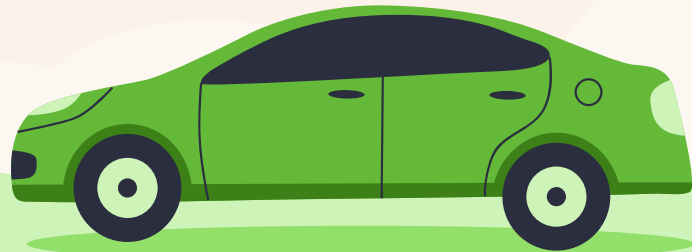


Project Overview: CarClinch Followup Assistant

Group 4:

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Agenda

01

Overview

02

Context

03

Scope

04

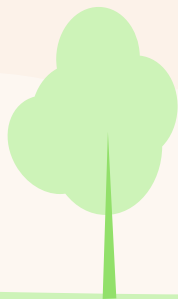
**High-Level
Flow**

05

Timeline

06

Conclusion



Overview



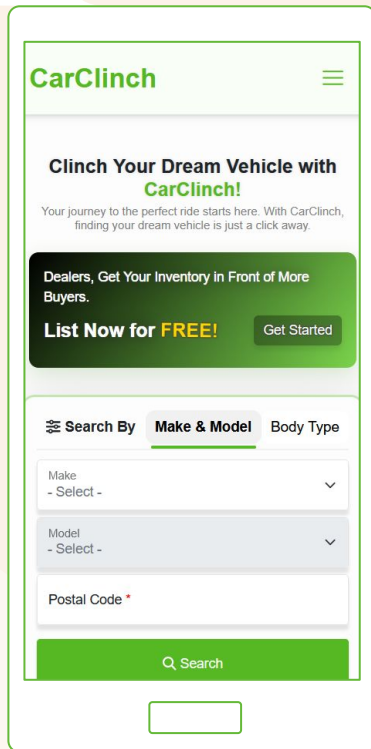
Follow-up System

- POC for **automated communication service**
- Outreach via email/SMS to leads who filled out contact form
- Supports appointment scheduling via calendar integration



AI Integration

- AI-generated, **personalized message templates**
- Tailored based on variables like vehicle details, form context, etc.



Context

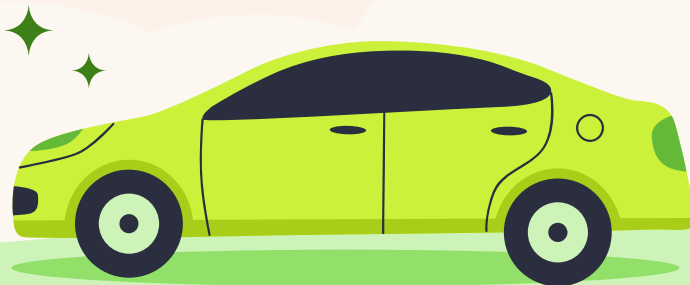
Who: **CarClinch**

- Vehicle listing & marketing platform
- Showcase dealership inventory & forward lead info
- Integrates with partner website **Caraxios**, a CRM and inventory management system for dealerships

Growth strategy: attract partnerships via free plan

Purpose: **Exploration**

- Demonstrate & prove feasibility of using automation & AI in communications to support strategy



Scope & Constraints



Integration

No full system
integration/access expected



Tech Skill

High-skill stakeholders → tool
flexibility



Budget

Dev/Test tiers expected



Expectation

POC: focus on feasibility, not
production-scale



High-Level Flow

Step 1

Lead/client fills out and submits form



Step 2

AI takes context: vehicle details, message body, etc.



Step 3

Message to schedule appointment with lead



Step 6

Appointment set!



Step 5

Offer timeslots based on calendar integration



Step 4

Follow-up message to engage again



If no response...



Timeline

Options Analysis

Communication services

- Twilio, Azure Communication Services, etc.

AI services

- Azure AI services, general LLMs, etc

Compare...

- Costs, features, integration ease, etc.

Identify...

- Risks, vendor lock-in, etc.

Recommend...

- Consolidated options analysis report to client on **02/04**

**Prototype
Development**

**Test
& Iterate**

**Deliver
POC**



Conclusion

1. **Project:** AI-integrated follow-up scheduling assistant for car dealerships that work with **CarClinch**
2. **Scope:** External development on POC with expected limited budget for experimental purposes
3. **Next:** Options analysis report & BRD from client



Thanks!
Any questions?