



Intelligent Quote

Managing leads into the future.





What is it?

Method of capturing a customer's details, quoting them on what they want, inputting that data into a CRM and informing dealer of what customer is looking for and finally communicating on *various platforms* back to the customer everything they need to know... **in 30 SECONDS!**



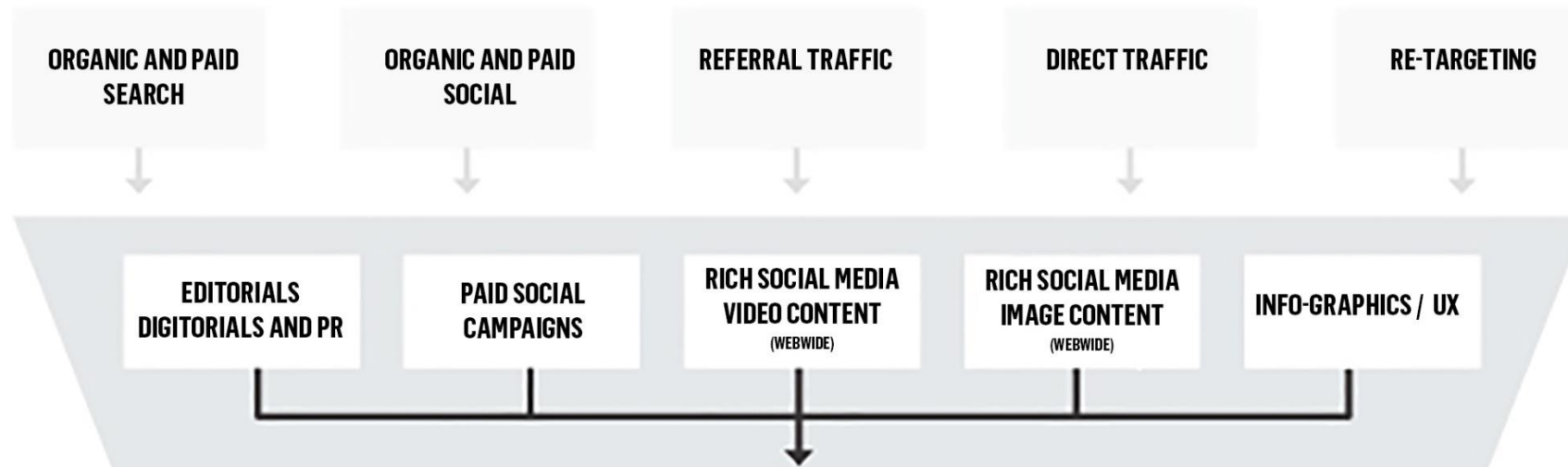


Problems we faced

- Customers waiting up to a 36 hours to get a price / official quote.
- Dealers not following up on leads.
- Delivering information to the customer in real-time.
- Limited insights on enquiries.
- Limited measurability on performance of digital assets.
- No ability to cross communicate across various platforms in real-time.
- We have leads come in at odd times like 8pm when there is no staff to action right away.

Acquisition Channels

- First, traffic is driven to site using the top level (traffic sources).
- Secondly, awareness is created using second level sources.
- Finally, customer is channeled into IQ System.
- For further information about how we do this. Contact us.

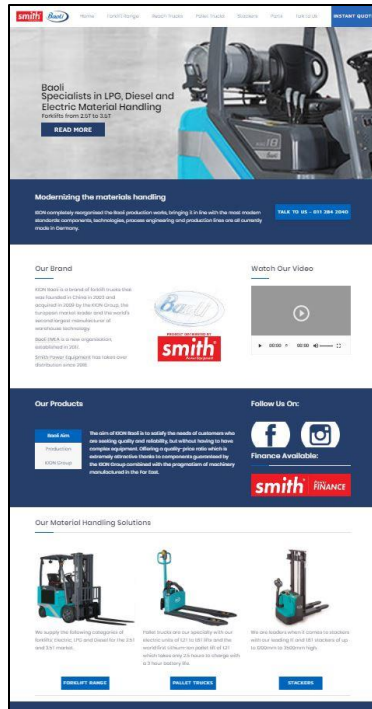


How it works

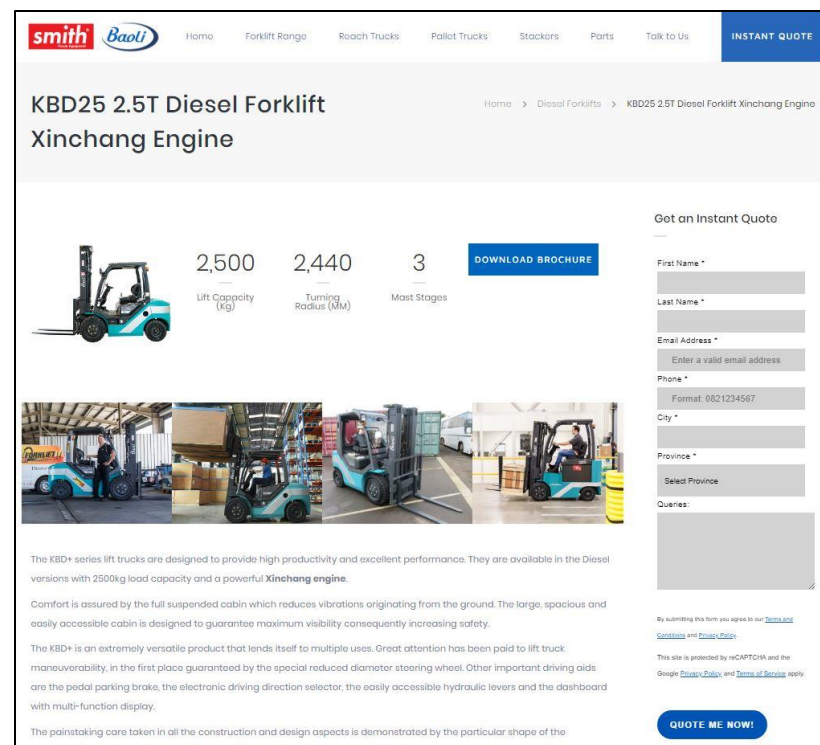
Smith IQ (Intelligent Quote)

1. A customer visits our site and is prompted get an Intelligent Quote on a unit.
2. Once a customer selects the unit they want a quote on, they are directed to the unit page.
3. On completion of the form various processes are triggered. The customer data is written to the CRM database and an email is triggered containing the quoted unit, an SMS and whatsapp is sent to customer.

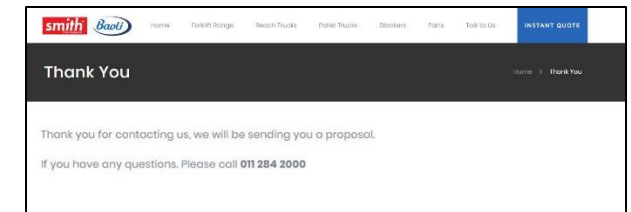
1. Website



2. Unit Page



3. Thank You Page

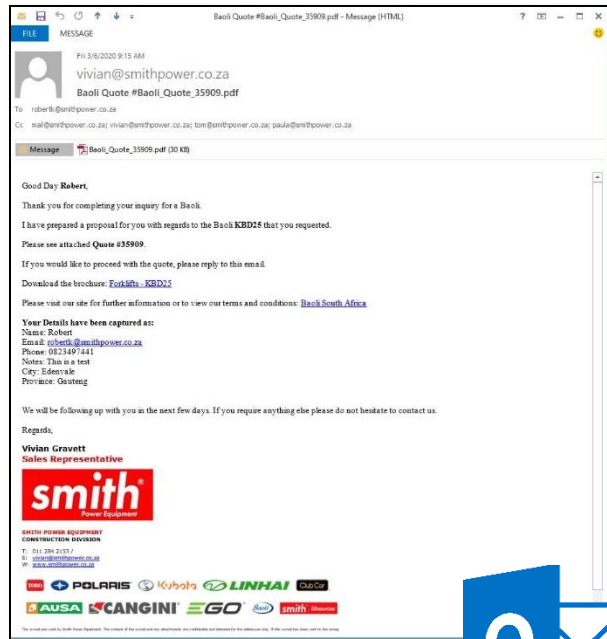


CRM database

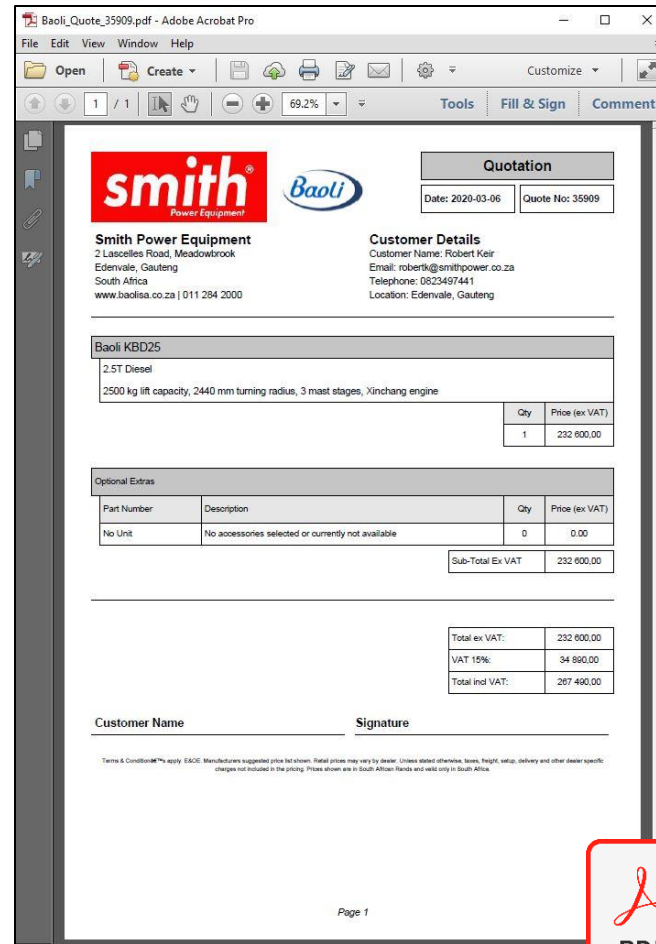
Triggers

How it works (cont.)

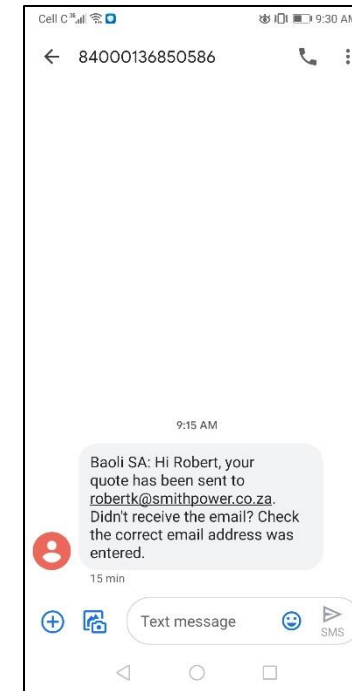
1. Personalised Email



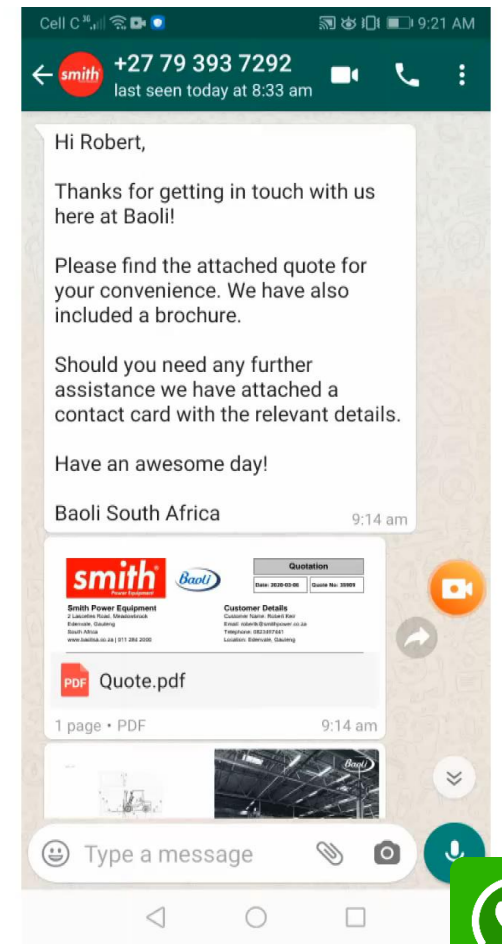
2. Personalised PDF Quote



3. Confirmation SMS



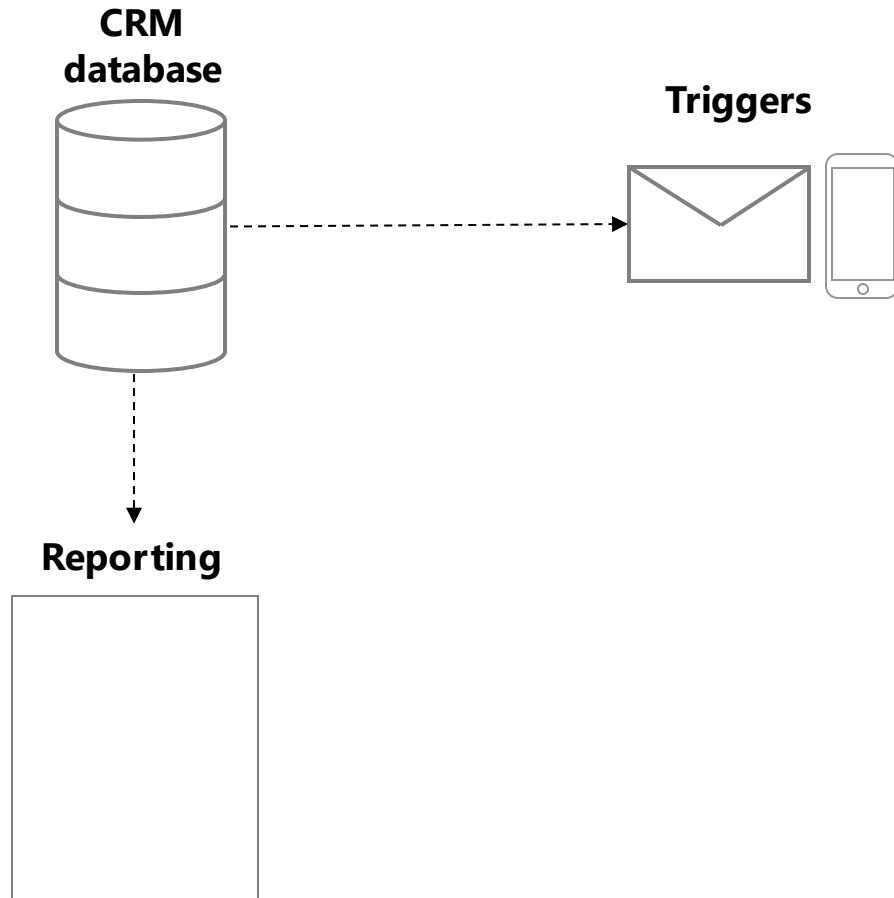
4. Whatsapp



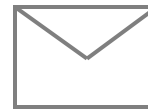
How it works (Cont.)

Triggers

Emails, SMS and WhatsApp messages are triggered to send to the customer, General Manager and Dealer. This is an omni-channel approach focussing on all touch-points of communication.



1. Email Quote to Customer



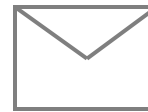
Email contains all the customers details, a PDF Quote attachment, contact details of the Dealer and General Manager.

2. SMS to customer



SMS informs the customer that a quote has been sent to their email

3. Email to General Manager



Email contains all the customers details, a PDF Quote attachment, contact details of the Dealer.

4. Email to Dealer



Email contains all the customers details, a PDF Quote attachment, contact details of the Dealer.

5. Whatsapp to customer



A personalised Whatsapp is sent to the customer with the quote requested, a location pin, vcard, brochure and video.

How it works (Cont.)

CRM

The lead is captured to our CRM and the follow up process is initiated:

smith

Leads

Docs

Products

Contacts

Quotes

Marketing

Process

Reports

Dealers

Warranty

Admin

Profile

Users

Search for contact, action, deal...

0

admin

Actions

Leads List

Create Lead

Lists

Import Leads

Export Leads

Favorites

Recent Items

Lead: Frederick Van Zyl

Lead: Johan Kruger

Marietjie . 03431 27912

Product: Onward lifted 4 pass electric

Joe Keir 0112842043

All Products

Create Product

ID

Name

Email

Instant Quote Stat

Create Date

Last Activity

Phone

City

Province

Quoted BraQuote No

Unit

Dealer Assigned

Quoted amc

Notes

AccessoDo N

8583

Robert Keir

robertk@smithpower.co.za

Instant Quote Iss

March 6, 2020, 9:14:52 AM

March 6, 2020, 9:14:52 AM

0823497441

Edenvale

Gauteng

Baoli

35,909

KBD25

Smith Power - Head Office

232,600

This is a test

No

How it works (Cont.)

The screenshot displays the Smith Power Equipment CRM interface. The top navigation bar includes links for Leads, Docs, Products, Contacts, Quotes, Marketing, Process, Reports, Dealers, and Warranty. The left sidebar contains a list of actions such as Leads List, Create Lead, View (with Journal View and List View selected), Edit Lead, Delete Lead, Attach A File/Photo, Quotes/Invoices, Convert to Contact, Convert to Opportunity, Print Record, and Edit Layout. Below this is a Research section with a timer and buttons for Start and Reset. The main content area is titled 'Leads: Robert Keir' and is divided into several sections: Instant Details, Customer Details, CRM Info, Dealer Comments, Relationships (0), Process, and Tags. The Instant Details section is highlighted with a red box and contains fields for Create Date, Quote No, Notes, Instant Quote Status, Lead Source, Quoted Brand, Unit, Accessories, and Quoted amount Ex VAT. The Customer Details section contains fields for Company, First Name, Last Name, Phone, Cellphone, Dealer Assigned, Group, Email, City, Province, and Country. The CRM Info section contains fields for Web Tracking Key, Assigned To, Do Not Email, Visibility, Updated By, and Last Updated. The Dealer Comments section contains a field for Dealer Comment. The Relationships section shows no results found. The Process section is highlighted with a red box and shows a progress bar for 'Instant Quote - Baoli' with stages for 'Instant Quote Issued', 'First Follow Up', and 'Final Follow Up'. The Tags section contains a text area for tags.

Leads: Robert Keir

Instant Details

Create Date	March 6, 2020, 9:14:52 AM	Instant Quote Status	Instant Quote Issued
Quote No	35,909	Lead Source	Website
Notes	This is a test	Quoted Brand	Baoli
		Unit	KBD25
		Accessories	
		Quoted amount Ex VAT	232,600

Customer Details

Company		Group	
First Name	Robert	Email	robertk@smithpower.co.za
Last Name	Keir	City	Edenvale
Phone	0823497441	Province	Gauteng
Cellphone		Country	
Dealer Assigned	Smith Power - Head Office		

CRM Info

Web Tracking Key		Visibility	Public
Assigned To	Anyone	Updated By	admin
Do Not Email	<input checked="" type="checkbox"/>	Last Updated	March 6, 2020, 9:14:52 AM

Dealer Comments

Dealer_Com ment

Relationships (0)

No results found.

Process

Instant Quote - Baoli

Instant Quote Issued Started 2020-03-06 [Details]

First Follow Up [Start]

Final Follow Up [Start]

Tags

Drag tags here from the tag cloud widget or click to create a custom tag.

CRM

All the lead's details are captured. As you can see there is also a follow up process that begins to ensure that the customer is followed up with.

If the lead is assigned to a dealer a dealer will be asked to update the lead status.

Customer Journey



TOTAL MATERIALS HANDLING SOLUTIONS

Baoli STACKERS
1.0 - 1.6T CAPACITY
4 POINT SUPPORT STRUCTURE
BATTERY OPERATED
BUILT-IN BATTERY CHARGER

Baoli PALLET TRUCK
1.0 - 1.6T LIFT CAPACITY
BATTERY OPERATED
BUILT-IN BATTERY CHARGER
SLOW DRIVE FUNCTION

Baoli FORKLIFTS
1.5 - 10T LIFT CAPACITY
3 STAGE MAST
AVAILABLE IN ELECTRIC, DIESEL, AND LPG

TOTAL MATERIALS HANDLING SOLUTIONS

BEST SELLING FORKLIFT

2.5T DIESEL / LPG 3 STAGE FORKLIFT

Baoli FORKLIFTS
1.5 - 10T LIFT CAPACITY
3 STAGE MAST
AVAILABLE IN ELECTRIC, DIESEL AND LPG TRUCKS

Baoli STACKERS
1.0 - 1.6T CAPACITY
4 POINT SUPPORT STRUCTURE
BATTERY OPERATED
BUILT-IN BATTERY CHARGER

Baoli PALLET TRUCK
1.0 - 1.6T LIFT CAPACITY
BATTERY OPERATED
BUILT-IN BATTERY CHARGER
SLOW DRIVE FUNCTION

TOTAL MATERIALS HANDLING SOLUTIONS

BEST SELLING FORKLIFT

1.8T ELECTRIC / 3 WHEEL 3 STAGE FORKLIFT

Baoli FORKLIFTS
1.0 - 10T LIFT CAPACITY
3 STAGE MAST
AVAILABLE IN ELECTRIC, DIESEL AND LPG TRUCKS

Baoli REACH TRUCKS
1.0 - 2.0T REACH TRUCKS
BATTERY OPERATED
11M MAST REACH

Baoli PALLET TRUCK
1.0 - 1.6T LIFT CAPACITY
BATTERY OPERATED
BUILT-IN BATTERY CHARGER
SLOW DRIVE FUNCTION

TOTAL MATERIALS HANDLING SOLUTIONS

BEST SELLING REACH TRUCKS

1.6T - 2T ELECTRIC 11M MAST REACH

Baoli REACH TRUCKS
1.0 - 2.0T REACH TRUCKS
BATTERY OPERATED
11M MAST REACH

Baoli FORKLIFTS
1.0 - 10T LIFT CAPACITY
3 STAGE MAST
AVAILABLE IN ELECTRIC, DIESEL AND LPG TRUCKS

Baoli PALLET TRUCK
1.0 - 1.6T LIFT CAPACITY
BATTERY OPERATED
BUILT-IN BATTERY CHARGER
SLOW DRIVE FUNCTION

Achievements and Interesting Facts

- **Rapid** customer data acquisition.
- Customers are now quoted in **30 seconds**.
- Leads are sent directly to dealer responsible. Distributor copied in.
- Quote is sent through as a **personalized** email, PDF, SMS and WhatsApp.
- Customers are quoted **without need of staff** – at anytime.



Achievements and Interesting Facts

- Leads are **captured into central CRM** and managed.
- Eliminates discount shoppers (Customers that looking for best price)
- Multi-platform communication achieved in real-time.
- Drawing statistics based on performance of digital assets. (AdWords, Social, Demo Days and Trade Shows)
- **Ability to market through the CRM.** IE: Mobile Platforms, Email Marketing, Customer Journeys and Call Down Lists all these managed by Artificial Intelligence.



Roadmap

- Deliver **personalised experiences** in real time
- Optimising the customer experience
- Using **marketing automation** to increase efficiency and yield
- Reaching and **understanding** mobile customers
- Building the Polaris brand personality in South Africa
- **Engaging audiences** through virtual or augmented reality
- Creating compelling content for digital experiences
- **Data driven marketing** that focuses on the individual
- **Internet of Things** – Audience tracking
- Enhanced payment technologies and **development into rapid finance**
- Multichannel & Social marketing

A photograph of a Baoli forklift operator in a warehouse. The operator is a man wearing a dark long-sleeved shirt and safety glasses, sitting on a teal and grey Baoli forklift. He is moving a large stack of wooden pallets. The background shows a warehouse interior with other equipment and a worker in the distance. The image is overlaid with a semi-transparent grey rectangle containing text. There are blue and white geometric shapes in the corners.

“Quoting quick sells vehicles.”

Thank you.

