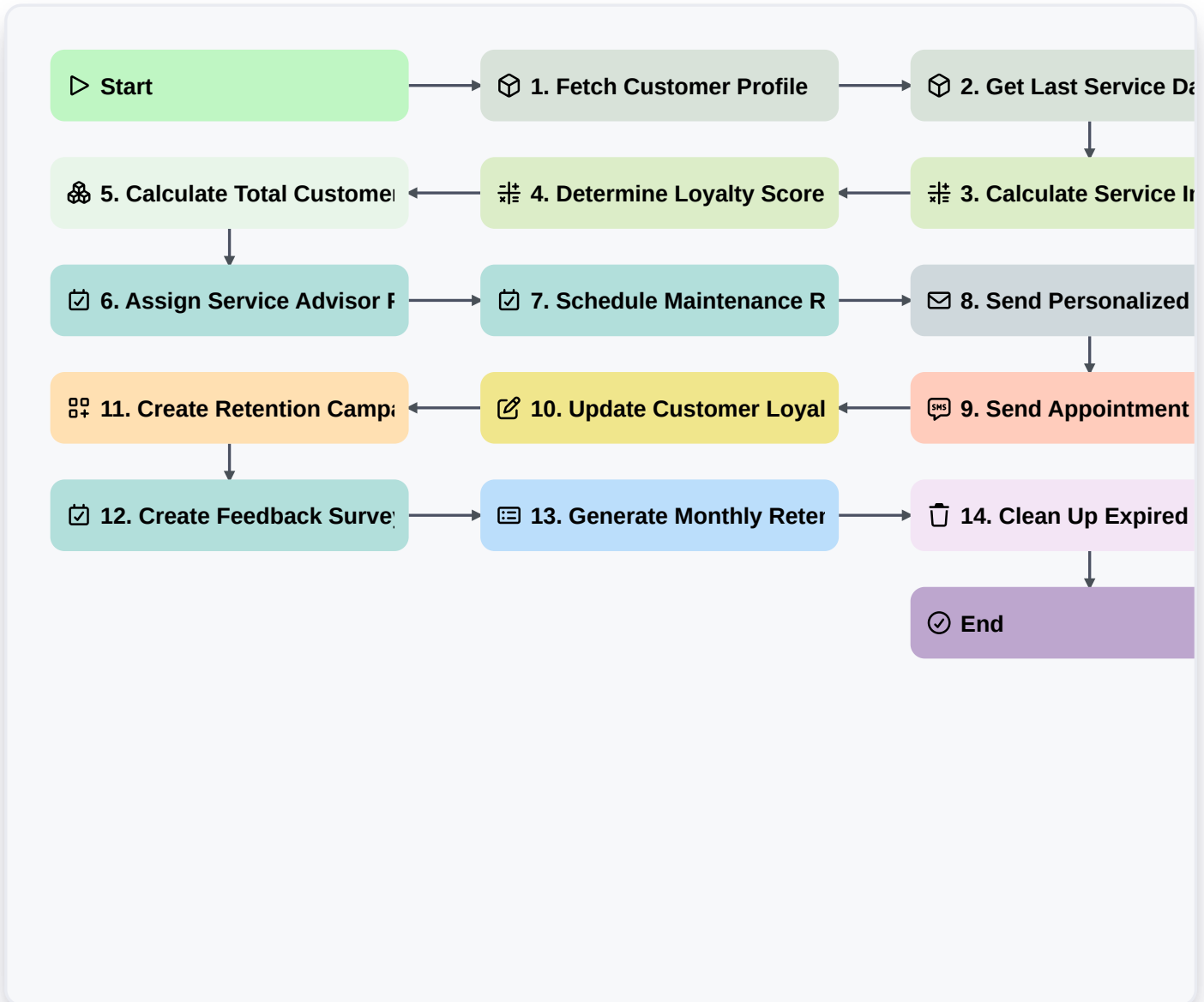


Automotive Customer Retention Process



▷ Start

Start of the Workflow/Process.

📦 1. Fetch Customer Profile

Retrieve the customer's service history, contact details, and vehicle information from the Customer Data Model.

📦 2. Get Last Service Date

Identify the date of the last recorded maintenance visit to calculate the interval since last service.

📊 3. Calculate Service Interval Gap

Calculate the number of days elapsed between the current date and the last service date.

📊 4. Determine Loyalty Score

Apply a formula based on frequency of visits and total spend to determine the customer's loyalty tier.

📊 5. Calculate Total Customer Lifetime Value

Sum all historical transaction amounts from the Sales Data Model for the specific customer.

📋 6. Assign Service Advisor Follow-up

Create a task for the assigned Service Advisor to review the customer's recent feedback.



 **7. Schedule Maintenance Reminder Task**

Create a task for the CRM team to call customers whose service interval is approaching.

 **8. Send Personalized Service Offer**

Send an automated email containing a discount voucher for the upcoming scheduled maintenance.

 **9. Send Appointment Reminder SMS**

Send a short text message reminder 24 hours before the scheduled service appointment.

 **10. Update Customer Loyalty Tier**

Update the 'Loyalty Status' field in the Customer Data Model based on the new calculated score.

 **11. Create Retention Campaign Log**

Create a new entry in the Campaign Tracking model to log that a retention action was performed.

 **12. Create Feedback Survey Task**

Create a task to trigger a CSAT (Customer Satisfaction) survey 3 days after the service is completed.

 **13. Generate Monthly Retention Report**

Create a summary report showing the conversion rate of customers who responded to retention offers.

 **14. Clean Up Expired Offers**

Delete temporary promotional code entries that have passed their expiration date.

 **End**

End of the Workflow/Process.