CUST_IN_EQUITY

FILE DESCRIPTION

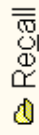
FORD_CUST_IN_EQUITY - 01/08/2002

We click Open File to tell LSI the file we want to import...

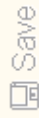
Next →



New



Recall



Save



Recap



Huddle



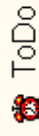
Letter



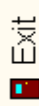
VScan



Call



ToDo



Exit

QuickCal

-CUSTOM

Year

1999

Start Da

-DEAL IN

1 Paym

Term

Base

Resid

Net C

Cap R

Open

Look in:

Desktop



My Recent Documents



Desktop



My Documents



My Computer



My Network Places

My Documents

My Computer

My Network Places

CustInEquity4thQtr.csv

Here we have located our saved data on the desktop. We select the file and click on Open...

File name:

CustInEquity4thQtr.csv

Files of type:

FORD_CUST_IN_EQUITY files (*.CSV)

Open

Cancel

Next →

CUSTOMER (Last, First)

Year 1999

Start Date

DEAL INFO

1 Payment L

Term

Base Paym

Residual Va

Net Cap Co

Cap Reduction

TAX

n

LSI Import Window

Open File

Start

Halt

Exit

FILE TYPE

FORD_CUST_IN_EQUITY

FILE DESCRIPTION

FORD_CUST_IN_EQUITY - 01/08/2002

Finished Importing \$: 379

Our data is now imported into LSI...

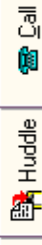
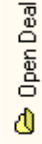
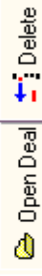
CUSTOMER (Last, First)

Year 1999 Make FORD Model Body

Start Date Source FMCC LEASE Tax Profile 6% TAX

DEAL INFO		FEES		PAYOFF	
1 Payment Lease	☐	License Fee	0.00	Early Termination	☐
Term	24	Doc/Other Fee	0.00		
Base Payment	0.00	Trade Cr (for Tax)	0.00		
Residual Value	0.00				
Net Cap Cost	0.00				
Cap Reduction	0.00				

Now we are ready to click Recall and look at all of our Customer Records...



NAME	YEAR	MAKE	MODEL	BODY	PAYMENT	EST. PAYOFF	EST. EQUITY	START DATE	TERM	EXT.	SCHED TERM	ACTUAL TERM	DATE PRESEN
SEERY, RUSSELL	2000	FORD	TAURUS		512	9,200		06/25/2000	36	0	06/25/2003		
SEGAL, DENNIS	2000	FORD	E350		528	9,200		06/20/2000	36	0	06/20/2003		
SEKEL, BRUCE	2000	FORD	E350		664	10,300		05/10/2000	36	0	05/10/2003		
SENH, MARK	1999	FORD	EXPLORER		596	3,000		05/28/1999	36	0	05/28/2002		
SERVICES, DAVID ACCE	1999	FORD	F150		362	8,300		03/01/1999	60	0	03/01/2004		
SHACKELFORD, KRISTII	2000	FORD	FOCUS	LX 4-D	359	8,200		03/25/2000	24	0	03/25/2002		
SHANELY, KEITH	1997	FORD	E150		408	1,100		03/17/1997	60	0	03/17/2002		
SHANK, TERRY	1999	FORD	EXPLORER		485	10,100		12/06/1998	60	0	12/06/2003		
SHERIN, VINCE	1999	FORD	F250		429	12,800		09/18/1999	60	0	09/18/2004		
SHORT, MARCIA	1998	FORD	F150		187	5,000		10/03/1999	60	0	10/03/2004		
SIDERIO, KRISTEN	1999	FORD	TAURUS		389	5,000		01/13/1999	48	0	01/13/2003		
SILVA, SUZANNE	1999	FORD	F150		384	1,500		04/19/1999	36	0	04/19/2002		
SIMMERS, JAMES	1997	FORD	EXPLORER		474	500		01/31/1998	48	0	01/31/2002		
SIMMONS, DOLORES	1999	FORD	EXPEDITION		396	10,400		05/31/1999	60	0	05/31/2004		
SIMONES, DANIELLE	1997	FORD	F150		386	0		11/08/1996	60	0	11/08/2001		
SLEVIN, TERRY	1994	FORD	E150		267	3,100		01/15/2000	36	0	01/15/2003		
SOK, DANIELLE													
SOLANAKIS, VIRGINIA													
SPANGLER, GINA													
SPARKS, RYAN B													
SPIRITO, JOSEPH													
SPISHOCK, KRISTEN													
SPITZER, MARY E													
STANTOM, PHILLIP													
STARR, CAROL	1998	FORD	F150		281	5,100		07/22/1998	60	0	07/22/2003		
STIEFF, MAURICE	2001	FORD	EXPLORER	SPOR	487	18,700		03/07/2000	24	0	03/07/2002		
STONE, RICHARD G	2000	FORD	TAURUS	SE 4-D	350	10,000		01/07/2000	24	0	01/07/2002		
STOOP, MARK	1997	FORD	EXPLORER		403	4,300		11/11/1997	60	0	11/11/2002		
STRAGHAN, DAVID	1992	FORD	F150		489	0		09/15/1999	24	0	09/15/2001		
SUGAR, RUSSELL	1998	FORD	EXPLORER		407	4,500		11/27/1998	48	0	11/27/2002		
SULLIVAN, VINCE	1999	FORD	F150		557	10,600		08/22/1999	48	0	08/22/2003		
SUNQUIST, JAMES G	2000	FORD	EXPEDITION	XLT 4-D	691	22,500		01/20/2000	24	0	01/20/2002		
SUTTERLY, ANGEL	1999	FORD	EXPLORER		421	4,600		11/29/1998	48	0	11/29/2002		
SYKES, KEITH	1999	FORD	TAURUS		463	4,400		10/12/2000	24	0	10/12/2002		
TALBOT SR, ERIC	1997	FORD	TAURUS		539	1,600		04/06/1998	48	0	04/06/2002		

Having your Customer's at your fingertips is incredibly valuable and a source of recurring business...

Next

DATE RANGE

Choose a Range

Scheduled Termination Date

From To

Maximum Days Left

Show Only Open Deals

VEHICLE INFO

Year

Make

Model

Body

Color

New/Used

Equity

Max Payoff

ADVANCED SEARCH

Customer

Word

Salesperson

Source

Deal Type

Import Desc.

Zip Code

FINANCE

NAME	YEAR	MAKE	MODEL	BODY	PAYMENT	EST. PAYOFF	EST. EQUITY	START DATE	TERM	EXT.	SCHED TERM	ACTUAL TERM	DATE PRESEN
ADDALA, REUBEN J	2000	FORD	EXPLORER	XLT	384	17,800		03/17/2000	24	0	03/17/2002		
AHLBORN, JOYCE	1997	FORD	F150		332	2,000		07/02/1997	60	0	07/02/2002		
AHMED, DENNIS	2000	FORD	F150		398	11,800		08/25/2000	48	0	08/25/2004		
ALI, DAVID	1999	FORD	WINDSTAR		551	9,900		06/12/1999	48	0	06/12/2003		
AMARAL, JANE	1998	FORD	F150		553	5,900		11/27/1998	48	0	11/27/2002		
ANDRUSS, RICHARD	1999	FORD	WINDSTAR		303	5,100		01/04/2001	30	0	07/04/2003		
ANTONINI, MARCIA	1999	FORD	EXPLORER		636	0		03/11/1999	48	0	03/11/2003	12/27/2001	
APPLEGARTH, DAVID	1999	FORD	F150		354	10,600		08/31/1999	60	0	08/31/2004		
APTER, KEITH	2000	FORD	TAURUS		88	1,600		06/11/2000	36	0	06/11/2003		
ARACO, KRISTINE	1999	FORD	F150		377	8,600		01/19/1999	60	0	01/19/2004		
ASIADO, ANDREE	2000	FORD	WINDSTAR		472	7,500		05/05/2000	36	0	05/05/2003		
AZEMI, TERRY D	2000	FORD	EXPLORER	XLS	482	16,500		02/21/2000	24	0	02/21/2002		
BABETSKI, AIDA	1999	FORD	F150		483	0		02/02/1999	60	0	02/02/2004	12/31/2001	
BAJWA, RU													
BAKALOV, T													
BALLARD, J													
BANDOS, VIRGINIA	1999	FORD	F150		549	12,500		11/27/1999	48	0	11/27/2003		
BANGERT, PHILLIP	1997	FORD	EXPLORER		531	0		12/15/1997	48	0	12/15/2001		
BANKS, SUSAN D	2000	FORD	EXPEDITION	XLT	487	22,500		02/09/2000	24	0	02/09/2002		
BARNEY, MICHELE	1997	FORD	F250		714	1,300		03/08/1998	48	0	03/08/2002		
BARRELLA, JOSEPH	1998	FORD	F150		476	4,600		10/14/1997	60	0	10/14/2002		
BEALS, ALLEN	1999	FORD	EXPEDITION	XLT	451	21,600		03/31/1999	36	0	03/31/2002		
BEAM, KRISTINE J	2000	FORD	F150	STYLE	229	10,600		02/28/2000	24	0	02/28/2002		

Lets find our 1999 Explorer Finance Customers...

Next

DATE RANGE

Choose a Range

Scheduled Termination Date

From To

Maximum Days Left

0

Show Only Open Deals

☒

VEHICLE INFO

Year

1999

Make

Model

Body

Color

New/Used

Equity

Max Payoff

9500

ADVANCED SEARCH

Customer

Word

Salesperson

Source

Deal Type

FINANCE

Import Desc.

File

NAME	YEAR	MAKE	MODEL	BODY	PAYMENT	EST. PAYOFF	EST. EQUITY	START DATE	TERM	EXT.	SCHED TERM	ACTUAL TERM	DATE PRESEN
CONTE, VINCE	1999	FORD	EXPLORER		375	6,600		06/23/1999	48	0	06/23/2003		
COURTNEY, AILEEN	1999	FORD	EXPLORER		891	4,400		05/22/1999	36	0	05/22/2002		
DAVIES, VIRGINIA	1999	FORD	EXPLORER		777	9,900		01/15/1999	48	0	01/15/2003		
DENTON, DEBRA	1999	FORD	EXPLORER		599	10,600		06/27/1999	48	0	06/27/2003		
FRATELLA, DEBRA	1999	FORD	EXPLORER		665	5,300		08/19/1999	36	0	08/19/2002		
GIBIAN, ANGEL	1999	FORD	EXPLORER		644	3,800		06/23/1999	36	0	06/23/2002		
HAGAMON, DEBRA	1999	FORD	EXPLORER		400	9,800		02/20/1999	60	0	02/20/2004		
HAGOPIAN, THOMAS	1999	FORD	EXPLORER		553	0		11/30/1998	36	0	11/30/2001		
HUMES, KRISTEN	1999	FORD	EXPLORER		464	10,500		12/18/1998	60	0	12/18/2003		
LANSIDEL, MARK													
MCCAULEY, JESS													
MCCORMICK, LA													
MCLAREN, ERIC													
NAVAZIO, BRUCE													
PINTO, LESLIE													
PLOCHA, DENNIS													
REIMEL JR, BEN													
SCHENO JR., KIRSTEN	1999	FORD	EXPLORER		429	3,400		08/11/1999	36	0	08/11/2002		
SENH, MARK	1999	FORD	EXPLORER		596	3,000		05/28/1999	36	0	05/28/2002		
SHANK, TERRY	1999	FORD	EXPLORER		485	10,100		12/06/1998	60	0	12/06/2003		
SUTTERLY, ANGEL	1999	FORD	EXPLORER		421	4,600		11/29/1998	48	0	11/29/2002		
TOWBAR, LYNN	1999	FORD	EXPLORER		592	6,500		11/30/1999	36	0	11/30/2002		
VANDERVEER, SUSAN	1999	FORD	EXPLORER		538	9,500		07/11/1999	48	0	07/11/2003		

We can further refine our search based upon estimated payoff or Equity. In this case we will look for 1999 Explorer Customers that owe 9500 or less...

Next



Exit

Find

Show All

DATE RANGE

Choose a Range

Scheduled Termination Date

From To

Maximum Days Left

Show Only Open Deals

VEHICLE INFO

Year

Make

Model

Body

Color

New/Used

Equity

Max Payoff

ADVANCED SEARCH

Customer

Work

Salesperson

Source

Deal Type

Import Desc.

Zip Code

NAME	YEAR	MAKE	MODEL	BODY	PAYMENT	EST. PAYOFF	EST. EQUITY	START DATE	TERM	EXT.	SCHED TERM	ACTUAL TERM	DATE PRESEN
CONTE, VINCE	1999	FORD	EXPLORER		375	6,600		06/23/1999	48	0	06/23/2003		
COURTNEY, AILEEN	1999	FORD	EXPLORER		891	4,400		05/22/1999	36	0	05/22/2002		
FRATELLA, DEBRA	1999	FORD	EXPLORER		665	5,300		08/19/1999	36	0	08/19/2002		
GIBIAN, ANGEL	1999	FORD	EXPLORER		644	3,800		06/23/1999	36	0	06/23/2002		
HAGOPIAN, THOMAS	1999	FORD	EXPLORER		553	0		11/30/1998	36	0	11/30/2001		
LANSIDEL, MARK	1999	FORD	EXPLORER		333	7,000		11/09/2000	36	0	11/09/2003		
MCCAULEY, JESSICA	1999	FORD	EXPLORER		344	5,400		04/20/1999	48	0	04/20/2003		
MCCORMICK, LAUREN	1999	FORD	EXPLORER		660	8,400		01/13/1999	48	0	01/13/2003		
MCLAREN, ERIC	1999	FORD	EXPLORER		440	7,200		06/05/1999	48	0	06/05/2003		
NAVAZIO, BRUCE													
PINTO, LESLIE													
PLOCHA, DENNIS													
REIMEL JR, BEN													
SCHENO JR., KIRS													
SENH, MARK	1999	FORD	EXPLORER		596	3,000		05/28/1999	36	0	05/28/2002		
SUTTERLY, ANGEL	1999	FORD	EXPLORER		421	4,600		11/29/1998	48	0	11/29/2002		
TOWBAR, LYNN	1999	FORD	EXPLORER		592	6,500		11/30/1999	36	0	11/30/2002		
VANDERVEER, SUSAN	1999	FORD	EXPLORER		538	9,500		07/11/1999	48	0	07/11/2003		

Now we are ready to use the Call Center to contact our "Opportunity Customers"

Next

Ford Motor Company



**RETAIL TRADE CYCLE
MANAGEMENT**



Phase Two

Contact

YOUR SOURCE FOR AUTOMOTIVE KNOW HOW™

Next →

✓ Save

↻ Save/Next

↔

✗ Cancel

📄 Letter

🗣️ Huddle

📊 Recap

📅 Activity

Vince Conte
1549 Maple St., Hometown, Ca 90000
1999 Ford Explorer Salesperson 1: Jones, Rick
Start:06/23/1999 Term:48 Sch. Term:06/23/2003 Source:FINANCE

NUMBERS

- 📞 Home: 818-555-1212
- 📞 Work: 818-555-2345
- 📞 Cell: - -

📞 Dial

1-818-555-1212

📄 Script

RETAIL RECONNECT/APPT C ▾

NOTE

☒ Dial 1 ☒ Include Area Code

CALL STATUS

COMPLETED C

Date/Time
12/27/2001 2:40

12/27/2001 2:40 PM

DAVID

RESULT: Callback in 30 Days
STATUS: Call Completed
Activity Scheduled: PHONECALL - CALLBACK - 01/26/2002 Followup based on Call of 12/27/2001

The LSI Call Center puts all of the important information in one spot. Customer information, Vehicle information, Finance Terms and any previous history.

Next ➡

Save

Save/Next

Cancel

Letter

Huddle

Recap

Activity

Vince Conte
1549 Maple St., Hometown, Ca 90000
1999 Ford Explorer Salesperson 1: Jones, Rick
Start:06/23/1999 Term:48 Sch. Term:06/23/2003 Source:FINANCE

Update

Privacy

NUMBERS

- Home: 818-555-1212
- Work: 818-555-23
- Cell: - -



Dial

1-818-555-1212

Script

RETAIL RECONNECT/APPT C ▾

NOTE

☒ Dial 1 ☒ Include Area Code

CALL STATUS

We click on the phone number we want to use...

Date/Time	User	Note
12/27/2001 2:40 PM	DAVID	DIALED: 1-818-555-1212 (Home) RESULT: Callback In 30 Days STATUS: Call Completed
12/27/2001 2:40 PM	DAVID	Activity Scheduled: PHONECALL - CALLBACK - 01/26/2002 Followup based on Call of 12/27/2001

Next ➡

✓ Save

↻ Save/Next

⬅ ➡

✗ Cancel

📄 Letter

🗣️ Huddle

📄 Recap

📄 Activity

Vince Conte
1549 Maple St., Hometown, Ca 90000
1999 Ford Explorer Salesperson 1: Jones, Rick
Start:06/23/1999 Term:48 Sch. Term:06/23/2003 Source:FINANCE

📄 Update

🚫 Privacy

NUMBERS

- 🏠 Home: 818-555-1212
- 🏢 Work: 818-555-2345
- 📱 Cell: - -

📞 Dial

1-818-555-1212

📄 Script

RETAIL RECONNE...APPT C ▾

NOTE

☒ Dial 1 ☒ Include Area Code

CALL STATUS

COMPLETED C

Date/Time	User	Note
12/27/2001 2:40 PM	DAVID	DIALED: 1-818-555-1212 (Home) RESULT: Callback In 30 Days STATUS: Call Completed
12/27/2001 2:40 PM	DAVID	Activity Scheduled: PHONECALL - CALLBACK - 01/26/2002 Followup based on Call of 12/27/2001

When contacting Customers, it's critical that we say the right things and ask the right questions. Scripts help automate that process

Next ➡

✓ Save and Exit

✗ Cancel

Print

Update

Schedule Activity

Vince Conte - 1999 Ford Explorer - Term: 48 Expires: 06/23/2003

- QUESTION (Short)
- GREETING**
- REALIZE EQUITY?
- CONSIDER NEW/NEARLY NEW?
- FUTURE CONTACT
- RATE VEHICLE
- MILES
- MAINTENANCE
- AGREEMENT & THANK YOU
- ANS. MACHINE MESSAGE

QUESTION

Good Afternoon, may I speak to Vince Conte?

Hi, Vince Conte, this is David Krier I'm calling from Hometown Ford.

If this is a good time for you...

Let me tell you why I'm calling.

LSI Scripts are merged with the information on the Customer, their Vehicle and their Deal. They can be easily customized to fit any situation or Dealer requirements.

Previous Question

Next Question

Next

✓ Save and Exit

✗ Cancel

Print

📅 Update

📅 Schedule Activity

Vince Conte - 1999 Ford Explorer - Term: 48 Expires: 06/23/2003

- QUESTION (Short)
- GREETING
- REALIZE EQUITY?**
- CONSIDER NEW/NEARLY NEW?
- FUTURE CONTACT
- RATE VEHICLE
- MILES
- MAINTENANCE
- AGREEMENT & THANK YOU
- ANS. MACHINE MESSAGE

QUESTION

We've been reviewing the contract on your Explorer and we've looked at some reliable sources such as Kelly Blue Book...
Based on the miles and condition of your vehicle, it's possible that you may have an equity opportunity.
Did you realize that?

We can walk through the questions simply by pressing page-down. Anything we type is instantly recorded in the response window.

RESPONSE

Good timing, they were thinking about a new vehicle

⬆ Previous Question
Next Question ⬇

Next ➡

✓ Save and Exit

✗ Cancel

Print

Update

Schedule Activity

Vince Conte - 1999 Ford Explorer - Term: 48 Expires: 06/23/2003

QUESTION (Short)
GREETING
REALIZE EQUITY?
CONSIDER NEW/NEARLY NEW?
FUTURE CONTACT
RATE VEHICLE
MILES
MAINTENANCE
AGREEMENT & THANK YOU
ANS. MACHINE MESSAGE

QUESTION

On a scale of 1 to 10, 10 being best, how would you rate your Explorer?

[10] Great! Tell me what makes it a 10?

[1 - 9] That's interesting! Why do you say ____? What would have made it a "10"?

SURVEY QUESTIONS (If Applicable)

☐ 10	☐ 6	☐ 2
☒ 9	☐ 5	☐ 1
☐ 8	☐ 4	☐ (N/A)
☐ 7	☐ 3	

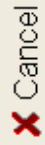
We can even ask "Survey" questions and run statistics based upon the results...

Next Question

Next



Save and Exit



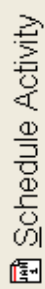
Cancel



Print



Update



Schedule Activity

Vince C

Update Customer Window

QUESTIO

GREETIN

REALIZE

CONSIDER

FUTURE

RATE VE

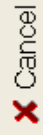
MILES

MAINTEN

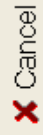
AGREEM

ANS. MA

Save



Cancel



Name

CONTE, VINCE

Dear

VINCE

Home

818-555-1212

Address 1

1549 MAPLE ST.

Work

818-555-2345

Address 2

Cell

- -

City

HOMETOWN

St

CA

Zip

90000

Email

Our script can remind us to verify the address and to get an e-mail address...

Next Question



Next



✓ Save and Exit

✗ Cancel

Print

Update

Schedule Activity

Vince Conte - 1999 Ford Explorer - Term: 48 Expires: 06/23/2003

- QUESTION (Short)
- GREETING
- REALIZE EQUITY?
- CONSIDER NEW/NEARLY NEW?
- FUTURE CONTACT
- RATE VEHICLE
- MILES
- MAINTENANCE
- AGREEMENT & THANK YOU
- ANS. MACHINE MESSAGE

QUESTION

Let's set a time for you to come in so we can review all the options available to you.

Would you prefer the beginning or end of the this week? (pick a day, offer two times AM/PM).

Great! We will see you on (day) at (time). Do you remember how to get here or would you like directions?

Thank you for your time.

RESPONSE

Previous Question

Next Question

Our goal is to set an Appointment, so we click on Schedule Activity...

Next



Save and Exit



Cancel



Print



Update



Schedule Activity

Vince Conte

QUESTION (SH
GREETING
REALIZE EQUI
CONSIDER NE
FUTURE CONT
RATE VEHICLE
MILES
MAINTENANCE
AGREEMENT &
ANS. MACHINE

Add/Edit Activity Window

Activity: **APPOINTMENT**

Regarding: **NEW VEHICLE**

Date: **01/12/2002** Time: **11:00 AM**

Scheduled For: **DAVID** Scheduled By: **DAVID**

January, 2002

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Today: 1/9/2002

Pending Activities for: Saturday 01/12/2002

Customer	Time	Activity	Regarding	Scheduled For	Scheduled By
SENH, MARK	10:00 AM	APPOINTMENT	OPTIONS	DAVID	DAVID

A Calendar and listing of appointments and activities for that day helps avoid scheduling conflicts...

Next Question

Next



Save and Exit



Cancel



Print



Update



Schedule Activity

Vince Conte

QUESTION (SH
GREETING
REALIZE EQUI
CONSIDER NE
FUTURE CONT
RATE VEHICLE
MILES
MAINTENANCE
AGREEMENT &
ANS. MACHINE

Activity

Regarding

Date

Scheduled For

DAVID

Customer

SENH, MARK

Add/Edit Activity Window

APPOINTMENT

NE

01

Set a confirmation call for this appointment?

APPOINTMENT DATE

01/12/2002

CONFIRMATION CALL DATE

01/11/2002



No

LSI generates a Confirmation Call for the day before. We know that Confirmation Calls dramatically increase show rates.

Next



Save and Exit



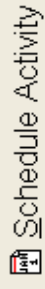
Cancel



Print



Update



Schedule Activity

Vince Conte - 1999 Ford Explorer - Term: 48 Expires: 06/23/2003

QUESTION (Short)

GREETING

REALIZE EQUITY?

CONSIDER NEW/NEARLY NEW?

FUTURE CONTACT

RATE VEHICLE

MILES

MAINTENANCE

AGREEMENT & THANK YOU

ANS. MACHINE MESSAGE

QUESTION

Let's set a time for you to come in so we can review all the options available to you.

Would you prefer the beginning or end of the this week? (pick a day, offer two times AM/PM).

Great! We will see you on (day) at (time). Do you remember how to get here or would you like directions?

Thank you for your time.

RESPONSE

Previous Question

Next Question

Next

Finally, we save the results of our call and return to the Call Center...

Save

Save/Next

↔

→

Cancel

Letter

Huddle

Recap

Activity

Vince Conte

1549 Maple St., Hometown, Ca 90000

1999 Ford Explorer Salesperson 1: Jones, Rick

Start:06/23/1999 Term:48 Sch. Term:06/23/2003 Source:FINANCE

Update

Privacy

NUMBERS

Home: 818-555-1212

Work: 818-555-2345

Cell: - -

Dial

Script

1-818-555-1212

RETAIL RECONNECT/APPT C ▾

☒ Dial 1 ☒ Include Area Code

CALL STATUS

COMPLETED

The results of our script and a note telling us that we scheduled an appointment shows up in our Customer history window...

Date/Time	DAVID	Note
01/09/2002 2:58 PM	DAVID	{SCRIPT-NAME: RETAIL RECONNECT/APPT CALL) REALIZE EQUITY?: Good timing, they were thinking about a new vehicle CONSIDER NEW/NEARLY NEW?: [Interested] RATE VEHICLE: [8] Great truck, but need something with better gas mileage MILES: 32000 MAINTENANCE: All service done at Hometown Ford, Verified Address
01/09/2002 2:58 PM	DAVID	Activity Scheduled: APPOINTMENT - 01/12/2002 11:00 AM A NEW VEHICLE
12/27/2001 2:40 PM	DAVID	DIALED: 1-818-555-1212 (Home) RESULTS: Callback In 30 Days

Next →

✓ Save

↻ Save/Next

↔

✗ Cancel

📄 Letter

🗨️ Huddle

📄 Recap

📄 Activity

Vince Conte
1549 Maple St., Hometown, Ca 90000
1999 Ford Explorer Salesperson 1: Jones, Rick
Start:06/23/1999 Term:48 Sch. Term:06/23/2003 Source:

NUMBERS
• Home: 818-555-1212
• Work: 818-555-2345
• Cell: - -

☒ Dial 1 ☒ Include Area Code
CALL STATUS
COMPLETED CALL RESULT

1-818-555-1212

NOTE

- 120 Day Letter
- Appointment Letter**
- Can't Contact
- Customers in equity test
- Envelope
- Ford Customer in Equity
- Ford Customer in Equity Test2
- Lease Expired
- Lease Term Confirmation
- New Opportunity
- Odometer Statement
- Reconnect Thank You test
- Thanks for Visiting

Thank you letters and Appointment Confirmation letters are also a nice touch...

Date/Time	01/09/2002 2:58 PM	DAVID	REALIZE EQUITY?: Good timing, they were thinking about a new vehicle
			CONSIDER NEW/NEARLY NEW?: [Interested]
			RATE VEHICLE: [8] Great truck, but need something with better gas mileage
			MILES: 32000
			MAINTENANCE: All service done at Hometown Ford, Verified Address
	01/09/2002 2:58 PM	DAVID	Activity Scheduled: APPOINTMENT - 01/12/2002 11:00 AM A NEW VEHICLE
	12/27/2001 2:40 PM	DAVID	DIALED: 1-818-555-1212 (Home)
			REQUEST: Callback In 30 Days

Next ➔



Hometown Ford Sales

1234 Main St.
Anytown, USA 12345
818-555-1212
Fax: 818-555-1212

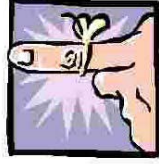
January 9, 2002

Vince Conte
1549 Maple St.
Hometown, CA 90000

Dear Vince;

For your convenience, we wanted to provide you with an appointment ...

Appointment scheduled for: **Saturday, Jan**



Appointment reminder:

Saturday, Jan. 12th 11:00 AM
I look forward to seeing you then!



Customized mail merged letters can be easily
created by the Dealership to respond to
opportunities...

John Jones
Options Specialist

818-555-1212
Fax: 818-555-1212

Next ➔

✓ Save

↻ Save/Next

↔

➡

✖ Cancel

Letter

Huddle

Recap

Activity

Update

Privacy

Vince Conte

1549 Maple St., Hometown, Ca 90000

1999 Ford Explorer Salesperson 1: Jones, Rick

Start:06/23/1999 Term:48 Sch. Term:06/23/2003 Source:FINANCE

NUMBERS

• Home: 818-555-1212

• Work: 818-555-2345

• Cell: - -

Dial

1-818-555-1212

Script

RETAIL RECONNECT/APPT C ▾

☒ Dial 1

☒ Include Area Code

CALL STATUS

COMPLETED CALL RESULT

NOTE

The Huddle/Strategy Worksheet makes sure everybody is on the same page and the Salesperson is expecting the Customer...

Date/Time	01/09/2002 2:58 PM	DAVID	Activity Scheduled: APPOINTMENT - 01/12/2002 11:00 AM A NEW VEHICLE	MAINTENANCE: All service done at Hometown Ford, Verified Address	RATE VEHICLE: [8] Great truck, but need something with better gas mileage
	12/27/2001 2:40 PM	DAVID	DIALED: 1-818-555-1212 (Home)		MILES: 32000
			RESULTS: Callback In 30 Days		CONSIDER NEW RECONNECT NEWS: (pending)

Next ➡



HUDDLE / STRATEGY WORKSHEET VINCE CONTE

Vince Conte
1549 Maple St.
Hometown, CA 90000

Hm: 818-555-1212

Wk: 818-555-2345

Cell:

1FMYU22X6XUC37121

1999 FORD EXPLORER

Salesperson..... JONES, RICK

Start Date..... 06/23/1999

Scheduled Term Date..... 06/23/2003

Presented Date.....

Term..... 48

Payment (incl Tax)..... 375.28 APR: 2.90

Cap Cost..... 0.00

Option Amount..... 0.00

Orig Down Payment..... 0.00

Security Deposit.....

Source..... FINANCE Allow. Miles:

Acct #:..... ABC123AAAA

Deal #.....

Estimated Payoff..... 6,600.00 Estimated Payments Elapsed 30

PENDING ACTIVITIES

PHONECALL - CON 01/11/2002 Confirm Appt on 01/12/2002 11:00 AM
APPOINTMENT 01/12/2002 11:00 AM NEW VEHICLE

NOTES

01/09/2002 2:58 PM DAVID

(SCRIPT-NAME: RETAIL RECONNECT/APPT CALL)
REALIZE EQUITY?: Good timing, they were thinking about a new vehicle
CONSIDER NEW/NEARLY NEW?: [Interested]

RATE VEHICLE: [8] Great truck, but need something with better gas mileage

MILES: 32000

MAINTENANCE: All service done at Hometown Ford, Verified Address

01/09/2002 2:58 PM DAVID

Activity Scheduled: APPOINTMENT - 01/12/2002 11:00 AM A NEW VEHICLE

12/27/2001 2:40 PM DAVID

DIALED: 1-818-555-1212 (Home)

RESULT: Callback In 30 Days

STATUS: Call Completed

12/27/2001 2:40 PM DAVID

Activity Scheduled: PHONECALL - CALLBACK - 01/26/2002 Followup based on Call of 12/27/2001

← Customer Information

← Deal Information

← Scheduled Activities

← Notes and Contacts

Next →

Save

Save/Next

↔

Cancel

Letter

Huddle

Recap

Activity

Vince Conte
1549 Maple St., Hometown, Ca 90000
1999 Ford Explorer Salesperson 1:
Start:06/23/1999 Term:48 Sch. Term:

NUMBERS

Home: 818-555-1212

Work: 818-555-2345

Cell: - -

☒ Dial 1 ☒ Include Area Code

CALL STATUS

COMPLETED CALL RESULT

Date/Time

01/09/2002 2:5

01/09/2002 2:58 PM

12/27/2001 2:40 PM

Activity

DIALE

RESULT: Callback in 30 days



Value Added Worksheet

VINCE CONTE - 1999 FORD EXPLORER

Payments 48 @ 375.28

Three Cycles in the Life of a Vehicle

Gas and Go - The Joy of New -- Up to 3 Years -- Warranty

- Gas
- Change Oil
- Rotate Tires
- Hassle Free Driving
- Best part of any Vehicles Life

Maintenance Cycle -- 2 to 5 Years -- Warranty ???

Item	Amount	When
Brakes		
Tires		
Alignment		
Belts & Hoses		
Wiper Blades		
Filters & Flushes		
30,000 Mile Service		
Transmission Service		

Total

The Recap button generates the Value Added Worksheet that helps us show the true cost of driving...

- Exhaust System
- Fuel Injectors
- Power Windows/Locks
- Radiator

Total

Next ➔

☒ Save

☒ Save/Next

☐ Cancel

☐ Letter

☐ Huddle

☐ Recap

☐ Activity

Vince Conte
1549 Maple St., Hometown, Ca 90000
1999 Ford Explorer Salesperson 1: Jones, Rick
Start:06/23/1999 Term:48 Sch. Term:06/23/2003 Source:FINANCE

NUMBERS

☐ Home: 818-555-1212

☐ Work: 818-555-2345

☐ Cell: - -

☐ Dial

☐ Script

1-818-555-1212

RETAIL RECONNECT/APPT C ▾

☒ Dial 1

☒ Include Area Code

CALL STATUS

Call Completed

Busy

Call Completed

Left Message - Machine

Left Message - Person

No Answer

Not Available

Wrong Number

NOTE

We enter a Call Status...

01/09/2002 2:58 PM	DAVID	{SCRIPT-NAME: RETAIL RECONNECT/APPT CALL) REALIZE EQUITY?: Good timing, they were thinking about a new vehicle CONSIDER NEW/NEARLY NEW?: [Interested] RATE VEHICLE: [8] Great truck, but need something with better gas mileage MILES: 32000 MAINTENANCE: All service done at Hometown Ford, Verified Address
01/09/2002 2:58 PM	DAVID	Activity Scheduled: APPOINTMENT - 01/12/2002 11:00 AM A NEW VEHICLE
12/27/2001 2:40 PM	DAVID	DIALED: 1-818-555-1212 (Home) RECALL T: Callback In 30 Days

Next ➔

☒ Save

☒ Save/Next

☐ Cancel

☐ Letter

☐ Huddle

☐ Recap

☐ Activity

Vince Conte
1549 Maple St., Hometown, Ca 90000
1999 Ford Explorer Salesperson 1: Jones, Rick
Start:06/23/1999 Term:48 Sch. Term:06/23/2003 Source:FINANCE

NUMBERS

☐ Home: 818-555-1212

☐ Work: 818-555-2345

☐ Cell: - -

☒ Dial 1

☒ Include Area Code

☐ Script

NOTE

CALL STATUS

Call Completed

COMPLETED CALL RESULT

Appointment - Sales

Aftermarket Opportunity

Appointment - Sales

Appointment - Service

Callback In ?? Days

Customer Hung Up

Follow-up

Issue Needs To Be Resolved

Moved Distant

We enter a Completed Call Result...

01/09/2002 2:58 PM	DAVID	MAINTENANCE: All service done at Hometown Ford, Verified Address
12/27/2001 2:40 PM	DAVID	Activity Scheduled: APPOINTMENT - 01/12/2002 11:00 AM A NEW VEHICLE
		DIALED: 1-818-555-1212 (Home)
		RESULT: Callback In 30 Days

Next



Save



Save/Next



Cancel



Letter



Huddle



Recap



Activity

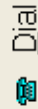
Vince Conte**1549 Maple St., Hometown, Ca 90000****1999 Ford Explorer Salesperson 1: Jones, Rick****Start:06/23/1999 Term:48 Sch. Term:06/23/2003 Source:FINANCE**

NUMBERS

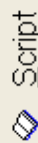
Home: 818-555-1212

Work: 818-555-2345

Cell: - -



Dial



Script

1-818-555-1212**RETAIL RECONNECT/APPT C ▾**

NOTE

☒ Dial 1 ☒ Include Area Code

CALL STATUS

Call Completed

COMPLETED CALL RESULT

Appointment - Sales

Date/Time

01/09/2002 2:58 PM

01/09/2002 2:58 PM

12/27/2001 2:40 PM

DAVID

DAVID

REALIZE EQUITY?: Good timing, they were thinking about a new vehicle
CONSIDER NEW/NEARLY NEW?: [Interested]
RATE VEHICLE: [8] Great truck, but need something with better gas mileage
MILES: 32000
MAINTENANCE: All service done at Hometown Ford, Verified Address
Activity Scheduled: APPOINTMENT - 01/12/2002 11:00 AM A NEW VEHICLE
DIALED: 1-818-555-1212 (Home)
REQUEST: Callback In 30 Days

Now we are ready to save and go to the next Call...

Next →

Ford Motor Company



**RETAIL TRADE CYCLE
MANAGEMENT**



Phase Three

Sell the Vehicle

Next →

YOUR SOURCE FOR AUTOMOTIVE KNOW HOW™



Value Added Worksheet

VINCE CONTE - 1999 FORD EXPLORER

Payments 48 @ 375.28

Three Cycles in the Life of a Vehicle

Gas and Go - The Joy of New -- Up to 3 Years -- Warranty

- Gas
- Change Oil
- Rotate Tires
- Hassle Free Driving
- Best part of any Vehicles Life

Maintenance Cycle -- 2 to 5 Years -- Warranty ???

Item	Amount	Whe
Brakes		
Tires		
Alignment		
Belts & Hoses		
Wiper Blades		
Filters & Flushes		
30,000 Mile Service		
Transmission Service		

Total

Repair Cycle -- 4 Years and Up -- No Warranty

Item	Amount	Whe
Maintenance Items... Plus		
60,000 Service		

- Tra
- Air
- Str
- Exl
- Fue
- Pov
- Rac

↩ Gas and Go Cycle

↩ Maintenance Cycle

↩ Repair Cycle

The Value Added Worksheet helps us discover what items the Customer has done to enhance the value of their vehicle. At the same time it helps us show the true cost of driving...

Next ➔



Valor Agregado Hoja de Trabajo

VINCE CONTE - 1999 FORD EXPLORER

Mensualidades ... 48 @ 375.28

Tres Ciclos en la Duración de un Vehículo.

Gasolina y Vamonos - La alegría de uno nuevo hasta 3 años - Garantía

Gasolina

Cambiar Aceite

Alternar Las Llantas

Sin problemas de manejo

La vida útil de un vehículo

Ciclo de Mantenimiento de 2 a 5 años -- Garantía?

Cosa	Cantidad	Cuando
Frenos		
Llantas		
Alineación		
Bandas y mangueras		
Parabrisas		
Filtros y Limpiezas		
30,000 Millas de Servicio		
Servicio de Transmisión		
Total		

Ciclo de reparación - 4 años para arriba -- no garantía

Cosa	Cantidad	Cuando
Lista de Mantenimiento ... Mas		
60,000 Servicio		
Transmisión		
Aire Acondicionado		
Soporte		
Sistema de mofle		
Injectores de Gasolina		
Ventanas electronicas / cerradur		
Radiador		



Feuille de travail - Valeur ajoutée

VINCE CONTE - 1999 FORD EXPLORER

Versements 48 de 375.28

Les trois cycles de la durée de vie d'un véhicule

Faites le plein et partez - Nouvelle location -- jusqu'à 3 ans -- Garantie

Essence
Changement d'huile
Rotation des pneus
Conduite sans souci
Meilleure partie de la durée d'un véhicule

Cycle d'entretien -- 2 à 5 ans -- Garantie ???

Élément	Montant	Quand
Freins		
Pneus		
Alignement		
Courroies et boyaux		
Balais d'essuie-glace		
Filtres et vidanges		
Entretien 50 000 km		
Entretien de transmission		
Total		

Cycle de réparation -- 4 ans et plus -- Aucune Garantie

Élément	Montant	Quand
Éléments d'entretien... Plus		
Entretien 100 000 km		

Injecteurs
Verrous/Glaces électriques
Radiateur

Total

Presentations even print in Spanish or French...

Next →

Ford Motor Company



**RETAIL TRADE CYCLE
MANAGEMENT**

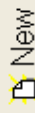


Phase Four

Track Results

Next ➔

YOUR SOURCE FOR AUTOMOTIVE KNOW HOW™



New



Recall

QuickCalc

CUSTOMER (Last, F

CONTE, VINCE

Year

1999

Make

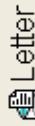
FORD

Model

EXPLORER

Body

Juddle



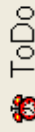
Letter



VScan



Call



ToDo



Exit

the Car

Joy of New

Activities

Notes

Results

-CUSTOMER (Last, F

CONTE, VINCE

Make

FORD

Model

EXPLORER

Body

Start Date

06/23/1999

Source

FINANCE

Tax Profile

6% TAX

DEAL INFO

Term

48

Monthly Payment

375.28

Selling P

Amount

Down P

Rate (AP

FEES

License Fee

0.00

Doc/Other Fee

0.00

Trade Cr (for Tax)

0.00

PAYOFF

Early Termination



of Payments Elapsed

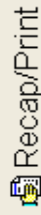
30

00.00

clude

Payments

5.



Recap/Print

The Call Results Report makes sure our people are making the calls and provides positive feedback on Results...

Next ➔

New Recall

QuickCalc De

Save

Recap

Huddle

Letter

VScan

Call

ToDo

Exit

CUSTOMER (Last, F

CONTE, VINCE

Year

1999

M

F

Start Date

06/23/

DEAL INFO

Term

Monthly Payment

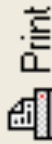
Selling Price

Amount Financed

Down Payment

Rate (APR)

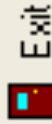
Call Result Report



Print



Preview



Exit

CALL DATE RANGE

FROM

12/01/2001

TO

01/09/2002

FILTER (Optional)

Call Status

-ALL-

Call Result

-ALL-

PRINT SETTINGS

☐ Order By Caller☐ Print Summary Only

We specify a Date Range ...

Monthly Termination

Number of Payments Elapsed

30

Estimated Payoff

6,600.00

Estimate Only: Does not include Termination Fees, Unpaid Payments or Other Charges and Fees.

Next →



CALL RESULTS REPORT
HOMETOWN FORD
 From 12/01/2001 To 01/09/2002

CALLS ON: December 27, 2001

Call Completed

User	Time	Customer	Vehicle	Result
DAVID	2:39 PM	ANTONINI, MARCIA	1999 FORD EXPLORER	Appointment - Sales
DAVID	2:40 PM	CONTE, VINCE	1999 FORD EXPLORER	Callback In 30 Days
Total:	2			

Left Message - Machine

User	Time	Customer	Vehicle	Result
DAVID	2:42 PM	COURTNEY, AILEEN	1999 FORD EXPLORER	(blank)
Total:	1			
>>> 3 TOTAL RESULTS FOR: 12/27/2001				

CALLS ON: December 31, 2001

Busy

User	Time	Customer	Vehicle	Result
DAVID	2:01 PM	REIMEL JR, BEN	1999 FORD EXPLORER	(blank)
Total:	1			

Call Completed

User	Time	Customer	Vehicle	Result
DAVID	2:03 PM	SHANK, TERRY	1999 FORD EXPLORER	Appointment - Sales
DAVID	2:04 PM	TOWBAR, LYNN	1999 FORD EXPLORER	Appointment - Sales
DAVID	2:08 PM	BALLARD, JESSICA	1999 FORD E250	Appointment - Sales
DAVID	2:03 PM	SUTTERLY, ANGEL	1999 FORD EXPLORER	Appointment - Service
DAVID	2:08 PM	BABETSKI, AIDA	1999 FORD F150	Appointment - Service
DAVID	2:04 PM	VANDERVEER, SUSAN	1999 FORD EXPLORER	Callback In 180 Days
DAVID	2:08 PM	MCCAULEY, JESSICA	1999 FORD EXPLORER	Issue Needs To Be Resolved
Total:	7			

Left Message - Person

User	Time	Customer	Vehicle	Result
DAVID	2:02 PM	SENH, MARK	1999 FORD EXPLORER	(blank)
Total:	1			

01/09/2002 5:00 PM

Page 3



CALL RESULTS REPORT
HOMETOWN FORD
 From 12/01/2001 To 01/09/2002

SUMMARY - Call Results

Status: Busy 1 out of 15 6.67%

Status: Call Completed 10 out of 15 66.67%

Appointment - Sales 5 out of 10 50.00%

Appointment - Service 2 out of 10 20.00%

Callback In 30 Days 1 out of 10 10.00%

Callback In 180 Days 1 out of 10 10.00%

Issue Needs To Be Resolved 1 out of 10 10.00%

Status: Left Message - Machine 1 out of 15 6.67%

Status: Left Message - Person 1 out of 15 6.67%

Status: Not Available 1 out of 15 6.67%

Callback In 11 Days 1 out of 1 100.00%

Status: Wrong Number 1 out of 15 6.67%

TOTAL CALLS:

Unique Customers: 15

New Lease: 1

New Purchase: 2

Used Lease: 0

Used Purchase: 0

Total Sold/Leased: 3

The Call Results report summarizes our calls and also gives us a recap of any resulting sales...

Next ➔



Renewal Results from 01/01/2001 Actual Termination Report

07/19/2001 3:12 PM

Page 2



Renewal Results from 01/01/2001 to 01/31/2001 Actual Termination Report

Customer Vehicle Term Ext. Sch Term Term Date
ROTHARMEL,BILL & JAN 1999 Mercury Mystique 24 08/08/2001 01/05/2001
 VIN: Source: FMCC LEASE Acct
 Salesper 1: WILLIAMS,BILL Salesper 2:

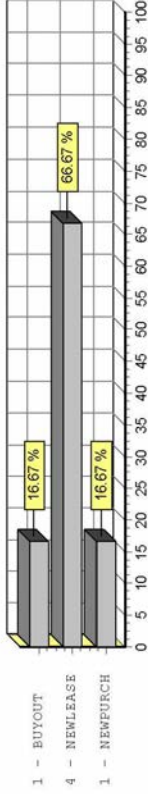
1 BUYOUT - Customer Bought Leased Vehicle 16.67%

Customer Vehicle Term Ext. Sch Term Term Date
DILGER,TOM 1999 Ford Explorer 24 10/08/2001 01/01/2001
 VIN: 1FABP32X123123123 Source: FMCC LEASE Acct
 Salesper 1: SMITH, DONNA Salesper 2: KATHY
TIMES, NEIL 1999 Lincoln Continental SD 36 02/15/2002 01/05/2001
 VIN: 12312312312312312 Source: FMCC LEASE Acct
 Salesper 1: SMITH,JOE Salesper 2:

3 Time Repeat
ROBINSON,SAMUEL 1999 Mercury Villager SW 25 10/08/2001 01/10/2001
 VIN: Source: FMCC LEASE Acct
 Salesper 1: JONES,JIM Salesper 2:
PAULS,DENNIS 1999 Ford Contour SDN 24 10/29/2001 01/15/2001
 VIN: Source: FMCC LEASE Acct
 Salesper 1: SMITH,JOE Salesper 2:
 Repeat Customer 3 Times

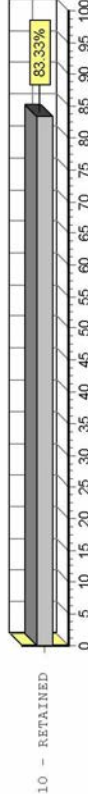
4 NEWLEASE - Leased a New Vehicle from Us 66.67%

CUSTOMER RENEWAL RESULTS



RETENTION %

12 Total Terminations
 0 Excluded (No Result, Dead File, Moved Far, or Repo)
 12 Eligible For Retention



07/20/2



Salesperson	Terminations	Ineligible	Opportunities	Retained	%	Results Graph
BILL SMITH	4	0	4	2	50%	
BILL WILLIAMS	15	0	15	9	60%	
GEORGE JONES	8	0	8	5	62%	
JOHN JONES	6	0	6	5	83%	
JOHN SMITH	2	0	2	1	50%	
TOM SMITH	9	0	9	7	78%	

Results can be tracked by Dealership or by Individual Salesperson and are summarized Graphically.

Next →

SURVEY RESULTS REPORT from 07/01/2001 to 07/31/2001
SAMPLE SURVEY CALL

SURVEYS FOR: July 19, 2001

Caller Time Customer Vehicle Salesperson

DAVID 3:25 PM TIMES, NEIL
LIKE VEHICLE Loves car.
GREETED PROMPTLY Within 10 Minutes
SALESPERSON YES
FINANCE DEPT Extremely Helpful
DELIVERY Yes
FOLLOWUP Yes

DAVID 3:26 PM PRATT, KAREN
GREETED PROMPTLY Within 5 Minutes
SALESPERSON YES
FINANCE DEPT Helpful
DELIVERY No - Gas not full, but they said it
FOLLOWUP Yes
LIKE VEHICLE Love the car
GREETED PROMPTLY Within 5 Minutes
SALESPERSON YES
FINANCE DEPT Extremely Helpful
DELIVERY Yes
FOLLOWUP Yes

DAVID 3:27 PM MADDEN, JOHN & SUSAN
LIKE VEHICLE Great car. Would like to add a b
GREETED PROMPTLY Within 10 Minutes
SALESPERSON YES
FINANCE
DELIVER
FOLLOW

>>>

07/19/2001 3:29 PM

Page 2

SURVEY RESULTS REPORT from 07/01/2001 to 07/31/2001
SAMPLE SURVEY CALL

If I could, I would like to ask you a couple of questions about your treatment at {DEALER NAME}.

Were you greeted promptly when you arrived?

2 Within 5 Minutes (50%)
2 Within 10 Minutes (50%)
4 RESPONSES

Was your Salesperson, {SALESPERSON1}, courteous and friendly?

4 YES (100%)
4 RESPONSES

Was the Finance Manager that helped you finilize the documents on your {VEHICLE MODEL} courteous and helpful?

Surveys provide Proactive Feedback to help resolve issues before they affect our standings with the Factory.

Did your salesperson contact you within 72 hours of Delivery?

4 Yes (100%)
4 RESPONSES

Next ➔



Phase Five

Follow-up

Pending Activities thru: Wednesday 01/09/2002

Activities thru: 01/09/2002 Scheduled For DAVID Activity Refresh

Open Clear Edit Letter(s) Call E-Mail Report Exit

Customer	Date	Time	Activity	Comment	Scheduled For	Scheduled By
ANTONINI, MARCIA	01/08/2002		PHONECALL	- Confirm Appt on 01/09/2002	DAVID	DAVID
SHANK, TERRY	01/08/2002		PHONECALL	- Confirm Appt on 01/09/2002	DAVID	DAVID
▶ANTONINI, MARCIA	01/09/2002	10:00 AM	APPOINTMENT	OPTIONS	DAVID	DAVID
SHANK, TERRY	01/09/2002	11:00 AM	APPOINTMENT	OPTIONS	DAVID	DAVID
MCCAULEY, JESSICA	01/09/2002		PHONECALL	FOLLOWUP ON SERVICE	DAVID	DAVID

Each day when LSI starts it lets us know what activities and appointments are pending...



May 1, 2001

Barbara Monticello
1234 Maple Lane
Anytown, PA 12345

Dear Barbara;

We've discovered what could be exciting new information:

As you may recall, you purchased your 1999 Ford Taurus GLE with a 3.0L V6 engine and a 5-speed manual transmission.

Here's the good news... Ford Motor Company has announced that you have won a \$1,000 cash award for being a loyal customer.

A quick call to the next time you call will be a pleasure.

The time is very short, so we encourage you to call us today.

If you'd like to be called, please call us today.

Thank you for your business.

Sincerely,

Bill Williams
Options Specialist

Hometown Ford Sales

1234 Main St.
Anytown, USA 12345
818-555-1212
Fax: 818-555-1212

Pending Activities thru: Thursday 06/07/2001

Open Deal Clear Edit Call Exit

Print Pending Activities Print Letter Print All Letters

Customer	Date	Time	Activity	Comment
JONES, JOHN	06/07/2001		PHONECALL - CONFIRM	Confirm Appt on 06/09/2001 10:00 AM
JOYCE, KEN	06/07/2001	10:00 AM	APPOINTMENT	GO OVER OPTIONS
WILLIAMS, BILL	06/07/2001	3:00 PM	DELIVER	DELIVER VEHICLE

LSI Call Center

Save Save & Next Skip Cancel Huddle Schedule Activity Update Privacy Script

John Jones
1234 Fifth St., Hometown, Ca 91301
1999 Ford Taurus GLE Salesperson 1: Williams, Bill
Start: 05/19/1999 Term: 24 Sch. Term: 05/19/2001 Source: FMCC LEASE

NUMBERS
Home: 818-555-1212
Work: 818-555-2121

1,848-555-1212

RETAIL RECONNECT/APPT C

06/26/2001

Regarding
Confirm Appt on 06/27/2001 10:00 AM
Confirm Appt on 06/27/2001 11:00 AM

Today: 7/13/2001

June, 2001

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

Even Customers that may buy elsewhere are put in a follow-up cycle for the next time they will be in the market for a vehicle... Nobody falls through the cracks!

Next



- **Get Ready**
- **Contact**
- **Sell the Vehicle**
- **Track Results**
- **Follow-up**

Ford Motor Company



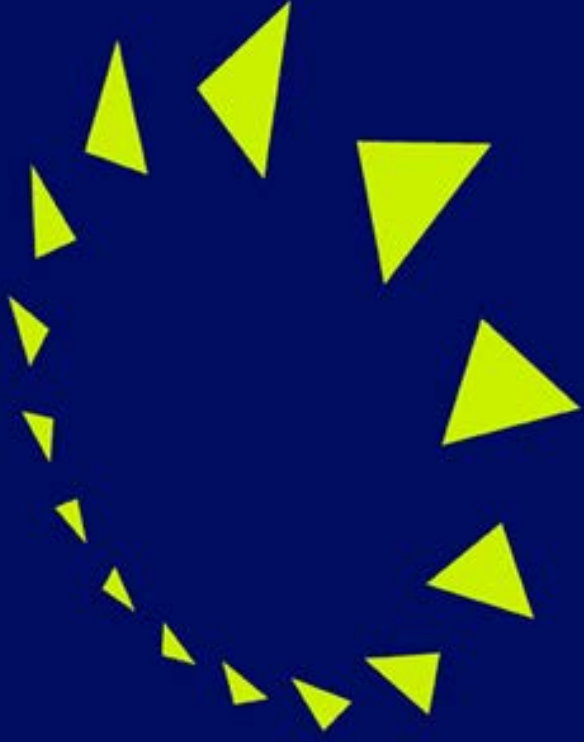
**RETAIL TRADE CYCLE
MANAGEMENT**



Get Results!

YOUR SOURCE FOR AUTOMOTIVE KNOW HOW™

EXHIBIT C

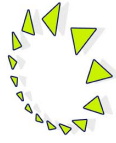


RETAIL TRADE CYCLE MANAGEMENT



Overview

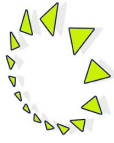
- Overview of Retail Trade Cycle Management (RTCM) Process
- Overview of LSI Contact Software
- Review RTCM Training Process
- Review Exciting Enhancements to the Training Earnback Program



Pop-Up Question # 1

What is your Position in the Dealership?

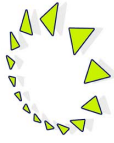
- A. Dealer / General Manager**
- B. Sales Manager**
- C. Other Manager**
- D. Salesperson**



Pop-Up Question # 2

What is your Annual Sales Volume?

- A. Less Than 250 units**
- B. 251 - 500 units**
- C. 501 - 750 units**
- D. More than 750 units**

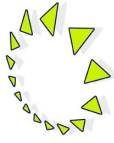


Pop-Up Question # 3

Have you had Training on Retail Trade Cycle Mgmt ?

Yes

No

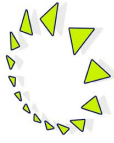


Pop-Up Question # 4

Have you Downloaded the RTCM / CIE Manuscripts?

Yes

No

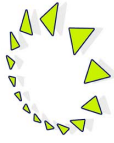


- Existing Product
- 20 Year History
- Success

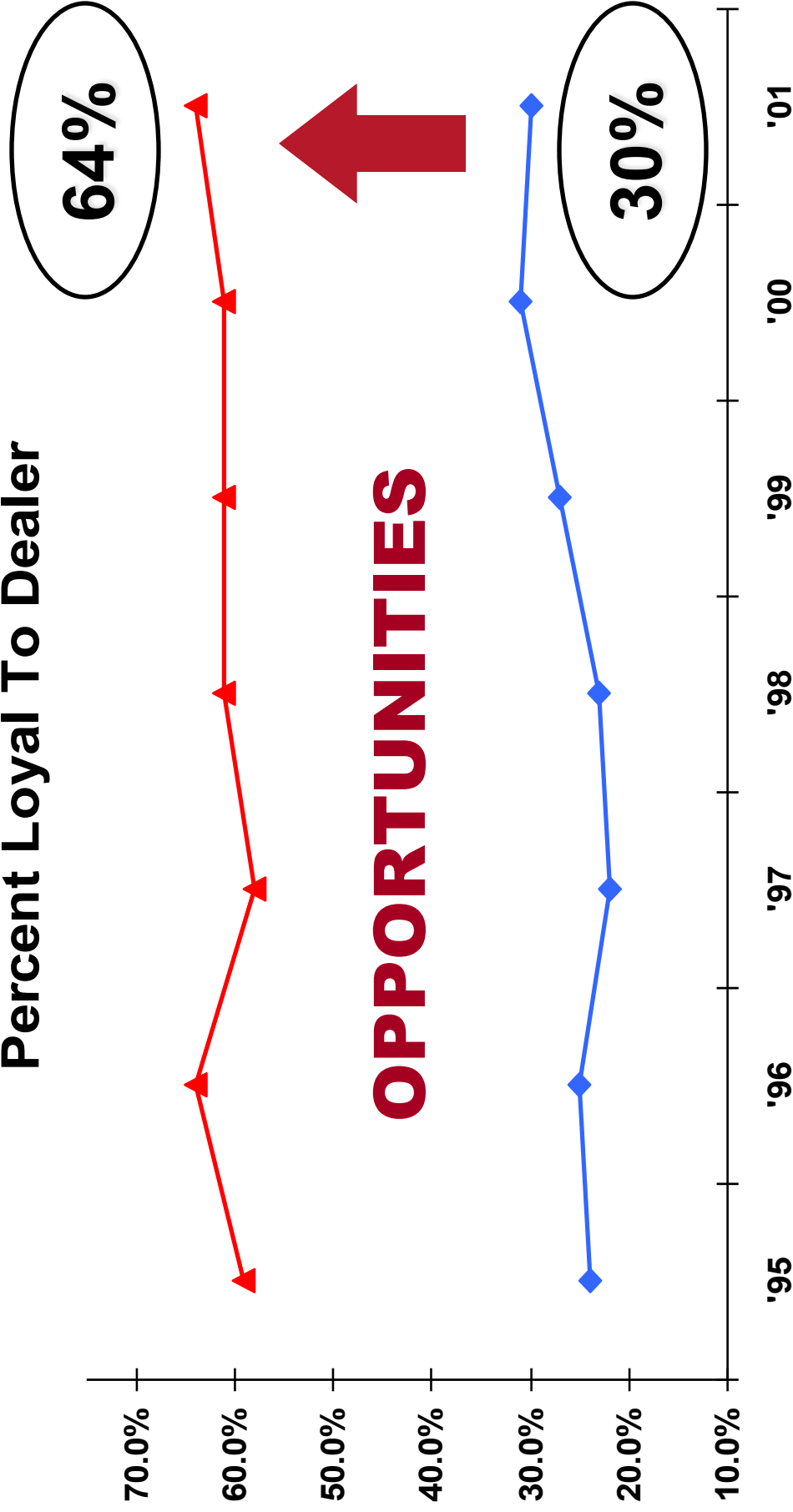


- New Product
- Same Philosophy
- Future Success

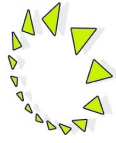




Percent Loyal To Dealer

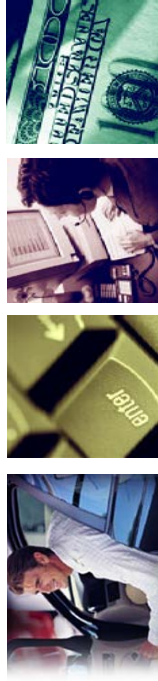
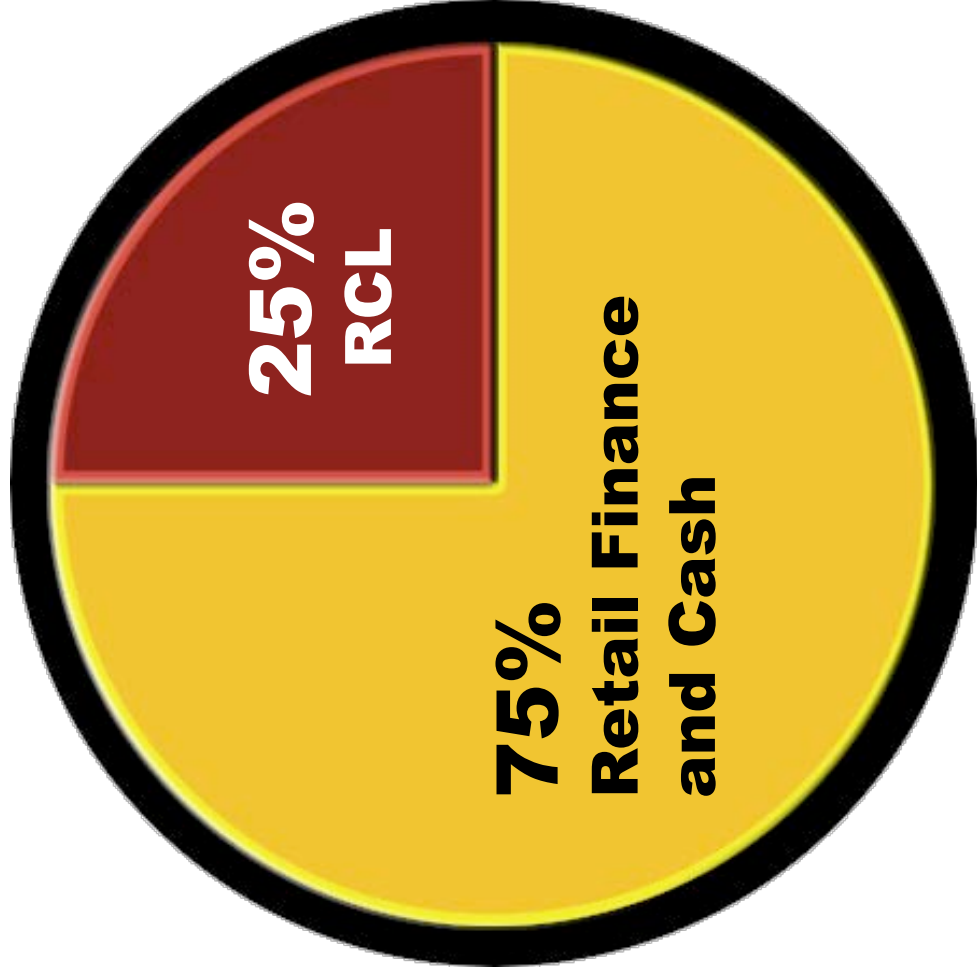


Ford Motor Company



**RETAIL TRADE CYCLE
MANAGEMENT**

Portfolio of Loyal Lifetime Customers!

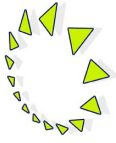




PILOT PROGRAM

**How often do customers like to trade?
We discovered...**

***7 out of 10 customers who purchased
their vehicles using a 60 month
Finance contract paid their contract
within the first 36 months.***

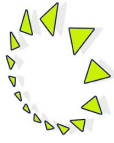


Pilot Program Profit Opportunities

- Higher CSI
- More Referrals
- Additional Used Vehicle Availability
- Service Appointments
- F&I Additional Profit Opportunities



Ford Motor Company



**RETAIL TRADE CYCLE
MANAGEMENT**



57%

Closing Ratio on Kept Appointments



Pop-Up Question # 5

How do you Contact Previously Sold Customers?

- A. Direct Mail**
- B. Telephone**
- C. Email**
- D. Combination of above**
- E. Don't have process in place**



Pop-Up Question # 6

Who makes Customer Contact?

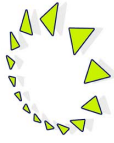
- A. Salesperson
- B. Customer Relations Dept.
- C. Outside Company
- D. Manager
- E. Combination of above



Pop-Up Question # 7

Where do you Find Information on these Customers?

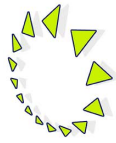
- A. DMS System**
- B. Ford Manuscripts**
- C. Outside Company**



Pop-Up Question # 8

How Do You Utilize your Customer Listings?

- A. Printed Listing
- B. Download to Software Package



3 Elements

Process



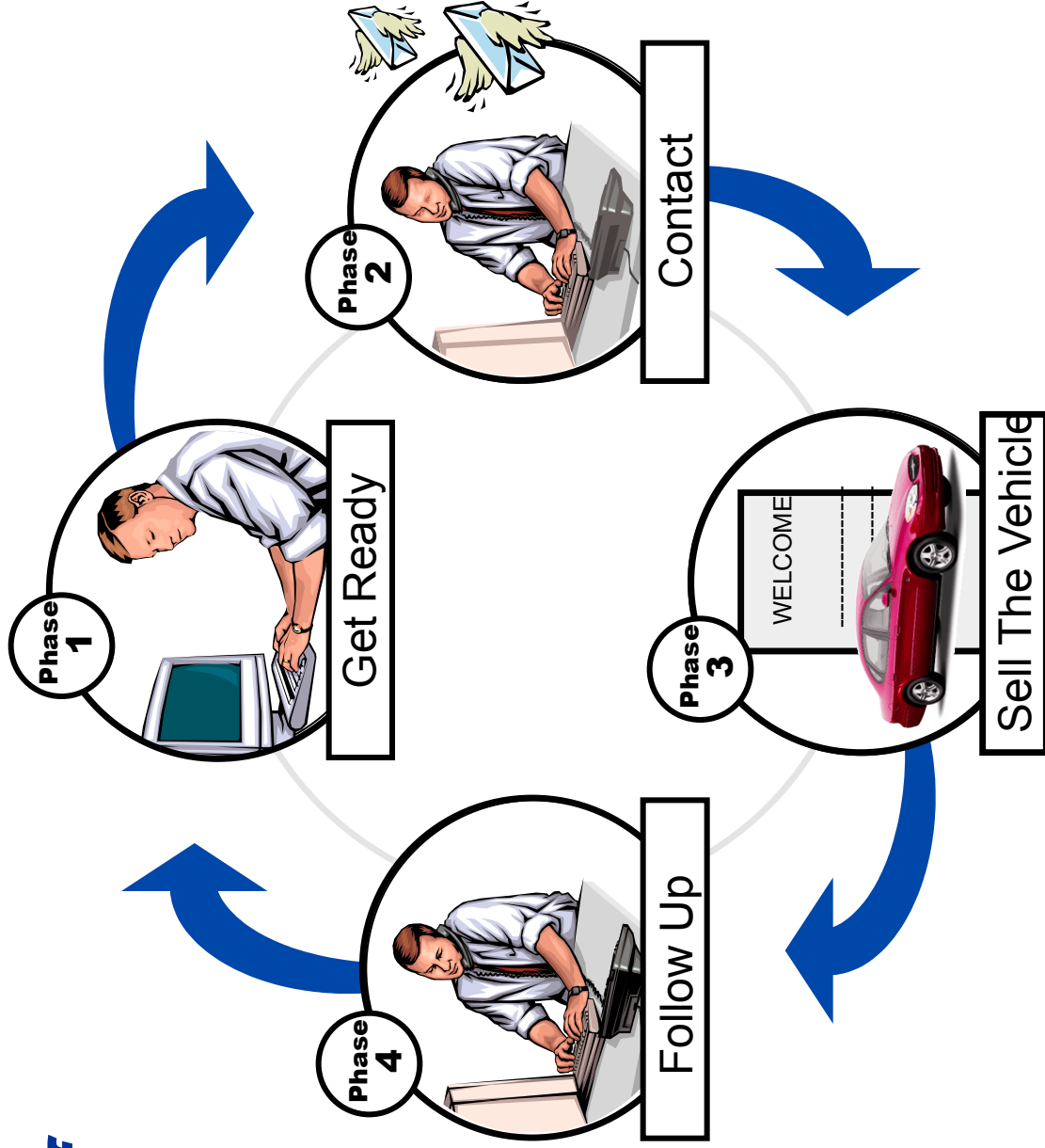
Technology

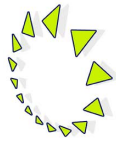


Training



4 Phases of Retail Trade Cycle Management Element 1





Phase One – GET READY



Ford Credit makes data accessible

— **Provides an Updated current
customer data base.**



LSI downloads and filters data

— **Easy to use format**



Phase Two – CONTACT



Reconnect /Appointment Call
Why: *To reconnect the cust. to the dealership*



Thank You Letter
Why: *To show we care*



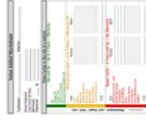

Appointment Confirmation Call
Why: *To increase the show ratio*

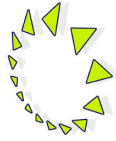


Management Strategy Session
Why: *Pre-plan GAME Plan & Increase closing ratio*



Phase Three – SELL THE VEHICLE



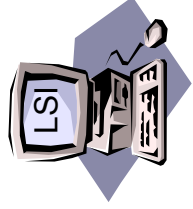


Phase Four – FOLLOW UP



Sold Follow Up

Why: *To insure the customer total satisfaction*



Unsold Follow Up

Why: *To set a future appt. to insure customer returns*

USED VEHICLE FACTORY.											
30	30	30	30	30	30	30	30	30	30	30	30
60	60	60	60	60	60	60	60	60	60	60	60
90	90	90	90	90	90	90	90	90	90	90	90
120	120	120	120	120	120	120	120	120	120	120	120

Resale Club

Why: *Potential equity keeps customer connected*



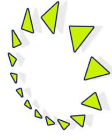
Technology - Element 2



***Designed by Retail Car People
for Retail Car People!***

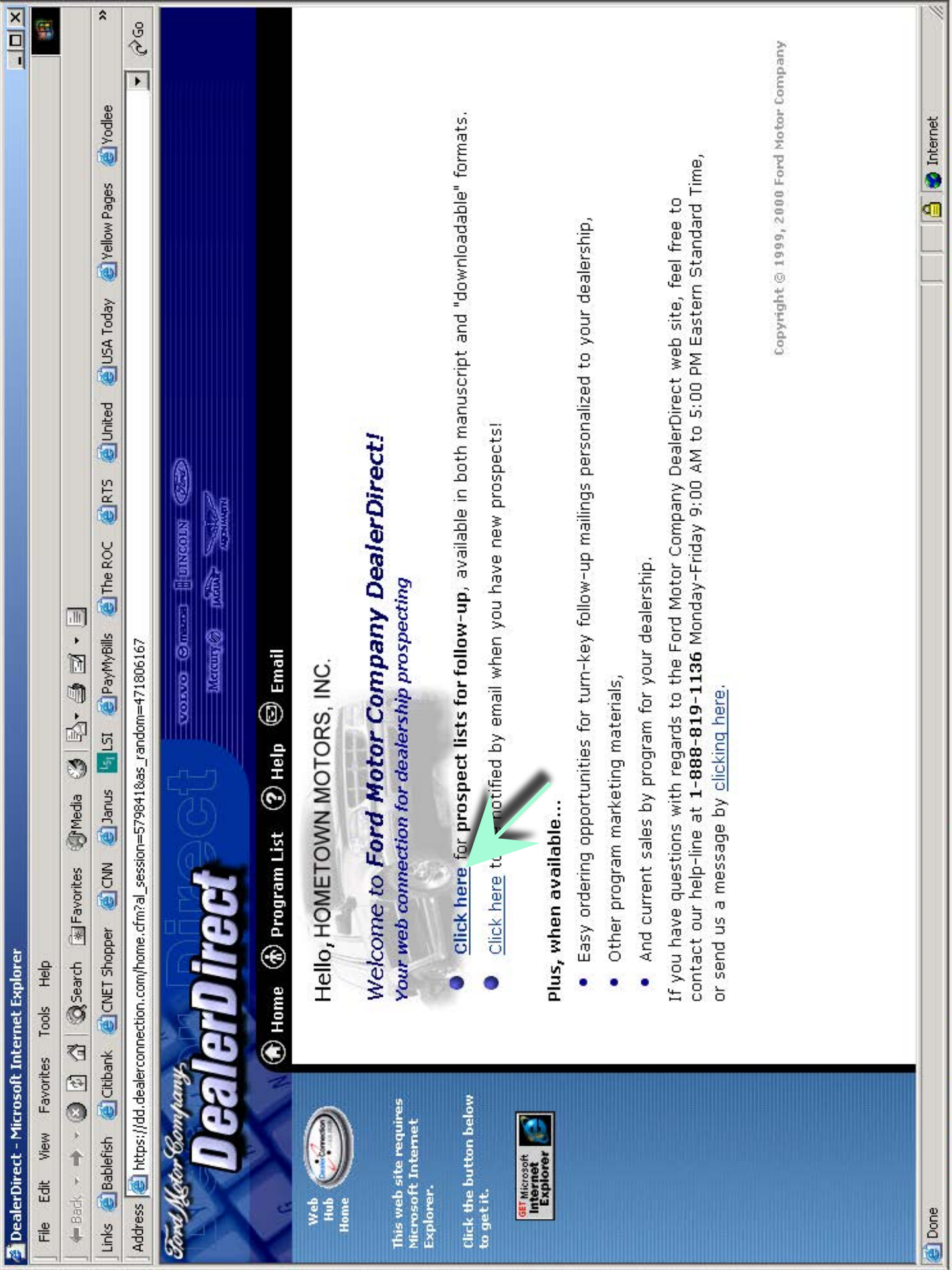
***Covers all areas of
the Customer Retention
Process electronically.***





Phase One

Get Ready (Identify)



This web site requires Microsoft Internet Explorer.

Click the button below to get it.



Hello, HOMETOWN MOTORS, INC.

Welcome to **Ford Motor Company DealerDirect!**
Your web connection for dealership prospecting

- [Click here for prospect lists for follow-up](#), available in both manuscript and "downloadable" formats.
- [Click here to be notified by email when you have new prospects!](#)

Plus, when available ...

- Easy ordering opportunities for turn-key follow-up mailings personalized to your dealership,
 - Other program marketing materials,
 - And current sales by program for your dealership.
- If you have questions with regards to the Ford Motor Company DealerDirect web site, feel free to contact our help-line at **1-888-819-1136** Monday-Friday 9:00 AM to 5:00 PM Eastern Standard Time, or send us a message by [clicking here](#).

Ford Motor Company's

DealerDirect

[Home](#) [Program List](#) [Help](#) [Email](#)Web
Hub
HomeThis web site requires
Microsoft Internet
Explorer.Click the button below
to get it.

- Other Prospecting Programs

[2002 3Q RTCM Customers In Equity](#) (posted 8/30/2002)[2002 3Q RTCM - Ford Credit Customers Highly In Market](#) (posted 8/30/2002)[2002 3Q E-Series Owner Loyalty](#)

(posted 8/9/2002)

[2002 3Q Taurus Owner Loyalty](#)

(posted 8/8/2002)

[2002 FDAF E-Series Mailing](#)

(new mailing 8/1/2002)

[E-Series / Ford Credit Knapheide Mailing](#)

(Posted 7/26/2002)

[E-Series / Ford Credit PDV Mailing](#)

(Posted 7/26/2002)

[Retail Trade Cycle Management - Non Ford Credit Customers Highly In Market - July 2002](#) (posted 7/19/2002)[Retail Trade Cycle Management - Ford Credit Customers Highly In Market \(No Equity\) - July 2002](#) (posted 7/19/2002)[2002 Windstar Purchase Incentive](#)

(posted 6/3/2002)

[Retail Trade Cycle Management - Ford Credit Customers in Equity - May 2002](#)

(posted 5/24/2002)



Retail Trade Cycle Management - Ford Credit Customers in Equity - May 2002

The prospect count for HOMETOWN MOTORS, INC.

379

Prospect List

- [Click here](#) to obtain a list of your prospects.
- [Click here](#) to get your list in a comma-separated file, which can be used in Microsoft Excel or other programs.

Note: Larger prospect lists will take longer to come up after you click.

Program Materials

- [Dealer Bulletin](#)

Go Back

Save As

Save in:



Desktop



History



My Documents



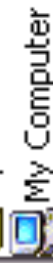
Desktop



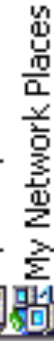
Favorites

My Network
Places

My Documents



My Computer



My Network Places

File name:

RTCM 3rd Quarter.csv

Save as type:

CSV (Comma delimited) (*.csv)



Save

Cancel

LSI Renewal Center

Please Log In:

User Name:

DAVID

OK

Cancel

By using the LSI Renewal Center software you agree to comply with any applicable privacy laws relating to your Customers and their locality.

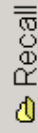
For More Info Click Here

Version: 8.64

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New



Recall



Save

Main

QuickCalc

Deal

CUSTOMER (Last, First)

Year

1999

Make

FORD

Start Date

DEAL INFO

1 Payment Lease

Term

Base Payment

Residual Value

Net Cap Cost

Cap Reduction

Backup Data Files

Restore Data Files

Sync Data

Calculator

Calendar

Global Replace

Import Options Records

Salesperson Reassignment

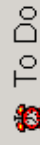
Sample Deal

VIN Decoder

Automatic Activities



Call



To Do



Exit

Activities

Notes

Results



Repeat Count

0

Profile

6% TAX



YOFF

Early Termination



Loan Fee (End)



Recap/Print

NewRecallSaveRecapHuddleLetterVScanCallTo DoExit

LSI Import Window

Open File

Halt

Exit

FILE TYPE

FORD 2QTR/3QTR RTCM

(GENERIC)
ADP
ADVENT
CHRYSLER
FORD 2QTR/3QTR RTCM
FORD 3RD_QTR_F-SERIES
FORD 3RD_QTR_TAURUS
FORD_MKTG_POINT_EXPEDITION
FORD_TERM_TRACKER_CFM
FORD_TERM_TRACKER_CSV
LM_CUST_IN_EQUITY
REYNOLDS
UCS

Main

CUSTOMER

Year

1999

Start Date

DEAL INFO

1 Payment

Term

Base Payn

Residual V

Net Cap C

Cap Reduction

Open

Look in:



Desktop



History



Desktop



My Documents



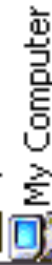
My Computer



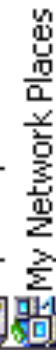
My Network P...



My Documents



My Computer



My Network Places



RTCM 3RD QTR.CSV



File name:

RTCM 3RD QTR.CSV

Files of type:

FORD_2QTR/3QTR_RTCM files (*.CSV)

Open

Cancel



NAME	YEAR	MAKE	MODEL	BODY	TRIM	DRIVE	ENGINE	PAYMENT	EST. PAYOFF	EST. EQUITY	START DATE	TERM	EXT.	SCHED TERM	ACTUAL T
ADAMS, JAMES	1999	FORD	EXPLORER	UTILITY	XL	2WD	3.8L V6	456	12,200	300	03/18/1999	60	0	04/18/2004	
AHLBORN, JOYCE	1999	FORD	MUSTANG	COUPL	BASE		3.8L V6	344	4,400	5,900	02/11/1999	48	0	02/11/2003	
AHMED, DENNIS	2000	FORD	MUSTANG	CONVI	BASE		3.8L V6	283	9,700	4,600	02/06/2000	60	0	02/06/2005	
ALI, DAVID	1999	FORD	RANGER	SUPE		2WD	4.0L V6	314	8,500	1,500	05/16/1999	60	0	05/16/2004	
ANDRUSS, RICHARD	2000	FORD	MUSTANG	COUPL	BASE		3.8L V6	441	9,600	2,000	11/30/2000	36	0	11/30/2003	
ANTONINI, MARCIA	1999	FORD	MUSTANG	COUPL	BASE		3.8L V6	290	7,100	3,200	04/01/1999	60	0	04/01/2004	
APPLEGARTH, DAVID	1999	FORD	MUSTANG	COUPL	BASE		3.8L V6	421	7,200	3,200	07/11/1999	48	0	07/11/2003	
APTER, KEITH	1999	FORD	ESCORT	HATCH	2X2 C		2.0L L4	216	3,800	2,800	07/03/1999	48	0	07/03/2003	
ARACO, KRISTINE	2000	FORD	F150	STYLE	BASE		5.4L V8	518	12,300	2,700	02/28/2000	48	0	02/28/2004	
ASIADO, ANDREE	2000	FORD	RANGER	STAN	XL	2WD	2.5L L4	238	7,400	500	11/07/1999	60	0	11/07/2004	
BABETSKI, AIDA	2000	FORD	MUSTANG	CONVI	GT		4.6L V8	640	12,100	5,300	08/10/2000	36	0	08/10/2003	
BAJWA, RUSSELL	1999	FORD	EXPLORER	UTILITY	XL	2WD	2.0L L4	635	10,600	1,800	06/26/1999	48	0	06/26/2003	
BALLARD, JESSICA	1999	FORD	ESCORT	HATCH	2X2 C		2.0L L4	295	3,200	3,500	12/21/1998	48	0	12/21/2002	
BANDOS, VIRGINIA	2000	FORD	MUSTANG	CONVI	BASE		3.8L V6	471	12,600	1,800	05/21/2000	48	0	05/21/2004	
BANGERT, PHILLIP	2000	FORD	RANGER	STAN	XL	2WD	2.5L L4	310	6,200	1,800	09/09/2000	36	0	09/09/2003	
BARNEY, MICHELE	2000	FORD	FOCUS	WAGO	SE		2.0L L4	321	5,300	4,600	06/22/2000	36	0	06/22/2003	
BARRELLA, JOSEPH	2000	FORD	EXPEDITION	UTILITY		4WD	5.4L V8	535	16,700	2,200	11/26/1999	60	0	11/26/2004	
BEEGLE, LESLIE	1999	FORD	ESCORT	HATCH	2X2 C		2.0L L4	276	3,300	3,400	01/18/1999	48	0	01/18/2003	
BEILER, JANE	2000	FORD	MUSTANG	COUPL	BASE		3.8L V6	330	12,200	-600	05/20/2000	60	0	05/20/2005	
BERCAW, ALYCE	1999	FORD	EXPLORER	UTILITY	SPOR	2WD	3.8L V6	606	9,500	1,800	05/14/1999	48	0	05/14/2003	
BERGER, SUSAN	1999	FORD	MUSTANG	COUPL	BASE		3.8L V6	341	7,700	2,600	01/24/1999	60	0	01/24/2004	
BETTS, BARBARA	1999	FORD	RANGER	SUPE		2WD		409	4,900	5,200	01/16/1999	48	0	01/16/2003	
BIGLIN, ANDREE	1999	FORD	RANGER	SUPE		2WD		329	13,700	-3,600	04/03/2001	60	0	04/03/2006	
BIRMINGHAM, BEN	1999	FORD	RANGER	STAN	XL	2WD		253	3,000	4,400	01/29/1999	48	0	01/29/2003	
BIRR, KRISTINE	1999	FORD	CROWN VIC	SEDAN	LX		4.6L V8	603	5,200	6,800	10/12/1998	48	0	10/12/2002	
BLACKBURN, RYAN	1999	FORD	WINDSTAR	STAN		2WD	3.8L V6	588	10,900	1,700	08/11/1999	48	0	08/11/2003	
BOBAL, THOMAS	1999	FORD	RANGER	STAN	XL	2WD		332	5,300	2,100	05/31/1999	48	0	05/31/2003	
BONSALIM, MICHELE	2000	FORD	MUSTANG	CONVI	BASE		3.8L V6	719	12,900	1,800	07/15/2000	36	0	07/15/2003	
BORDA, ERIC	1999	FORD	RANGER	SUPE		2WD		147	3,600	6,200	04/15/2000	48	0	04/15/2004	
BORDARRAMPE, AILEEN	2000	FORD	TAURUS	SEDAN	SEL		3.0L V6	607	9,600	1,800	05/29/2000	36	0	05/29/2003	
BORSKA, THOMAS	2000	FORD	MUSTANG	CONVI	BASE		3.8L V6	676	10,800	3,900	05/29/2000	36	0	05/29/2003	
BOUNDS, DOLORES	2000	FORD	RANGER	SUPE	XL	2WD	3.0L V6	204	3,200	7,800	05/06/2000	36	0	05/06/2003	
BOYANCE, LYNN	1999	FORD	MUSTANG	COUPL	BASE		3.8L V6	327	9,100	1,200	07/03/1999	60	0	07/03/2004	
BRECKENRIDGE, THOM	2000	FORD	MUSTANG	COUPL	GT		4.6L V8	336	5,500	8,700	06/25/2000	36	0	06/25/2003	
BRINTON, LAUREN	2000	FORD	RANGER	SUPE	XL	2WD	4.0L V6	494	5,800	5,500	01/12/2000	36	0	01/12/2003	
BROTHERS, JOSEPH	2000	FORD	MUSTANG	CONVI	GT		4.6L V8	300	11,700	5,300	10/02/2000	60	0	10/02/2005	
BRYAN, VINCE	1999	FORD	MUSTANG	COUPL	BASE		3.8L V6	318	8,300	2,000	05/31/1999	60	0	05/31/2004	

NAME	YEAR	MODEL	BODY	TRIM	DRIVE	ENGINE	PAYMENT	EST. PAYOFF	EST. EQUITY	START DATE	TERM	EXT.	SCHED TERM	ACTUAL T
ADAMS, JAMES	1999	FORD	EXPLORER	UTILITI XL	2WD	3.8L V6	456	12,200	300	03/18/1999	60	0	04/18/2004	
AHLBORN, JOYCE	1999	FORD	MUSTANG	COUPL BASE		3.8L V6	344	4,400	5,900	02/11/1999	48	0	02/11/2003	
AHMED, DENNIS	2000	FORD	MUSTANG	CONVI BASE		3.8L V6	283	9,700	4,600	02/06/2000	60	0	02/06/2005	
ALI, DAVID	1999	FORD	RANGER	SUPEI	2WD	4.0L V6	314	8,500	1,500	05/16/1999	60	0	05/16/2004	
ANDRUSS, RICHARD	2000	FORD	MUSTANG	COUPL BASE		3.8L V6	441	9,600	2,000	11/30/2000	36	0	11/30/2003	
ANTONINI, MARCIA	1999	FORD	MUSTANG	COUPL BASE		3.8L V6	290	7,100	3,200	04/01/1999	60	0	04/01/2004	
APPLEGARTH, DAVID	1999	FORD	MUSTANG	COUPL BASE		3.8L V6	421	7,200	3,200	07/11/1999	48	0	07/11/2003	
APTER, KEITH	1999	FORD	ESCORT	HATCH ZX2 C		2.0L L4	216	3,800	2,800	07/03/1999	48	0	07/03/2003	
ARACO, KRISTINE	2000	FORD	F150	STYLE BASE		5.4L V8	518	12,300	2,700	02/28/2000	48	0	02/28/2004	
ASIADO, ANDREE	2000	FORD	RANGER	STANI XL	2WD	2.5L L4	238	7,400	500	11/07/1999	60	0	11/07/2004	
BABETSKI, AIDA	2000	FORD	MUSTANG	CONVIGT		4.6L V8	640	12,100	5,300	08/10/2000	36	0	08/10/2003	
BAJWA, RUSSELL	1999	FORD	EXPLORER	UTILITI XL	2WD	3.8L V6	635	10,600	1,800	06/26/1999	48	0	06/26/2003	
BALLARD, JESSICA	1999	FORD	ESCORT	HATCH ZX2 C		2.0L L4	295	3,200	3,500	12/21/1998	48	0	12/21/2002	
BANDOS, VIRGINIA	2000	FORD	MUSTANG	CONVI BASE		3.8L V6	471	12,600	1,800	05/21/2000	48	0	05/21/2004	
BANGERT, PHILLIP	2000	FORD	RANGER	STANI XL	2WD	2.5L L4	310	6,200	1,800	09/09/2000	36	0	09/09/2003	
BARNEY, MICHELE	2000	FORD	FOCUS	WAGO SE		2.0L L4	321	5,300	4,600	06/22/2000	36	0	06/22/2003	
BARRELLA, JOSEPH	2000	FORD	EXPEDITION	UTILITI	4WD	5.4L V8	535	16,700	2,200	11/26/1999	60	0	11/26/2004	
BEEGLE, LESLIE	1999	FORD	ESCORT	HATCH ZX2 C		2.0L L4	276	3,300	3,400	01/18/1999	48	0	01/18/2003	
BEILER, JANE	2000	FORD	MUSTANG	COUPL BASE		3.8L V6	330	12,200	-600	05/20/2000	60	0	05/20/2005	
BERCAW, ALYCE	1999	FORD	EXPLORER	UTILITI SPOR	2WD	3.8L V6	606	9,500	1,800	05/14/1999	48	0	05/14/2003	
BERGER, SUSAN	1999	FORD	MUSTANG	COUPL BASE		3.8L V6	341	7,700	2,600	01/24/1999	60	0	01/24/2004	
BETTS, BARBARA	1999	FORD	RANGER	SUPEI	2WD	3.8L V6	409	4,900	5,200	01/16/1999	48	0	01/16/2003	
BIGLIN, ANDREE	1999	FORD	RANGER	SUPEI	2WD	3.8L V6	329	13,700	-3,600	04/03/2001	60	0	04/03/2006	
BIRMINGHAM, BEN	1999	FORD	RANGER	STANI XL	2WD	3.8L V6	253	3,000	4,400	01/29/1999	48	0	01/29/2003	
BIRR, KRISTINE	1999	FORD	CROWN VIC	SEDAN LX		4.6L V8	603	5,200	6,800	10/12/1998	48	0	10/12/2002	
BLACKBURN, RYAN	1999	FORD	WINDSTAR	STANI	2WD	3.8L V6	588	10,900	1,700	08/11/1999	48	0	08/11/2003	
BOBAL, THOMAS	1999	FORD	RANGER	STANI XL	2WD	3.8L V6	332	5,300	2,100	05/31/1999	48	0	05/31/2003	
BONSALIM, MICHELE	2000	FORD	MUSTANG	CONVI BASE		3.8L V6	719	12,900	1,800	07/15/2000	36	0	07/15/2003	
BORDA, ERIC	1999	FORD	RANGER	SUPEI	2WD	3.8L V6	147	3,600	6,200	04/15/2000	48	0	04/15/2004	
BORDARRAMPE, AILEEN	2000	FORD	TAURUS	SEDAN SEL		3.0L V6	607	9,600	1,800	05/29/2000	36	0	05/29/2003	
BORSKA, THOMAS	2000	FORD	MUSTANG	CONVI BASE		3.8L V6	676	10,800	3,900	05/29/2000	36	0	05/29/2003	
BOUNDS, DOLORES	2000	FORD	RANGER	SUPEI XL	2WD	3.0L V6	204	3,200	7,800	05/06/2000	36	0	05/06/2003	
BOYANCE, LYNN	1999	FORD	MUSTANG	COUPL BASE		3.8L V6	327	9,100	1,200	07/03/1999	60	0	07/03/2004	
BRECKENRIDGE, THOM	2000	FORD	MUSTANG	COUPL GT		4.6L V8	336	5,500	8,700	06/25/2000	36	0	06/25/2003	
BRINTON, LAUREN	2000	FORD	RANGER	SUPEI XL	2WD	4.0L V6	494	5,800	5,500	01/12/2000	36	0	01/12/2003	
BROTHERS, JOSEPH	2000	FORD	MUSTANG	CONVIGT		4.6L V8	300	11,700	5,300	10/02/2000	60	0	10/02/2005	
BRYAN, VINCE	1999	FORD	MUSTANG	COUPL BASE		3.8L V6	318	8,300	2,000	05/31/1999	60	0	05/31/2004	

DATE RANGE

Choose a Range

All Dates

Maximum Days Left

Show Only Open Deals

In Market

VEHICLE INFO

Year

1999

Make

EXPLORE

Model

Body

Trim

New/Used

Equity

Max Payoff

ADVANCED SEARCH

Customer

Word

Person

Source

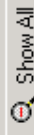
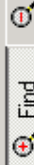
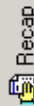
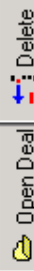
Deal Type

Import Desc.

Zip Code

FINANCE

NAME	YEAR	MAKE	MODEL	TRIM	DRIVE	ENGINE	PAYMENT	EST. PAYOFF	EST. EQUITY	START DATE	TERM	EXT.	SCHED TERM	ACTUAL T
ADAMS, JAMES	1999	FORD	EXPLORER	UTILITI XL	2WD	3.8L V6	456	12,200	300	03/18/1999	60	0	04/18/2004	
AHLBORN, JOYCE	1999	FORD	MUSTANG	COUPE BASE		3.8L V6	344	4,400	5,900	02/11/1999	48	0	02/11/2003	
AHMED, DENNIS	2000	FORD	MUSTANG	CONVI BASE		3.8L V6	283	9,700	4,600	02/06/2000	60	0	02/06/2005	
ALI, DAVID	1999	FORD	RANGER	SUPE	2WD	4.0L V6	314	8,500	1,500	05/16/1999	60	0	05/16/2004	
ANDRUSS, RICHARD	2000	FORD	MUSTANG	COUPE BASE		3.8L V6	441	9,600	2,000	11/30/2000	36	0	11/30/2003	
ANTONINI, MARCIA	1999	FORD	MUSTANG	COUPE BASE		3.8L V6	290	7,100	3,200	04/01/1999	60	0	04/01/2004	
APPLEGARTH, DAVID	1999	FORD	MUSTANG	COUPE BASE		3.8L V6	421	7,200	3,200	07/11/1999	48	0	07/11/2003	
APTER, KEITH	1999	FORD	ESCORT	HATCH ZX2 C		2.0L L4	216	3,800	2,800	07/03/1999	48	0	07/03/2003	
ARACO, KRISTINE	2000	FORD	F150	STYLE BASE		5.4L V8	518	12,300	2,700	02/28/2000	48	0	02/28/2004	
ASIADO, ANDREE	2000	FORD	RANGER	STANI XL	2WD	2.5L L4	238	7,400	500	11/07/1999	60	0	11/07/2004	
BABETSKI, AIDA	2000	FORD	MUSTANG	CONVIGT		4.6L V8	640	12,100	5,300	08/10/2000	36	0	08/10/2003	
BAJWA, RUSSELL	1999	FORD	EXPLORER	UTILITI XL	2WD		635	10,600	1,800	06/26/1999	48	0	06/26/2003	
BALLARD, JESSICA	1999	FORD	ESCORT	HATCH ZX2 C		2.0L L4	295	3,200	3,500	12/21/1998	48	0	12/21/2002	
BANDOS, VIRGINIA	2000	FORD	MUSTANG	CONVI BASE		3.8L V6	471	12,600	1,800	05/21/2000	48	0	05/21/2004	
BANGERT, PHILLIP	2000	FORD	RANGER	STANI XL	2WD	2.5L L4	310	6,200	1,800	09/09/2000	36	0	09/09/2003	
BARNEY, MICHELE	2000	FORD	FOCUS	WAGO SE		2.0L L4	321	5,300	4,600	06/22/2000	36	0	06/22/2003	
BARRELLA, JOSEPH	2000	FORD	EXPEDITION	UTILIT	4WD	5.4L V8	535	16,700	2,200	11/26/1999	60	0	11/26/2004	
BEEGLE, LESLIE	1999	FORD	ESCORT	HATCH ZX2 C		2.0L L4	276	3,300	3,400	01/18/1999	48	0	01/18/2003	
BEILER, JANE	2000	FORD	MUSTANG	COUPE BASE		3.8L V6	330	12,200	-600	05/20/2000	60	0	05/20/2005	
BERCAW, ALYCE	1999	FORD	EXPLORER	UTILIT SPOR	2WD		606	9,500	1,800	05/14/1999	48	0	05/14/2003	
BERGER, SUSAN	1999	FORD	MUSTANG	COUPE BASE		3.8L V6	341	7,700	2,600	01/24/1999	60	0	01/24/2004	
BETTS, BARBARA	1999	FORD	RANGER	SUPE	2WD		409	4,900	5,200	01/16/1999	48	0	01/16/2003	
BIGLIN, ANDREE	1999	FORD	RANGER	SUPE	2WD		329	13,700	-3,600	04/03/2001	60	0	04/03/2006	
BIRMINGHAM, BEN	1999	FORD	RANGER	STANI XL	2WD		253	3,000	4,400	01/29/1999	48	0	01/29/2003	
BIRR, KRISTINE	1999	FORD	CROWN VIC	SEDAN LX		4.6L V8	603	5,200	6,800	10/12/1998	48	0	10/12/2002	
BLACKBURN, RYAN	1999	FORD	WINDSTAR	STANI	2WD	3.8L V6	588	10,900	1,700	08/11/1999	48	0	08/11/2003	



DATE RANGE

Choose a Range

All Dates

Maximum Days Left

0

Show Only Open Deals

☐

In Market

☐

VEHICLE INFO

Year

1999

Make

EXPLORE

Model

EXPLORE

Body

Trim

New/Used

0

Equity

1,000

Max Payoff

1,000

ADVANCED SEARCH

Customer

W/ord

Salesperson

Source

Deal Type

FINANCE

Import Desc.

De

NAME	YEAR	MAKE	MODEL	BODY	TRIM	DRIVE	ENGINE	PAYMENT	EST. PAYOFF	EST. EQUITY	START DATE	TERM	EXT.	SCHED TERM	ACTUAL T
ADAMS, JAMES	1999	FORD	EXPLORER	UTILITI	XL	2WD		456	11,000	1,500	12/18/1998	60	0	01/18/2004	
BAJWA, RUSSELL	1999	FORD	EXPLORER	UTILITI	XL	2WD		635	10,600	1,800	06/26/1999	48	0	06/26/2003	
BERCAW, ALYCE	1999	FORD	EXPLORER	UTILITI	SPOR	2WD		606	9,500	1,800	05/14/1999	48	0	05/14/2003	
CAMPBELL JR, BARBAR	1999	FORD	EXPLORER	UTILITI	SPOR	2WD		377	9,900	1,200	05/15/1999	60	0	05/15/2004	
CATON, PHILLIP	1999	FORD	EXPLORER	UTILITI	XL	2WD		675	10,600	1,800	05/20/1999	48	0	05/20/2003	
DILLINGHAM, BEN	1999	FORD	EXPLORER	UTILITI	SPOR	2WD		400	3,600	7,500	10/29/1999	36	0	10/29/2002	
FURTAW, MARCIA	1999	FORD	EXPLORER	UTILITI	XL	2WD		440	13,200	-900	09/10/1999	60	0	09/10/2004	
GIBIAN, ANGEL	1999	FORD	EXPLORER	UTILITI	XL	2WD		469	11,000	1,200	02/28/1999	60	0	02/28/2004	
GREAVES, ALLEN	1999	FORD	EXPLORER	UTILITI	XL	2WD		540	10,000	2,300	08/15/1999	48	0	08/15/2003	
KOZORA, RICHARD	1999	FORD	EXPLORER	UTILITI	SPOR	2WD		458	10,300	800	01/01/1999	60	0	01/01/2004	
KRAMEDAS, KENNETH	1999	FORD	EXPLORER	UTILITI	XL	2WD	4.0L V6	374	11,200	900	08/28/1999	60	0	08/28/2004	
LANSIDEL, MARK	1999	FORD	EXPLORER	UTILITI		4WD		481	13,000	1,000	06/05/1999	60	0	06/05/2004	
NEILSON, ALLEN	1999	FORD	EXPLORER	UTILITI	XL	2WD		574	11,400	900	09/06/1999	48	0	09/06/2003	
SENH, MARK	1999	FORD	EXPLORER	UTILITI	XL	2WD	4.0L V6	337	10,800	1,300	01/10/2000	60	0	01/10/2005	
WATTERSON, JOSEPH	1999	FORD	EXPLORER	UTILITI		4WD	4.0L V6	439	13,500	400	10/03/1999	60	0	10/03/2004	

DATE RANGE

Choose a Range

All Dates

Maximum Days Left

0

Show Only Open Deals

In Market

VEHICLE

Year

1999

Make

EXPLORE

Model

EXPLORE

Body

EXPLORE

Trim

EXPLORE

New/Used

EXPLORE

Equity

1000

Max Payoff

EXPLORE

ADVANCED SEARCH

Customer

EXPLORE

Ward

EXPLORE

Salesperson

EXPLORE

Source

EXPLORE

Deal Type

FINANCE

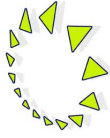
Import Desc.

EXPLORE

Zip Code

EXPLORE

NAME	YEAR	MAKE	MODEL	BODY	TRIM	DRIVE	ENGINE	PAYMENT	EST. PAYOFF	EST. EQUITY	START DATE	TERM	EXT.	SCHED TERM	ACTUAL T
ADAMS, JAMES	1999	FORD	EXPLORER	UTILITI	XL	2WD		456	11,000	1,500	12/18/1998	60	0	01/18/2004	
BAJWA, RUSSELL	1999	FORD	EXPLORER	UTILITI	XL	2WD		635	10,600	1,800	06/26/1999	48	0	06/26/2003	
BERCAW, ALYCE	1999	FORD	EXPLORER	UTILITI	SPOR	2WD		606	9,500	1,800	05/14/1999	48	0	05/14/2003	
CAMPBELL JR, BARBAR	1999	FORD	EXPLORER	UTILITI	SPOR	2WD		377	9,900	1,200	05/15/1999	60	0	05/15/2004	
CATON, PHILLIP	1999	FORD	EXPLORER	UTILITI	XL	2WD		675	10,600	1,800	05/20/1999	48	0	05/20/2003	
DILLINGHAM, BEN	1999	FORD	EXPLORER	UTILITI	SPOR	2WD		400	3,600	7,500	10/29/1999	36	0	10/29/2002	
GIBIAN, ANGEL	1999	FORD	EXPLORER	UTILITI	XL	2WD		469	11,000	1,200	02/28/1999	60	0	02/28/2004	
GREAVES, ALLEN	1999	FORD	EXPLORER	UTILITI	XL	2WD		540	10,000	2,300	08/15/1999	48	0	08/15/2003	
LANSIDEL, MARK	1999	FORD	EXPLORER	UTILITI		4WD		481	13,000	1,000	06/05/1999	60	0	06/05/2004	
SENH, MARK	1999	FORD	EXPLORER	UTILITI	XL	2WD	4.0L V6	337	10,800	1,300	01/10/2000	60	0	01/10/2005	



Phase Two

Make Contact



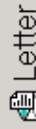
Save



Save/Next



Cancel



Letter



Huddle



Recap



Activity

James Adams

1307 Maple St., Hometown, Ca 90000

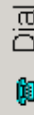
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Start:12/18/1998 Term:60 Sch. Term:01/18/2004 Source:FINANCE - FINANCE

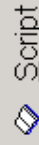
JAMES WORKS AT ABC AUTO BODY (PARTS CUSTOMER)Est. Payoff: 11000 Est. Equity: 1500 Data Source:Ford_Cust_In_Equity - 03/15/2002 **Pmt: 455.71****In Market**Preferred Contact **N/a**☒ Home: 818-555-1212☐ Work: 818-555-1213☒ Dial 1☒ Include Area Code

CALL STATUS

COMPLETED CALL RESULT



Dial



Script

1-818-555-1212**RETAIL RECONNECT/APPT C**

NOTE

Date/Time

User

Note

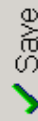
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DAVID

FORD_CUST_IN_EQUITY - 03/15/2002

Current Balance: 9799.86

Payments Made: 34



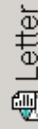
Save



Save/Next



Cancel



Letter



Huddle



Recap



Activity

James Adams

1307 Maple St., Hometown, Ca 90000

1999 Ford Explorer Utility Salesperson: Jones, Rick

Start:12/18/1998 Term:60 Sch. Term:01/18/2004 Source:FINANCE - FINANCE

JAMES WORKS AT ABC AUTO BODY (PARTS CUSTOMER)Est. Payoff: 11000 Est. Equity: 1500 Data Source:Ford_Cust_In_Equity - 03/15/2002 **Pmt: 455.71****In Market**Preferred Contact **N/a**☒ Home: 818-555-1212☐ Work: 818-555-1212☒ Dial 1☒ Include Area Code

CALL STATUS

COMPLETED CALL RESULT

Dial

Script

1-818-555-1212**RETAIL RECONNECT/APPT C**

NOTE

Date/Time

User

Note

03/15/2002 08:52 AM

DAVID

FORD_CUST_IN_EQUITY - 03/15/2002

Current Balance: 9799.86

Payments Made: 34



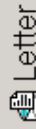
Save



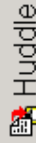
Save/Next



Cancel



Letter



Huddle



Recap



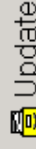
Activity

James Adams

1307 Maple St., Hometown, Ca 90000

1999 Ford Explorer Utility Salesperson: Jones, Rick

Start:12/18/1998 Term:60 Sch. Term:01/18/2004 Source:FINANCE - FINANCE

JAMES WORKS AT ABC AUTO BODY (PARTS CUSTOMER)Est. Payoff: 11000 Est. Equity: 1500 Data Source:Ford_Cust_In_Equity - 03/15/2002 **Pmt: 455.71****In Market**

Update

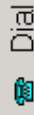


Privacy

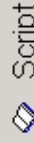
Preferred Contact **N/a**☒ Home: 818-555-1212☐ Work: 818-555-1213☒ Dial 1☒ Include Area Code

CALL STATUS

COMPLETED CALL RESULT



Dial



Script

1-818-555-

NOTE

RETAIL RECONNECT/APPT C**APPT CONFIRMATION SCRIPT****CUSTOMER CONTACT****LEASE OPTIONS CALL****NO SHOW FOLLOW UP****RETAIL RECONNECT/APPT CAL****SAMPLE SURVEY CALL****UNSOLD FOLLOW-UP -- 3RD PAR****WE NEED YOUR USED CAR**

Date/Time

03/15/2002 08:52 AM

User

DAVID

Note

FORD_CUST_IN_EQUIT

Current Balance: 9799.86

Payments Made: 34

✓ Save and Exit

✕ Cancel

 Print Update Schedule Activity

James Adams - 1999 Ford Explorer - Term: 60 Expires: 01/18/2004
Home: 818-555-1212 Work: 818-555-1213

Est. Payoff: 11000 Est. Equity: 1500 Pmt: 455.71

QUESTION (Short)

GREETING

REALIZE EQUITY?

CONSIDER NEW/NEARLY NEW?

FUTURE CONTACT

RATE VEHICLE

MILES

MAINTENANCE

AGREEMENT & THANK YOU

ANS. MACHINE MESSAGE

QUESTION

Good Afternoon, may I speak to James Adams?**Hi James this is David Krier calling from Hometown Motors.****If this is a good time for you...****Let me tell you *why* I'm calling.**

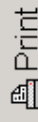
RESPONSE

⬆ Previous Question

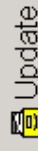
Next Question ⬇

✓ Save and Exit

✗ Cancel



Print



Update



Schedule Activity

James Adams - 1999 Ford Explorer - Term: 60 Expires: 01/18/2004
Home: 818-555-1212 Work: 818-555-1213

Est. Payoff: 11000 Est. Equity: 1500 Pmt: 455.71

QUESTION (Short)

GREETING

REALIZE EQUITY?

CONSIDER NEW/NEARLY NEW?

FUTURE CONTACT

RATE VEHICLE

MILES

MAINTENANCE

AGREEMENT & THANK YOU

ANS. MACHINE MESSAGE

QUESTION

Let me explain what that could mean to you.

You could enjoy driving a new or nearly new vehicle for the same payment or maybe even less that what it is costing you to drive your 1999 Explorer.

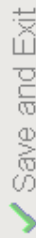
Is that something you would consider?

RESPONSE

Good timing, they were thinking about a new vehicle

⬆ Previous Question

Next Question ⬇



Save and Exit



Cancel



Print

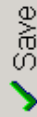


Update



Schedule Activity

Update Customer Window



Save



Cancel

Name

ADAMS, JAMES

Dear

JAMES

Address 1

1307 MAPLE ST.

Address 2

City

HOMETOWN

St

CA

Zip

90000

Home

818-555-1212

Work

818-555-1213

Cell

- -

E Mail

Salesperson 1

JONES, RICK

Preferred Contact

Comment

JAMES WORKS AT ABC AUTO BODY (PARTS CUSTOMER)

RESPONSE

Previous Question

Next Question

 Save and Exit Cancel Print Update Schedule Activity

James Adams - 1999 Ford Explorer - Term: 60 Expires: 01/18/2004
Home: 818-555-1212 Work: 818-555-1213

Est. Payoff: 11000 Est. Equity: 1500 Pmt: 455.71

QUESTION (Short)

GREETING

REALIZE EQUITY?

CONSIDER NEW/NEARLY NEW?

FUTURE CONTACT

RATE VEHICLE

MILES

MAINTENANCE

AGREEMENT & THANK YOU

ANS. MACHINE MESSAGE

QUESTION

Let's set a time for you to come in so we can review all the options available to you.

Would you prefer the beginning or end of the this week? (pick a day, offer two times AM/PM).

Great! We will see you on (day) at (time). Do you remember how to get here or would you like directions?

Thank you for your time.

RESPONSE

 Previous QuestionNext Question 

55.71

Add/Edit Activity Window

Activity

APPOINTMENT

Regarding

OPTIONS

Date

04/27/2002

Time

Scheduled For

DAVID

Scheduled By

DAVID

OK

Cancel

April, 2002

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7	8	9	10	11

Today: 4/22/2002

Pending Activities for: Saturday 04/27/2002

Customer	Time	Activity	Regarding	Scheduled For
DILLINGHAM, BEN	09:00 AM	APPOINTMENT	OPTIONS	DAVID
SENH, MARK	10:00 AM	APPOINTMENT	OPTIONS	DAVID
LANSIDEL, MARK	02:00 PM	APPOINTMENT	OPTIONS	DAVID
CATON, PHILLIP		TO DO	CHECK ON ORDERED VEHICLE	DAVID

Add/Edit Activity Window

APPOINTMENT

Activity

Regarding

Date

Scheduled For

DAVID

Customer

DILLINGHAM

SENH, MARK

LANSIDEL, M

CATON, PHIL

Set a confirmation call for this appointment?

APPOINTMENT DATE

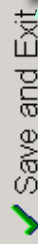
04/27/2002

CONFIRMATION CALL DATE

04/26/2002

 Yes

No



Save and Exit



Cancel



Print



Update



Schedule Activity

James Adams - 199 Ford Explorer - Term: 60 Expires: 01/18/2004
Home: 818-555-1212 Work: 818-555-1213

Est. Payoff: 11000 Est. Equity: 1500 Pmt: 455.71

QUESTION (Short)

GREETING

REALIZE EQUITY?

CONSIDER NEW/NEARLY NEW?

FUTURE CONTACT

RATE VEHICLE

MILES

MAINTENANCE

AGREEMENT & THANK YOU

ANS. MACHINE MESSAGE

QUESTION

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Would you prefer the beginning or end of the this week? (pick a day, offer two times AM/PM).

Great! We will see you on (day) at (time). Do you remember how to get here or would you like directions?

Thank you for your time.

RESPONSE

Previous Question

Next Question



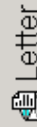
Save



Save/Next



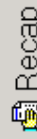
Cancel



Letter



Huddle



Recap



Activity

James Adams

1307 Maple St., Hometown, Ca 90000

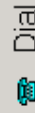
1999 Ford Explorer Utility Salesperson: Jones, Rick

Start:12/18/1998 Term:60 Sch. Term:01/18/2004 Source:FINANCE - FINANCE

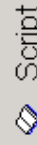
JAMES WORKS AT ABC AUTO BODY (PARTS CUSTOMER)Est. Payoff: 11000 Est. Equity: 1500 Data Source:Ford_Cust_In_Equity - 03/15/2002 **Pmt: 455.71****In Market**Preferred Contact **N/a**☒ Home: 818-555-1212☐ Work: 818-555-1213☒ Dial 1☒ Include Area Code

CALL STATUS

COMPLETED CALL RESULT



Dial

1-818-555-1212

Script

RETAIL RECONNECT/APPT C

NOTE

Date/Time

User

Note

04/22/2002 04:21 PM

DAVID

(SCRIPT-NAME: RETAIL RECONNECT/APPT CALL)

CONSIDER NEW/NEARLY NEW?: Good timing. they were thinking about another vehicle

FUTURE CONTACT: [Yes]

RATE VEHICLE: [8] Great truck - but need something larger because they have a new child.

MILES: Approx 32,000 miles

MAINTENANCE: All service done at Hometown... Updated address

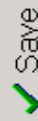
AGREEMENT & THANK YOU: Set appt for Saturday

Call Duration: 19:00 minutes

04/22/2002 04:19 PM

DAVID

Activity Scheduled: PHONECALL - CONFIRM - 04/26/2002 Confirm Appt on 04/27/2002



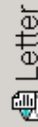
Save



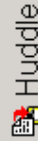
Save/Next



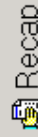
Cancel



Letter



Huddle



Recap



Activity

James Adams

1307 Maple St., Hometown, Ca 90000

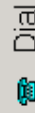
1999 Ford Explorer Utility Salesperson: Jones, Rick

Start:12/18/1998 Term:60 Sch. Term:01/18/2004 Source:FINANCE - FINANCE

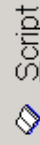
JAMES WORKS AT ABC AUTO BODY (PARTS CUSTOMER)Est. Payoff: 11000 Est. Equity: 1500 Data Source:Ford_Cust_In_Equity - 03/15/2002 **Pmt: 455.71****In Market**Preferred Contact **N/a**☒ Home: 818-555-1212☐ Work: 818-555-1213☒ Dial 1☒ Include Area Code

CALL STATUS

COMPLETED CALL RESULT



Dial

1-818-555-1212

Script

RETAIL RECONNECT/APPT C

NOTE

Date/Time

User

Note

04/22/2002 04:21 PM

DAVID

(SCRIPT-NAME: RETAIL RECONNECT/APPT CALL)

CONSIDER NEW/NEARLY NEW?: Good timing. they were thinking about another vehicle

FUTURE CONTACT: [Yes]

RATE VEHICLE: [8] Great truck - but need something larger because they have a new child.

MILES: Approx 32,000 miles

MAINTENANCE: All service done at Hometown... Updated address

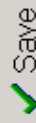
AGREEMENT & THANK YOU: Set appt for Saturday

Call Duration: 19:00 minutes

04/22/2002 04:19 PM

DAVID

Activity Scheduled: PHONECALL - CONFIRM - 04/26/2002 Confirm Appt on 04/27/2002



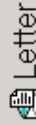
Save



Save/Next



Cancel



Letter



Huddle



Recap



Activity

James Adams

1307 Maple St., Hometown, Ca 90000

1999 Ford Explorer Utility Salesperson: Jones, Rick

Start:12/18/1998 Term:60 Sch. Term:01/18/2004 Source:

JAMES WORKS AT ABC AUTO BODY (PARTS CUSTOMER)

Est. Payoff: 11000 Est. Equity: 1500 Data Source:Ford_Cust_In

Preferred Contact

N/a

☐ Home: 818-555-1212☐ Work: 818-555-1213☒ Dial 1☒ Include Area Code

CALL STATUS

COMPLETED CALL RESULT

1-818-555-1213

NOTE

Date/Time

User

Note

04/22/2002 04:21 PM

DAVID

(SCRIPT-NAME: RETAIL R
CONSIDER NEW/NEARLY
FUTURE CONTACT: [Yes]
RATE VEHICLE: [8] Great t
MILES: Approx 32,000 miles
MAINTENANCE: All service done at Hometown... Updated address
AGREEMENT & THANK YOU: Set appt for Saturday
Call Duration: 19:00 minutes

04/22/2002 04:19 PM

DAVID

Activity Scheduled: PHONECALL - CONFIRM - 04/26/2002 Confirm Appt on 04/27/2002

120 Day Letter

Appointment Letter

Can't Contact

Envelope

Ford Customer in Equity

Lease Expired

Lease Term Confirmation

New Opportunity

Odometer Statement

Reconnect Thank You

Thanks for Visiting

New Letter



Hometown Ford Sales

1234 Main St.
Hometown, USA 12345
818-555-1212
Fax: 818-555-1212

March 15, 2002

James Adams
1307 Maple St.
Hometown, CA 90000

Dear James;

For your convenience, we wanted to provide you with a reminder appointment ...

Appointment scheduled for: **Saturday, Mar. 23 @**

I look forward to seeing you then! Thank you.

Sincerely,

Hometown Motors

John Jones
Options Specialist



Appointment reminder:

Saturday, Mar. 23rd 11:00 AM
I look forward to seeing you then!

John Jones
Options Specialist

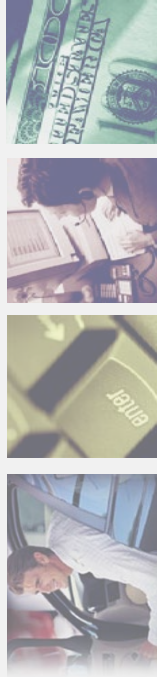


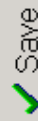
Hometown Ford
Sales

1234 Main St.
Hometown, USA 12345
818-555-1212
Fax: 818-555-1212



James Adams
1307 Maple St.
Hometown, CA 90000





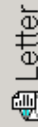
Save



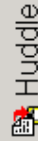
Save/Next



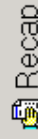
Cancel



Letter



Huddle



Recap



Activity

James Adams

1307 Maple St., Hometown, Ca 90000

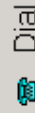
1999 Ford Explorer Utility Salesperson: Jones, Rick

Start:12/18/1998 Term:60 Sch. Term:01/18/2004 Source:FINANCE - FINANCE

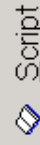
JAMES WORKS AT ABC AUTO BODY (PARTS CUSTOMER)Est. Payoff: 11000 Est. Equity: 1500 Data Source:Ford_Cust_In_Equity - 03/15/2002 **Pmt: 455.71****In Market**Preferred Contact **N/a**☒ Home: 818-555-1212☐ Work: 818-555-1213☒ Dial 1☒ Include Area Code

CALL STATUS

COMPLETED CALL RESULT



Dial

1-818-555-1212

Script

RETAIL RECONNECT/APPT C

NOTE

Date/Time

User

Note

04/22/2002 04:21 PM

DAVID

(SCRIPT-NAME: RETAIL RECONNECT/APPT CALL)

CONSIDER NEW/NEARLY NEW?: Good timing. they were thinking about another vehicle

FUTURE CONTACT: [Yes]

RATE VEHICLE: [8] Great truck - but need something larger because they have a new child.

MILES: Approx 32,000 miles

MAINTENANCE: All service done at Hometown... Updated address

AGREEMENT & THANK YOU: Set appt for Saturday

Call Duration: 19:00 minutes

04/22/2002 04:19 PM

DAVID

Activity Scheduled: PHONECALL - CONFIRM - 04/26/2002 Confirm Appt on 04/27/2002



HUDDLE / STRATEGY WORKSHEET **JAMES ADAMS**

James Adams
1307 Maple St.
Hometown, CA 90000

Hm: 818-555-1212

Wk: 818-555-1213

Cell:

1999 FORD EXPLORER

Salesperson..... JONES, RICK

Sale Date..... 03/18/1999

Scheduled End Date..... 04/18/2004

Presented Date.....

Term..... 60

Payment (incl Tax)..... 455.71 APR: 6.90

Sell Price / Cap Cost..... 31,642.87

Option Amount..... 0.00

Orig Down Payment..... 0.00

Security Deposit.....

Source..... FINANCE Allow. Miles:

Acct #..... ABC123AAAA

Deal #.....

Estimated Payoff..... 11,000.00 Estimated Payments Elapsed 37

James works at ABC Auto Body (parts customer)**PENDING ACTIVITIES**

PHONECALL - CON 04/26/2002 Confirm Appt on 04/27/2002 11:00 AM

APPOINTMENT 04/27/2002 11:00 AM OPTIONS

NOTES**04/22/2002 10:34 AM DAVID**

(SCRIPT-NAME: RETAIL RECONNECT/APPT CALL)
 REALIZE EQUITY?: Good timing, they were thinking about a new vehicle
 CONSIDER NEW/NEARLY NEW?: [Interested]
 RATE VEHICLE: [8] Great truck, but would like better gas mileage
 MILES: 32000 miles
 MAINTENANCE: Has done all maintenance here
 AGREEMENT & THANK YOU: Set appt
 Call Duration: 13.00 minutes

04/22/2002 10:32 AM DAVID

Activity Scheduled: APPOINTMENT - 04/27/2002 11:00 AM OPTIONS

03/15/2002 8:52 AM DAVID

FORD_CUST_IN_EQUITY - 03/15/2002
 Current Balance: 9799.86
 Payments Made: 34

↩ Customer Information

↩ Vehicle/Deal Information

↩ Scheduled Activities

↩ Notes and Contacts

1FMZU32E2XZA91592

Payoff:

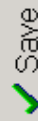
Good Thru:

Rating:

Current Mileage:

Equity Estimate ?:

Motivation ?:



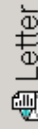
Save



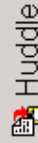
Save/Next



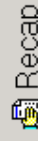
Cancel



Letter



Huddle



Recap



Activity

James Adams

1307 Maple St., Hometown, Ca 90000

1999 Ford Explorer Utility Salesperson: Jones, Rick

Start:12/18/1998 Term:60 Sch. Term:01/18/2004 Source:FINANCE - FINANCE

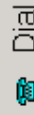
JAMES WORKS AT ABC AUTO BODY (PARTS CUSTOMER)

Est. Payoff: 11000 Est. Equity: 1500 Data Source:Ford_Cust_In_Equity - 03/15/2002

Pmt: 455.71**In Market**Preferred Contact **N/a**☒ Home: 818-555-1212☐ Work: 818-555-1213☒ Dial 1☒ Include Area Code

CALL STATUS

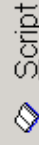
Call Completed



Dial

1-818-555-1212

NOTE



Script

RETAIL RECONNECT/APPT C

Busy

Call Completed

Incoming Call

Left Message - Machine

Left Message - Person

No Answer

Not Available

Wrong Number



(ALL)

they were thinking about another vehicle

something larger because they have a new child.

Updated address

Sunday

4/26/2002 Confirm Appt on 04/27/2002



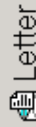
Save



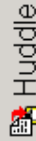
Save/Next



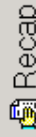
Cancel



Letter



Huddle



Recap



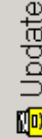
Activity

James Adams

1307 Maple St., Hometown, Ca 90000

1999 Ford Explorer Utility Salesperson: Jones, Rick

Start:12/18/1998 Term:60 Sch. Term:01/18/2004 Source:FINANCE - FINANCE

JAMES WORKS AT ABC AUTO BODY (PARTS CUSTOMER)Est. Payoff: 11000 Est. Equity: 1500 Data Source:Ford_Cust_In_Equity - 03/15/2002 **Pmt: 455.71****In Market**

Update



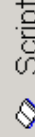
Privacy

Preferred Contact

N/a



Dial



Script

☒ Home: 818-555-1212☐ Work: 818-555-1213☒ Dial 1☒ Include Area Code

CALL STATUS

CALL COMPLETED

COMPLETED CALL RESULT

APPOINTMENT - SALES

AFTERMARKET OPPORTUNITY

APPOINTMENT - SALES

APPOINTMENT - SERVICE

CALLBACK IN ?? DAYS

CUSTOMER HUNG UP

FOLLOW-UP

ISSUE NEEDS TO BE RESOLVED

MOVED DISTANT

1-818-555-1212**RETAIL RECONNECT/APPT C**

NOTE

RECONNECT/APPT CALL)

: Good timing, they were thinking about another vehicle

but need something larger because they have a new child.

t Hometown... Updated address
appt for Saturday

CONFIRM - 04/26/2002 Confirm Appt on 04/27/2002



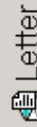
Save



Save/Next



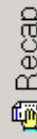
Cancel



Letter



Huddle



Recap



Activity

James Adams

1307 Maple St., Hometown, Ca 90000

1999 Ford Explorer Utility Salesperson: Jones, Rick

Start:12/18/1998 Term:60 Sch. Term:01/18/2004 Source:FINANCE - FINANCE

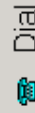
JAMES WORKS AT ABC AUTO BODY (PARTS CUSTOMER)Est. Payoff: 11000 Est. Equity: 1500 Data Source:Ford_Cust_In_Equity - 03/15/2002 **Pmt: 455.71****In Market**Preferred Contact **N/a**☐ Home: 818-555-1212☐ Work: 818-555-1213☒ Dial 1☒ Include Area Code

CALL STATUS

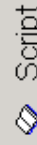
CALL COMPLETED

COMPLETED CALL RESULT

APPOINTMENT - SALES



Dial



Script

1-818-555-1212**RETAIL RECONNECT/APPT C**

NOTE

Date/Time

User

Note

04/22/2002 04:21 PM

DAVID

(SCRIPT-NAME: RETAIL RECONNECT/APPT CALL)

CONSIDER NEW/NEARLY NEW?: Good timing, they were thinking about another vehicle

FUTURE CONTACT: [Yes]

RATE VEHICLE: [8] Great truck - but need something larger because they have a new child.

MILES: Approx 32,000 miles

MAINTENANCE: All service done at Hometown... Updated address

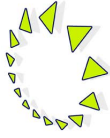
AGREEMENT & THANK YOU: Set appt for Saturday

Call Duration: 19:00 minutes

04/22/2002 04:19 PM

DAVID

Activity Scheduled: PHONECALL - CONFIRM - 04/26/2002 Confirm Appt on 04/27/2002



Phase Three

Sell the Vehicle



Value Added Worksheet
JAMES ADAMS - 1999 FORD EXPLORER

Payments 60 @ 455.71

Three Cycles in the Life of a Vehicle

Gas and Go - The Joy of New -- Up to 3 Years -- Warranty

Gas
Change Oil
Rotate Tires
Hassle Free Driving
Best part of any Vehicles Life

Maintenance Cycle -- 2 to 5 Years -- Warranty ???

Item	Amount	When
Brakes		
Tires		
Alignment		
Belts & Hoses		
Wiper Blades		
Filters & Flushes		
30,000 Mile Service		
Transmission Service		

Total

Repair Cycle -- 4 Years and Up -- No Warranty

Item	Amount	When
Maintenance Items... Plus		
60,000 Service		
Transmission		
Air Conditioner		
Struts		
Exhaust System		
Fuel Injectors		
Power Windows/Locks		
Radiator		

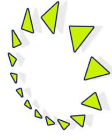
Total

↩ Gas and Go Cycle

↩ Maintenance Cycle

↩ Repair Cycle





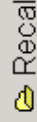
Phase Four

Track Results

& Follow-up



New



Recall

Main

Quick

QuickSearch

Name

Customer Info

ADAMS, JAMES
1307 MAPLE ST.
HOMETOWN, CA 90

Home: 818-555-1211
Work: 818-555-1211

Salesperson: JONES, RICK

NEW 1999 FORD EXPLORER UTILITY XL 2WD
1FMZU32E2XZA91592 Acct # ABC123AAAA Deal #

Type: FINANCE	FINANCE	Start Date:	12/18/1998
Term:	60	End Date:	01/18/2004
Payment:	455.71		
Down/Cap Red:	0		
Elapsed Months:	40	Est. Equity:	1,500
Est. Payoff:	11,000	Equity Date:	02/28/2002

Customer Status: OPEN

Closed Date: N/A

Comment: JAMES WORKS AT ABC AUTO BODY (PARTS CUSTOMER)

Import Source: Ford_Cust_In_Equity - 03/15/2002

Print / Preview Reports

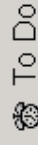
Activities Pending

Activities Completed

Call Results



Call



To Do



Exit

Activities

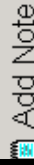
Notes

Results

VIN



GO



Add Note



Add Activity

Scheduled Activities

6/2002 PHONECALL - CONFIRM RE:
firm Appt on 04/27/2002
7/2002 APPOINTMENT RE: OPTIONS

Notes

04/22/2002 04:29 PM -- DAVID
DIALED: 1-818-555-1212 (Home)
RESULT: APPOINTMENT - SALES
STATUS: CALL COMPLETED

04/22/2002 04:21 PM -- DAVID
(SCRIPT-NAME: RETAIL RECONNECT/APPT
CALL)
CONSIDER NEW/NEARLY NEW?: Good
timing, they were thinking about another
vehicle
FUTURE CONTACT: [Yes]
RATE VEHICLE: [8] Great truck - but need
something larger because they have a new
child.

CALL RESULTS REPORT **HOMETOWN FORD** **From 12/01/2001 To 01/09/2002**



CALLS ON: December 27, 2001

Call Completed

User	Time	Customer	Vehicle	Result
DAVID	2:38 PM	ANTONINI, MARCIA	1999 FORD EXPLORER	Appointment - Sales
DAVID	2:40 PM	CONTE, VINCE	1999 FORD EXPLORER	Callback In 30 Days
Total:	2			

Left Message - Machine

User	Time	Customer	Vehicle	Result
DAVID	2:42 PM	COURTNEY, AILEEN	1999 FORD EXPLORER	(blank)
Total:	1			
>>> 3 TOTAL RESULTS FOR: 12/27/2001				

CALLS ON: December 31, 2001

Busy

User	Time	Customer	Vehicle	Result
DAVID	2:01 PM	REIMEL JR, BEN	1999 FORD EXPLORER	(blank)
Total:	1			

Call Completed

User	Time	Customer	Vehicle	Result
DAVID	2:03 PM	SHANK, TERRY	1999 FORD EXPLORER	Appointment - Sales
DAVID	2:04 PM	TOWBAR, LYNN	1999 FORD EXPLORER	Appointment - Sales
DAVID	2:08 PM	BALLARD, JESSICA	1999 FORD EX250	Appointment - Sales
DAVID	2:03 PM	SUTTERLY, ANGEL	1999 FORD EXPLORER	Appointment - Service
DAVID	2:08 PM	BABETSKI, AIDA	1999 FORD F150	Appointment - Service
DAVID	2:04 PM	VANDERVEER, SUSAN	1999 FORD EXPLORER	Callback In 180 Days
DAVID	2:08 PM	MCCAULEY, JESSICA	1999 FORD EXPLORER	Issue Needs To Be Resolved
Total:	7			

Left Message - Person

User	Time	Customer	Vehicle	Result
DAVID	2:02 PM	SENH, MARK	1999 FORD EXPLORER	(blank)
Total:	1			

01/09/2002 5:00 PM

Page 3



CALL RESULTS REPORT **HOMETOWN FORD** **From 12/01/2001 To 01/09/2002**

SUMMARY - Call Results

Status: Busy 1 out of 15 6.67%

Status: Call Completed 10 out of 15 66.67%

Appointment - Sales 5 out of 10 50.00%

Appointment - Service 2 out of 10 20.00%

Callback In 30 Days 1 out of 10 10.00%

Callback In 180 Days 1 out of 10 10.00%

Issue Needs To Be Resolved 1 out of 10 10.00%

Status: Left Message - Machine 1 out of 15 6.67%

Status: Left Message - Person 1 out of 15 6.67%

Status: Not Available 1 out of 15 6.67%

Callback In 11 Days 1 out of 1 100.00%

Status: Wrong Number 1 out of 15 6.67%

TOTAL CALLS:
 Unique Customers: 15
 New Lease: 1
 New Purchase: 2
 Used Lease: 0
 Used Purchase: 0
 Total Sold/Leased: 3

Renewal Results from 01/01/2001 Actual Termination Report

07/19/2001 3:12 PM

Page 2

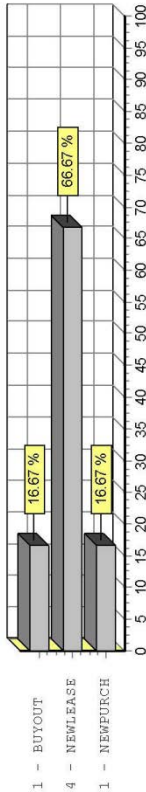
Renewal Results from 01/01/2001 to 01/31/2001 Actual Termination Report

Customer Vehicle Term Ext. Sch Term Term Date
ROTHARMEL,BILL & JAN 1999 Mercury Mystique 24 08/08/2001 01/05/2002 Acct
 VIN: Source: FMCC LEASE
 Salesper 1: WILLIAMS,BILL Salesper 2:

1 BUYOUT - Customer Bought Leased Vehicle 16.67%

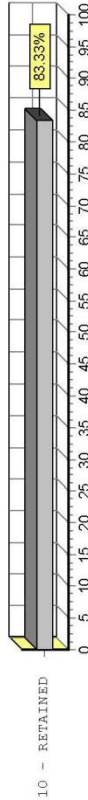
6 8,641 1,233 Total GP = 9,874

CUSTOMER RENEWAL RESULTS



RETENTION %

12 Total Terminations
 0 Excluded (No Result, Dead File, Moved Far, or Repo)
 12 Eligible For Retention



Customer Vehicle Term Ext. Sch Term Term Date
DILGER,TOM 1999 Ford Explorer 24 10/08/2001 01/01/2002 Acct
 VIN: 1FABP32X123123123 Source: FMCC LEASE
 Salesper 1: SMITH, DONNA Salesper 2: KATHY
TIMES, NEIL 1999 Lincoln Continental SD 36 02/15/2002 01/05/2002 Acct
 VIN: 12312312312312312 Source: FMCC LEASE
 Salesper 1: SMITH,JOE Salesper 2:
 3 Time Repeat
ROBINSON,SAMUEL 1999 Mercury Villager SW 25 10/08/2001 01/10/2002 Acct
 VIN: Source: FMCC LEASE
 Salesper 1: JONES,JIM Salesper 2:
PAULS,DENNIS 1999 Ford Contour SDN 24 10/29/2001 01/15/2002 Acct
 VIN: Source: FMCC LEASE
 Salesper 1: SMITH,JOE Salesper 2:
 Repeat Customer 3 Times

4 NEWLEASE - Leased a New Vehicle from Us 66.67%

Gross Gross Cust Vehicle

07/20/2001 2:33 PM

Page 1

Renewal Results by Salesperson 01/01/2001 to 07/31/2001

Salesperson	Terminations	Ineligible	Opportunities	Retained	%	Results Graph
BILL SMITH	4	0	4	2	50%	
BILL WILLIAMS	15	0	15	9	60%	
GEORGE JONES	8	0	8	5	62%	
JOHN JONES	6	0	6	5	83%	
JOHN SMITH	2	0	2	1	50%	
TOM SMITH	9	0	9	7	78%	

SURVEY RESULTS REPORT from 07/01/2001 to 07/31/2001
SAMPLE SURVEY CALL

SURVEYS FOR: July 19, 2001

Caller	Time	Customer	Vehicle	Salesperson
DAVID	3:25 PM	TIMES, NEIL		
LIKE VEHICLE		Loves car.		
GREETED PROMPTLY		Within 10 Minutes		
SALESPERSON		YES		
FINANCE DEPT		Extremely Helpful		
DELIVERY		Yes		
FOLLOWUP		Yes		
DAVID	3:26 PM	PRATT, KAREN		
GREETED PROMPTLY		Within 5 Minutes		
SALESPERSON		YES		
FINANCE DEPT		Helpful		
DELIVERY		No - Gas not full, but they said it		
FOLLOWUP		Yes		
LIKE VEHICLE		Love the car		
GREETED PROMPTLY		Within 5 Minutes		
SALESPERSON		YES		
FINANCE DEPT		Extremely Helpful		
DELIVERY		Yes		
FOLLOWUP		Yes		
DAVID	3:27 PM	MADDEN, JOHN & SUSAN		
LIKE VEHICLE		Great car. Would like to add a b		
GREETED PROMPTLY		Within 10 Minutes		
SALESPERSON		YES		
FINANCE DEPT		Very Helpful		
DELIVERY		Yes		
FOLLOWUP		Yes		
>>>>	3	TOTAL SURVEYS FOR		

07/19/2001 3:29 PM

Page 2

SURVEY RESULTS REPORT from 07/01/2001 to 07/31/2001
SAMPLE SURVEY CALL

If I could, I would like to ask you a couple of questions about your treatment at {DEALER NAME}.

Were you greeted promptly when you arrived?

2 Within 5 Minutes (50%)

2 Within 10 Minutes (50%)

4 RESPONSES

Was your Salesperson, {SALESPERSON1}, courteous and friendly?

4 YES [100%]

4 RESPONSES

Was the Finance Manager that helped you finilize the documents on your {VEHICLE MODEL} courteous and helpful?

2 Extremely Helpful (50%)

1 Very Helpful (25%)

1 Helpful (25%)

4 RESPONSES

Was your {VEHICLE MODEL} delivered Clean and with a full tank of Gas?

3 Yes (75%)

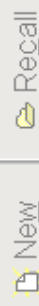
1 No (25%)

4 RESPONSES

Did your salesperson contact you within 72 hours of Delivery?

4 Yes [100%]

4 RESPONSES



New



Recall



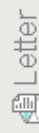
Save



Recap



Huddle



Letter



VScan



Call

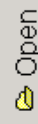


To Do

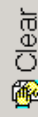


Exit

Pending Activities thru: Saturday 04/27/2002



Open



Clear



Edit



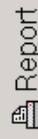
Call



Letter(s)



E-Mail



Report



Exit

Activities thru:

04/27/2002

Scheduled For

DAVID

Activity



Refresh

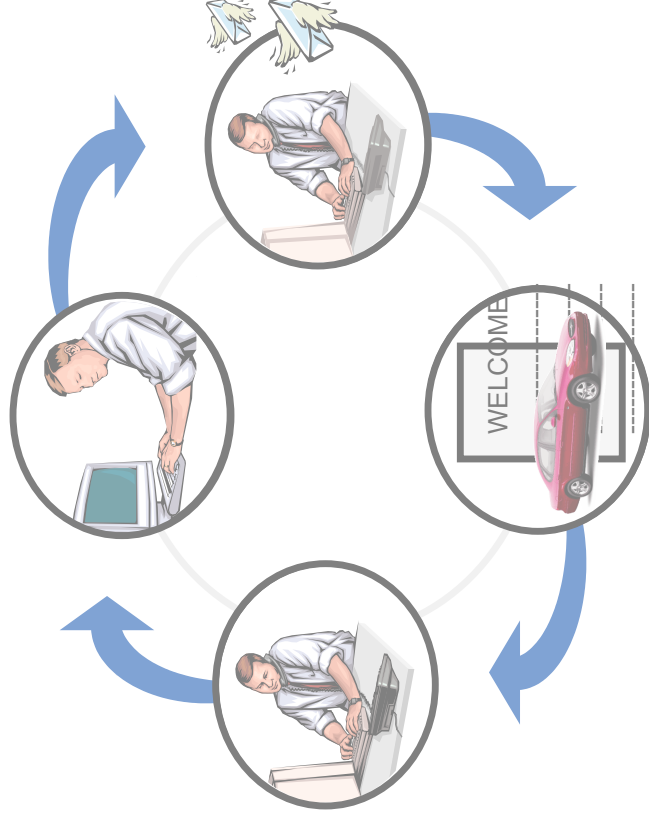
☒ Auto Activ.

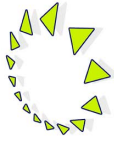
Customer	Date	Time	Activity	Comment	Scheduled For	Scheduled By	Salesperson
ADAMS, JAMES	04/26/2002		PHONECALL	Confirm Appt on 04/2	DAVID	DAVID	JONES, RICK
DILLINGHAM, BEN	04/26/2002	09:00 AM	APPOINTMENT	OPTIONS	DAVID	DAVID	WILLIAMS, BILL
SENH, MARK	04/26/2002		PHONECALL	CONFIRM APPT ON	DAVID	DAVID	
LANSIDEL, MARK	04/27/2002	02:00 PM	APPOINTMENT	OPTIONS	DAVID	DAVID	WILLIAMS, BILL
ADAMS, JAMES	04/27/2002		APPOINTMENT	OPTIONS	DAVID	DAVID	JONES, RICK
SENH, MARK	04/27/2002	10:00 AM	APPOINTMENT	OPTIONS	DAVID	DAVID	
CATON, PHILLIP	04/27/2002		TO DO	CHECK ON ORDERED	DAVID	DAVID	JOHNSON, JACK

7 recs



Process = Results





Pop-Up Question # 9

Do you have a Dedicated BDC Department ?

Yes

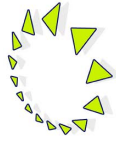
No



Pop-Up Question # 10

What are the Functions of your BDC?

- A. Walk-in / Phone Follow-up**
- B. Lease Renewal**
- C. Retail Trade Cycle Management**
- D. Internet**
- E. Combination of Above**



Training - Element 3



Key Management



In-Dealership Installation



Key Dealership Management Training

- Discuss what's in it for the Dealership
- What's in it for the Manager & Salespeople?
- Barriers and solutions to Success
- The Four Phases
- Telephone Scripts
- The Value Added Worksheet
- Role-play real scenarios





In-Dealership Installation

- Sales Meeting
- Install Process & Download Data
- Train on the Process
- Actual customer calls
- Customer Appointments
- Value Added Worksheet
- Management Strategy Sessions





GET READY

What needs to be done to prepare for the
In-Dealership Installation

Dedicate a Place

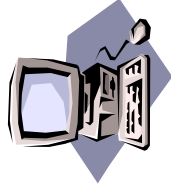


Dedicate a Person



- Full or Part Time
- Review Job Profiles
- Pay Plan

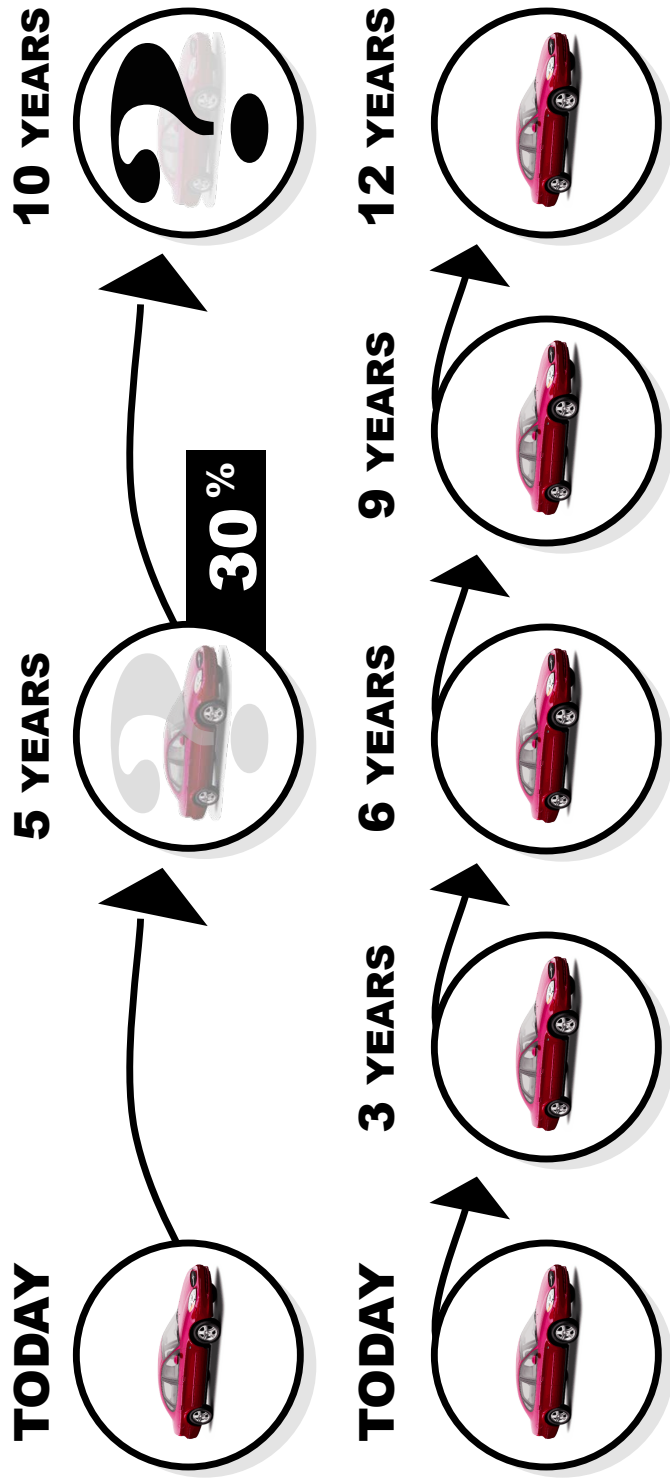
Dedicate a Computer



- Internet Access
- PC attached to DMS



RETAIL TRADE CYCLE MANAGEMENT



JOY of NEW

The Technology of Trading Cycles is as Important
as the Technology of the Product.

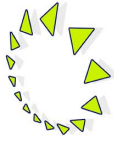


NEXT STEPS

Enroll

Start Training

Ford Motor Company



**RETAIL TRADE CYCLE
MANAGEMENT**



**Earn Back
Up to 75%
of Your Training Costs!**



Ford Division Earnback Program

- **\$ 10** per New Retail Ford Division Vehicle
- **\$ 75** per New Red Carpet Lease
- Earnback up to **75%** of Training Costs
- Up to **16** Days per Year of Training
- Installation and 1st 30 days of LSI Software



Ford Division Earnback Program

Dealership Selling 150 Retail and 17 RCL
New Ford Division vehicles in a Quarter

2 Training Days @ \$1,800 = \$ 3,600

Earnback Achieved: 150 X \$ 10 = \$ 1,500

17 X \$ 75 = \$ 1,275

\$ 2,775

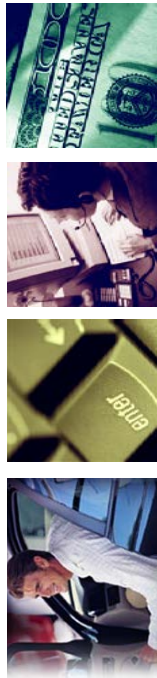
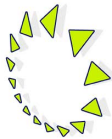
Maximum Earnback 75% = \$ 2,700

Net Training Cost = \$ 900



Ford Division Earnback Program

- Training Available on Program**
- **Retail Trade Cycle Management Process**
 - **Red Carpet Lease Trade Cycle Process**
 - **eBusiness Sales and Service Process**



RCL Program Headquarters: 800-336-0296
Fax # (248) 488-3682

FORD DIVISION ONLY IN-DEALERSHIP TRAINING ENROLLMENT FORM

DEALER INFORMATION

Distribution Code: _____ FWA Code: _____

Dealership Name: _____

Street Address: _____

City, State, Zip: _____

Phone Number: _____ Fax Number: _____

Dealer Principal: _____ Primary Contact: _____

E-mail Address: _____

TRAINING SELECTION

The In-Dealership Training Program conducted by Reynolds Transformation Solutions (RTS) provides on-site Red Carpet Lease, Retail Trade Cycle, and E-Business Sales & Service training. Please select and initial the annual number of training days.

_____ 6 Days _____ 10 Days _____ 12 Days _____ 16 Days

Please designate your estimated number of training days for each of the following sales opportunities.

	8 of Days	Initial
• Red Carpet Lease Sales & Renewal - Grow & maintain your lease portfolio	_____	_____
• Retail Trade Cycle Management - Manage your retail finance portfolio	_____	_____
• E-Business Sales & Service Process - Increase your online/offline customer portfolio	_____	_____

You may enhance your training agreement with additional training days as needed (earnback qualification is limited to 16 training days annually).

LAUNCH TRAINING

Dealers who have not previously participated in the In-Dealership Training Program or have not participated in the last 12 months may enroll in Trade Cycle Launch Training. The launch training provides Basic Trade Cycle Training for dealership personnel (sales consultants and managers) and Advanced Catalyst Training for dealership management. The first 4 days of launch training are at no cost to the eligible dealer.

(Please initial) I acknowledge my dealership qualifies for launch training and I wish to utilize the 4 days of Trade Cycle Launch Training in conjunction with my In-Dealership Training.

STURDIDY & EARNBACK QUALIFICATION

- Your dealership will receive \$10 earnback for each retail (non-lease) sale of a new Ford division vehicle written in the quarter that training was completed.
- Your dealership will receive \$75 earnback for each New Red Carpet Lease written in the quarter that training was delivered to offset your training costs.
- Your dealership may earnback up to a maximum of 75% of the \$1,800 per day training cost based on your new Red Carpet Lease volume during the quarter that training was received. Earnback under stands alone.
- Training subsidy and earnback is limited to 16 training days per year.

By signing this enrollment form, I agree to be billed quarterly for the actual training days received in that quarter. I understand that the cost per training day is \$1,800, less any earnback achieved, up to a maximum of \$1,350 per day. I understand that billing and earnback credits will be issued quarterly through my Dealer PMS Statement and that quarterly billing is based on actual training days received in the quarter. A minimum of 6 training days, not including any free days, must be taken over the next 12 months or I will be billed for the number of days less than that.

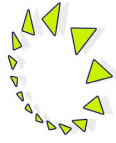
Note: Cancellation of scheduled training dates are counted as training days and subject to billing, unless written notification to RTS is received 10 business days prior to the scheduled training date.

Ford Motor Company reserves the right to revise the In-Dealership Training and Sturdy & Earnback Qualification upon written notification to the dealer, providing new terms and conditions, which will remain in place unless this agreement is terminated. Either party may terminate this agreement upon 30 days written notification. It is further agreed that dealer's written notification to RTS will require an exit meeting between RTS, Ford Credit, and the Dealer Principal.

Dealer Principal Signature
Or Signatory Authority:

Date:

Ford Motor Company



**RETAIL TRADE CYCLE
MANAGEMENT**



To Enroll

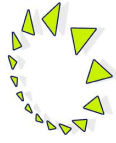
Forms available on Fdealer

- OR -

Call **Chris Kolody** @

800-221-4632 ext. 1146

Ford Motor Company



**RETAIL TRADE CYCLE
MANAGEMENT**



Q & A