



DEALER SECRETS TO SUCCESS

“Discover How This Powersports Business Thrives in Customer Service by Going the Extra Mile to Communicate with its Customer Base”



Billy Clymer, co-partner of Action Cycle & Jet Ski

Here's your chance to learn how Billy and Mike Clymer have set Action Cycle & Jet Ski apart from the competition by keeping in constant communication with their customers through the use of direct mail, surveys, birthday cards, thank you cards, open houses and interaction in the community. And by tracking customer information, customer purchases and mail merging in *Ideal for Windows*, Billy and Mike have found it much easier to frequently reach the community and continue their business growth...

Question: Can you tell us what you and your brother Mike have done to make your business successful?

Billy: “We’ve been in the business since 1994, but took it over when our father passed away in 2001. Since then, I think we’ve worked hard to make the business become more inviting to our customers.

There are several things we do to promote good customer service. We have open houses twice a year and offer demo rides. We also keep in touch with our customers on a continual basis by sending out birthday cards that include coupons, thank you notes, and we do a lot of direct mailing.”

Question: How do you keep track of how you send out birthday cards?

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6 Ways You Can Improve the Quality of Your Service Department

By Dave Baumgarten, Jeff Haefner and Erin Zein

Learning how to properly manage your service department can make or break you in terms of providing good customer service and spreading great word of mouth about your business.

All too often businesses overlook some simple aspects of providing good customer service through their service department. Therefore it's essential that you evaluate the things you are currently doing and discover ways to better manage this area of your business.

Here are six practices you can incorporate into your business to improve the quality of service you provide for your customers...

1) ALWAYS keep your customers up to date if the work is going to take longer than expected! □

This is a really important detail that many businesses tend to overlook. Truly understanding how to make this a priority can often be the difference between keeping and losing a customer.

The important thing to remember is to provide any information possible about the service order, whether it's close to completion or not. It's especially helpful to inform the customer if something is causing a delay. For example, let the customer know that the reason you can't perform their service today is because "you are waiting for parts on back order" or "your mechanic got held up working on a job that took longer than expected".

Obviously this becomes a little more hectic during busier seasons, but it is something that your administrative employees should make a conscious habit of doing. If you don't always keep your customers up to date and give them a reason why something is happening, they

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Action Cycle & Jet Ski: Achieving Success Through Customer Service...

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Billy: "Before we used Outlook and now we use *Ideal*. We record our customer's birthday when they purchase a unit from us. Twice a month we search for birthdays that are coming up in the following month. Then we send out basic birthday cards with a coupon as an incentive to the customer to come in and do more business with us."

Question: What do you consider to be the strengths of your business compared to most other retailers?

Billy: "I think the big thing for us is love of the sport. We ride what we sell so we have tremendous product knowledge and enthusiasm for what we do."

Question: What steps do you take to go that extra mile to provide great customer service?

Billy: "We've done some customer surveys. If there is a problem, we work on solutions. It may cost some money up front, but we found that if you make the customer happy, they will stick with you."

Question: What type of surveys do you conduct?

Billy: "We do surveys on how did you find us and why did you choose us. We ask them what radio stations they listen to so we can advertise in the right places. We also try to find ways on how we can expand the business. Right now we're working on a survey to see if customers are needing



Action Cycle & Jet Ski keeps in constant communication with customers through birthday cards, thank you cards, direct mail and surveys. The customer information and mailing lists can easily be tracked through *Ideal*.

winter storage because we are considering the possibility of offering storage units to our customers. So we also try to use these surveys to look for new ventures for our business."

Question: What kind of response rate do you get from the surveys?

Billy: "We usually get a pretty good response rate. For the survey on our storage venture, we're using a random sample that we're either calling or sending out mailers to and have had a great response. It helps us out quite a bit."

Question: What specific methods do you think are most important in maintaining return customers?

Billy: "Just customer care and customer satisfaction. If you have a lot of repeat business, it is easier to know the customer and find ways to help them out."

Question: What are the top three most effective methods you've used to attract new customers?

Billy: "Getting out in the public eye and word

of mouth. We attend about three or four rides a year and use the products we sell. We go to a lot of gathering places and interact with other riders. That is a very effective tool for us."

Question: What methods do you use to advertise your business?

Billy: "We do a lot of direct mailing. We also advertise on radio and TV."

Question: How big are your direct mailings and do you outsource them?

Billy: "Our last mailing was sent to approximately 2,000 people. We write our mailings in-house and take them to a copier."

Question: What types of services do you promote in these mailings?

Billy: "We promote open houses, sales products, and when new things come out. If there is a special on a specific part for a certain machine, we will send something out to the people who have that machine. If there are updates for a specific bike, we will send something out to those customers saying now is the time to update this bike."

Action Cycle & Jet Ski

Location: Marion, IA

Opened: 1994

Co-Partners: Billy and Mike Clymer

Employees: 4 full-time

Merchandise:

Motorcycles, ATVs, Jet Ski, Watercraft and Mule Utility Vehicles

Top 3 Brands:

Full-line Kawasaki Dealer, Parts Unlimited, ShoreLand'r

It's much easier to determine who has these products now that we have the *Ideal* system."

Question: Inventory management is hard for any dealer. How have you been able to keep the right items stocked so you don't lose sales?

Billy: "Now that we have *Ideal*, we are able to access a Lost Sales search. We are also able to track parts sold. We can see that we sold five of something in a certain month, so we make sure we have five in stock. *Ideal* has helped us a lot with our inventory management. Everything is less time consuming and helps put us back on the sales floor faster."

Question: Is there ever a time of year when business is slow? If so, what sales practices do you use to keep business consistent throughout the year?

Billy: "January and February are probably our slowest months. We usually do direct mail during that time offering all types of routine services, warranty services and customization of bikes."

Question: What are the top three practices you've incorporated to manage your service department more effectively?

Billy: "Since we are kind of a smaller business, we try to keep the customers who are looking for free service advice away from the actual service technicians. We try and screen phone calls a little better so this doesn't happen. We have a big scheduling pad so we are better organized. We also hire more people when needed. If we need to hire extra people, it's to help us do routine stuff. It doesn't happen a lot, but we will hire good customers that we know are knowledgeable of our products."

Question: What concerns did you have when you were trying to decide if you should purchase *Ideal*?

Billy: "We knew there were concerns on whether we would be able to stick to it and use it properly since this was our first computer system. We wanted to make sure we were organized enough to use it and use it well."

Question: What was the one deciding factor that made you purchase *Ideal*?

Billy: "I felt we needed something to become more updated. We needed something we could use to track our inventory and customer information better."

Question: Which features in *Ideal* do you find most beneficial?

Billy: "I would say probably the customer lists. They easily tell me who my customers are, where they're from, and what they purchased. It's been a great help. This allows us to do all of our mail merging through the system so we can easily send out our surveys and direct mailings."

Question: What advice would you give to someone that is looking to buy software for their business?

Billy: "Find a place that is customer friendly and willing to help. Make sure they want to help you make your business run properly and grow, not just sell you the software." 📱

Announcement About a New **FREE** Interface with *PartsManager Pro* and *Ideal for Windows*

Did you know that if you are



currently using the PartSmart interface with your *Ideal for Windows* system, you can receive *Ideal's* PartsManager Pro interface for free!

That's right! Now you have even more flexibility to look up the latest information on your parts, including Tecumseh, and easily add them to an invoice through your *Ideal* system. The addition of this interface will allow you to display the updated pricing and stock information right in Parts Manager Pro.

To learn more about how *Ideal* interfaces with PartSmart and PartsManager Pro, please contact an *Ideal* sales representative today at 800-737-1620. 📱

Coming Soon... *Ideal for Windows'* **FREE** Interface with mediaCAT!

Ideal for Windows customers who require parts lookup for Stihl products, please take note...

We are just a couple weeks away from introducing a new interface between *Ideal for Windows* and eVision's mediaCAT parts lookup. The interface will work similar to the PartSmart and PartManager Pro interfaces and will give you the ability to look up the latest information on your Stihl products and add them to invoices through *Ideal*.

The mediaCAT interface will be available to *Ideal for Windows* users who currently use the PartSmart interface free of charge. More details will be released once they become available. 📱

Announcing a NEW Website Shopping Cart Interface That Makes it MUCH Easier to Get Your Orders into *Ideal for Windows*

With more and more of our customers selling products on their website, we have received many requests for a faster and easier way to enter those website orders into *Ideal*.

In order to meet those needs, *Ideal* is pleased to announce a quick and reliable way to save hours of time processing all of your website orders...

A new website shopping cart interface has been developed to import orders that come from your website directly through *Ideal for Windows*, virtually eliminating the hassle of entering orders and new customers by hand. The interface also reduces data entry mistakes and will improve your customer service by accurately filling in the needed information from your website orders.

"We have a lot of sales come through our website shopping cart and the new interface has made this part of our job a lot easier," said Riz Ahmad of Speedway Sales, an *Ideal* customer who recently incorporated the new shopping cart interface into his business. "Using the *Ideal* interface has helped save us a great deal of time so we can focus our attention on the other daily tasks of our business."

Whether You Currently Utilize a Website Shopping Cart or If You Want to Use *Ideal's* Fully Integrated Cart, We Can Help...

Ideal for Windows users who would like to take advantage of the new shopping cart interface have two options...

Option #1: You can check with *Ideal* to see if your existing shopping cart has the capability to export into your *Ideal* system.

If your current shopping cart has the proper exporting abilities, you can utilize our new shopping cart interface.

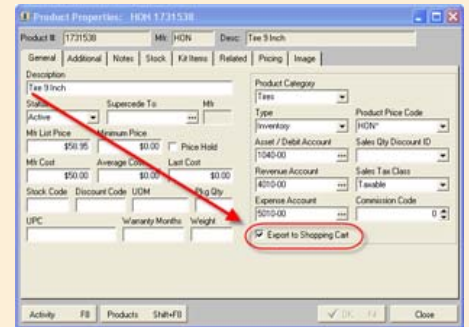
By using this interface with your existing shopping cart, you will greatly reduce the amount of time it takes to process orders because there is no longer a need to manually input each order. All orders will be recorded and completed in just a few steps!

And not only can you import all your orders in just a few seconds, you can also create new customers in the system. If the customer doesn't exist in *Ideal*, the interface will create the new customer automatically. *Ideal* users have found this to be extremely helpful because most website orders come from brand new customers. And having to create a new customer every time an order is placed is incredibly time consuming. Now, this can be done in just seconds!

In addition, if your shopping cart supports the proper importing features, you can easily export products and pricing from the *Ideal* software so you don't have to update information in both systems. You can pick and choose which products get exported to file. This feature alone will save you huge amounts of time!

Even though this new solution is a big time saver, there are still a few steps required to export and import files. Also keep in mind that this requires a bit of computer knowledge and you must remember to initiate the process manually for the updates to occur. In addition, you will have to make sure that all of the product numbers on your shopping cart site are identical to the product numbers listed in *Ideal*.

Although this solution will work extremely well for some of our customers, we have an even better solution for those who are looking for even more integration and want to save more time...



You can easily select which products you would like to import into your shopping cart from *Ideal* by checking the "Export to Shopping Cart" box located in *Ideal's* Product Properties.

Option #2: Use our fully integrated shopping cart solution that gives you more features and makes it even easier to use

Ideal has teamed up with GepCom to offer a fully integrated shopping cart solution. The shopping cart saves you time by synchronizing information in two directions...

First, if you simply check the "Export to Shopping Cart" box in *Ideal* for a specific product, these items will automatically be displayed on your website.

Then, every time you update pricing or any information for this product in *Ideal*, those changes will be reflected on your website automatically. This process can happen "behind the scenes" so you never have to remember to run the export.

The current image, price, manufacturer, category, product number and description of your items will all be accessible on your website shopping cart.

Because everything is synchronized, you won't have to worry about discrepancies in product information between your website and *Ideal*.

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Ideal Family Continues to Grow with the Addition of Six New Positions...

Ideal customers have noticed some new voices when communicating with Ideal employees over the last few months. That's because the recent growth of our customer base has created the need for six new positions.

Since December, Ideal has hired an additional technician in the IT department, a full-time systems documentation specialist, two additional customer support representatives, an Internet trainer for *Ideal* DOS to Windows data conversions and an administrative assistant to the marketing department.

Here's your chance to meet the new faces of Ideal...

Joe Haefner (pictured far left)

Internet Trainer for DOS to Windows Data Conversions

After spending the past two years doing some part-time work at Ideal while attending college, Joe Haefner began working in April full-time and is now Ideal's Internet trainer for DOS to Windows data conversions.

During his time at Ideal, Joe has helped build systems and has assisted in several on-site trainings. Joe graduated from the University of Northern Iowa in December 2005 where he received his Bachelor's degree in Accounting.

Greg Crisp (pictured 2nd from left)

Computer Installation/Repair Technician

Greg came to Ideal in December and serves as Ideal's customer computer installation technician and computer repair technician. He is in charge of customers' hardware setup and repair and also helps troubleshoot hardware issues.

Greg has specialized in computer hardware work since 1997. Prior to working at Ideal, he spent four years as a computer repair technician at APAC in Cedar Rapids, IA.

Megan Andersen (pictured 3rd from left)

Administrative Assistant to the Marketing Dept.

Megan is the newest addition to the Ideal family, joining in late May as the administrative assistant to the marketing department. Megan aids in the lead generation/conversion process, conducts



Ideal's newest employees are (L to R): Joe Haefner, Greg Crisp, Megan Andersen, Bill Hall, Pam Kraus and Mary Mulligan

evaluation calls with current Ideal customers and also assists with major marketing projects.

She graduated from the University of Northern Iowa in December 2005 and has had several administrative internships. She also has an extensive background in customer service, working 2 ½ years as a department supervisor at Kohl's.

Bill Hall (pictured 3rd from right)

Customer Support Representative

Customer support representative Bill Hall came to Ideal in late February after working the previous two and a half years as a support technician at Applied Systems, an insurance management software company.

Bill's work focuses on helping customers troubleshoot all areas of the Ideal software. He's also working toward a degree in Local Area Networking at Kirkwood Community College.

Pam Kraus (pictured 2nd from right)

Systems Documentation Specialist

Pam started working for Ideal in December as a full-time systems documentation specialist, creating all help files and procedures for the *Ideal for Windows* software.

Pam has had 11 years experience in writing software documentation. Prior to her work at Ideal, she created documentation at LMS International for a Dynamic Analysis

Software program. She also worked at Parson's Technology writing documentation for consumer software programs.

Pam graduated from the University of Iowa in 1993 with a Bachelor of Arts in Journalism and Mass Communications.

Mary Mulligan (pictured far right)

Customer Support Representative/Training Specialist

Mary brings 25 years of experience in accounting and computer science to her role as a customer support technician/training specialist at Ideal.

She previously owned Data Management Services in Tampico, IL. The business later grew into William & Mary Computer Center in Rock Falls, IL, specializing in computer sales and service, networking, accounting software training and support.

She has also taught classes on computers for both Sterling (IL) Area Adult Education and Kirkwood College in Monticello, IA.

After selling her business, she completed her degree in computer programming which led to writing software requirements, specifications and test plans for a very large database at ACT.

Mary then accepted the position at Ideal in February where she's able to make excellent use of her accounting, training, and computer skills. 📁

Ways to Improve Your Service Department: *Increasing Your Mechanics' Efficiency*

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will be left wondering what exactly is going on. Or they will wonder why you couldn't have just let them know why there was a delay with their project to begin with. This can make them second guess your intentions and think twice before they ever decide to do business with you again.

2) Keep your mechanics at their workstations as much as possible.

Your mechanics' time is precious and the last thing you want is for them wasting time doing tasks outside of their workspace. One of the best ways to solve this problem is to have a computer at their workstation area.

By having a computer in their workstation area, your mechanics can look up their own parts, invoices, and create pick tickets. A very efficient system is having a mechanic send pick tickets to a printer where someone else can get their needed parts because if that mechanic starts to wander, they are susceptible to getting sucked into conversations, answering questions, smoke breaks, etc.

If you don't have an employee available to get parts for your mechanics, it's still very effective to have the mechanic enter and print their own pick ticket so they can locate their own parts without wasting time searching for everything. Bottom line, the more your mechanic is at their workstation area, the more efficient your service department will be - plain and simple.

3) Reduce the amount of non-billable activities your technicians perform.

The success of your service department is based off the billable work of your mechanics. And nothing's worse than when they get wrapped up performing tasks they aren't being billed for. If you aren't careful the results can become catastrophic, causing you to lose massive amounts of productivity and money.

A good solution to this problem is to hire people to do your odd jobs (at a relatively low wage) on a part-time basis. You could look for high school students, good customers that are knowledgeable about your business, retired people, or someone

who is just looking for a couple hours of work per day. You'll be amazed at how much more productive your mechanics will be if you have someone else answering the phones, getting lunch, unloading trucks, driving fixed equipment out of the work area, getting parts for jobs, etc.

4) Always record detailed notes on work orders and request a signature when the equipment is picked up.

Taking detailed notes and requesting a signature at pick up is a good way to cover your bases in the event of a customer dispute. For example, let's say you are working on an engine that has low compression. You inform the customer that it has low compression and it could give out tomorrow, so you ask the customer if they still want it fixed. If they say yes, make sure that you include that information in the order and the customer signs off on it. That way if their engine does give out, they can't hold you accountable because you noted that problem on the work order. This can save you from dealing with a lot of frustration caused by an angry customer.

Another good reason for requesting a signature is to ensure the right person is picking up the equipment. Even if a different person picks up a unit then who dropped it off and you know them well, it's still a very good idea to request a signature to protect yourself from getting involved in the equipment ending up in the wrong hands.

5) If a customer calls and wants an update, make sure all employees keep your computer system updated to help you respond quickly and professionally.

Many service departments make the mistake of not updating information until the last minute. This can cause a lot of headaches and drastically affect your customer service. Therefore, keeping work orders updated in your computer system from the time the counterperson receives the equipment, to the time the service department completes the work is essential. This will dramatically increase the efficiency of your customer service because even an administrative person can check the system to provide current information.

It's also incredibly important to keep the work order status up-to-date. If this isn't done properly, it can cause a great deal of confusion because if a completed order is still listed as active, the counterperson has to waste time to go check with the mechanic before invoicing the customer. And if that mechanic is sick or gone for an extended period of time, it can be disastrous for your customer service.

If you are having trouble with this area of your business, make it a non-negotiable policy for all of your employees so they understand the importance of tracking all information.

6) For those in the OPE industry, incorporate a loaner program for your big customers. □

If a customer spends a lot of money with you, or if you recently sold them a large piece of equipment and their unit isn't functioning properly, you should help keep them working while their unit is in for repairs. The best solution for this situation is to incorporate a loaner program.

Many commercial dealers already have a loaner program in place. If they can't fix equipment within 24 hours, they supply a loaner because for every minute that unit isn't running across the grass, their customer is losing money.

Putting a loaner program in place for your customers can give you a huge boost in customer service. If you can't find some way for your customer to continue working, you won't keep them as your customer very long.

By incorporating just a few of these simple practices into your service department, you will quickly begin to see results in productivity, efficiency and will easily create a solid base of return customers who will rave about the quality service you provide. 📧

DID YOU KNOW?

You Can Easily Create a Mail Merge for a Specific Group of Customers in a Matter of Minutes with the Help of *Ideal*

Ideal for Windows provides you with an easy solution to contact your customer base through its mail merge system. Rather than spending hours of time searching through customers and breaking them down into countless lists, you can easily filter customer information through several categories and quickly create a mail merge of those customers, saving you an enormous amount of time that can be used to work on other areas of your business.

For example, let's say you wanted to let your customers who purchased Toro riding lawn mowers know that their two-year warranty is about to expire and wanted to offer a discount on a tune-up if they brought their mower in before the warranty expires. You might write a template that looks like this:

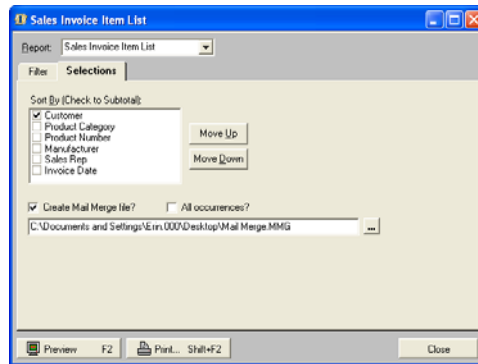
Hello **[first name]**,

I am writing to thank you for your purchase of a Toro **[description]** on **[date]**. I noticed that your **[product category]** has not been in for any service in almost two years. If you bring your **[product category]** in for a tune-up before August 31, 2006, we will offer you a 10% discount...

... *Ideal* would take this form letter and merge all of the personal information for your customers, who have Toro riding lawnmowers almost up on warranty, and place the information into the appropriate fields. So Scott, for example, would receive a mailer that looks like this:

Hello **Scott**,

I am writing to thank you for your purchase of a Toro **16 hp Riding Mower** on **August 19, 2004**. I noticed that your **riding mower** has not been in for any service in almost two years. If you bring your **riding mower** in for a tune-up before August 31, 2006, we will offer you a 10% discount...



Ideal's Mail Merge Feature

By using *Ideal's* powerful filtering features, you can send mailings based on:

- **Customer type.**
- **The type of items a customer has purchased.**
- **Customers who made specific purchases on a certain date.**
- **Customers who have products almost up on warranty.**
- **Customers who have products that need to be recalled.**
- **Customers with wholegoods that need a tune-up based on their mileage.**
- **And much more...**

To learn more about how *Ideal for Windows* can work for your business, log on to www.idealcomputersystems.com/demo to view a self-paced presentation. 📄

Murray Price List Customers Can Receive *Ideal's* Part Number Conversion Program for Free

As many of you know, Briggs & Stratton bought Murray and has changed the format of all part numbers that are in the current price list.



Because of this change, *Ideal* has created a program that will convert Murray part numbers for *Ideal* users from the old format to the new format issued by Briggs & Stratton. The program will locate all valid Murray part numbers in *Ideal* users' current system (in Inventory, Purchasing, Sales History, etc.) and convert the old number to its new number.

The Part Number Conversion program will only change the part numbers in your computer since those are the valid parts that are being offered through Briggs at this time.

The Part Number Conversion program is available free of charge to dealers that currently purchase the Murray price list update from *Ideal*. 📄

Ideal for Windows NEW Shopping Cart Interface: Users Save Unbelievable Amounts of Time!

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Second, you'll save time by sending information the other direction (from your website to *Ideal*)...

New orders that come in on your website will automatically be created in your *Ideal* software. All you have to do is verify the orders and finish them. Or, if you choose, you can print and finalize all orders at once.

You will also notice another big time saving benefit when it comes to receiving website orders from new customers. With this new interface, there is no longer a need to manually create new customers in *Ideal* from website sales. The new customer and all of the information will automatically be created for you!

The GepCom shopping cart includes a number of advanced features. Just a few of them include the ability to add reviews, maintain product changes that you want different on your website, search features, best seller lists, email notifications and related product displays.

Another perk of the GepCom cart is that your site will be optimized for search engines so customers from all over the country can easily find your products when searching on sites such as Google, Yahoo, etc.

Yet another reason to consider the GepCom cart is future developments. If this solution becomes popular, we plan to add other helpful functionality. For example, we're considering the ability for your

customers to check the status of their work orders and special orders right on your own website. Imagine how great it would be to offer this unique feature to your customers! This is just one example of the many features we could implement.

To find out more about how *Ideal's* new shopping cart interface can help you save countless hours of manual data entry and eliminate the headaches caused by human error, please contact *Ideal* at 800-737-1620. 📞

