Reference: IPSB/18-218
Date: September 28, 2018

Attention: Retailer Principal, Executive & Service Managers

INFINITI announced the availability of a new DBS enhancement tool to the *Service > Campaign* screen: *Retailed Vehicle Open Campaign Report* on July 9, 2018, which identifies owner contact information for specific campaigns. Currently, only Takata campaign owner lists are available. The following personnel will have access to this tool:

- **Retailer:** Dealer Principal, Executive Managers, General Managers, Parts/Service Managers, and/or Parts/Service Directors
- **Regions:** Regional Aftersales Manager (RAM), Regional Operations Managers (ROM), Fixed Operations Manager (FOM), Dealer Operation Managers (DOM), Regional Service Operation Managers (RSOM), and Client Experience Managers (CEM)

The report can be viewed on screen or exported to Microsoft Excel and identifies the following:

- VIN
- Campaign ID & Campaign Description
- Model & Model Year
- Data Source
    - Up to three data sources can be provided for each VIN
        - *RO Info:* If this VIN has visited an Infiniti retailer anywhere in the U.S. within the last twelve months, the RO information will be displayed.
        - *Campaign Mailing List*: This is DMV data for the VIN listed
        - *Marketing List*: If an owner is on your marketing list, their contact information from that list will be displayed here. DMV data is not used for marketing list owner information.
- Contact Name
- Last Name/First Name & Address (City, State, Zip)
- Phone (1-3) & Email (1-3)
- Remove Flag
    - This defaults to "N" unless the retailer or INFINITI USA flags this VIN for removal.
    - The removed information will still show on the DBS screen and exported report, but can be filtered on the exported file to only display the records with "N" in this column.
- Comment
    - This field will display a reason if the remove flag being set to "Y"
    - This will allow information to be relayed back to INFINITI USA and our data provider to improve future lists.
    - Beginning September 16, 2018, this comment field will offer a drop down selection of choices for changing the flag to "Y".
        - Scrapped/Salvage
        - Stolen
        - Exported
        - No longer owned
        - Not in retailer inventory
        - Incorrect contact info
        - Too far from retailer
        - Free text (50 characters) – free text of 20 characters is available now.

- o INFINITI has already identified VINs that should be flagged as "Y" for each retailer and will implement a change to update the removed flag status to "Y" on those identified VINs. The comment will display "HQ Removed" for VINs changed. This update will not affect any records already identified by retailers and changed.
- Action:
  - o This field activates the edit function for changing the remove flag to "Y" or "N"
  - o The check mark will save any edits made
  - o The "x" will cancel any edits made

IMPORTANT: *Due to the personally identifiable information available in this report, retailers should limit employee access to this information to only those personnel that requires it. Additionally, INFINITI Corporate employees should avoid saving and emailing this information for their retailers. Instead, coach your retailers on how to use this feature using the step-by-step instructions in this bulletin.*

Frequently Asked Questions (FAQ):

Q. Are there differences in how marketing information is sourced vs. campaign mailing lists?

A. Yes, marketing lists are sourced from a different vendor and do not use DMV data to confirm owner information. The campaign mailing lists may also use multiple sources to append owner information apart from DMV records (e.g. credit reports, police files, salvage records, etc.). DMV data is obtained from state DMVs based on owner provided information.

Q. When I run a Custom VIN Campaign Report (IPSB17-130) using VINs from my marketing list, I see vehicles on the Custom VIN Campaign Report (sourced from marketing data) that are not on my Retailed Vehicle Open Campaign Report or vice versa. Why?

A. This happens for several reasons:

1. The marketing list is gathered from different sources and does not use DMV data

2. The VIN assignment logic is different.

   a. The marketing list uses sales within the last 12 months and service within the last 18 months to determine which retailer is assigned the VIN. When using sales records (RDR), the distance from the retailer determines whether the VIN is assigned to the selling retailer or the closest Primary Market Area (PMA)/retailer to the owner's address. When using service history, the number of repair orders is used to determine retailer assignment. If two or more repair orders have been created within the last 18 months, the servicing retailer is assigned the VIN. If less than two repair orders have been created, the closest PMA/retailer is assigned the VIN.

   b. The campaign-list retailer-assignment methodology is much simpler. If a vehicle has been to a retailer within the last 12 months, the servicing retailer is assigned the VIN. If no repair order history exists within the last year, the closest PMA/retailer is assigned the VIN.

Q. My marketing list has different contact information than the retailed vehicle open campaign report. Why?

A. The marketing list is not using DMV data for owner information.

Q. Why do salvage yards, insurance companies, and banks show up as owners for some VINs?

A. If a vehicle is scrapped, an insurance company or salvage yard may show up as the owner. Similarly, a bank may show as the owner of a repossessed vehicle. Campaign mailing lists may reflect these owners if it cannot be determined if a vehicle is out of transit (i.e. not being driven/used) and governmental regulations require us to keep these vehicles active on our list. The remove flag was provided in DBS as a resource for retailers to use to flag these VINs and filter them out before passing the information to their Business Development Center (BDC).

Q. Will additional campaigns be added in the future?

A. The report has the functionality to include any campaign Client list. INFINITI will upload campaigns on a case-by-case basis. Retailers also have the ability to automatically send open campaign communications (postcards and emails) to Clients in a CADENCE-Enrolled retailer's active parameter settings. For example, if a retailer enrolled in a 10-mile/10-model year minimum, and a Client in those parameters is eligible for a campaign, the communication will deploy automatically. Campaign reminders through the CADENCE program are considered eligible if:

- An official notification has been sent to an owner by INFINITI and at least 60 days have passed without a remedy applied.

- Parts required for the campaign remedy are readily available and not restricted.

Q. How often are the lists updated?

A. The timing will vary by campaign.

CONTINUE FOR STEP BY STEP INSTRUCTIONS FOR ACCESSING THE RETAILED VEHICLE OPEN CAMPAIGN REPORT

Topics Included in this Reference Guide:

☑ Access the Retailed Vehicle Open Campaign Report Screen

☑ Generate the Retailed Vehicle Open Campaign Report

☑ Using the Filter and Search Fields

☑ Update the Remove Flag and the Comment Fields

☑ Export the Retailed Vehicle Open Campaign Report

RETAILED VEHICLE OPEN CAMPAIGN REPORT

Access the Retailed Vehicle Open Campaign Report Screen

1. Hover over the **Service Menu**.
2. Click **Retailed Vehicle Open Campaign Report**. The *Retailed Vehicle Open Campaign Report* screen displays.
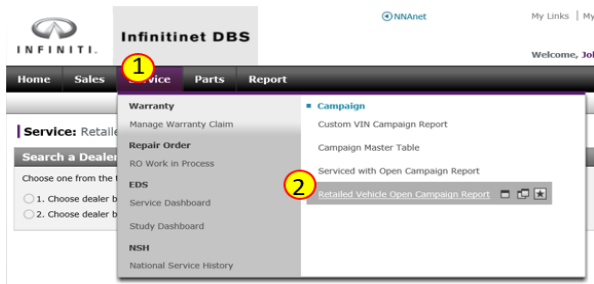
Generate the Retailed Vehicle Open Campaign Report

1. At the confidentiality **Agreement**, read the Agreement, and then click the *"Check this box to accept the Agreement"*. The **Search** button becomes active.
2. Click the **Search** button to display owner contact information for specific campaigns.

   Note: A record for a VIN will display on multiple rows if the **Data Source** is different. The **Data Source** can be one or all of the following:

   - *RO Info* will display if this VIN has visited a retailer anywhere in the U.S. within the last twelve months, the RO information will be displayed.
   - *Campaign Mailing List* is DMV data for the VIN listed.
   - *Marketing List* displays if an owner is on your marketing list. Their contact information from that list will be displayed here. DMV data is not used for marketing list owner information.

RETAILED VEHICLE OPEN CAMPAIGN REPORT

Using the Filter and Search Fields

The **Filters** at the top of the report allow you to filter the **Retailed Vehicle Open Campaign Report** list by **Campaign Type**, **Campaign Group** (reserved for future use) or **Active Campaigns**. Currently, this report will only display *Safety* campaigns for Takata Air Bags. In the future, these filters will be expanded to include additional campaigns.

- The **Active Campaign** drop down will display a listing of all Takata Air Bag Campaigns.
- Once you change the Filter criteria, click the "*Check this box to accept the Agreement*", and then select the **Search** button.

The **Search** boxes are located on the **VIN**, **Campaign Number**, **Campaign Description** and **Data Source** columns.

- Type any portion of the information to search. For example, for VIN type the last 6 digits, the last 3 digits, etc.
- The **Search** boxes are case sensitive. For example, when typing a VIN, you <u>cannot</u> type **3n1ab**. You <u>must</u> type **3N1AB**.

RETAILED VEHICLE OPEN CAMPAIGN REPORT

Update the Remove Flag and the Comment Fields

Use the **Remove Flag** and the **Comment** field to indicate a record for removal and the reason. This will information will be relayed back to NNA and our data provider to improve future lists. The removed information will still show on the DBS screen and exported report, but can be filtered on the exported file to only display the records with "N" in this column.

1. In the **Action** column on the far right (you may have to scroll to view this column), click the **Edit** icon (pencil).

2. Select **Y** at the **Remove Flag** drop down.

3. At the **Comment** field, type a reason (current limit is 20 characters and will be increased to 50 characters) or select a reason from the drop down (available on 9/17/2018), e.g., Scrapped/Salvage, Stolen, Exported, No longer owned, Incorrect contact info, Too far from retailer, etc.

   Note: NNA has already identified VINs that should be flagged as "Y" for each retailer and will implement a change to update the removed flag status to "Y" on those identified VINs. The comment will display "*HQ Removed*" for VINs changed. This update will not affect any records already identified by retailers and changed.

RETAILED VEHICLE OPEN CAMPAIGN REPORT

Export the Retailed Vehicle Open Campaign Report

1. Click the **Export** icon, [icon], to transfer the report data to Excel.
2. Click **Open**, then **Save** the exported data to your desired file location.