

## Tips and Tricks

Follow the tips below to get the most out of your new CRM program. CRM was built specifically to work with Mitchell 1's Manager Program. Certain changes to Manager take place when you install CRM, and you should try to take advantage of these new features.

### 1. No Follow-up

Initially, you can expect to see some return mail based on outdated addresses. This is completely normal, 15% of the population moves each year according to the USPS. Use the No Follow-up feature to make sure you don't continue to send postcards to customers that recently moved.



Example of No Follow-up box checked

No Follow-up should also be used to exclude any vendor in the system that you don't want to solicit. If a vehicle is associated with a parts vendor or fleet, we will send a reminder based on the maintenance schedule. No Follow-up is a key piece of managing your new CRM program.

### 2. Mileage Updates

During the CRM extraction utility install, Mitchell 1 automatically installs a new mileage enforcement rule for Manager. This new feature requires the user to update mileage before leaving the order screen. You should always update mileage when you have a vehicle in. This ensures the CRM postcards and e-mails are accurately sent based on the latest information.



### 3. Collecting E-mails

It is important to collect e-mails in the management system. E-mails are one of the most effective ways to reach your customers. Two separate studies at Mitchell 1 showed an average response to e-mail for CRM customers at 35%, a 15% increase over postcards! If you aren't collecting e-mails today, you need to start! E-mails allow your customers to choose when they want to view your marketing message. Your new welcome kit includes an e-mail script which will guide you along the proper way to collect an e-mail address. We are also including a counter card and poster which explains to your customers why you are requesting an e-mail address.

