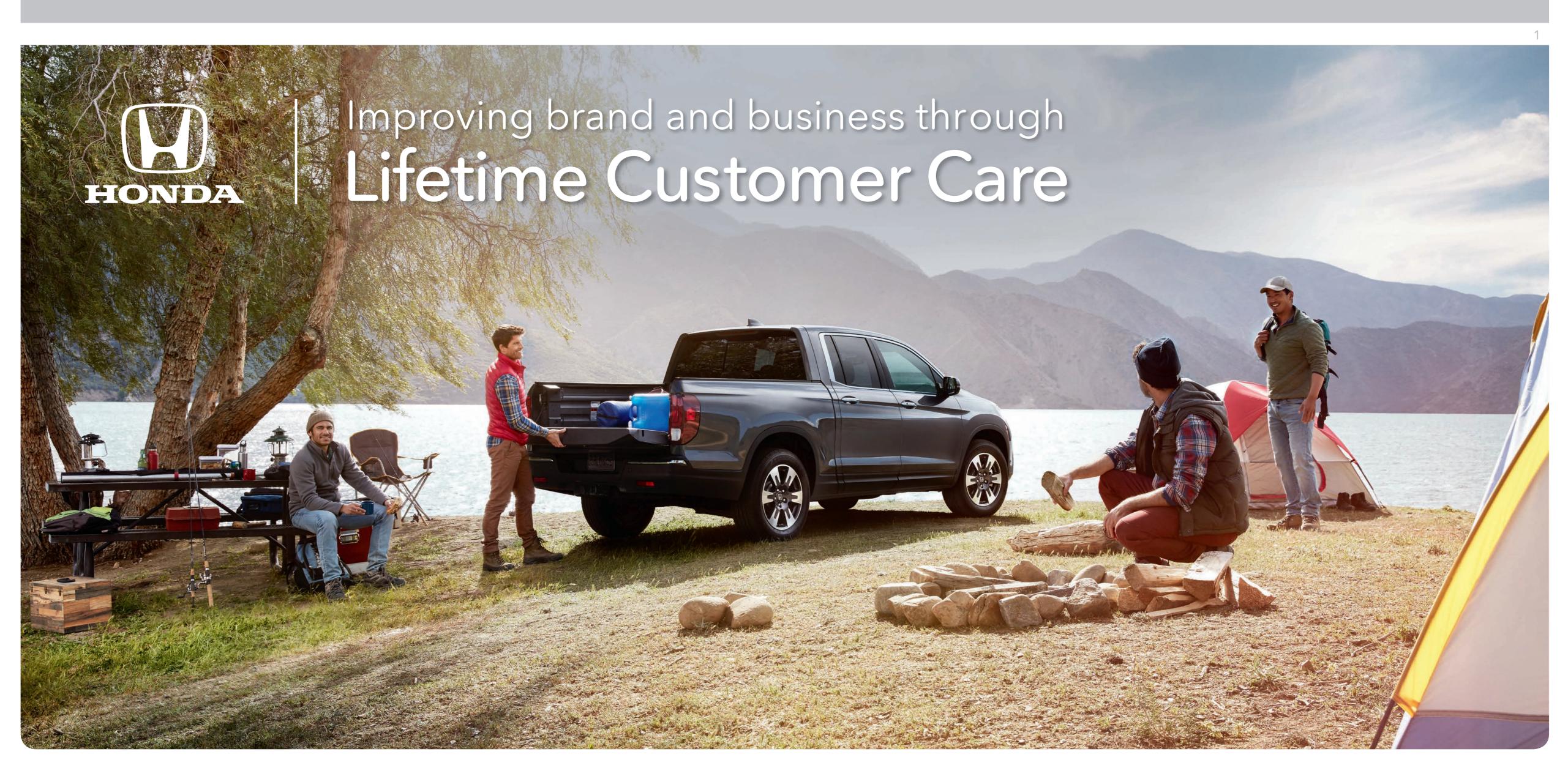
Reporting Guide





Contents

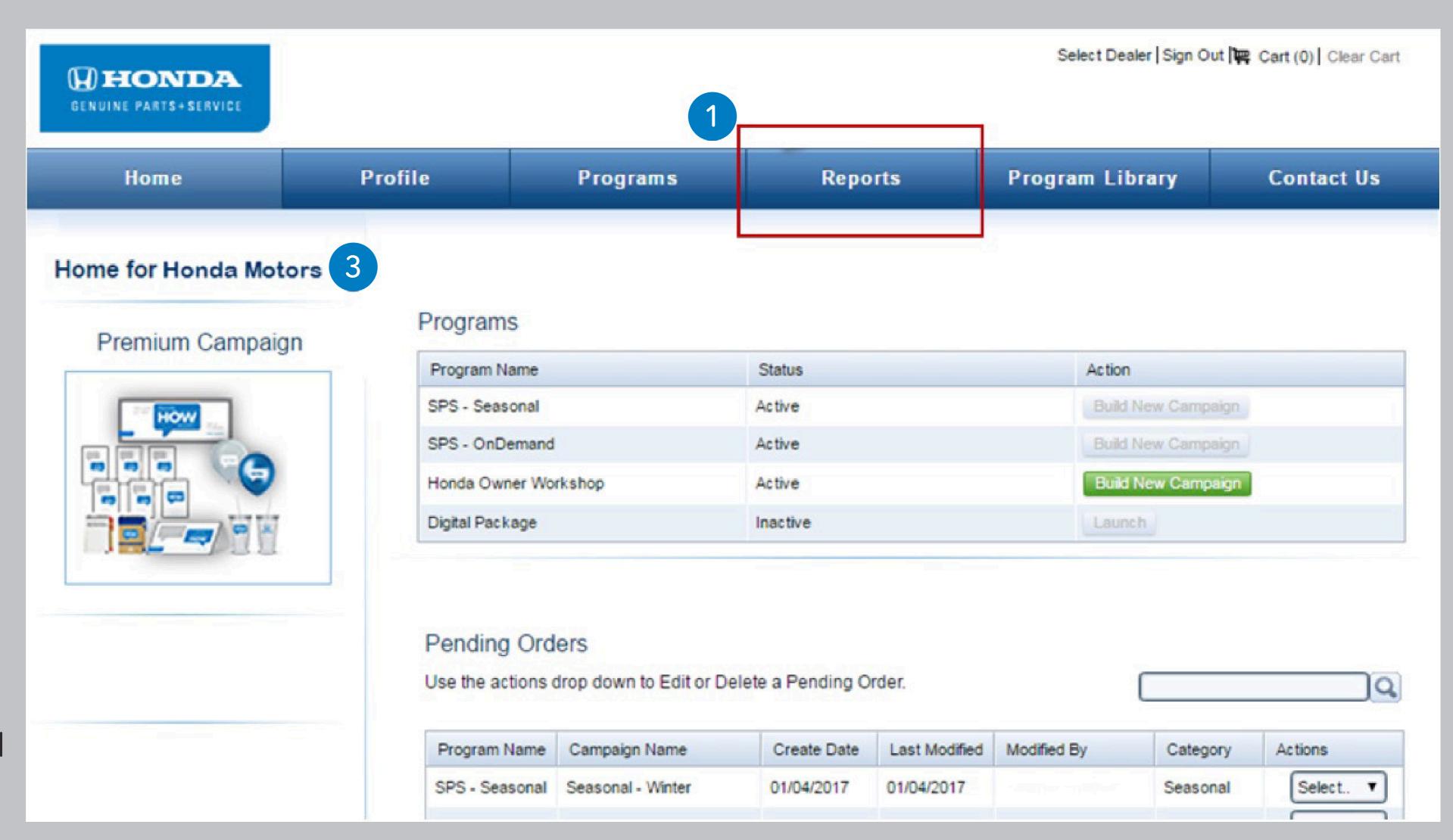


Access to Enterprise Reporting Area	- 3	Trend Analysis	14
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Accessing Reports in the Portal



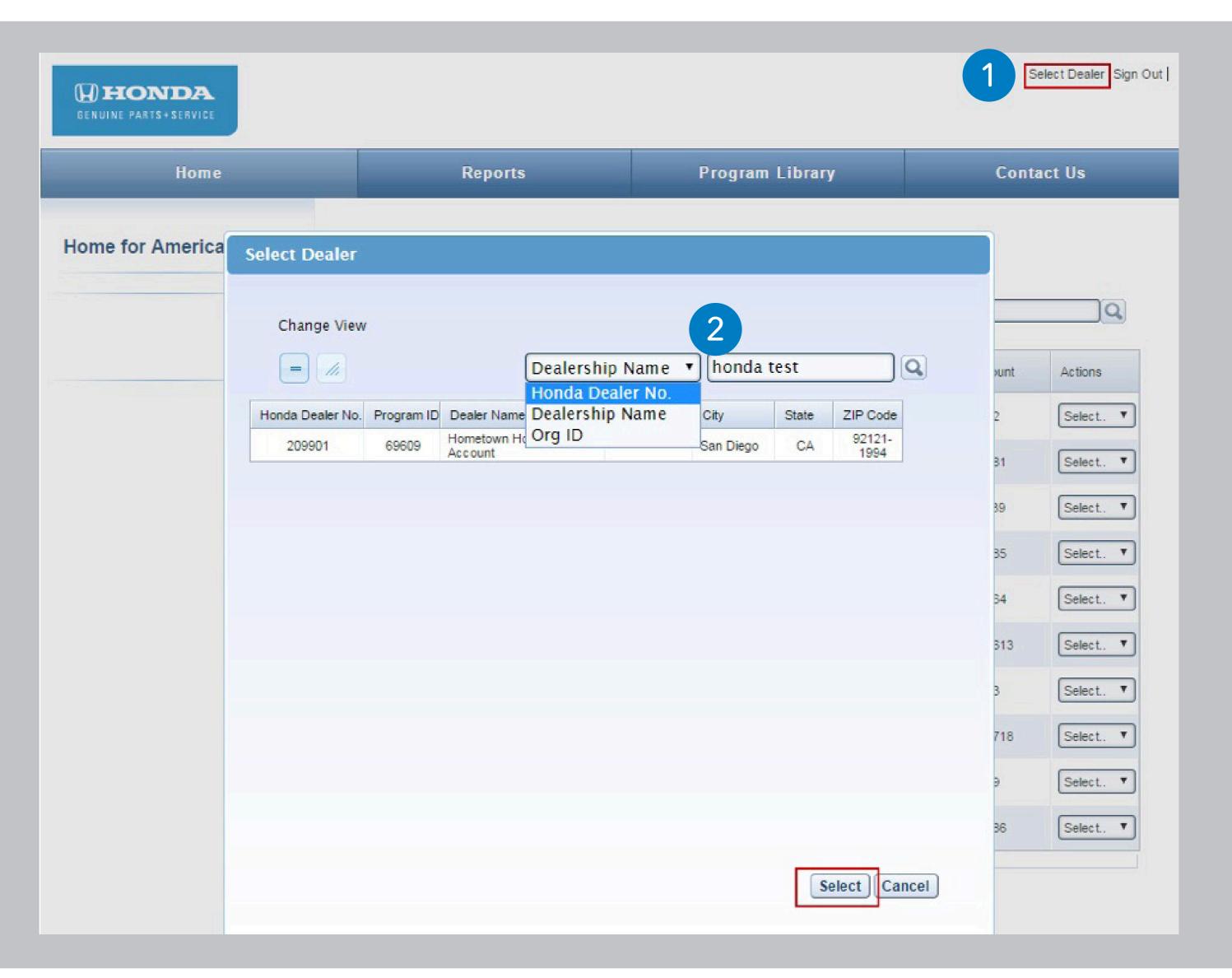
- 1 To view Enterprise
 Reporting area, click on
 "Reports" in the main
 navigation bar.
- The "Reports" button in the main navigation bar is available in all areas of the portal to access Enterprise Reporting from any page.
- 3 Users who are logged in as a corporate role will see aggregate level report options only. Dealers or users impersonating a dealer will be able to see detail level data.



Selecting a Dealer (if available)



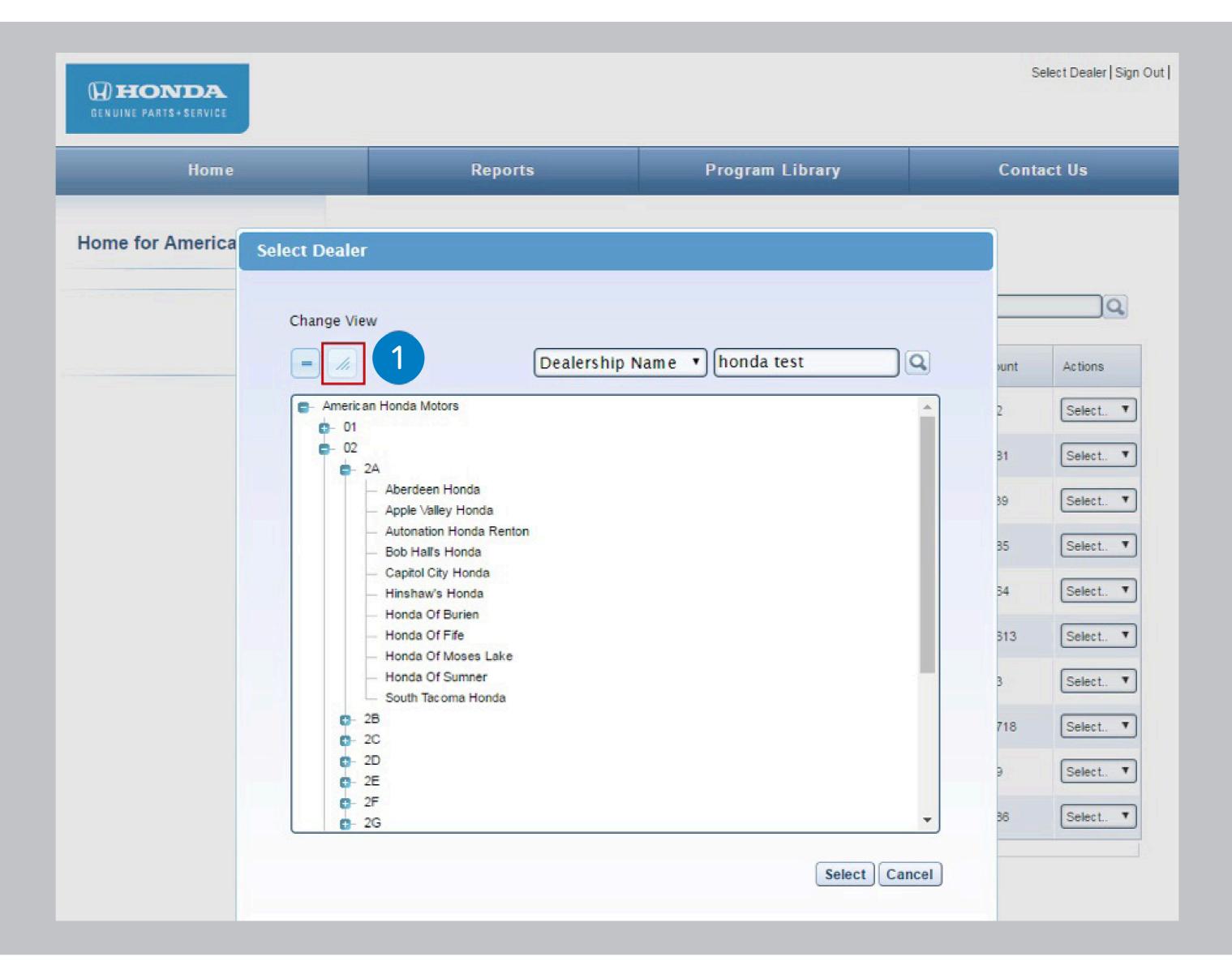
- To view Enterprise Reporting data at the dealer level (if available), select the "Select Dealer" link at the top right of the page.
- 2 Using the pull down menu, select a method to search for the desired dealer by and once highlighted, click the "Select" button at the bottom of the window.



Selecting a Dealer (cont'd)



1 If you do not know the dealer you are searching for, you may click on the "Expose Hierarchy" button and select a dealer from within the tree view.

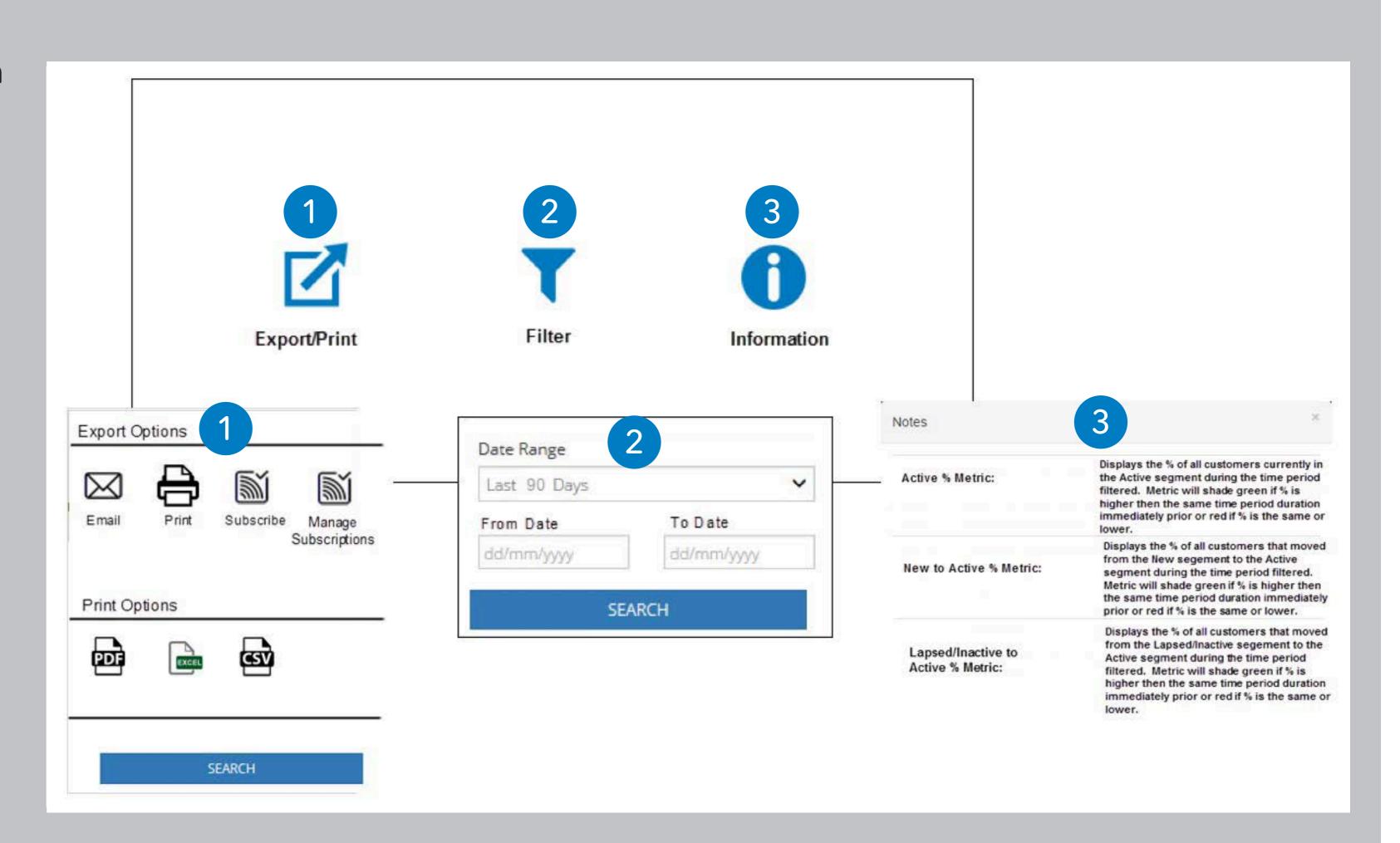


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Export/Print, Filter, & Info Icon Functionality

Export/Print, Filter, & Information icons found in the upper right of each section and their functionality:

- 1 Selecting the filter icon will open the filter menu allowing you to filter on date range for the metrics in the Program Dashboard or data in the reports.
- Selecting the export icon will open the export/print menu allowing for export/print options to be selected.
- 3 Selecting the information icon will open the field notes window. This will give you a high level description of the fields displayed.



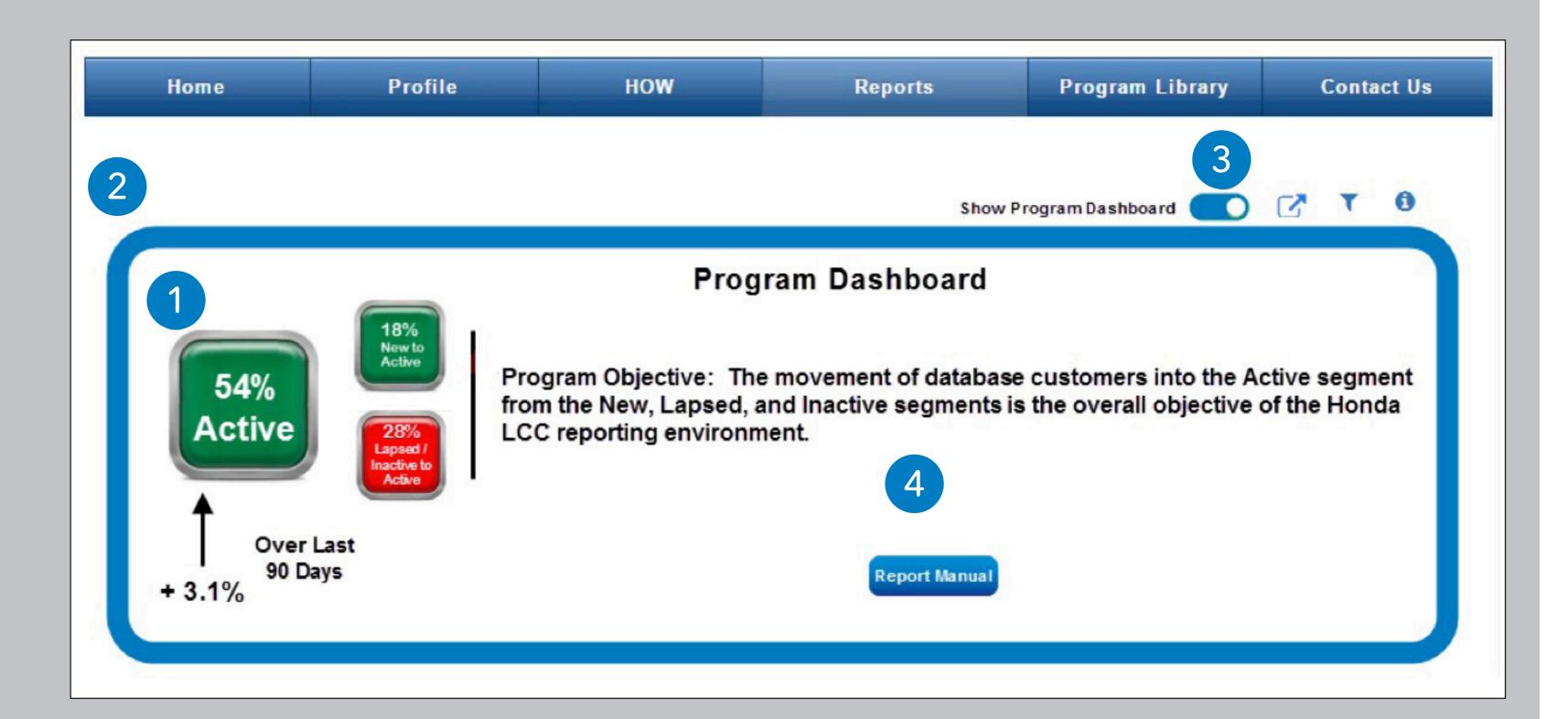
,

Program Dashboard (Top Level KPI)



Program Dashboard:

- 1 Contains quick reference metrics on the health of the dealer's customer retention objective.
- Users will see the dashboard present at all times while in the Enterprise Reporting area.
- 3 Users have the ability to collapse the Program Dashboard using the toggle button.
- 4 Also contains brief overview of the objective and a quick link to the reporting manual.



Program Phase Reporting (Welcome)



Program Phase Reporting for Welcome phase contains:

- 1 KPI's pertinent to the phase's actions
- 2 Indicators displaying usage of performance increasing tools
- 3 Actionable button to navigate directly to campaign building pages
- 4 A campaign communication/response summary with drill down capability

Welcome Phase

Engage Phase

Winback Phase

OnDemand

Communication Summary

Trend Analysis

Manage Subscriptions

Channel Reports

How Event indicator will display red if you have not had a How event in the last 90 days or do not have one scheduled. It will display green if you have had an event in the last 90 days or have one scheduled.

Bulk Mailer indicator will display red if you did not include bulk mailers in your last submitted How event order. It will display green if you did.

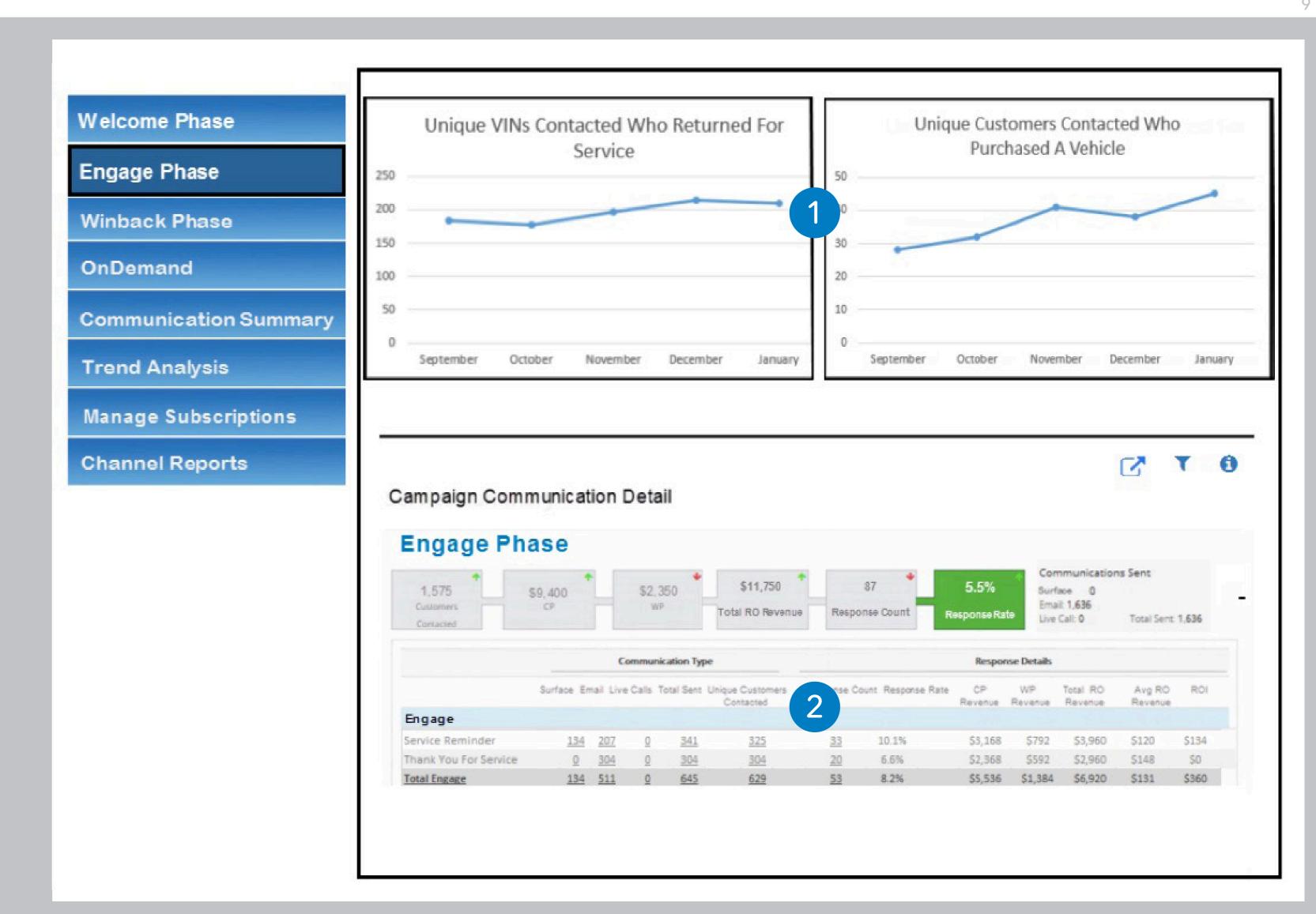


Program Phase Reporting (Engage)



Program Phase Reporting for Engage phase contains:

- 1 KPI's pertinent to the phase's actions
- 2 A campaign communication/response summary with drill-down capability

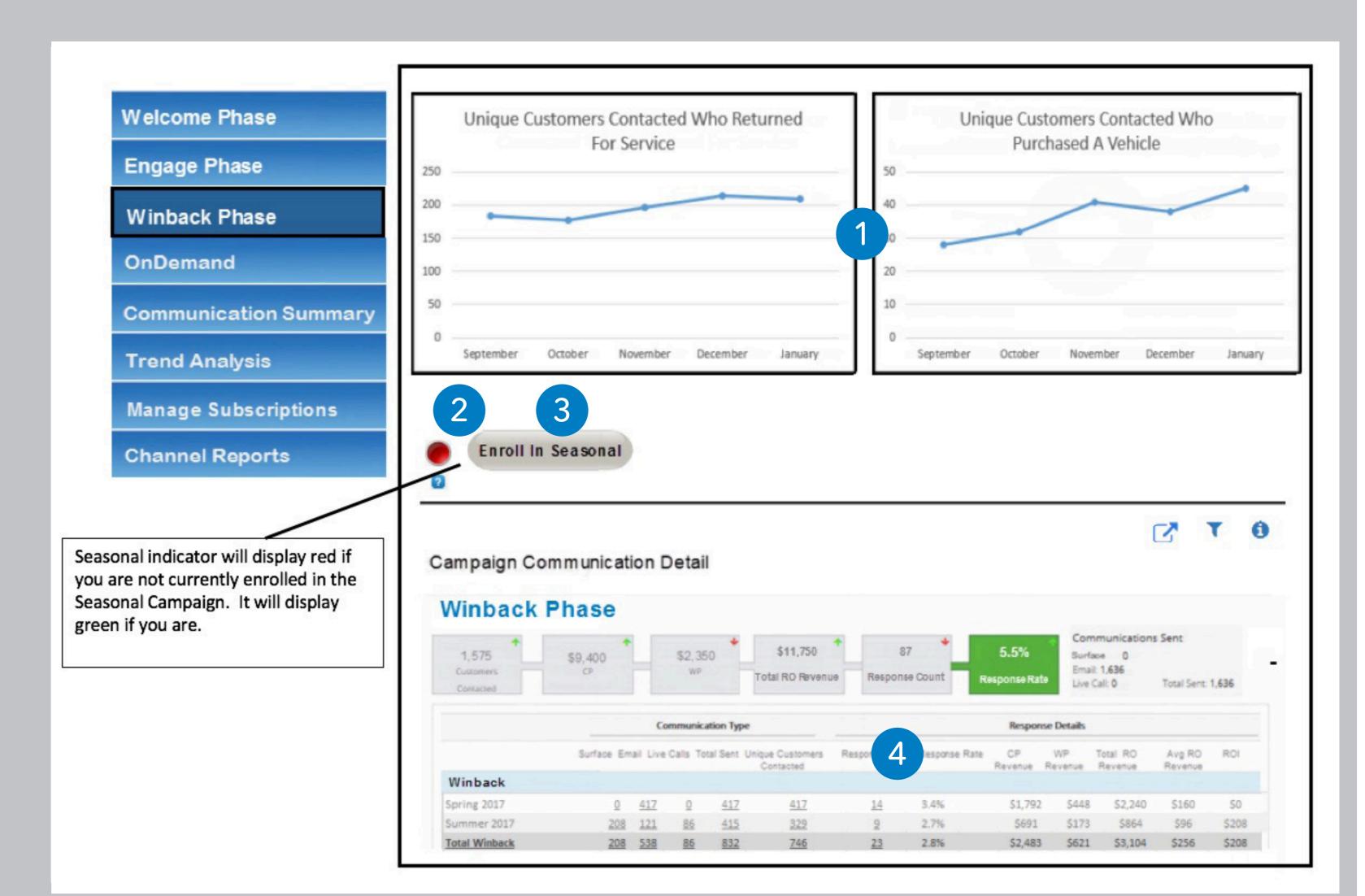


Program Phase Reporting (Winback)



Program Phase Reporting for Winback phase contains:

- 1 KPI's pertinent to the phase's actions
- 2 Indicators displaying usage of performance increasing tools
- 3 Actionable buttons to navigate directly to campaign building pages
- 4 A campaign communication/response summary with drill down capability

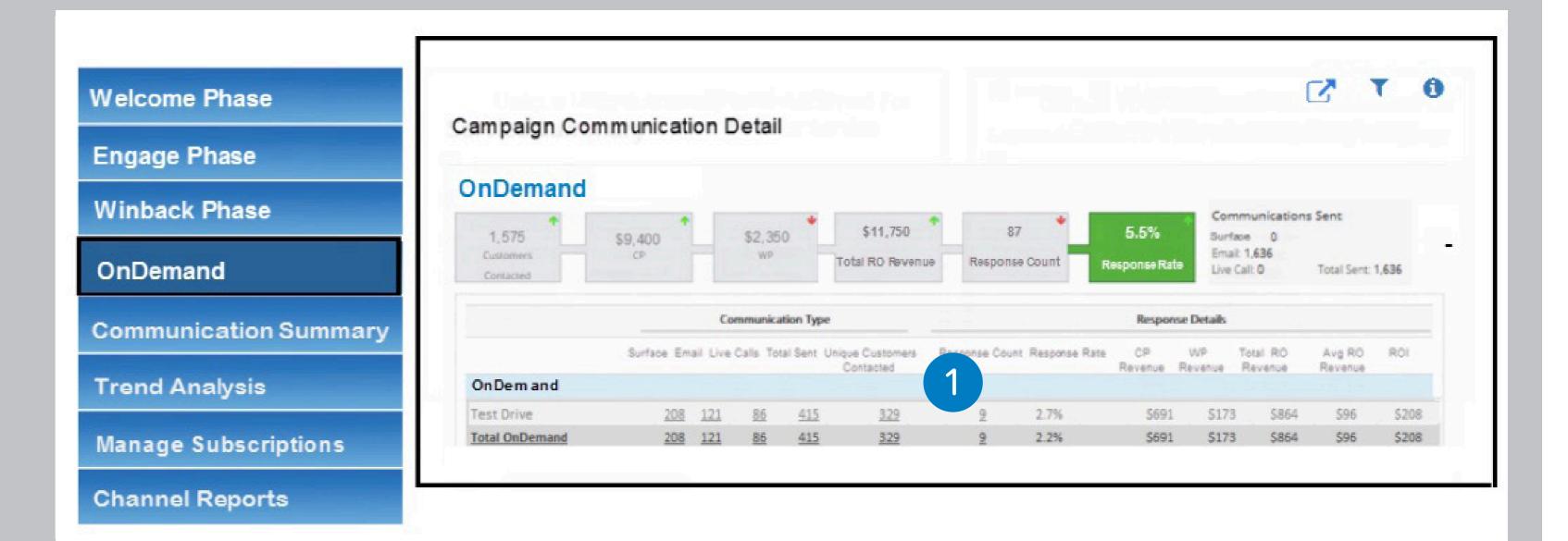


Program Phase Reporting (OnDemand)



Program Phase Reporting for OnDemand phase contains:

1 A campaign communication/response summary with drill-down capability

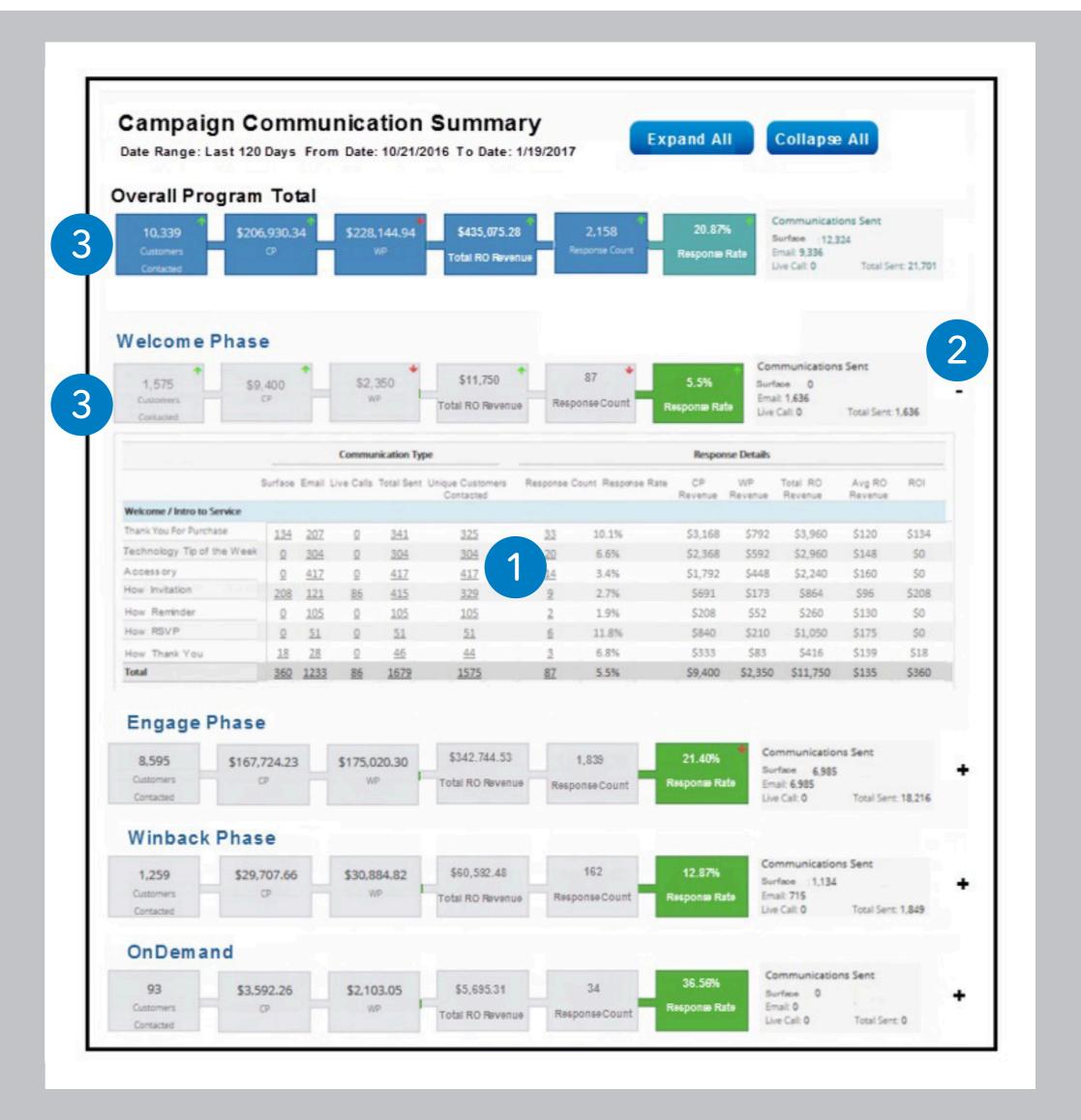


Communication Summary



Communication Summary contains:

- 1 Communication counts by channel for each communication along with response and revenue data.
- 2 Communication and response data is grouped by phase in expandable/collapsible sections.
- 3 Aggregate high level totals are always visible for each phase for comparison.
- 4 Report offers the ability to drill down to communication and response detail level by clicking on underlined fields.



Communication Summary (Exported View)

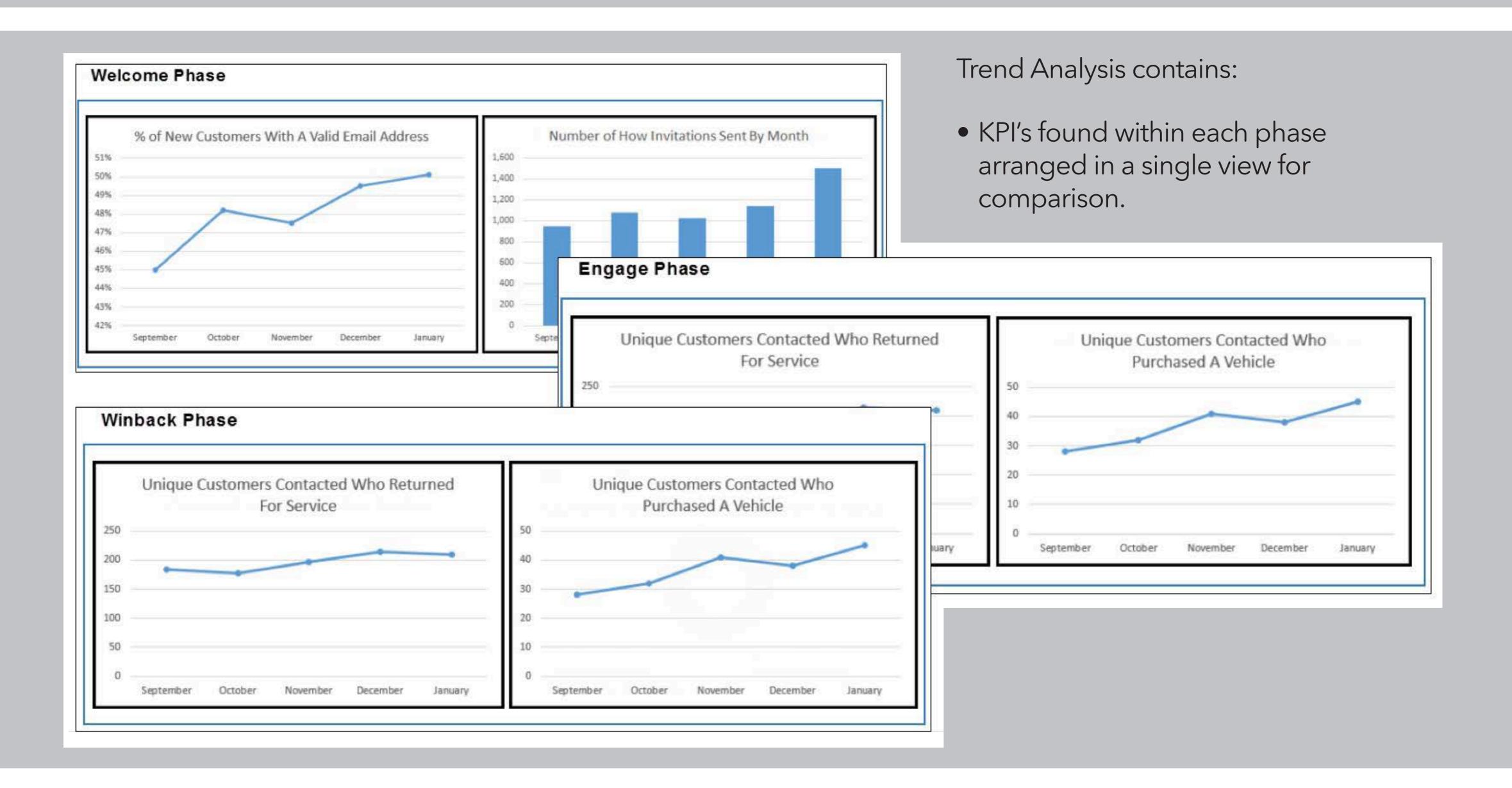


This excel friendly view is accessed by exporting the Communication Summary to excel through the export/print options menu (see slide 6).

Campaign Communication Summary Date Range: Last 120 Days From Date: 10/21/2016 To Date: 1/19/2017				Honda Motors Anytown, CA				Org ID: 000000				
Welcome												
Thank You For Purchase	134	207	0	341	325	33	10.1%	\$3,168	\$792	\$3,960	\$120	\$134
Technology Tip Of The Week	0	304	0	304	304	20	6.6%	\$2,368	\$592	\$2,960	\$148	\$0
Accessory	0	417	0	417	417	14	3.4%	\$1,792	\$448	\$2,240	\$160	50
How Invitaion	208	121	86	415	329	9	2.7%	\$691	\$173	\$864	\$96	\$208
How Reminder	0	105	0	105	105	2	1.9%	\$208	\$52	\$260	\$130	\$0
How RSVP	0	51	0	51	<u>51</u>	<u>6</u>	11.8%	\$840	\$210	\$1,050	\$175	\$0
How Thank You	18	28	0	46	44	3	6.8%	\$333	\$83	\$416	\$139	\$18
Total Welcome	360	1233	86	1679	<u>1575</u>	<u>87</u>	5.5%	\$9,400	\$2,350	\$11,750	\$135	\$360
Engage												
Service Reminder	134	207	0	341	325	33	10.1%	\$3,168	\$792	\$3,960	\$120	\$134
Thank You For Service	0	304	0	304	304	20	6.6%	\$2,368	\$592	\$2,960	\$148	\$0
Total Engage	134	511	0	645	629	<u>53</u>	8.2%	\$5,536	\$1,384	\$6,920	\$131	\$360
Winback												
Spring 2017	0	417	0	417	417	14	3.4%	\$1,792	\$448	\$2,240	\$160	\$0
Summer 2017	208	121	86	415	329	9	2.7%	\$691	\$173	\$864	\$96	\$208
Total Winback	208	538	86	832	746	23	2.8%	\$2,483	\$621	\$3,104	\$256	\$208
OnDemand												
Test Drive	208	121	86	415	329	9	2.7%	\$691	\$173	\$864	\$96	\$208
Total OnDemand	208	121	<u>86</u>	415	329	9	2.2%	\$691	\$173	\$864	\$96	\$208
Grand Total	910	2403	258	3571	3279	172	4.8%	\$18,110	\$4,528	\$22,638	\$618	\$1,136

Trend Analysis





Manage Subscriptions



Manage Subscriptions contains:

• Consolidated view of all reports that the logged in user is currently subscribed to with the option to see last published time stamp and details as well as the ability to delete the subscription.

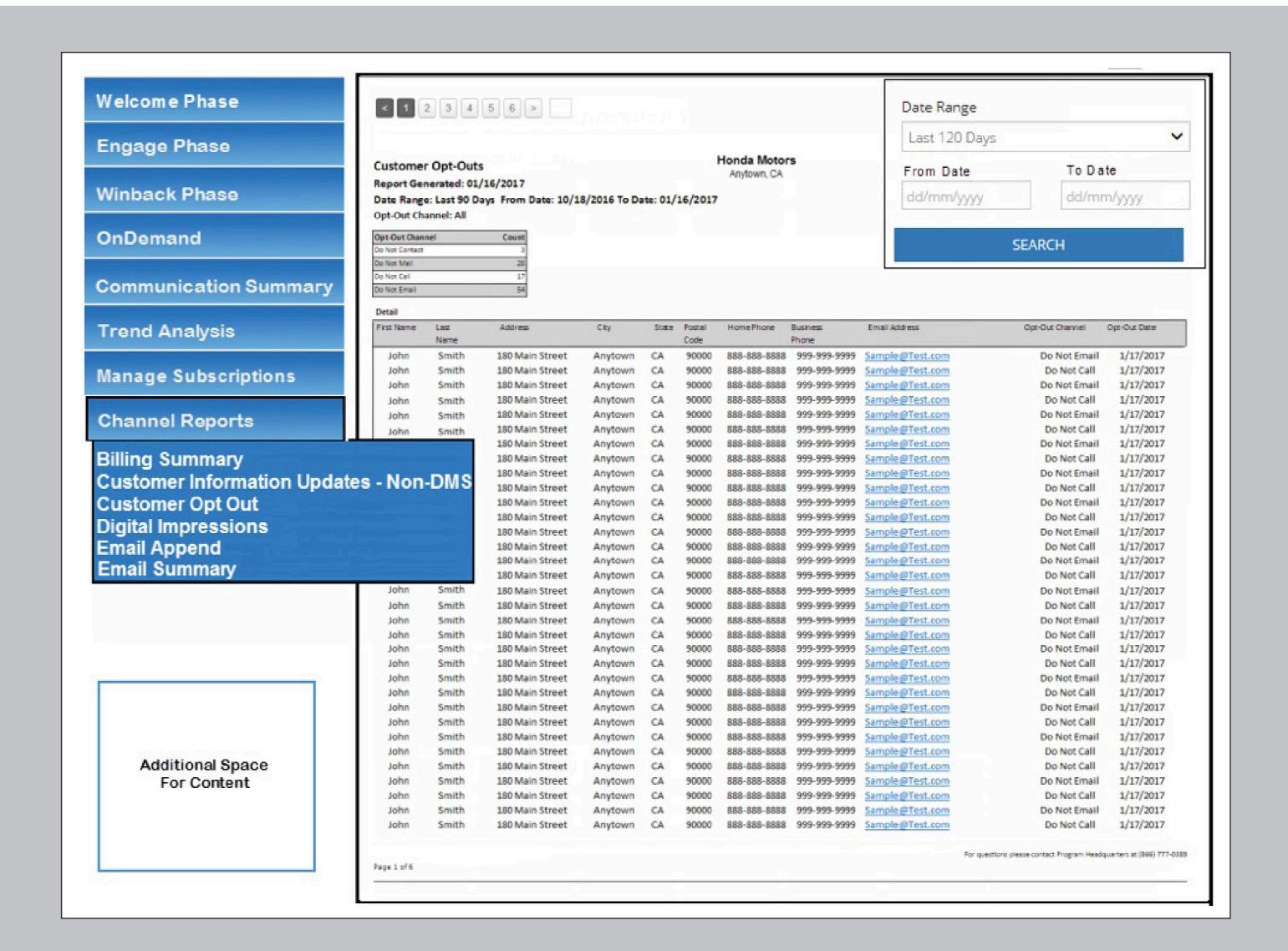
Manage Subscriptions											
Report	File Type	Subject	Last Published	Details	Delete						
Welcome Phase	PDF	Welcome Communications	1/5/2017 06:00		*						
		Close									

Channel Reports



Channel Reports is a concise suite of reports providing information on:

- Billing by month
- Customer Information Updates
- Customers that have opted out of communications
- Digital Impressions (OLA) sent to customers
- Emails added to database through the append process
- Email performance by campaign including undeliverable reasons, clicks, opens, & unsubscribes

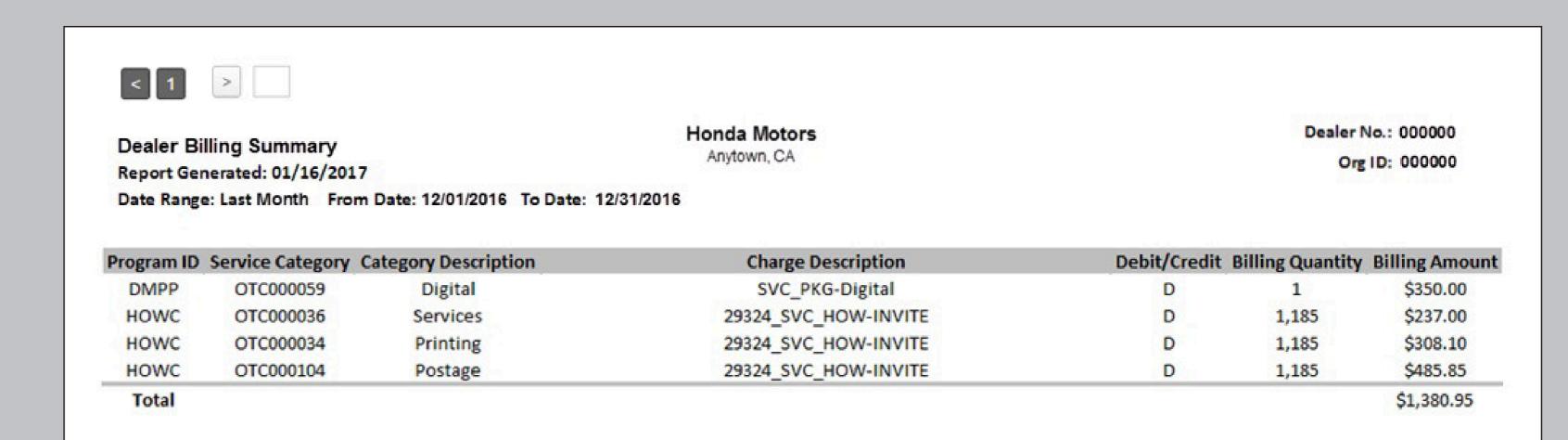


Billing Summary



Billing Summary provides information on:

• Line item billing detail for each month



Customer Information Updates – Non-DMS



Customer Information Updates – Non-DMS provides information on:

 Updates to customer information outside of those received in the Dealer Management System



Customer Information Updates -Non-DMS Honda Motors Anytown, CA

Dealer No.: 000000

Org ID: 000000

Report Ran on: 01/13/2017 Measurement as of: 01/03/2017

Month: December 2016

Detail							
Modified Date	First Name	Last Name	Address	City	State	ZIP Code Email Address	Phone Number Updated
Dec 2016	John	Smith	180 Main Street	Anytown	CA	90000 Test@sample.com	888-888-8888 Email Addre
Dec 2016	John	Smith	180 Main Street	Anytown	CA	90000 Test@sample.com	888-888-8888 Email Addre
Dec 2016	John	Smith	180 Main Street	Anytown	CA	90000 Test@sample.com	888-888-8888 Email Addre
Dec 2016 —	John	Smith	180 Main Street	Anytown	CA	90000 Test@sample.com	888-888-8888 Email Addre
Dec 2016	John	Smith	180 Main Street	Anytown	CA	90000 Test@sample.com	888-888-8888 Email Addre
Dec 2016	John	Smith	180 Main Street	Anytown	CA	90000 Test@sample.com	888-888-8888 Email Addre
Dec 2016	John	Smith	180 Main Street	Anytown	CA	90000 Test@sample.com	888-888-8888 Email Addre
Dec 2016	John	Smith	180 Main Street	Anytown	CA	90000 Test@sample.com	888-888-8888 Email Addre
Dec 2016	John	Smith	180 Main Street	Anytown	CA	90000 Test@sample.com	888-888-8888 Email Addre

Notes

In the event you download your permissioned email addresses (including appended data) from Epsilon | RMS and use it yourself or through a third party, you are solely responsible for complying with all applicable laws, including but not limited to compliance with all consumer elections not to receive future electronic messages from you and the CAN-SPAM Act. You should NOT use your permissioned email addresses more than ten (10) times from the date you download it from Epsilon | RMS.

If while using the permissioned email addresses you or a third party receives a request from a consumer not to receive further electronic messages or marketing solicitations, you are responsible for documenting it and notifying Epsilon | RMS within five (5) business days of the request to unsubscribe. Your unsubscribe notification must include your dealership ID, a time and date stamp, and the email address of the unsubscriber.

Epsilon | RMS will not engage with any third party email service providers on your behalf. It is your responsibility to ensure that appended data/outside lists can be used in accordance to a third party email service provider's usage specifications.

You acknowledge that Epsilon | RMS shall have no liability to you as a result of your use of email data provided by/from Epsilon | RMS. Furthermore, you shall defend, indemnify and hold harmless Epsilon | RMS from and against any and all suits, claims, and actions, and the damages, costs, liabilities and expenses (including reasonable attorneys' fees) arising there from or arising out of your use of email related data with other persons or companies.

Customer Opt-Out



Customer Opt-Out provides information on:

- Customers who have actively opted out a communication channel.
- Opt out information comes from Harmony (email provider) for email, ECRM for Surface, and Do Not Call database for Phone.

Customer Opt-Outs

Report Generated: 01/16/2017

Honda Motors

Anytown, CA

Org ID: 000000

Date Range: Last 90 Days From Date: 10/18/2016 To Date: 01/16/2017

Opt-Out Channel: All

Opt-Out Channel	Count
Do Not Contact	2
Do Not Mail	28
Do Not Call	17
Do Not Email	54

Detail										
First Name	Last Name	Address	City	State	Postal Code	Home Phone	Business Phone	Email Address	Opt-Out Channel	Opt-Out Date
John	Smith	180 Main Street	Anytown	CA	90000	888-888-888	999-999-9999	Sample@Test.com	Do Not Email	1/17/2017
John	Smith	180 Main Street	Anytown	CA	90000	888-888-8888	999-999-9999	Sample@Test.com	Do Not Call	1/17/2017
John	Smith	180 Main Street	Anytown	CA	90000	888-888-8888	999-999-9999	Sample@Test.com	Do Not Email	1/17/2017
John	Smith	180 Main Street	Anytown	CA	90000	888-888-8888	999-999-9999	Sample@Test.com	Do Not Call	1/17/2017
John	Smith	180 Main Street	Anytown	CA	90000	888-888-888	999-999-9999	Sample@Test.com	Do Not Email	1/17/2017
John	Smith	180 Main Street	Anytown	CA	90000	888-888-8888	999-999-9999	Sample@Test.com	Do Not Call	1/17/2017

John	Smith	180 Main Street	Anytown	CA	90000	888-888-888	999-999-9999	Sample@Test.com	Do Not Email	1/17/2017	
John	Smith	180 Main Street	Anytown	CA	90000	888-888-8888	999-999-9999	Sample@Test.com	Do Not Call	1/17/2017	
John	Smith	180 Main Street	Anytown	CA	90000	888-888-888	999-999-9999	Sample@Test.com	Do Not Email	1/17/2017	
John	Smith	180 Main Street	Anytown	CA	90000	888-888-8888	999-999-9999	Sample@Test.com	Do Not Call	1/17/2017	
John	Smith	180 Main Street	Anytown	CA	90000	888-888-8888	999-999-9999	Sample@Test.com	Do Not Email	1/17/2017	
John	Smith	180 Main Street	Anytown	CA	90000	888-888-8888	999-999-9999	Sample@Test.com	Do Not Call	1/17/2017	
John	Smith	180 Main Street	Anytown	CA	90000	888-888-8888	999-999-9999	Sample@Test.com	Do Not Email	1/17/2017	
John	Smith	180 Main Street	Anytown	CA	90000	888-888-8888	999-999-9999	Sample@Test.com	Do Not Call	1/17/2017	
John	Smith	180 Main Street	Anytown	CA	90000	888-888-8888	999-999-9999	Sample@Test.com	Do Not Email	1/17/2017	
John	Smith	180 Main Street	Anytown	CA	90000	888-888-8888	999-999-9999	Sample@Test.com	Do Not Call	1/17/2017	
John	Smith	180 Main Street	Anytown	CA	90000	888-888-8888	999-999-9999	Sample@Test.com	Do Not Email	1/17/2017	
John	Smith	180 Main Street	Anytown	CA	90000	888-888-8888	999-999-9999	Sample@Test.com	Do Not Call	1/17/2017	

Digital Impressions



Digital Impressions provides information on:

- The count of digital impressions served to customers by week.
- The count of impressions served on tablets, mobile devices, and computers.



Honda Motors

Anytown, CA

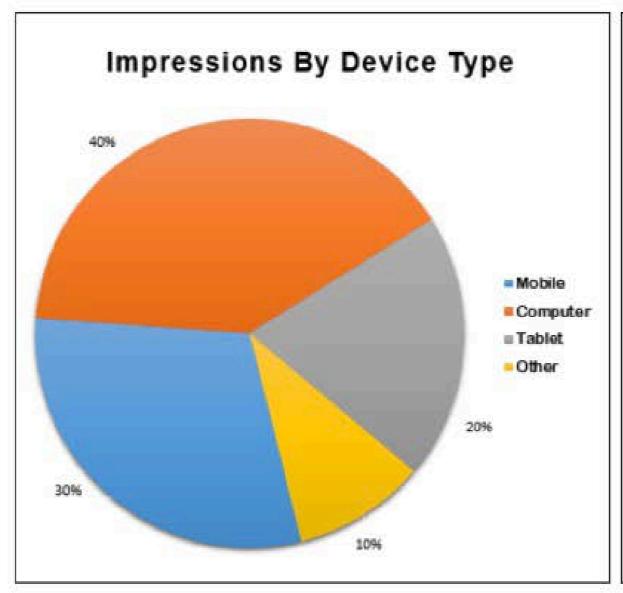
Dealer No: 000000 Org ID: 000000

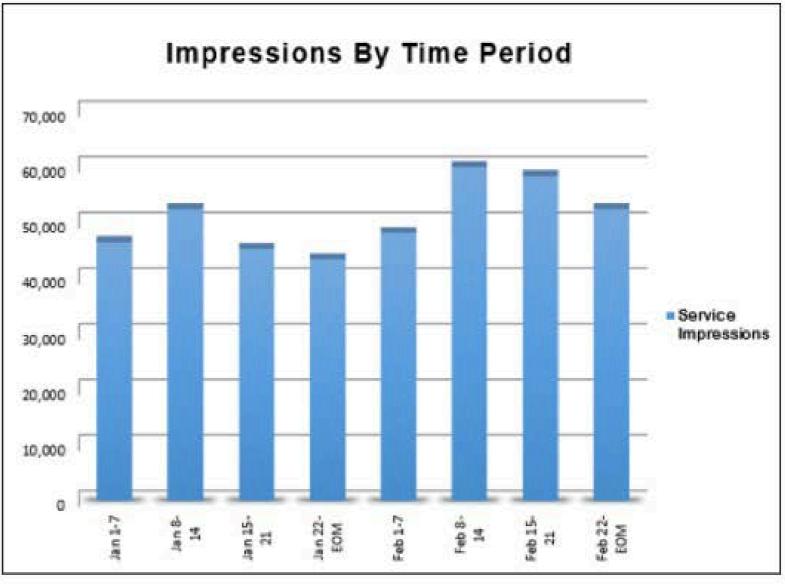
Digital Impressions Report

Report Generated: 3/1/2016

Last 60 Days: From Date: 1/1/2016 To Date: 2/28/2016

Days of the Month	1-7	8-14	15-21	22-EOM	Total
Impressions	96,439	106,590	98,469	104,561	406,059



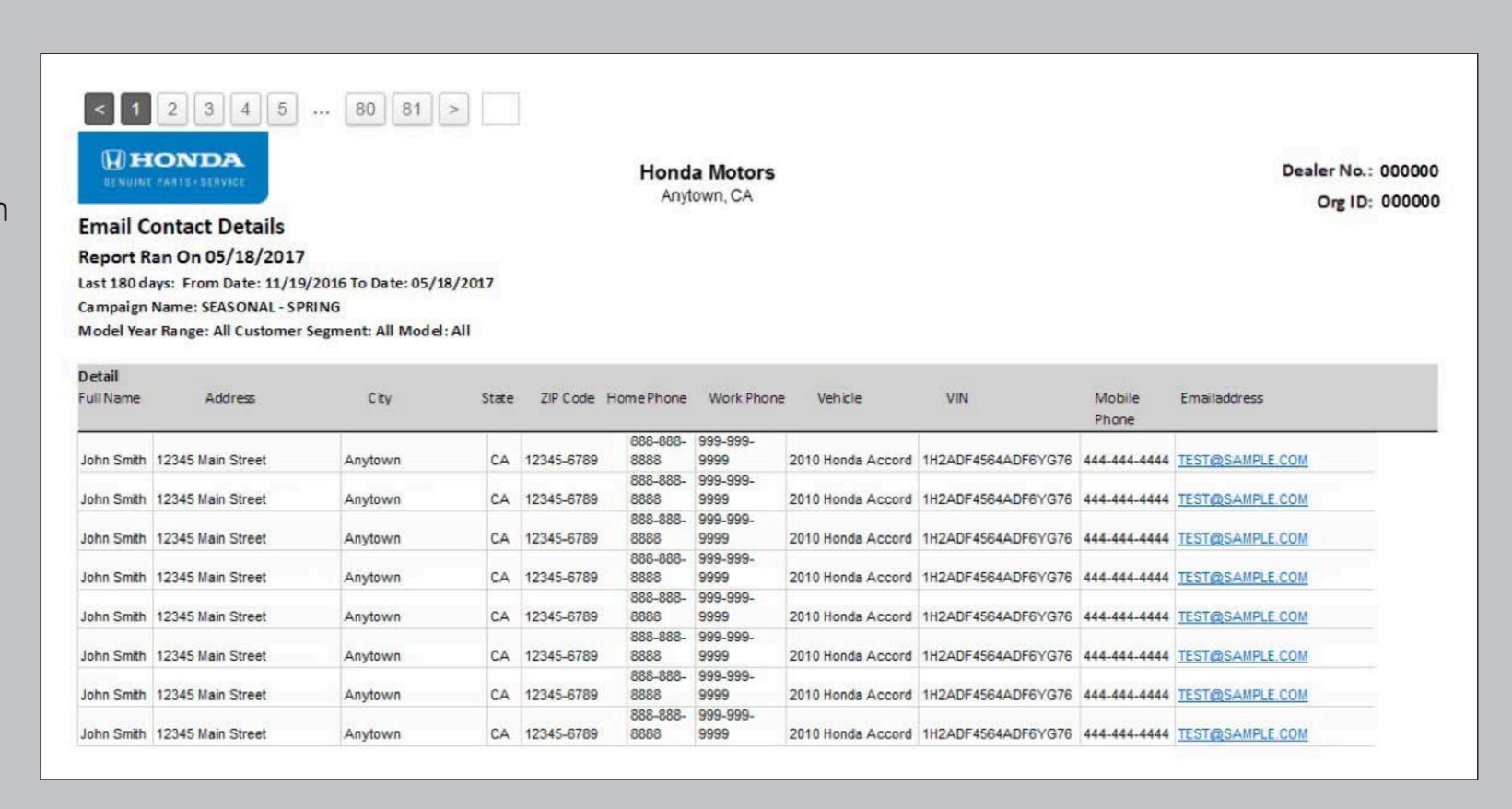


Email Summary (cont'd)

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Email Summary drill-down:

• Clicking on underlined fields in the Email Summary will open a drill-down report of that campaigns contact list for each disposition.



Business Rules



Response Match Window

180 Days for HOW and 90 Days for all others from estimated in-home date.

Response Match Logic

- VIN
- Last Name, Address 1, City, State
- Last Name, Address 1, ZIP
- Address 1, City, State
- Address 1, ZIP

- Each repair order is counted as a response match.
- Match window is based on repair order open date.
- If a repair order is matched to multiple campaign communications a response is counted for each qualifying campaign.
- RO Detail reflects servicing VIN if soliciting different VIN from multi-VIN household.