

Customer lifecycle marketing

Automatically segments customers based on purchase history and service records, then delivers personalized marketing campaigns across multiple touchpoints to drive repeat sales and service appointments.

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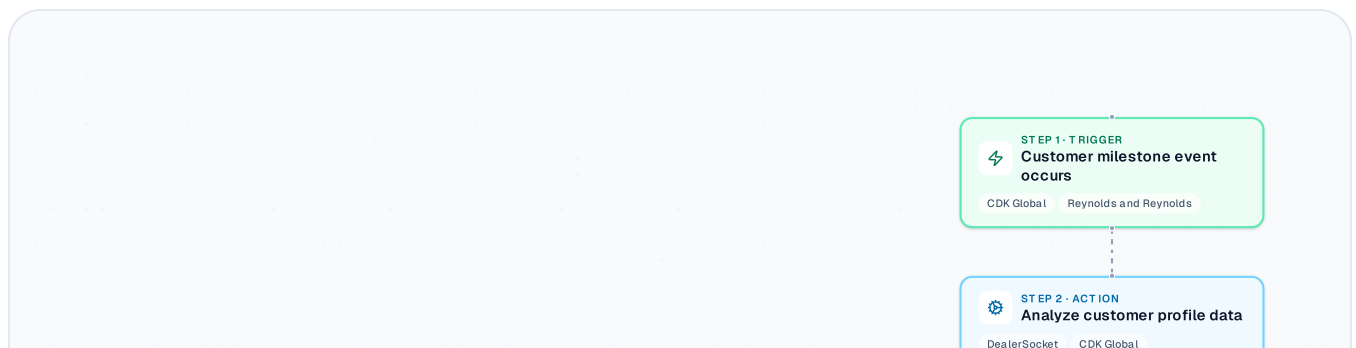


WORKFLOW TRIGGER

Customer completes vehicle purchase or major service milestone

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

Customer milestone event occurs

Workflow initiates when a customer purchases a vehicle, completes a major service, or reaches a predefined lifecycle stage. Customer data is pulled from the dealership management system.

CDK Global

Reynolds and Reynolds

2

 ACTION

Analyze customer profile data

System aggregates customer purchase history, service records, vehicle details, and demographic information to build comprehensive customer profile. Previous interaction history and preferences are compiled.

DealerSocket

CDK Global

3

 DECISION

Segment customer lifecycle stage

Customer is categorized based on time since purchase, service frequency, vehicle age, and engagement level into segments like new owner, loyal customer, or at-risk customer.

DealerSocket

4

 ACTION

Generate personalized marketing content

System creates targeted messaging and offers based on customer segment, vehicle type, and identified needs. Content includes service reminders, upgrade offers, or loyalty rewards.

5

ACTION

Execute multi-channel campaign delivery

Personalized messages are sent through email, SMS, direct mail, and digital advertising platforms at optimal timing. Campaign schedule is customized to customer preferences and behavior patterns.

DealerSocket

VinSolutions

6

ACTION

Track engagement and responses

System monitors customer interactions with campaigns including email opens, clicks, appointment bookings, and sales inquiries. Response data is logged for future optimization.

DealerSocket

CDK Global

7

OUT PUT

Update customer journey status

Customer lifecycle stage and engagement score are updated in the CRM system. Next campaign triggers are scheduled and campaign performance metrics are recorded.

DealerSocket

CDK Global



Outputs

- Segmented customer profiles with lifecycle stages
- Personalized marketing campaigns delivered across channels
- Updated customer engagement scores and next action triggers



Key Metrics

- Customer retention rate
- Service appointment conversion rate
- Repeat purchase rate



Tools & Integrations

- CDK Global
- Reynolds and Reynolds
- DealerSocket
- VinSolutions

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