

2018

Digitally Dominant
Automotive

pnakata

EQUITY MINING MAJOR REDESIGN

Research based on market, OEM and tech research, new findings, emerging trends (business, social & tech), new regulatory compliances and market competition (Big DATA analytics) and intuitive training. This document represents over 75 secondary documents (in a zipped archive), with links to the summary docs. We assume nothing and plan for everything based on extensive business, social and technology research of the past, current and future markets. The results:

DEFINITION: EQUITY-OPPORTUNITY FORESIGHT, MARKET RESEARCH & INTEGRATION INITIATIVE; (a) extend and refine the qualifications, sorts, filter and administration of program candidates, (b) filtering and customization controls at a per user level, (c) wizards (or richer websockets) to tightly integrate our offerings with each client's CRM system, (d) optimize new data provider relations (ex: Fortellis) and API integration (our special development). This document establishes the Use Case for Psychometric Segmentation (actionable psychographics).

Equity Mining Major Redesign

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NOTE1: This paper is an extension of the DDA service description in our main presentation pages 36-46, that can be accessed via this link:

=> <http://www.digitallydominantautomotive.com/DOCS/Intelligent.ERP.Auto.Industry.pdf#page=36>

NOTE2: This document contains links to ~100 pages of in-depth notes, data tables, formulas, processes, etc. for this psychometric enhancement to the equity mining and everyday processing of leads.

Equity Mining Major, Major Redesign

based on market, OEM and tech research, new findings, emerging trends (business, social & tech), new regulatory compliances and market competition, based on Big DATA analytics and intuitive training.

- **Research:** A complete analysis of (1) Dealersocket's Revenue Radar, as compared to (2) CDK's Auto Alert, eLeads Xchange, and VinSolution's TargetPro (75+ total documents) as well as (3) other equity mining services that factored such items as (i) the number of children, (ii) home ownership, (iii) income range, (iv) job type, etc., (4) OEM Branding, e.g. car personalities and market stereotypes, (5) OEM Lifestyle Research and social demographics - including common Television, News Channels, Social Media, Celebrities, Political, Sports, Pets, Shopping interests, etc., as well as how people commonly describe themselves like their [OEM's branding](#), and (6) Automotive Psychometric Programs (For recruitment and sales).

This [research](#) (doc xlsx [Here](#)) included (a) All [Screens](#) and [Definitions](#), (b) Alert/Radar [Setups](#), (c) Alert [Scoring](#), (d) Comparisons of [Leading EM Alert](#) types, (e) Auto Alert [Research Report](#), (f) Phone Scripts: [Basic](#), [All](#), [Guide](#), (g) Mining [Aged Inventory](#), (h) [Car Personalities](#) and OEM Research by Make, Style, Size, Color, (i) [DDA Data Extensions](#), (j) [DDA Psychometrics](#) for Equity Mining & Digital Marketing, (k) The development of a generalized API integrator, (l) in-depth analysis (and negotiations) with many 3rd party data providers (herein & within the greater body of this document, (m) Other related data (like Automotive CRM 3.0), (n) new DMS integration frameworks (like signing up with Fortellis; see within), (o) new Facebook licensing, (p) The effects and actions needed to address the GDPR, (q) The details of Auto Alert's Patents and trade secrets for non-generic specifics, (r) [OEM brand positioning](#) (best in what categories), (s) Some great car quizzes ([here](#) and [here](#)) and (t) the [selected DMS data fields from Dealervault](#) for Equity Mining.

- **Findings:** Respectively, the 4 major system supporting classical equity mining (Revenue Radar, Auto Alert, eXchange, and TargetPro), were similar in supporting Alerts, based on data mining DMS (and/or Dealervault), CRM and vAuto data, along with remarketing profiling, focused on **client equity** (positive and negative), **auto financing APRs** (as most cars are financed), and future **auto payments**, for **popular, low mileage** cars in great **condition** as trade-ins. And while Auto Alert and eLeads focus on particular types of sales opportunities, Revenue Radar focused on customer touch points. All systems profiled the opportunity similarly – e.g. Customer history, including sales, financing, and service data, along with the opportunity, new target car and stats, and financing offers. Each system processed these alerts to individual sales reps (typically round robin) or the BDC center.

A number of problems were then observed. Little additional research data about the customer is being supplied. The parameters for qualifying clients was too low, flooding the dealership with over 2,000 leads, the majority not being followed up, with the majority being in the "Serviced but not Sold Category. System administration of how Alerts are filtered and scored is established on an agency or manager level, or on a per customer basis, with no process that allows the salesperson to master one category of sales, before going on to the next. Furthermore, following every action in the Equity Mining system or sub-system, a number of follow-up steps must be taken (for example in Dealersocket CRM) to update status fields (unless the Revenue Radar Radars are set-up as Dealersocket 'Campaigns' whereby the Revenue Radar system is viewed as a slave or child to the Dealersocket controller system).

Lastly, and perhaps most importantly, there needs to be more built-in training that bridges the psychometrics of selling to the underlying needs and motivations of buyers today, that is just as much about non-financially driven needs and motivations as it is about financial ones. In perspective, this is like the realization that most people do not quit jobs because of money, which is absolutely true (most quit because of job conditions and fellow workers). This is particularly important, as with the slim margins, if your only advantage is money, then the dealership is selling lots of cars at near cost, in order to maintain their quotas, and service suffers, while for most dealerships, it is the major source of profits.

The biggest challenge for DDA is how to create something (1) generally equivalent, but with (2) better features to find more alerts, (3) that complies with the GDPR, with (4) better qualifications to make alerts manageable, (5) easier secure integrations with CRM, DMS and 3rd party data systems, and (5) product/people training that doubles or triples the close and retention rates. On the bigger picture side of things, (6) how to generate this offering that leverages our other offerings for the auto dealership market (EX: OBD-II remote access, connected car, used car videos, psychometrics & research for email – sms – phone scripts – and – digital marketing, and more).

- **Recommendations & Plan;** 60 days to deployment; Mgmt + 2 programmers full time.

Armed with sufficient research about the common key elements of current equity mining services including all data definitions, integration APIs, qualifiers, sorts/searches, filters, administration, phone scripts, training and support services required (and fully documented in attached notes herein), our offering will be based (for version one), on the

following recommendations and enhancements, integrated into any of the main automotive CRM systems, accessing common DMS data, and 3rd party data (that includes sources of correlated predictable events and lifestyle behavior).

- (1) We will **extend and refine the qualifications, sorts, filter and administration** of program candidates (and their cars of choice) with **this list** of factors (DDA Data Extensions above), that includes **(a)** the OEM lifestyle research & branding per make-model, and **(b)** the Interpersonal Sales Psychometrics Foresight Rating and Built-in communications support services. This is the super-set of opportunity mining that **extends itself beyond** the targets for conventional equity mining based on **equity, APR and loan payments...** which is both the **emerging market trend** as well as the future of this technology as it merges with CRM 3.0.

Respectively, for new sales, **this is still equity mining** if you query about the trade-in, or apply significant emphasis on the future equity retention value of the new car. How you approach either of these scenarios will come out with a different result, using the same financial data, but based on the personality inter-dynamics between the prospect and the salesperson, e.g. did you fulfill their needs? Please see [this link](#) for more detail.

Similar to the Automastermind service offering, we will be scoring the potential of Alerts, based not just on the number Alert classifications, but rather on gauging the potential of closing a prospect based on contemporary financial factors, non-conventional financial & financially related lifestyle factors, where psychometric/personality is also measured related to the customer and the default salesperson, or alternately by the salesperson with the best potential of successfully maneuvering the relationship, mapped to the financial return to the agency. **Net effect: Optimizing** sorting/filtering of Alerts for the **highest potential** (vs. the number of Radar Pings), and the **best matched relationship** with the prospect and/or client and the dealership salesperson or service person.

- (2) We will apply **filtering and customization controls at a per user level** with management of a users' progress to master one type of sale before moving on to others. We will build **role-playing training** to be completed prior that includes **modifications to the beginning** of phone scripts (whereas with most, the intro and trust statements are the same, with reason for calling and the close are different alert type to alert type). Without going into detail on the financials, **additional questions related** to more info on **safety, performance, style, economy, popularity, reliability**, etc. may be asked, followed by the familiar close. Note that it is ok to send Psychometric Type C lots of data.
- (3) We will implement simple, but flexible and expansive **wizards (or richer websockets) to tightly integrate our offerings with each client's CRM system**. By contrast, most equity mining were designed for their sister CRM framework, and thus if you implement Revenue Radar via CRM campaigns, you do not have to implement the additional overhead.
- (4) We will implement a built-in **training, orientation and sales processing service and support system for the salesperson (and management)** that successfully **customizes every sale opportunity**, with **simple**, step by step technical and relationship **notes, do's and don'ts'**, that reference how to best communicate with each person for each salesperson or service person involved.

To understand what this service will look like as well as how it will work, combine the links for items **a, b, c, and f**, with the special report **J, in the "Research" section above** (which reflects the data from items **h, l, r and s**), and the API development **k**, which supports both the equity mining project initiative, and several of the other DDA offerings, version one (1).

The additional 2nd benefit of this technology is its' application for recruiting (find the best person for the job), training, team building, conflict resolution, and career counseling, along with its' applicability for sales and marketing, labeled as "psychometrics". Go CRM 3.0 for the Automotive Industry.

- (5) **Data Providers and their APIs:** With the exception of [Dealervault files](#) (fields in yellow) and the generalized Automotive API manager we developed as a starting POC, reference (including all negotiations and APIs selected) to access the CDK DMS, Dealersocket CRM, vAuto and all third party data providers can be found on page 16 and 17 of **"Intelligent ERP Foresight & more for the Automotive Industry"**, under the titles **(a) "DMS, CRM, Dealervault & 3rd Party Data Providers (including Fortellis, vAuto & All APIs)"**, **(b) "Integration Strategy w/ CRM, DMS & External Data Providers"** and **(c) "Use Case(s) & Benefits for CRM, DMS & External Data Providers"** respectively. It should be noted that these APIs were addressed in an earlier Use Case for implementation of an OBD-II remote monitoring and automated service scheduling (by mileage and/or by remote diagnostics), which addressed the Equity Mining initiative in that: **For every service appointment being placed, a 2nd notification process** to the last salesperson for that client (or the default next sales contact) will be promoted for review of upsell (upgrade) or equity mining like opportunities.

Classical Equity Mining Alert Types, Criteria, and/or related Opportunity

- **Smart Payment**
 - Criteria: Raise/Lower payments, Min. # of Payments made, Exclude if ends in xx months, purchase type
 - Strategy: Customer may qualify to purchase a new/used vehicle for payments close to or below their current payment.
- **Equity**
 - Criteria: Min. # of payments made, Exclude if ends in XX days, Amt of Equity
 - Strategy: Contact this customer and inform them that they may qualify to trade in their vehicle and drive a new/used vehicle with little or no money out of pocket.
- **Lower APR**
 - Criteria: APR between XX and XX%; Min. # of payments made, Exclude if ends in XX days, Purchase type
 - Strategy: Customer may qualify to lower their current APR and save on finance charges when they purchase a new/used vehicle.
- **End of Term**
 - Criteria: End of term between XX and XX weeks; Prior Purchase Type
 - Strategy: Customer is nearing the end of their payment schedule on their current vehicle. Contact this customer to build rapport and provide payment options on a recommended new/used vehicle.
- **Serviced Not Sold**
 - Criteria: Last Service between XX and xx months; Estim. Mileage bw 30000 and 150000; Prior vehicles purchased?
 - Strategy: Valuable service customer who has never purchased. Potential sales opportunity.
- **Lease Over Mileage**
 - Criteria: Est. Mileage Fee at Lease Termination > than \$XX; Min # payments made; Exclude if terms ends in XX months, Over Mileage penalty fee over \$XX.
 - Strategy: Based on customer's driving history, we are projecting that the vehicle will be over the lease mileage limit, and customer will likely incur over-mileage fees. Call the customer to discuss their options.
- **Service Contract**
 - Criteria: Project Mileage bw 30000 and 35000; Months since purchase; Prior purchase type
 - Strategy: The warranty on this vehicle is about to expire. Call the customer to discuss their options regarding purchasing an extended service contract.
- **Cash**
 - Criteria: Purchase date bw xx (24) and yy (48) months; Last service bw X (6) and Y (18) mo.;
 - Strategy: This customer paid cash for their vehicle. Call the customer with latest incentives and see if they'd be interested in trading in their car or selling it to the dealership.
- **Lost Service (Service Defector)**
 - Criteria: Not Serviced within the last X (6) mo.; Sold or serviced within the last XX (12) mo.
 - Strategy: Customer has not scheduled their recommended service appointment with our dealership.
- **Sold Not Serviced**
 - Criteria: Vehicle Purchase bw XX (26) and YY (52) months ago.
 - Strategy: Local customer that has purchased but never serviced. Introduce customer to service department.
- **Declined Service**
 - Criteria: Last Service between 15 and 90 days, Declined Service Op Code and Description
 - Strategy: Contact this customer because they recently declined service on their last service visit.

-
- Dealersocket Revenue Radar focuses on lender, amt financed, monthly payment, APR, and months to term.

Auto Alert's Alerts: *Note: Flex and 'In-Market' tagging similarity with DDA's Psychometrics & Market Research Services...*

- **Upgrade Alert:** Customers can UPGRADE to a 2016/2017 model for the same payment.
- **Mileage Alert:** UPGRADE LEASE Customers to A 2016/2017 model before mileage penalties occur.
- **Warranty Alert:** Offer EXTENDED Warranties, even if they did not purchase with you.
- **Service Alert:** Your Customer is in the SERVICE LANE. Say hello, with a relevant offer in hand.
- **Contract Alert:** Be the first to know when contracts are ENDING on a lease or purchase.
- **Flex Alert:** Identify buyers who are eligible to trade now, trading their current vehicle.
- **In Market Alert:** Recognize shopping patterns that define a customer is READY TO BUY.

eLeads Funnels: *Note: Total overlap of eLeads with Revenue Radar's related touch points.*

- Positive Equity
- Lower Payment
- End of Term/Lease
- Delivery/Defector
- Warranty

Lists: For Detail Samples, Click [HERE](#)... ours will be similar but integrated into custom roadmaps per client.

- Alert Classes
- Alerts
- Inventory
- Services
- Setup
- Customer

<p>Timothy Williams Edit</p> <p>DNC - Current Customer</p> <p>Email</p> <p>Home 1(831) 726-2618</p> <p>Work 1(831) 722-4122</p> <p>Mobile Phone 1(831) 262-5233</p>	<p>▲ Radar Ping - Equity Event Id: 146457</p> <p>Radar Category - Vehicle Status Assign To</p> <p>7.6 Equity - 2012 Chevrolet Silverado 2500HD In Progress Revenue Rad</p> <p>Term Expiration Date 04/30/2018 Est. Trade Value \$28,466.00</p> <p>Est. Payoff \$731.97</p> <p>Net Trade-In Equity \$27,734.03</p>																																								
<p>○ Purchase History Edit</p> <p>Vehicle New 2012 Chevrolet Silverado 2500HD</p> <p>Trim 4WD Crew Cab 153.7" LTZ</p> <p>VIN # 1GC1KYC89CF164637</p> <p>MPG City / Hwy 0 / 0</p> <p>Est. Current Mileage 90,577</p> <p>Purchase Date - Months Since 04/30/2012 - 72</p> <p>Purchase Type Finance</p> <p>Lender Wells</p> <p>APR 0.00%</p> <p>Term / Payment 72 months @ \$731.97</p> <p>MSRP \$50,784.36</p> <p>Sales Price \$50,784.36</p> <p>Payments Made / Remaining 71 / 1</p> <p>Sales Person Monte Medeiros</p>	<p>➤ Sales Opportunity Recalculate Save</p> <p>NEW: In Stock (1)</p> <p>NEW: Stk# T8350 \$54,755.00 - 2018 Chevrolet Silverado 2500HD 4WD Crew Cab 153.7" ⚙️ 🔍</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Year</th> <th>2018</th> <th>Sales Type</th> <th>Retail</th> <th>Lease</th> </tr> </thead> <tbody> <tr> <td>Make</td> <td>Chevrolet</td> <td>MSRP</td> <td>\$ 54,755.00</td> <td></td> </tr> <tr> <td>Model</td> <td>Silverado 2500HD</td> <td>Sales Price</td> <td>\$ 54,755.00</td> <td></td> </tr> <tr> <td>Trim</td> <td>4WD Crew Cab 153.7" Work Truck</td> <td>Equity Position</td> <td></td> <td>\$27,734.03</td> </tr> <tr> <td>VIN #</td> <td>1GC1KUEYXJF211922</td> <td>Customer Cash</td> <td>\$ 0.00</td> <td></td> </tr> <tr> <td>MPG City / Hwy</td> <td>0 / 0</td> <td>Dealer Cash</td> <td>\$ 0.00</td> <td></td> </tr> <tr> <td>Est. Current Mileage</td> <td>1</td> <td>Retail Default Fees</td> <td></td> <td>\$150.00</td> </tr> <tr> <td>Stock No. / Age</td> <td>T8350 / 29</td> <td>Tax Rate (for Customer)</td> <td></td> <td>7.75%</td> </tr> </tbody> </table>	Year	2018	Sales Type	Retail	Lease	Make	Chevrolet	MSRP	\$ 54,755.00		Model	Silverado 2500HD	Sales Price	\$ 54,755.00		Trim	4WD Crew Cab 153.7" Work Truck	Equity Position		\$27,734.03	VIN #	1GC1KUEYXJF211922	Customer Cash	\$ 0.00		MPG City / Hwy	0 / 0	Dealer Cash	\$ 0.00		Est. Current Mileage	1	Retail Default Fees		\$150.00	Stock No. / Age	T8350 / 29	Tax Rate (for Customer)		7.75%
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⇒ **NEXT**, a wireframe of **DDA's Psychometric Needs, Motivations, Predictive Behavior & Strategy** profile, associated with sliders about each client's level of concern (great <==> none) regarding: (1) Safety, (2) Performance, (3) Reliability, (4) Economy (gas & maintenance), (5) Equity, (6) Style, (7) Size, (8) Popularity, (9) Service, (10) Convenience, (11) Visibility, (12) Comfort (feet/head room), (13) Latest/Newest, (14) Security. (15) Color & more.

Name: Phillip Rowland Nakata

ARCHETYPE: **Architect** – DISC FORESIGHT CLASS: **Dc**

- **ASSERTIVE**
- **PERSUASIVE**
- **CONFIDENT**
- **Quick Tip:** Phillip tends to work like a general: Bold, pragmatic, skeptical, extremely goal-driven, and most comfortable with control.

What Comes Naturally to Phillip

When Speaking to Phillip

What Motivates Phillip

What Drains Phillip

In a Meeting with Phillip

- SET A CLEAR END TIME
- EXPECT TOUGH QUESTIONS
- AVOID UNNECESSARY CHATTER
- Phillip values his time and tries to avoid meetings, so consider whether you can accomplish your goal on the phone or over email before asking to meet. When meeting with Phillip, project confidence and decisiveness. If Phillip senses the other party has the upper hand, he will end the meeting on his terms.
- PREPARE BEFORE THE MEETING
- SHOW DECISIVENESS

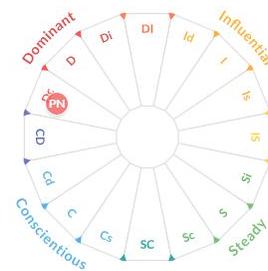
To Convince Phillip

- AVOID TOO MUCH HYPE
- POINT OUT YOUR OWN FLAWS
- BE PERSISTENT
- USE FACTS INSTEAD OF STORIES
- CREATE A SENSE OF URGENCY
- Phillip is fast-paced, goal-oriented, and direct, so make your point quickly and **stay focused**.

PHILLIP'S PERSONALITY: Phillip tends to work like a general: Bold, pragmatic, skeptical, extremely goal-driven, and most comfortable with control.



Archetype: Architect



DISC type: Dc

Customer may qualify to purchase a new/used vehicle for payments **close to or below their current payment**

Contact this customer and inform them that they may qualify to **trade in** their vehicle and drive a new/used vehicle with **little or no money** out of pocket.

Customer may qualify to **lower their current APR and save on finance charges** when they purchase a new/used vehicle.

Customer is nearing the **end of their payment schedule** on their current vehicle. Provide **payment options on a recommended new/used vehicle**.

Based on customer's driving history, we are projecting that the **vehicle will be over** the lease mileage limit, and customer will **likely incur over-mileage fees**

The **warranty on this vehicle is about to expire**. Call the customer to discuss their options regarding **purchasing an extended service contract**.

- > **Age or Range:** Leaders, Outgoing, Feisty,
- > **Gender:** Dependable,
- > **Ethnicity:** > **Recent** home purchase, graduation, new job, new move-in
- > **Nat'l Status:** > **Own a home?**
- > **Job type:** > **Generation:** bb, x,y,z
- > **Income Range:** > **Television (hours/week)** and **favorite channels:**
- > **Years/Job:** > **News:**
- > **Softpull:** > **Music:**
- > **Garage Size:** > **Celebrities:**
- > **Location:** > **Political:**
- > **# Household members:** > **Games:** Coldplay, Rihanna
- > **CLUBS****:** > **Food:**
- > **Self-Descriptions: (Car &/or Person)** Anachronistic, Gentle, Easygoing, Caring,
- > **Sports:** Golf, Horse racing, NASCAR, dancing, Ice Hockey, Soccer, Football, fishing
- > **Interests:** Ballet, Off-Road, gardening,
- > **Pets:** Birds, Dogs, Cats, Fish
- > **Shopping:** Norstrom, Sams Club, Target, Safeway, Eddie Bauers, Wholefoods, Banana Republic, Converse, Dickies, Wal-Mart, Apple Store,
- > **Takes Stock Market Risks**

Sample Sales Psychometric Templates:

Kyle Fisher - Potential Drake Motors Small SUV Buyer

Personal Profile
 Kyle is a 42-year-old and owner of a late model Ford Escape.

He's an active father of two, still plays team sports and is always connected to friends and family through the internet and his mobile phone.

Kyle is looking for a vehicle that offers outstanding fuel economy since he commutes approximately 90 miles round trip each day.

He's also considering the Ford Escape Hybrid, Toyota Highlander, the Honda CR-V and the Ford Flex.

He uses a variety of review and third party print research sites in addition to dealer catalogs.

Kyle's Product-Content Needs

- Information supporting fuel economy
- Photos and video that highlight vehicle's technology and styling features
- Guidance, education and reassurance that the brand can be trusted
- Competitive comparisons to his current vehicle
- Ability to gather and share information easily

Background

- 42-year-old caucasian male
- Father of two
- Plays drop in hockey 3 mornings a week
- Uses vehicle daily for commuting, picking up kids from sports, weekend coaching and vacations
- Drives long distances and puts 20,000 miles on vehicle every year

Attributes

- Upper Middle class
- Smartphone and laptop user
- Influenced by online reviews, heavy user of print
- iPod and Smartphone user
- Spends time reading in social media researching, but less time contributing



"I want a vehicle with outstanding fuel economy, smart features and enough space for me and my family."

From Existing Assets

- Running Footage
- Still Photography
- Build Your Own Material
- Catalog Images
- Longform video
- 'Other' Images

Media Mix



TOBI DAY PERSONA TEMPLATE

AGE 26
OCCUPATION Record Store Manager
STATUS Single
LOCATION New York, NY
TIER Enthusiast
ARCHETYPE The Maestro

Ambitious | Admired | Focused

MOTIVATIONS

- Secure
- Fair
- Achievement
- Growth
- Power
- Social

GOALS

- To grow a strong industry reputation
- To build an audio-pro portfolio
- To keep track of everything

FRUSTRATIONS

- Slow download times
- Data crashes
- Poor communication

PERSONALITY

Extrovert | Introvers

Sensing | Intuition

Thinking | Feeling

Judging | Perceiving

TECHNOLOGY

IT and Internet

Software

Mobile Apps

Social Networks

BIO

Tobi has a day job at a record store, but on the side she does all kinds of production work for up-and-coming artists. She never hesitates to learn something new and she often acts as tech support for her friends and clients. She is usually working on a dozen projects at a time and is trying to establish herself in the industry, so she hates data crashes or anything that makes her look bad. Because she works alone and in her home, collaboration is everything.

"If I had a way to share projects and collaborate in real time, that would make my workload so much easier to manage."



Buyer Persona Profile	Priority Initiative	Success Factors	Perceived Barriers	Decision Criteria	Buyer's Journey
 Persons name Amanda Roles Digital Marketing Manager, Marketing Manager, Agency Owner Education Bachelors in Marketing, Advertising, Communications or equivalent experience				Industry, geographic or other segments B2B Reports to VP Marketing or Agency Owner Solutions, Sales Play or Campaign Email Marketing	
MY RESPONSIBILITIES <ul style="list-style-type: none"> Effective planning and implementation of marketing content Establishing and adjusting strategies to meet goals Engaging in business partner relationships with clients and/or cross-functional resources Project management, executing reporting and presenting results Delivering work product and staying current with industry standards and trends. 	HOW I AM EVALUATED <ul style="list-style-type: none"> Knowledge of marketing project workflow process and digital process lifecycle Attention to detail and accuracy Quality of written, presentation and verbal communication skills Knowledge of digital and social media analytics Budget management, metrics and reporting, especially demand generation Ability to work as a member of a persuasive and effective team 	INFORMATION RESOURCES I TRUST <ul style="list-style-type: none"> Business professionals (peers) Consultants Internet / websites Business social media Events / conferences Personal social media 			

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	Technical Decision Maker: The Transformational Leader
	<ul style="list-style-type: none"> CIO Technical decision maker Develops IT strategy and roadmap Leads technology team that evaluates technology options
Key Attributes	40-55 years old; Masters in Science, Executive MBA; at least 15 years experience in enterprise leadership roles
Attitude	Leader, business savvy, frugal, skeptical of vendor claims
Reputation	Visionary, decisive, well regarded within industry, egotistical
Job Focus	Creating enterprise-wide change, shifting perception of technology from utilitarian to strategic
Pain Points	<ul style="list-style-type: none"> Identifying most promising technology Getting company-wide buy-in for new software initiatives Finding ways to make measurable impact
Keywords Used to Search for Information	enterprise, software ROI, strategic software investments, breaking down departmental silos, increasing enterprise-wide productivity
Values	<ul style="list-style-type: none"> Leadership: Ability to see and convey the "big picture" Knowledge and expertise: Broad IT knowledge but not interested in technical details Innovation: Follows latest trends; seeks proof of how others have applied new technologies Expectations: High expectations of IT team and vendors/solutions to make strategic roadmap a reality
Fears	Making bad purchase decision, tarnishing reputation
Pat Peaves	Self-serving vendors who don't do their homework to understand his focus; vendors who disappear after implementation
Internal influences	Board of directors, CEO, CFO
Motivators	Bonus structure, ego, industry recognition
Information Sources	Peers; online search; Gartner, Forrester; Gartner CIO Leadership Forum; CIO Magazine; Fast Company magazine
Content Preferences	In-depth white papers, podcasts

Rachael, the Stay at Home Mum



Lifestyle

- Home life is hectic for Rachel as she has all the children & home responsibilities
- Dave leaves early and home late
- Financial pressure is relentless as there is really only one salary now
- They have a great home, but it would be just nice to afford a holiday

Personal Background

- Age 40 years
- Married with two children
- Live, the Northern Beaches of Syd

Their Challenges/ Pain Points

- High Mortgage gives little spare cash
- Need to down size and reduce mortgage
- Sell property at a good price in a bad market

Business Background

- Has a Marketing Background
- Is setting up an Internet Business in Promotional Items
- Husband David has a high paying job in Finance

Where do they go for Information

- Are heavy users of the Internet
- Are on Facebook, LinkedIn, Pinterest

For more information regarding DDA's Automotive Psychometric Foresight and Relationship services – coaching you on the best way for you to communicate with every person and fulfill their needs, supported by research and predictive technologies of simple to apply methods... contact me at one of the methods below.

Phillip R. Nakata, Digital Marketing Polymath (SME/Authority); Former CBO & Group Program Director for SMRC (Social Market Research for Charity), & Former IBM CTO & CSC Partner; 303.435.5206 (Cell/SMS); pnakata@digitallydominantautomotive.com; phillipnakata@gmail.com; **303.800.5766** (Skype-In, rolls over to cell/No SMS).

"Assume Nothing, Plan for Everything; Reverse Engineer the Future, to find what you didn't know that you didn't know;

The personalities of car brands

% of each car brand's current customers who identify with the following personality traits

		Knowledgeable	Imaginative	Emotionally Intelligent	Socially Skilled	Great Memory	A Leader	Bighearted	Mechanically Intelligent	Dependable	Adventurous	Analytical	Friendly
	BMW	70%	29%	27%	25%	19%	27%	26%	17%	13%	11%	16%	9%
	Cadillac	39%	36%	45%	46%	22%	26%	27%	18%	22%	14%	8%	12%
	Chrysler	56%	38%	27%	27%	23%	24%	24%	15%	25%	13%	11%	15%
	Dodge	46%	36%	33%	24%	25%	26%	29%	23%	23%	16%	9%	14%
	Ford	47%	36%	30%	30%	28%	26%	24%	25%	19%	12%	13%	16%
	General Motors	46%	34%	22%	26%	24%	18%	17%	28%	16%	9%	10%	12%
	Lexus	43%	34%	31%	29%	23%	43%	22%	15%	14%	21%	17%	12%
	Lincoln	44%	20%	47%	16%	30%	42%	26%	16%	13%	8%	11%	6%
	Mercedes-Benz	46%	35%	21%	21%	23%	45%	9%	21%	10%	36%	11%	7%
	Volkswagen	48%	49%	42%	34%	18%	26%	17%	15%	12%	19%	10%	6%

Car personalities by Make/Model ... Research on Personality, lifestyle & buyer stereo-types.

- ⇒ **AUDI** - **Yuppie** who likes LED headlights. In China, government official. Always yield to black Audis, you don't know who you're messing with. **You're a Millennial, you live in a city**—most likely on one of the coasts—and **you're a Democrat**. You work in **consulting or advertising**, and you really like Coldplay, Rihanna, and potato-leek soup. (Yes, the surveys really do get this weirdly specific.) **You watch a lot of TV—46 to 50 hours a week**—and read the **New Yorker**. You invest in **risky stocks**, and consider yourself a **sharp dresser**.
- ⇒ **BMW**: drivers skew male and are **young, urban types**, The top states are California, New York and Oregon. **They watch up to 40 hours of television a week, lean Republican politically, and shop at Norstrom**. They are fans of Oprah, take **stock market risks**, and describe themselves as "**anachronistic**" (Wiki Commons)
 - > Compared to other drivers, you think of yourself as **analytical and sensible**. You live in a city, work in **banking or finance**, and you're older than 65 OR UNDER 30. You enjoy **eating sushi, attending sporting events, and golfing**. You couldn't live without a GPS in your car, and you think public transportation is gross.
 - > You think it's important to look young and feel attractive. Related: How to Become Better Looking As You Age. You're a big fan of **Starbucks and Costco**, you tend to watch **premium channels**, and you think **Beyoncé rules**. (She does.)
 - > You consider yourself **knowledgeable**. You're likely **under 30, and you work in accounting or architecture**. You feel strongly that foreign-made cars are higher quality, and you're more likely than other people to have a fish for a pet. Related: **8 Gadgets Every Guy Needs to Keep In His Car**.
 - > You care about **current fashions**, and you like going to **trendy bars and restaurants**. You **exercise** more than most people, and you dread the thought of **going bald** more than any other driver surveyed. You're into Miley Cyrus.
- ⇒ **CADILLAC**: Cadillac drivers are older males, who live in Florida, Arizona and Arkansas. They are **slightly conservative, like ballet and golf, and they are most like to have a bird as a pet**. Cadillac drivers watch The **Golf Channel**, read the **New York Daily News, shop at Sams Club** and describe themselves as "**gentle**" (Wiki Commons).
 - > You think of yourself as **socially skilled and courteous**. You work in **quality assurance, safety, or consulting**. You love **sports**, and you play **golf**. You gamble more than you should, and you **occasionally feel lonely**. Related: 20 Secrets To a Happier Life.
 - > You admit you never leave the house without looking in a mirror. You drink Michelob Ultra and shop at Perry Ellis, and you think George Clooney is the coolest. (He is.)
- ⇒ **CHEVROLET**: You like **steak and eggs—together or on their own**—and you think of yourself as **mechanically inclined**. In fact, your **garage is your happy place**. You **love dogs, football, and NASCAR**. You identify as a leader, but acknowledge you can sometimes be too demanding. You blast Stevie Ray Vaughn and Kid Rock. You don't mind **losing your hair, and you would never consider plastic surgery**. Related: 5 Guys Who Look Better Bald. Your two favorite clothing brands are Under Armour and Carhartt, and you don't spend much time staring at screens.
- ⇒ **CHRYSLER**: Compared to other drivers, you're more likely to think of yourself as **dependable**. There's a good chance you're older than 65, and you enjoy a good **Waldorf salad or beef casserole**. You also love going to the **movies**. **College football** dominates your fall Saturdays, and you'd probably admit you go too long between haircuts.
- ⇒ **DODGE**: You think of yourself as **bighearted**. You prefer to wash your own car, and you disagree with the belief that electric cars are the way of the future. You don't style your hair, and you don't look after your health as much as you should.
- ⇒ **FORD**: The Average profile of a Ford driver looks like this: **male, non-urban, very conservative politically**. The top states for Fords are North Carolina, Texas and Missouri. They are fans of **fishing, football, like country music and FOX News**, and describe themselves as "**easygoing**" (Good Free Photos)

--> You think of yourself as friendly but direct, and you work in building or construction. You own a dog, and you're either a Gen X'er or a Baby Boomer. You love **football, beef jerky, and pumpkin pie**, and you don't care much about "looking young" or "feeling attractive." You turn up the radio for Toby Keith and Van Helen, and you like getting your hands dirty **gardening or fishing**. You prefer to **buy American**. You wear **Converse** and Dickies, and shop at **Wal-Mart**.

- ⇒ **HONDA:** You're a **Millennial** who works in **education or health care**. But you prefer to spend your **free time outdoors, visiting parks and historical places**. If you're not a parent already, **you can't wait to have kids**—and you **think science is cool**. Maybe your future children will appreciate it, too. You feel **satisfied with your life**, but you also **think you spend too much time online**. You wear **Nike** apparel and shop at **Target**, and you wish *The Office* was still on TV.

The average Honda driver is a **female 40-50 years old** and lives in an urban area. Honda lovers **lean Democrat politically, like horse racing, are fans of Meryl Streep, like Stephen Colbert, and shop at Target and Safeway**. The top states are California, Virginia, Washington and Maryland. Honda drivers work in education or healthcare, and describe themselves as **"caring"** (Wiki Commons)

- ⇒ **JEEP:** drivers are **male urbanites between the ages of 45-64**. They are **middle-of-the-road politically, fans of NASCAR, and are most likely to have a dog as a pet**. The top states for Jeeps are Illinois, Virginia and Oregon. They describe themselves as **"leaders"** (Wiki Commons)

- ⇒ **LINCOLN:** You work in **consulting or politics**, and live in a city. You really **love steak and roast chicken, college football, and your religion**. You like experimenting with **recipes**, and you worry life is more uncertain than it used to be. You **drink at home**—not out on the town—and you see yourself as **polite and kind**. Related: *The Best Beers For Fall*.

--> You think you have a **great memory**, and you're also great at **connecting emotionally** with other people. Your favorite actress is Amy Adams, you wish Buddy Holly was still around, and you spend a ton of time— 100 hours a week— online or watching TV.

- ⇒ **MERCEDES:** You put a big emphasis on **staying fit and active**, and you're either a Gen X'er or a Baby Boomer. Your hobbies include **golfing and playing the stock market**. You enjoy **exotic food**, and you buy your groceries at **Whole Foods**. You really liked *The Big Short*, and you enjoy watching *House Hunters International*—although you spend twice as **much time online as you do watching TV**. You would **never drive an ugly car**, and you gravitate toward **premium** products and services.

- ⇒ **SUBARU:** The average Subaru driver is a **male living in a non-urban** area. They are **democrats, like The Talking Heads and the Lumineers, and their favorite brand is Starbucks**. They describe themselves as **"feisty"**, like **ice hockey** and the top states are Virginia, Connecticut, and Washington (Wiki Commons)

- ⇒ **TOYOTA:** The average Toyota driver is an **urban male, with a median age of 50**. They **lean slightly democratic** and the top states for Toyotas are California, Nevada and Maryland. Their favorite sport is **soccer, a bird is their most likely pet, they shop at Banana Republic, eat at Chik Fil A, and their favorite singer is U2's Bono** (Wiki Commons)

--> You're probably a Gen X'er, and you likely work in logistics or transportation. You love **Indian food, guacamole, college football, and soccer**. Your friends are important to you, and so is maintaining a **healthy lifestyle**. You like to think of yourself as **spontaneous**. You shop at **Banana Republic** and **the Apple store**, you love the movie *Wall Street*, and Kevin Hart cracks you up. You read the **New York Times** and watch a ton of **ESPN**.

--> Nissan: drivers are **female, in the 40-50 age range**, and the top states for Nissans are Alabama, Missouri and California. They prefer **dogs as pets, like dancing**, and call themselves **"outgoing"**. Nissan drivers shop at **Eddie Bauer and Whole Foods** (Wiki Commons)

- ⇒ **VOLKSWAGEN:** Drivers are **female, urban** and California, Utah and Colorado have the highest average number of VW drivers. VW fans tend to be **very liberal, work in areas that feature creativity and design**, and describe themselves as **"straightforward"**. They are fans of the **NY Times**, like **HBO** and read **"Atlantic Monthly"** (Wiki Commons).

--> You think of yourself as **imaginative**, and you feel strongly that electric cars are the way of the future. You're happy to catch a bus or train if that's an option, and you care about the environment.

--> You're a Gen X'er, and you work in a **creative or design-focused profession**. You like **reading, visiting art galleries, and devouring enchiladas**. You shop for **organic food and you can't imagine a day without music**. You like Frontline on PBS, though you **hardly ever watch TV**.

- ⇒ **VOLVA:** The average Volvo driver is **male, between the ages of 45-65 and lives in an urban area**. The top states for Volvo drivers are New Hampshire, Pennsylvania and Virginia. These drivers tend to **lean left politically, have \$100K+ annual incomes, and work in politics or education**. **Baseball** is their favorite sport, they are interested in **science** and describe themselves as **"dedicated"** (Wikipedia Commons).

Car personalities by Size & Style ... Research on Personality, lifestyle & buyer stereo-types.

⇒ **Luxury Cars: Cadillac, Lexus**

Those who drive luxury cars are—no surprise—**status seekers**; they also are more apt to **drive long distances**. Men and **older or retired** people are more likely to drive luxury cars. In particular, luxury car drivers are over-represented among **highly-educated and higher-income** people. In psychographic lingo, the **"achievers"**—**profit-oriented workaholics** who like being **independent**—are also likely to drive luxury cars and/or sports cars. Luxury vehicles are the most expensive cars of all and usually come equipped with **many additional and extra features** that cannot be found in ordinary cars.

These vehicles are typically for people who make **plenty of money and use it** to enjoy the luxuries of life, even in their selection of vehicles. The people who purchase luxury vehicles **don't worry about practicality, fuel-efficiency and convenience**. All they care about is the **latest upgrades** their money can buy to make the driving experience in the vehicle more **relaxing, comfortable, and decadent**. In short, luxury vehicles show off your **need for status, extravagance and uniqueness**.

This car signals that **someone important is at the wheel** — or sitting in the back seat with a chauffeur driving. If you are driving this car, you are a VIP who enjoys discreet luxury, comfort and five-star satisfaction. You are **more interested in class than show**. **You have arrived and don't need to boast**.

⇒ **Sports Cars: BMW, Porsches**

Those who are **adventure seekers** (even if they never get out of the car) drive sports cars. They're not calm and are **more likely than average to have a college degree**. Surprisingly, based on the cost of most sports cars, they were **more likely to have lower incomes**. Some of these may fall into the category of "emulator"—**younger, financially unstable, low self-esteem people** who buy flashy cars that aren't true sports or luxury cars to try to emulate achievers.

What this car says about the owner's personality is quite **unique**. **Most are young and rich, seeking to live a dream, ostentatious enough** to take pleasure in roaring up and down streets in a car known for speed and sound, **pushing adrenaline to the max** and feeling good about it. Drivers of these cars **don't care about the world's problems**, they are narcissistically attached to their own ego satisfactions.

As the name implies, sports cars, are tuned for **performance and speed**. These vehicles reflect **speed, impulse control, youthful exuberance, and rejuvenation**. They have a very sporty look and come equipped with custom front and rear bumpers, exhausts, spoilers, roof tops, and side skirts. Usually people who drive sports car enjoy having a **good-looking and flashy** car that gets all the attention on the roads. These vehicles are **most common among financially successful young men and women**.

⇒ **2-Door Luxury Sports Car:**

We all have heard of or seen those 2-door sport cars parked in front of five-star hotels in Paris and London and it is not hard to guess who their owners are. What is different about this car is that it is not a car that you can drive every day. It is meant to be driven on weekends and special occasions to show off and tell people: **'I am rich and you are not'**. Having said that, some drive them to fulfill their passions for **luxury and speed**. If you are driving one of these cars, you are **probably extremely rich and living in city**. You are unembarrassed about loving luxury and every weekend you jump

in this car to tear through the city because you love being watched and admired by ordinary people. **You are a show-off.** Yes, the truth is painful, but let's face it, that is what motivates you.

⇒ Coupes

Are generally vehicles that have a 2-door body and a permanently attached roof. Please note that coupes are not similar to convertibles because their roofs do not detach. Compared to four-door and two-door sedans, these look generally sportier. Coupes usually proclaim gender identity and are **mostly a 'hit' among single women, and men looking for a sportier vehicle.**

⇒ Compact:

This vehicle is meant to be for **thirty somethings** who are devoted to **happiness and life's enjoyments**. It is a typical city car because it is small and does not consume a lot. You drive this car because you are someone who likes going out with a **few close friends** to have fun. You are an **ordinary** person who has recently finished your studies and started your career. You bought this car because it was **not expensive and was just what you needed**. The compact tells the world that you are **not rich but also not poor**; you have a sufficient income to get by, and you are living a **normal and enjoyable** life.

⇒ Mid-Sized Cars: (Sedan)

Mid-size cars popularly known as intermediates or **large family cars**, generally designed for **families that have young children**. These cars are perfect for short commutes such as **going grocery shopping, taking the kids to school and bringing them back from visiting the convenience store** at night. These vehicles are **not flashy**, and are usually **high-rated for safety**.

These vehicles generally define convenience and are **most common among married couples and single mothers and fathers**. The authors of the study found that "mid-sized car drivers have no distinct travel attitude, personality, lifestyle, mobility, or travel-liking characteristics." Ouch! Does that mean they're totally boring? Maybe, or maybe just pragmatic, or maybe they got their cars as a hand-me-down. The owners were more **likely to be female and homemakers; they also had higher incomes**.

If you're driving an American-made sedan, you might belong to the group psychographers call "**belongers**." That's those who need to belong to a group, are very **nationalistic**, and **don't like change**. The stereotype of this person is someone who lives in an average town in the Midwest. When not driving a sedan, they may also be in a U.S.-made pickup or station wagon.

⇒ Station Wagon:

This car type is usually for people living **outside of cities**. In many American movies we see this car driven by **middle-aged and older** people who live just outside of the city in bland neighborhoods. If you are driving this car, you have a personality that **more suburban than urban**. You **prefer calm to stress**. Yet you still want to be close to the city for daily needs because **you have a family**. You are driving this car around because it is **big enough** for your entire family.

⇒ Minivan/Van

In the study, minivan drivers tended to be **calm and weren't loners**. (Who would buy such a big car just for themselves?) They **enjoyed traveling** in their car; they were more **likely to live in the suburbs, be females, homemakers, and aged forty-one to sixty-four, and surprise surprise, have children**.

What kind of person would drive a minivan? Someone who likes to **go to events and parties in big groups, with friends and families**. It is a big-size car with enough space for **more than six people most** of the time. Minivan drivers have **big families and a lots of friends**. They are **middle-class, ordinary people with regular jobs**.

Minivans give you the best of an SUV and a sedan. They combine the low fuel consumption of sedans, and the spacious interior of SUV's. Minivans are very **spacious, pleasant, and an efficient workhorse** for a family. Minivans often state that you are a **caring** person who needs an escape every now and then and nurturance.

⇒ Pickup

In the study, pickup drivers **don't like high-density** living situations and are more likely to be dissatisfied with their lives. They tend to be **workaholics**, have **lower education**, be **full-time** employees, have **service related jobs**, and be **middle-income**.

If you are driving a pickup, you probably live in the countryside. You may be a farmer who needs a pick-up as a utility vehicle. The pickup is an excellent vehicle for people who **seek usability and reliability** both, off-road and on-road. It is **no-nonsense, useful, strong and hard-working**.

Pickup trucks are 4x4 vehicles that are perfect for towing, hauling and going on off-road adventures. These vehicles come equipped with powerful engines and are usually driven by people who **need to transport** heavy objects daily. These trucks are all about **control and power**, which is why the people who purchase pickup trucks are usually referred to as **workaholics**.

⇒ Off-Roader:

Off-road 4x4s are the car types of their names. They are usually driven off-road, in **mountains, deserts and hills**. Let's take the American Jeeps as an example. You are driving a Jeep because you like going on adventures with your customized vehicle, and you admire driving off-road over the hills and mountains far from the city crowds. **Adrenaline is in your veins**. This car allows you to push it to the max. You also like customizing 4x4 cars and holding **competitions** with people who have similar taste and passions.

⇒ SUV

It's not surprising that people who favored larger cars were less environmentally-minded. SUV drivers, in particular, also liked to travel short distances in their cars. They were more **likely to be suburbanites, aged forty or younger**. The drivers came from **larger households** that were more likely to **have children**.

SUV's usually tell that you **like more space, and prefer bigger cars**. These are also very good for **safety**, and have high ratings. SUV's are generally **most popular among married people, and families**.

--> Luxury Models: The SUV is a vehicle for people who are well-off and fond of comfort. SUV drivers are sometimes called "suburban farmers". They are wealthy family-oriented drivers with houses in both the city and country. They need an SUV to commute. SUV owners combine functional necessity and status symbols. So-called "yummy mummies" like to drive luxury SUVs for their daily routines like dropping off and picking up children at school.

⇒ HATCHBACKS:

A Hatchback is a type of car body that allows the cabin of the car to be integrated with the boot. This boot is accessed via a rear trunk door that can be moved upwards and outwards at the back of the car. These cars are **usually very small** and usually tell that you are **conscious about the environment** and are looking for ways to improve it. You **don't care about the impression** your vehicle gives off to others and simply **enjoy the practicality and economy**.

⇒ MUSCLE CARS:

Muscle cars such as the **old Firebird, Mustang, Camaro and Challenger** usually show off a combination of **gender identity, control, power and impulse control**. These vehicles are usually referred to as high-performance vehicles and are durable and have exceptionally powerful engines.

A large engine is placed into a 2-door, rear-wheel drive full-size or mid-size vehicle. These vehicles generally define power and are most common among **car enthusiasts** and people who appreciate powerful sounds from the engine and exhaust. They **care about power above all else**, willing to spend more on gas for it.

Car personalities by Color ... Research on Personality, lifestyle & buyer stereo-types.

- **Black:** aggressive personality, **rebel**
- **Silver:** **cool**, calm, may be a loner
- **Green:** **reactive**
- **Yellow:** **idealistic**
- **Blue:** **introspective**, reflective, and cautious
- **Red:** someone who is full of **energy** and pizzazz
- **White:** **status** seekers, gregarious
- **Cream:** contained and **controlled**

More Equity Mining & Direct Marketing Lead Sources: Each works well if you can key in on the lifestyle associated event for new and used automotive sales:

SEM & email (cars for sale - ex: Edmunds, KBB, Blackbook, Autotrader, etc.),
bankruptcy,
graduation,
marriage,
new job,
VIN databases – 2-5 years out,
auto loan remaining months,
garage additions,
In the Market Car Leads,
high propensity of preferring certain vehicles,

owners by fuel type,
auto owners by credit score (FICO or Beacon),
repossessions,
7 series BMW car owners,
Mercedes Benz Car owners,
Households with 4+ vehicles,
Young Affluent Car owners,
Spanish Speaking Car Owners,
Hot Leads (applied for Car loans last 24 hours),
Car owners by lease expiration dates,
Car owners with expiring auto insurance,