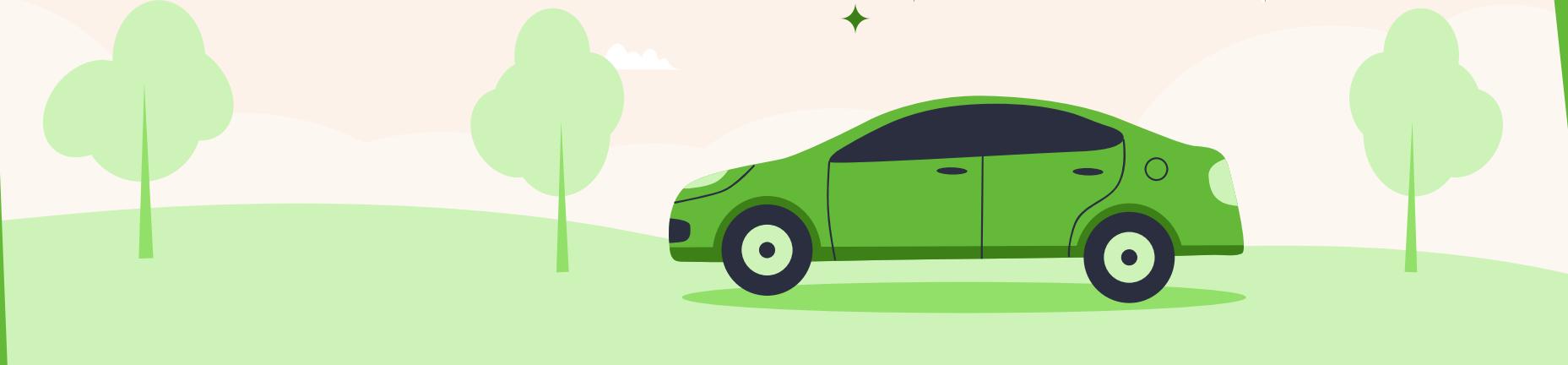


Project Overview: CarClinch Followup Assistant

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Agenda

01

Overview

02

Context

03

Scope

04

High-Level Flow

05

Timeline

06

Conclusion



Overview



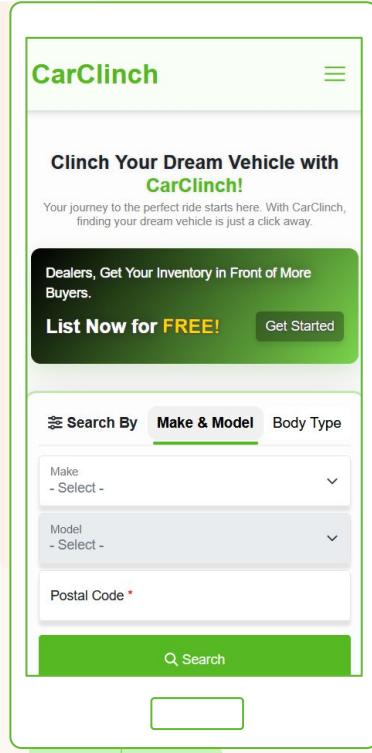
Follow-up System

- 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

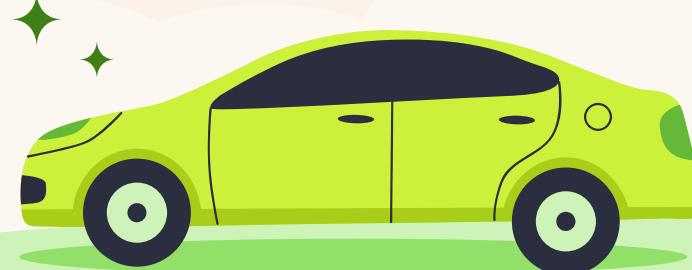
Who: CarClinch

- 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.

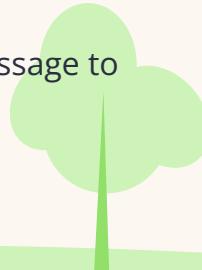
Step 3

Message to schedule appointment with lead



Step 4

Follow-up message to engage again



If no response...

Timeline

Options Analysis



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?

