eMaster™ Retention Alerts

eMaster™

The data-driven digital tool designed to help you increase vehicle sales, finance renewals and customer retention

ALPHERA FINANCIAL SERVICES

WELCOME

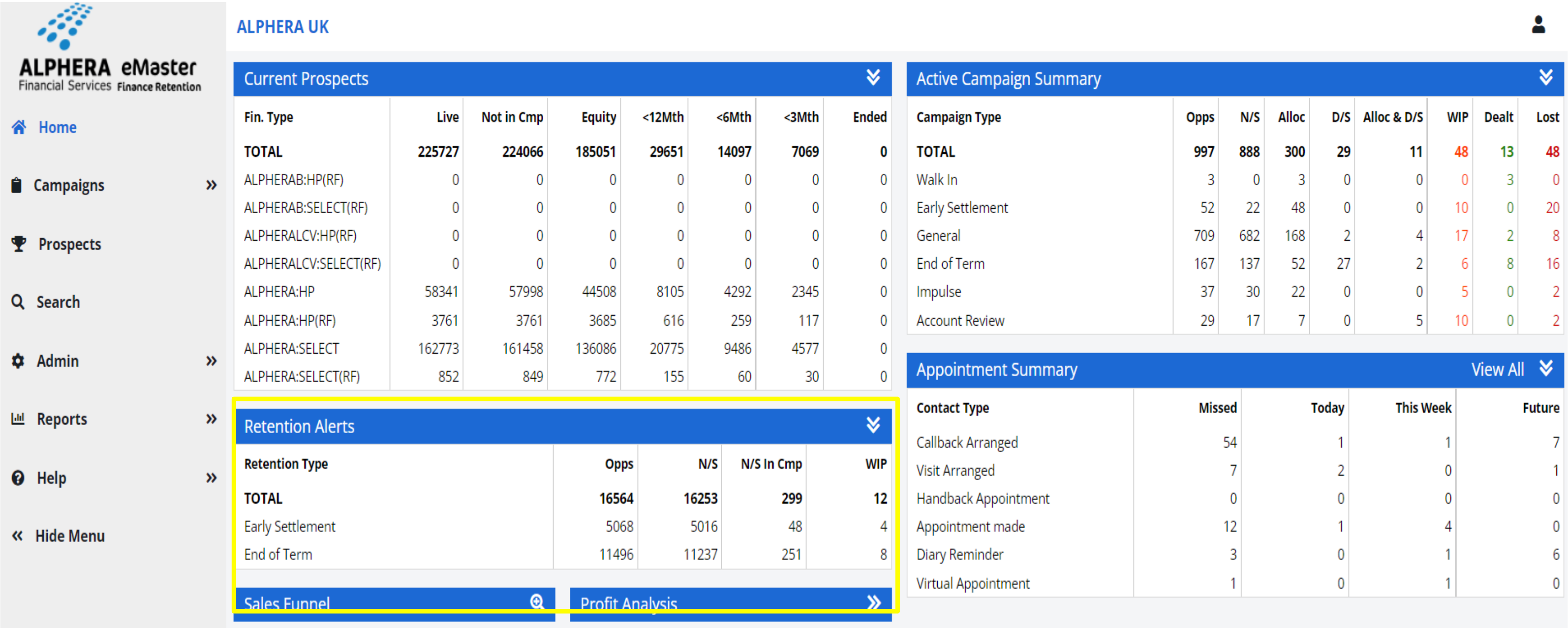
The **eMaster™** system provides you with a complete online customer retention solution which allows you to monitor and track all of your finance customers to ensure that you can resolicit them at exactly the right time. Whether it's an ongoing follow up program, a once off new car campaign or to find the right customer for a used car, eMaster™ will make the task simple and straightforward by using your live ALPHERA Finance data, which is updated daily, to target the **right customers**, with the **right product** with the **right deal** at the **right time**.

The system also allows you to put together new deals for both Select Finance and Hire Purchase Agreements, linking directly with data provided by ALPHERA Financial Services. This User Guide is designed to help you get the most from your system and will help answer any queries you may have.

Should you need any help please contact your ALPHERA Financial Services Regional Manager or send us your query via the system by clicking on the Help button found on the eMaster™ Menu screen.

CONTENT

GENERAL OVERVIEW



Fin. Type	Live	Not in Cmp	Equity	<12Mth	<6Mth	<3Mth	Ended
TOTAL	**225727**	**224066**	**185051**	**29651**	**14097**	**7069**	**0**
ALPHERAB:HP(RF)	0	0	0	0	0	0	0
ALPHERAB:SELECT(RF)	0	0	0	0	0	0	0
ALPHERALCV:HP(RF)	0	0	0	0	0	0	0
ALPHERALCV:SELECT(RF)	0	0	0	0	0	0	0
ALPHERA:HP	58341	57998	44508	8105	4292	2345	0
ALPHERA:HP(RF)	3761	3761	3685	616	259	117	0
ALPHERA:SELECT	162773	161458	136086	20775	9486	4577	0
ALPHERA:SELECT(RF)	852	849	772	155	60	30	0

Retention Type	Opps	N/S	N/S In Cmp	WIP
TOTAL	**16564**	**16253**	**299**	**12**
Early Settlement	5068	5016	48	4
End of Term	11496	11237	251	8

Campaign Type	Opps	N/S	Alloc	D/S	Alloc & D/S	WIP	Dealt	Lost
TOTAL	**997**	**888**	**300**	**29**	**11**	**48**	**13**	**48**
Walk In	3	0	3	0	0	0	3	0
Early Settlement	52	22	48	0	0	10	0	20
General	709	682	168	2	4	17	2	8
End of Term	167	137	52	27	2	6	8	16
Impulse	37	30	22	0	0	5	0	2
Account Review	29	17	7	0	5	10	0	2

Contact Type	Missed	Today	This Week	Future
Callback Arranged	54	1	1	7
Visit Arranged	7	2	0	1
Handback Appointment	0	0	0	0
Appointment made	12	1	4	0
Diary Reminder	3	0	1	6
Virtual Appointment	1	0	1	0

From the Home page main screen overview, you will find the **Retention Alerts Pod:**

This section shows the Early Settlement, End of Term and National Alerts.

RETENTION ALERTS

eMaster™ Type of Retention Alerts:

1
2
3

Retention Alerts				
Retention Type	**Opps**	**N/S**	**N/S In Cmp**	**WIP**
TOTAL	**24**	**24**	**0**	**0**
Early Settlement	3	3	0	0
End of Term	21	21	0	0

1 **Early Settlement** – This is when a customer requests an online or telephone settlement quotation directly from ALPHERA Financial Services. These alerts are an ideal opportunity to contact the customer in order to rebuild the relationship and nurture the prospect.

2 **End of Term (EOT)** – Once a prospect reaches six months to go before the end of their finance agreement, they will automatically drop in to the **RETENTION ALERT** box

**** Please note that End of term opportunities must be handled correctly and timeously to avoid customers being debited for Balloon and Guaranteed Future value payments. These end of term customers must be contacted in order to discuss their contractual obligations. If unleft, the balloon payment is a debit order amount that will run off the customer's account****

3 **National Campaigns** - These are prospects identified by ALPHERA Finance for targeted and focused campaigns, such as Key for Key on available stock.

RETENTION ALERTS

Description Columns:

Retention Alerts

	1	2	3	4
Retention Type	**Opps**	**N/S**	**N/S In Cmp**	**WIP**
TOTAL	**24**	**24**	**0**	**0**
Early Settlement	3	3	0	0
End of Term	21	21	0	0

1 The columns show the number of Opportunities in each type of alert activity. ***It includes all the alerts regardless if it is in campaign or not.***

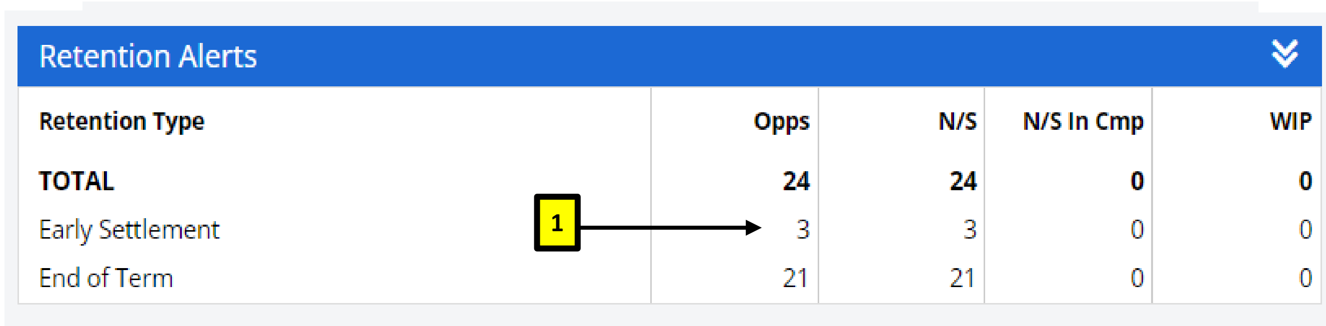
2 **Not Started** is displayed as **N/S**. Ideally, we want this figure to be low which will mean you are creating campaigns and working on the opportunities available.

****Click on any of the fields to create a campaign with those prospects pre-filtered****

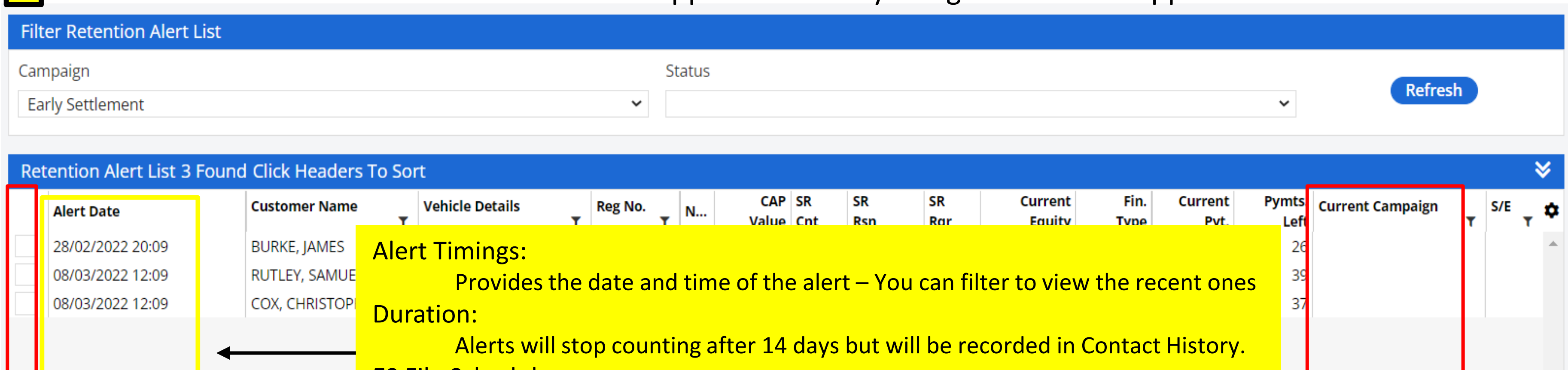
3 **N/S In a Campaign**, which means you have created a campaign for these customers and they have not been contacted yet

4 **WIP Work In Progress**, which means you have created a campaign for these customers and working thru each T-Card to Refine and Contact.

HOW TO ADD ALERTS TO A CAMPAIGN



1 If the retailer clicks on the number under the Opps column they will get a list of all opportunities



Alert Timings:

Provides the date and time of the alert – You can filter to view the recent ones

Duration:

Alerts will stop counting after 14 days but will be recorded in Contact History.

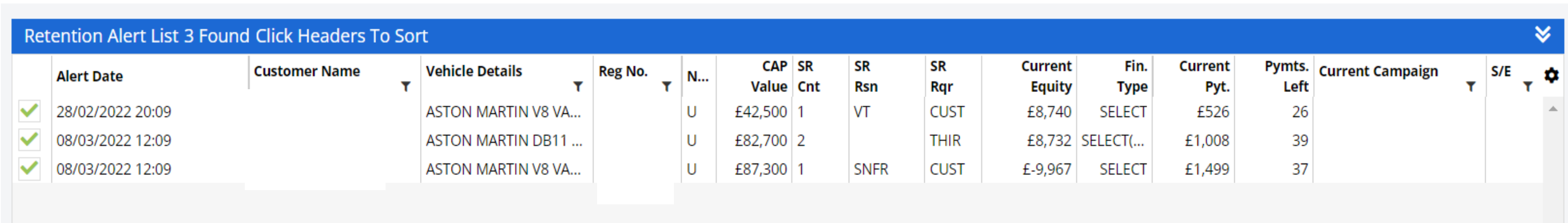
ES File Schedule:

Fed to eMaster EVERY HOUR… Refreshed +- 9 minutes past.
Triggered by **ALPHERA FINANCE** and **Customer Services**
Weekend requests – for Monday

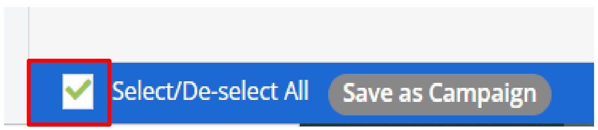
If there is a box in left column it means that these opportunities are available for selection to be added to a campaign, if there is not a box that signifies that the opportunity is already in a campaign there will also be a campaign name listed towards the right side of line and a salespersons initials if the opportunity has been allocated.

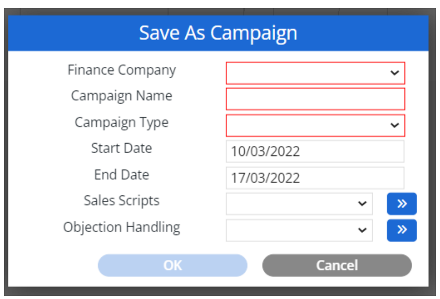
HOW TO ADD ALERTS TO A CAMPAIGN

To save opportunities to a campaign you can select all by clicking the box at bottom left in example below then click Save as Campaign



	Alert Date	Customer Name	Vehicle Details	Reg No.	N...	CAP Value	SR Cnt	SR Rsn	SR Rqr	Current Equity	Fin. Type	Current Pyt.	Pymts. Left	Current Campaign	S/E
✓	28/02/2022 20:09		ASTON MARTIN V8 VA...		U	£42,500	1	VT	CUST	£8,740	SELECT	£526	26		
✓	08/03/2022 12:09		ASTON MARTIN DB11 ...		U	£82,700	2		THIR	£8,732	SELECT(...	£1,008	39		
✓	08/03/2022 12:09		ASTON MARTIN V8 VA...		U	£87,300	1	SNFR	CUST	£-9,967	SELECT	£1,499	37		





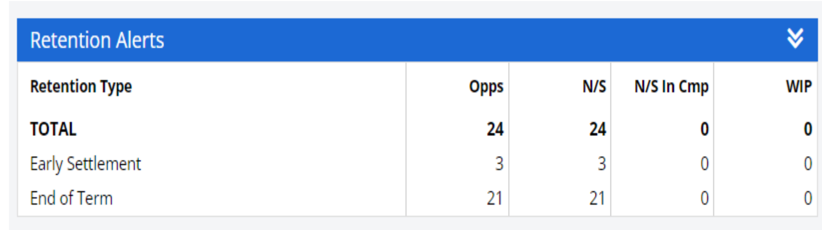
You will then be presented with a pop up to complete the campaign creation.

1. Select a finance company – you may have mixed brands (ALPHERA/LCV/BIKES) it does not matter which you select but you must select one.
2. Give the campaign a name we would suggest using a consistent format for example:
   - EOT 6MTG : End of Term 6 Months to Go
   - ESR 10MAR : Early Settlement Request - Date
3. Select Campaign type: **End of Term or Early Settlement – (Important for reports)**
4. eMaster will automatically set a start date of today but you can reset an end date as this is automatically set to 7 days as example shown.
5. Finally, you may select a sales script and objection handling script to assist with call structure **(These need adding)**
6. Click OK to save

HOW TO MANAGE THE ALERTS

Check and Create DAILY Early Settlement Alerts Campaigns.

1. Refine T-Card
2. Allocate with Instructions
3. Follow Up

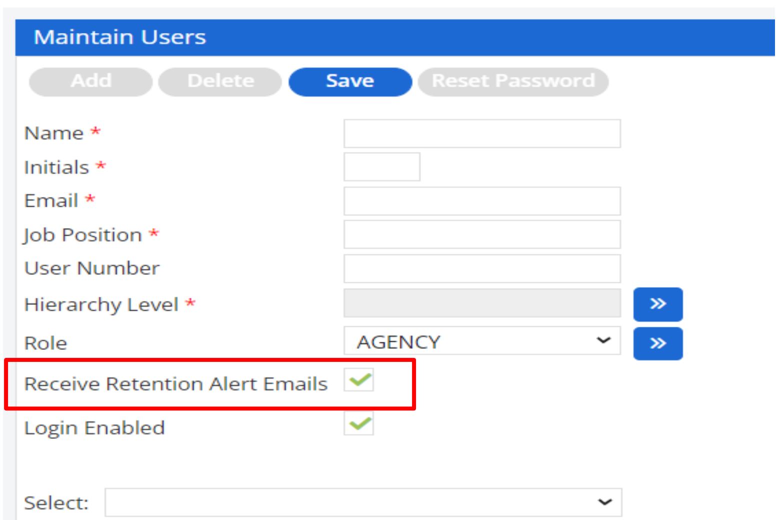


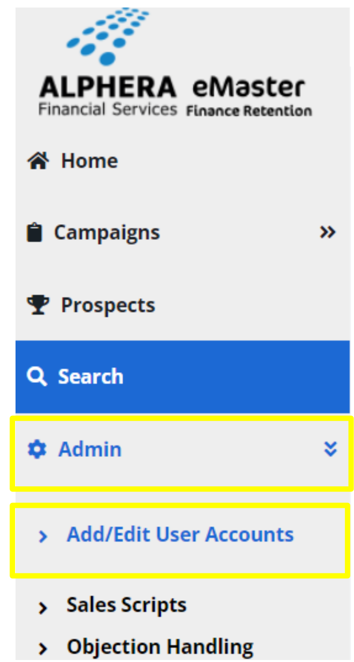
Retention Alerts

Retention Type	Opps	N/S	N/S In Cmp	WIP
TOTAL	**24**	**24**	**0**	**0**
Early Settlement	3	3	0	0
End of Term	21	21	0	0

Click on: ADMIN / ADD/EDIT USER ACCOUNT / Select user as required / ‘Receive Retention Alert Emails / Save

(Suggested for ALL Managers in Retailer)





EARLY SETTLEMENTS ALERTS

RECORDED HISTORY –

All Early Settlement Alerts are recorded in **Contact History** as ‘Outcome Early Settlement’

Contact History

Date/Time	Activity	By	Campaign Name	Outcome	Notes	Stat...
08/03/2022 12:09	No Action			Early Settlement	SNFR, CUST -	

EARLY SETTLEMENTS ALERTS

TERMINOLOGY –

Filter Retention Alert List

Campaign: Early Settlement

Status:

Refresh

Retention Alert List 3 Found Click Headers To Sort

Alert Date	Customer Name	Vehicle Details	Reg No.	N/U	CAF Value	SR Cnt	SR Rsn	SR Rqr	Current Equity	Fin. Type	Current Pyt.	Pymts. Left	Current Camp...
28/02/2022 20:09		ASTON MARTIN V8 VA...		U	£42,50	1	VT	CUST	£8,740	SELECT	£526	26	
08/03/2022 12:09		ASTON MARTIN DB11...		U	£82,70	2		THIR	£8,732	SELECT(...	£1,008	39	
08/03/2022 12:09		ASTON MARTIN V8 VA...		U	£87,30	1	SNFR	CUST	£-9,967	SELECT	£1,499	37	

SR: Settlement Request

- **Cnt:** Count – How Many times customer requested
- **Rsn:** Reason – *Selling or Replacement vehicle*
- **Rqr:** Type – Customer / RST Agent