

Ashok Motors – Dealership & After-Sales CRM

★ Problem statement-

♦ Ashok Motors needs a CRM to manage leads, test-drives, vehicle sales, service bookings and warranty claims. Goals: increase lead→sale conversion, reduce service turnaround time, and provide dashboards + simple AI suggestions for customers.

★ Requirement Gathering-

- ♦ Lead Management: Customer enquiry → Lead capture → Assign to dealer.
- ♦ Test-Drive Scheduling: Online/offline test-drive booking.
- ♦ Opportunity & Sales Tracking: Lead → Opportunity → Sale → Invoice.
- ♦ Service Appointment Management: Vehicle servicing's schedule aur SLA track .
- ♦ Warranty Claim Tracking: Vehicle warranty claim and approval/rejection.
- ♦ Dashboards & Reports: Sales conversion for Manager , service performance reports.
- ♦ Basic Automation: Lead assignment, service reminders, discount approval process.

★ Stakeholders list-

- ♦ Dealer Manager (needs sales dashboard)
- ♦ Sales Rep (needs leads & test-drive schedule)
- ♦ Service Agent (needs appointments & SLA)
- ♦ Customer (books test-drive & service)
- ♦ Admin (manages users & data)

★ Business process mapping-

♦ Customer inquiry → Lead created → Assign to Dealer → Test-drive scheduled → Convert to Opportunity → Close → Create Invoice → After sale service booking → Warranty claim workflow.

★ Industry-Specific Use Case Analysis-

- ♦ Lead Management (automobile inquiry handling)
- ♦ Test Drive scheduling & tracking
- ♦ Vehicle Sales (discount approval + invoice)
- ♦ After-Sales Service (appointment + SLA)
- ♦ Warranty Claims workflow
- ♦ Dealer Performance dashboard

★ AppExchange Exploration-

- ♦ Salesforce Scheduler → Test Drive & Service appointment scheduling
- ♦ Field Service Lite → Field assignment for Service Agents
- ♦ DocumentSign → Vehicle sales contracts me e-signature
- ♦ Salesforce Surveys → Customer feedback collection
- ♦ Einstein Next Best Action → AI-based recommendations