**NEXTBEE CORPORATION**

# Mobile-Optimized Capabilities

A Dealership Marketing Team's Guide to the Mobile-First Engagement Platform

**Reaching Customers Wherever They Are - On the Lot, At Home, or On the Road**

Version 1.0 | Updated March 2, 2026

# Contents

# 1 Our Vision: Meeting Dealership Customers in the Mobile Moment

## 1.1 The Shift to Mobile-First Customer Engagement

Today's dealership customer does not wait for a mailer or a weekday phone call. They schedule a service appointment from a parking lot, check their loyalty points balance during a coffee break, and share a referral link with a neighbor before the week is out. The mobile device is no longer a secondary channel - it is where the relationship lives.

NextBee was built with this reality at its core. The platform's three connector architecture - the DMS Bridge, the CRM Sync, and the Rewards Engine - is designed not only to integrate with the dealership's back-office systems, but to surface the output of those integrations directly in the customer's hand, within seconds of a transaction. Every Repair Order closure, every tier upgrade, every referral reward earned triggers a real-time communication delivered to the customer's mobile device. The entire loyalty lifecycle, from enrollment to redemption, is orchestrated through a mobile-optimized experience.

## 1.2 What Mobile-First Means for Your Marketing Team

For the dealership marketing team, mobile-first is not simply about responsive design - it is a fundamental rethinking of how, when, and where customers engage with your brand. NextBee's mobile-first approach delivers four strategic advantages:

- **Real-Time Relevance:** Push notifications and SMS messages fire within seconds of a qualifying event in the DMS. A customer who just closed a $600 service visit receives a "Thank you - here are your new points" notification before they leave the parking lot. This immediacy dramatically increases message relevance and open rates compared to scheduled batch campaigns.

- **Channel Flexibility Without Complexity:** Marketing teams do not need to manage separate campaigns for email, SMS, push, and in-app. NextBee's automated communications matrix handles channel routing based on customer preferences, opt-in status, and event urgency - the marketing team configures the trigger and message once, and the platform handles delivery across all mobile and digital channels.

- **Data-Driven Personalization at Scale:** Every mobile interaction - a push notification opened, a QR code scanned at the service counter, a referral link tapped - feeds back into the customer's engagement score and loyalty profile. Marketing teams gain a continuously updated picture of which customers are engaged, which are at risk, and which are ready for an upsell, all visible through the CRM Sync's real-time field updates.

- **Zero Incremental Staff Workload:** Mobile-delivered rewards, reminders, and campaigns are triggered automatically by DMS and CRM events. Service advisors do not send manual messages. Marketing managers do not manage individual outreach. The platform orchestrates the entire mobile engagement lifecycle without adding operational burden to the team.

---

**Mobile as the Loyalty Delivery Mechanism**

Every point earned, every tier achieved, and every redemption completed within the NextBee platform is communicated to the customer through mobile channels first. The mobile app is the customer's loyalty wallet, notification center, referral hub, and service history tracker - all in one.

---

## 1.3   The Mobile-First Loyalty Lifecycle

The customer's mobile journey through the NextBee platform follows a natural lifecycle tied directly to dealership transactions:

1. **Enrollment via SMS:** When a new vehicle is delivered or a VIN appears in the DMS for the first time, an SMS invitation is sent to the customer's mobile number inviting them to join the loyalty program - with a welcome bonus to incentivize immediate sign-up.

2. **In-App Activation:** Upon downloading the dealership's mobile loyalty app, the customer activates their profile, views their welcome bonus, and is presented with their unique QR code for in-store check-ins.

3. **Transaction-Triggered Notifications:** Every qualifying service visit, parts purchase, or vehicle sale generates an automatic push notification or SMS confirming points earned and displaying the updated balance.

4. **Redemption on Mobile:** Customers initiate redemptions directly from the app - scanning their QR code at the service counter or selecting digital gift cards within the app itself.

5. **Referral Sharing:** The app's built-in referral module generates a unique shareable link that the customer can send via native mobile share functionality (iMessage, WhatsApp, social media).

6. **Lifecycle Re-Engagement:** Automated campaigns triggered by inactivity, expiring points, or upcoming lease maturations reach the customer through push and SMS, pulling them back into the dealership relationship before it lapses.

# 2   Module-by-Module Mobile Capabilities



NextBee's three core connectors each contribute a distinct layer of mobile capability. This section details the specific mobile-optimized, mobile-enabled, and mobile-powered features within each module.

## 2.1   The DMS Bridge: Mobile-Optimized Transaction Intelligence

The DMS Bridge is the data engine that converts Repair Orders, Sales Contracts, Parts Invoices, and Appointment records into mobile engagement events. It is deeply mobile-optimized in that every transaction it processes can immediately produce a customer-facing mobile output.

### 2.1.1   Mobile-Optimized Features

- **Real-Time Push on RO Closure:** When a Repair Order closes with a status of `Closed-Paid` in the DMS, the DMS Bridge processes the reward-eligible amount and issues a push notification to the customer's mobile device within 60 seconds. The notification displays the points earned, the new balance, and a one-tap link to the loyalty app. This transforms an administrative event - the RO closure - into an immediate, personalized mobile moment.

- **First-Visit SMS Enrollment:** When a new VIN appears in the DMS for the first time, an SMS is sent automatically to the customer's registered mobile number with a welcome message, a one-time signup bonus offer, and a deep link to the loyalty app download page. The entire enrollment flow is mobile-native - the customer never needs to interact with a desktop.

- **Missed Appointment SMS Recovery:** When an appointment produces a No-Show status, an automated SMS is dispatched to the customer's mobile number within the hour: "We missed you today - reschedule your appointment and earn 50 bonus points." This single automated message recovers service revenue with no staff intervention.

- **Declined Service SMS Follow-Up:** When the DMS records declined services on a closed RO, a mobile-targeted SMS is scheduled for 48 hours later, offering bonus points to complete the recommended work. This turns a service lane conversation into a mobile campaign that continues working after the customer has left.

- **Mobile-Based QR Check-In with Geofencing:** Customers can check in at the dealership by presenting their in-app QR code to the service advisor. The DMS Bridge validates the QR check-in against the dealer's configured geofence radius (default: 500 meters), ensuring that check-ins can only be completed when the customer is physically on the premises. This prevents remote or fraudulent check-ins while providing a frictionless mobile experience for in-person visits.

- **Pre-Service Reminder Push:** The DMS Bridge calculates a projected next service date from the last recorded service code, odometer reading, and average daily mileage derived from prior visits. Two weeks before the projected date, it triggers a mobile push notification with a loyalty incentive for booking early.

### 2.1.2   Mobile-Enabled Features

- **Trade-In Equity Alert (SMS + Push):** When a vehicle's age or mileage crosses a configurable threshold, the DMS Bridge triggers a trade-in equity evaluation offer delivered via SMS to the customer. The message includes a unique link to a mobile-optimized appraisal landing page.

- **Recall Compliance SMS:** When the NHTSA recall data associated with a customer's VIN indicates an open recall, an automated SMS is sent urging the customer to schedule their recall appointment with a bonus points incentive. Recall completion is tracked by monitoring subsequent RO service codes.

- **MPI Follow-Up Push:** When a Multi-Point Inspection reveals amber or red findings attached to an RO, the customer receives a push notification linking to a mobile-optimized digital service report, with a call-to-action to book the recommended work for bonus points within 30 days.

- **Seasonal Campaign Outreach:** During configured seasonal windows (e.g., October–November for winter tire promotions), the DMS Bridge identifies vehicles whose last tire service exceeds 12 months and triggers targeted SMS and push campaigns to that segment.

### 2.1.3   Mobile-Powered Features

- **Loyalty App Balance Display:** Every points transaction processed by the DMS Bridge is immediately reflected in the customer's loyalty app balance. The app is the real-time ledger visible to the customer - the DMS Bridge keeps it accurate.

- **Service History in App:** Customers can view a summary of their DMS-connected service history within the loyalty app, including visit dates, service types, points earned per visit, and current vehicle odometer milestones.

- **App Download Incentive:** The DMS Bridge triggers a 50-point bonus reward upon confirmed app download and registration, creating a direct incentive loop between the transaction system and mobile app adoption.

> **DMS Bridge Mobile Snapshot**
>
> 60-second push notification on RO closure. Automated SMS for missed appointments, declined services, recalls, and pre-service reminders. QR-based geofenced check-in. Every transaction drives a mobile moment.

## 2.2   The CRM Sync: Mobile-Enabled Relationship Intelligence

The CRM Sync ensures that the customer-facing mobile engagement layer is backed by synchronized, real-time relationship data visible to every member of the dealership team. It is mobile-enabled in that it equips sales reps, BDC agents, and service advisors with live loyalty intelligence on their mobile CRM interfaces - enabling personalized, loyalty-aware interactions from any device.

### 2.2.1   Mobile-Optimized Features

- **Real-Time Walk-In Push to Sales Staff:** When a customer checks in via the dealership's loyalty app QR scan, the CRM Sync pushes an instant notification to the assigned salesperson's CRM mobile app: "[Customer Name] (Gold Tier, 1,200 points) just checked in." This empowers the sales team to deliver a personalized, VIP-quality greeting within seconds.

- **Tier Change Push Notifications (Customer-Facing):** When a customer's loyalty tier changes - whether an upgrade or a downgrade - the CRM Sync triggers an automated email and push notification. Tier upgrades celebrate the achievement and detail the new tier benefits; tier downgrades present a clear, mobile-friendly guide on how to re-qualify.

- **Referral Attribution via Mobile Link:** When a new lead is created in the CRM whose email or phone matches a referral link click tracked in the NextBee system, the CRM Sync automatically attributes the lead to the referring customer. The referrer receives a mobile push notification confirming their referral has been matched - closing the attribution loop in real time, on mobile.

### 2.2.2   Mobile-Enabled Features

- **Loyalty Card in CRM Mobile View:** Sales reps and BDC agents accessing their CRM on a mobile device see a "Loyalty Card" component on every customer record. This component surfaces the customer's tier badge, points balance, engagement score, and tenure at a glance - enabling an informed, personalized conversation without desktop access.

- **BDC Mobile Script Enrichment:** Outbound BDC campaigns can be filtered and sorted by loyalty tier, engagement score, or churn risk - fields that are continuously updated by the CRM Sync. Agents working from mobile CRM views see the loyalty context on every call, enabling tier-appropriate scripting (e.g., routing Platinum callers directly to senior advisors).

- **Engagement Score Mobile Dashboard:** The engagement score (updated every 15 minutes) is accessible to marketing managers through CRM mobile dashboards, providing a real-time pulse on the customer base's health - segmented by churn risk, tier level, and recency.

- **VIP Service Routing Alert:** When a Platinum or Diamond tier customer books a service appointment, the CRM Sync triggers a mobile CRM alert to the service manager and the designated service advisor to prepare a loaner vehicle, assign a dedicated advisor, and ready any VIP amenities.

### 2.2.3   Mobile-Powered Features

- **Personalized Email with Mobile Merge Tags:** The CRM Sync pushes live `NextBee_Points_Balance` and `NextBee_Tier_Level` fields as merge tags available in CRM-managed email campaigns. Emails rendered on mobile devices display the customer's real-time points balance and tier badge dynamically - no manual list exports required.

- **Churn Risk Alert to Mobile:**  When a customer's churn risk status changes to "Critical" (engagement score below 20), the CRM Sync automatically creates a CRM task for the customer's relationship owner, including a suggested personal outreach script. CRM task notifications are delivered to the team member's mobile device via the CRM's native mobile app.

- **Service-to-Sales Handoff via Mobile:** When the DMS Bridge detects trade-in criteria met on a customer's vehicle, the CRM Sync creates a new Opportunity record in the CRM assigned to the last salesperson, pre-populated with vehicle details. The salesperson's mobile CRM app surfaces this opportunity immediately - enabling timely, informed outreach.

## 2.3   The Rewards Engine: Mobile-Powered Incentive Fulfillment

The Rewards Engine is the customer-facing layer of the platform - it is the experience customers see, interact with, and value. It is mobile-powered in that the primary delivery mechanism for nearly every reward type is the mobile app or SMS, and the primary redemption mechanism is the mobile QR code. The Rewards Engine makes the loyalty program tangible and immediate on the customer's device.

### 2.3.1   Mobile-Optimized Features

- **In-App Points Redemption via QR Code:**  Customers open their loyalty app, tap "Redeem," and present a dynamic QR code to the service advisor at the counter. The advisor scans the code, the redeemed amount is applied to the Repair Order as a discount, and the point deduction is recorded in the NextBee ledger in real time. The entire redemption transaction is mobile-native and requires no desktop access for the customer.

- **Digital Gift Card Delivery to Mobile:** When a customer redeems points for a digital gift card (Amazon, Starbucks, Visa prepaid, and others), the gift card is delivered instantly to the customer's registered email and displayed within the loyalty app. The customer has immediate, mobile-accessible value - no physical card or mailing required.

- **Instant Push on Points Earned:** Every earn event - service visit, parts purchase, referral success, milestone achievement - triggers an immediate push notification displaying the points earned and the updated balance. The notification includes a one-tap deep link to the rewards catalog, shortening the path from earning to considering redemption.

- **Points Expiry Warning via Push and SMS:** Thirty days before a customer's points are scheduled to expire, a multi-channel mobile campaign fires: a push notification, an SMS, and an email - each directing the customer to the app to redeem before their value disappears.

- **Birthday Reward Push Delivery:** Seven days before a customer's birthday (sourced from the DMS customer master), a personalized push notification and email deliver a $25 service credit with a 30-day redemption window. The message is mobile-first: it is designed to be seen, tapped, and acted upon from a smartphone.

- **Referral Link Sharing from App:** The loyalty app generates a unique, trackable referral link for each customer. The customer shares it directly from the app using native mobile share functionality - iMessage, WhatsApp, Facebook, or any installed messaging application. When the referred contact clicks the link on their mobile device and completes an enrollment, the referral reward is automatically issued and confirmed via push notification.

- **In-App Milestone and Badge Display:** Every milestone reward (e.g., 5th service visit, 3rd successful referral) triggers a push notification and displays a digital badge within the app. The social share feature lets customers broadcast their milestone to their mobile social networks, with a 25-point bonus for each confirmed share.

### 2.3.2   Mobile-Enabled Features

- **OTP Verification for High-Value Redemptions:** For redemptions exceeding a configurable threshold (default: $50 in value), the Rewards Engine sends a one-time password to the customer's registered mobile number. The customer enters the OTP within the app to authorize the redemption. This adds a frictionless security layer that the customer completes entirely on their mobile device.

- **Re-Engagement Campaign Push:** After 180 days of no loyalty activity, the Rewards Engine triggers a "We miss you" campaign with a bonus points offer for the next service visit. The primary channel is push notification (for customers with app installed) with SMS as a fallback - ensuring mobile delivery regardless of app engagement level.

- **Welcome Bonus on App Registration:** The 100-point welcome bonus and the 50-point app download incentive are both triggered and confirmed through the mobile app activation flow - creating an immediate, tangible reward for the customer's first mobile interaction with the program.

### 2.3.3   Mobile-Powered Features

- **Loyalty Wallet in App:** The loyalty app functions as the customer's complete loyalty wallet: current points balance, pending points, lifetime earned and redeemed values, tier status and progress to next tier, available rewards, and transaction history - all accessible from the mobile device, with no login to a desktop portal required.

- **Fuel Card and Experience Reward Fulfillment:** Points redeemable for fuel card credits or experience rewards (concerts, spa packages, sporting events) are fulfilled and delivered to the customer's mobile device via integration with the relevant fulfillment partner APIs. The customer manages and accesses these rewards directly from the loyalty app.

- **Charitable Donation via App:** Customers who prefer to convert points to charitable donations select their preferred nonprofit from within the app, complete the conversion with a single tap, and receive a mobile confirmation. The tax receipt is generated by the fulfillment partner and emailed to the customer.

**Rewards Engine Mobile Snapshot**

QR-based in-store redemption. Instant digital gift card delivery. Push notifications on every earn, expiry, and milestone event. Referral link sharing via native mobile share. The entire rewards experience is mobile-first and mobile-complete.

## 3   Real-World Mobile Scenarios for Dealership Marketing Teams



The following scenarios illustrate how the NextBee mobile-first platform operates in practice across the customer journey. Each scenario is grounded in the platform's documented capabilities.

### 3.1   Scenario 1: The Service Visit That Starts a Loyalty Relationship

A customer brings in their vehicle for an oil change - their first service visit with this dealership. The DMS registers a new VIN + Customer ID combination. Within minutes, an SMS arrives on the customer's phone: "Welcome to [Dealer Name] Rewards! Earn points every time you service with us. Download the app and receive a 100-point bonus: [link]."

The customer is sitting in the waiting lounge. They download the app, register their profile, and receive the 100-point welcome bonus and an additional 50 points for the app download. When the RO closes as Closed-Paid, a push notification confirms their service visit points - earned and visible in the app before they have left the building. This customer is now enrolled, active, and holding a mobile loyalty experience from their very first visit.

### 3.2   Scenario 2: Declined Service Becomes a Second Visit

A service advisor completes an MPI and presents the customer with amber findings - brake pads approaching wear threshold. The customer declines the additional work today. The DMS Bridge records the declined service. Forty-eight hours later, an automated SMS reaches the customer: "Complete your brake service this month at [Dealer Name] and earn 50 bonus points - that's worth $5 off your next visit. Book now: [link]."

The customer taps the link on their mobile device, books the follow-up appointment through the mobile-optimized scheduling page, and returns the following week. No marketing manager

wrote this message; no service advisor followed up manually. The DMS-to-mobile pipeline delivered the outreach automatically and recovered the service revenue.

### 3.3   Scenario 3: Lease Maturity Turns into a Retained Customer

A customer's lease end date is 90 days away. The DMS Bridge detects the approaching Lease_End_Date and initiates a three-part mobile campaign sequence: an awareness email at 90 days, a consultation invitation push notification at 60 days, and an urgency SMS at 30 days with a loyalty incentive for returning to the same dealership to lease or finance their next vehicle.

The 30-day SMS reads: "Your lease is ending soon, [First Name]. Return to [Dealer Name] and we'll apply your [Points Balance] loyalty points toward your next deal - plus a special returning-customer bonus. Speak with your advisor today: [link]."

The customer taps the link, books an appointment, and the CRM Sync creates a pre-populated Opportunity record for the sales team before the customer arrives. The salesperson's mobile CRM notification alerts them to the appointment, tier level, and available points - enabling a personalized, prepared conversation.

### 3.4   Scenario 4: A Referral That Works While the Customer Sleeps

A Gold tier customer had a positive service experience. After the RO closes, a push notification confirms their points and includes a soft prompt: "Love your experience? Share [Dealer Name] Rewards with a friend and earn $200 in service credits when they purchase."

The customer taps the push notification, opens the referral module in the app, and shares their unique link via WhatsApp to a neighbor who mentioned they were car shopping. Three weeks later, the neighbor purchases a vehicle at the dealership. The CRM Sync matches the new lead's email to the referral click, attributes the deal to the referring customer, and issues a 2,000-point reward automatically. The referrer receives a push notification: "Your referral just earned you $200 in service credits." The marketing team sees the referral-to-sale conversion in the Referral-to-Sale Conversion Report - no manual tracking required.

### 3.5   Scenario 5: Re-Engaging an At-Risk Customer Before They Defect

A Silver tier customer has not visited the dealership in seven months. Their engagement score decays below 30 and their churn risk changes to "High" in the CRM. Two automated actions fire simultaneously: a CRM Task is created for their last service advisor's mobile CRM app with the alert "[Customer Name] at churn risk - last activity [date] - suggested personal call with bonus offer," and an automated SMS is sent to the customer: "We haven't seen you in a while, [First Name]. Come back for any service this month and we'll double your points. Book here: [link]."

The advisor makes the call, references the loyalty context on their mobile CRM, and the customer books a service appointment. The churn risk score is reset once the RO closes and the engagement score rebounds. A defection to a competing dealership is prevented - identified and acted upon through the mobile-first platform before the relationship was lost.

### 3.6   Scenario 6: A VIP Customer Receives a VIP Experience

A Diamond tier customer books a service appointment through the dealership's online scheduling tool. The CRM Sync detects the Platinum/Diamond flag on the booking and immediately triggers mobile CRM alerts to the service manager and the customer's dedicated service advisor: loaner vehicle reserved, VIP welcome packet prepared. The customer arrives, scans their in-app QR code at the service counter, and is greeted by name. Their loyalty status is confirmed on the service advisor's screen via the DMS terminal.

When the RO closes, the customer's points are confirmed via push notification within 60 seconds.  The dedicated advisor receives a post-visit CRM task reminder to send a personal follow-up note - delivered to their mobile device - within 24 hours. From reservation to follow-up, the entire VIP workflow is orchestrated through mobile touchpoints.

## 4 Safeguarding the Mobile Experience: Performance, Responsiveness, Accessibility, and Security



A mobile-first loyalty platform is only as strong as its reliability and trustworthiness. NextBee's approach to quality assurance across the mobile experience is built on four pillars: performance, responsiveness, accessibility, and security.

### 4.1 Performance: Speed That Matches the Service Lane

The service lane moves quickly. A customer who has just closed a Repair Order and is walking to their vehicle has a narrow window of mobile attention. NextBee's performance standards are calibrated to this reality.

- **Sub-60-Second Points Delivery:** The DMS Bridge is engineered to process a Repair Order event and issue a push notification to the customer within 60 seconds of the RO status change. This is achieved through real-time event listeners configured on CDK, Tekion, and Reynolds platforms, and near-real-time polling for SFTP-based platforms (Dealertrack, PBS) with sub-minute file-watcher intervals.

- **15-Minute Engagement Score Refresh:** The CRM Sync refreshes every customer's engagement score at a maximum interval of 15 minutes, ensuring that the loyalty intelligence visible to sales reps and BDC agents on their mobile CRM apps reflects current customer behavior rather than stale snapshots.

- **Real-Time Redemption Processing:** QR-based in-store redemptions are processed in real time - point deductions are recorded in the NextBee ledger instantly, and the updated balance is visible in the customer's app within seconds of a completed redemption.

- **Webhook-First Architecture:** For all DMS and CRM platforms that support it, NextBee uses event-driven webhooks rather than polling to minimize latency. Tekion's cloud-native webhook architecture, Salesforce Platform Events, and HubSpot webhook subscriptions all enable near-instantaneous data flow without the overhead of scheduled polling cycles.

- **Queue and Retry for Reliability:** If a push notification delivery fails or a sync endpoint is temporarily unavailable, all pending messages and updates are queued and retried with exponential backoff. No mobile message is silently dropped - failed deliveries are logged and escalated after three consecutive failures.

## 4.2   Responsiveness: Consistent Across Every Screen

- **Mobile-Optimized App Interface:** The customer-facing loyalty app is designed for thumb-friendly navigation: large tap targets, bottom-navigation patterns, minimal scrolling to access key actions (check balance, scan QR, share referral), and a single-screen overview of all relevant loyalty data.

- **Responsive Marketing Emails:** All email communications generated by the automated communications matrix are built on mobile-first responsive templates. Points balance notifications, tier upgrade celebrations, lease maturity sequences, and birthday reward emails all render correctly on iOS Mail, Gmail mobile, and Outlook mobile - the dominant email clients on smartphones.

- **SMS-First for Critical Triggers:** For time-sensitive, high-urgency events - missed appointments, points expiry, win-back campaigns - SMS is prioritized as the primary channel because it carries no rendering variability. An SMS message renders identically on every mobile device, regardless of carrier or operating system.

- **Deep Links to Specific App Screens:** Push notifications and SMS messages include deep links that open the customer directly to the relevant screen within the loyalty app - not the app's home screen. A points expiry warning deep links to the redemption catalog. A referral prompt deep links to the referral share module. A service reminder deep links to the booking interface.

- **Cross-Platform App Compatibility:** The loyalty app is maintained for both iOS and Android, with feature parity across platforms. QR code scanning, push notification delivery, biometric authentication for redemptions, and deep link routing function consistently across all supported OS versions.

## 4.3   Accessibility: Loyalty for Every Customer

- **Clear, Plain-Language Messaging:** All automated mobile communications - push notifications, SMS messages, and mobile-rendered emails - are written in plain, direct language accessible to customers of all literacy levels. Points balances are expressed in both points and dollar-equivalent values to eliminate confusion.

- **Large-Text and High-Contrast UI:** The loyalty app's interface respects the device's system-level accessibility settings, including Dynamic Type (iOS) and font scaling (Android), ensuring that customers who use larger text sizes can navigate the app without layout breaks.

- **Screen Reader Compatibility:** Interactive elements within the loyalty app include appropriate accessibility labels (ARIA-equivalent for mobile), enabling screen readers on both iOS (VoiceOver) and Android (TalkBack) to describe buttons, tier badges, and transaction items correctly.

- **Alternative Enrollment Pathways:** Customers who are unable or unwilling to use a mobile app can still participate in the loyalty program through web-based enrollment, email-based communication, and in-store QR code scanning via a dealership kiosk. Mobile is the primary channel, but it is not the only one.

- **TCPA Compliance Built In:** SMS communications are governed by the customer's `Opt_In_SMS` field in the DMS customer master. No SMS message is sent to a customer without a confirmed opt-in. Opt-in status is continuously synchronized between the DMS, NextBee, and the CRM - ensuring compliance as customer preferences change.

## 4.4   Security: A Trusted Mobile Environment

- **Geofenced QR Check-In:** Mobile check-in via QR code is validated against the dealer's configured geofence (default: 500-meter radius). A customer attempting to check in from outside the dealership's physical perimeter is blocked - preventing fraudulent remote check-ins and ensuring that in-store rewards are earned in-store.

- **OTP for High-Value Redemptions:** Redemptions exceeding a configurable dollar threshold (default: $50) require a one-time password sent to the customer's registered mobile number. The OTP must be entered within the app to authorize the redemption - adding a possession-based second factor that protects against unauthorized account access.

- **Encrypted Data Transmission:** All data transmitted between the loyalty app, the NextBee platform, and the DMS/CRM connectors is encrypted in transit using TLS 1.2 or higher. All customer personal data stored within the platform is encrypted at rest.

- **Referral Fraud Mobile Controls:** The referral system blocks self-referrals using a combination of IP address matching, household ID checking, and email/phone matching. Shared household referrals and rapid-fire referral attempts from the same device are flagged and reviewed automatically.

- **Velocity Controls on Mobile Redemptions:** A customer can initiate a maximum of three redemptions per day and two gift card redemptions per week from the app, with a maximum single gift card value of $100. Redemptions beyond daily limits are queued and require dealer admin approval - preventing velocity-based fraud attacks.

- **Penetration Testing and Security Audit:** As part of the standard deployment process, all API endpoints, mobile app communication channels, and OTP flows undergo formal penetration testing during the Security Audit phase (Week 7 of implementation). PCI DSS compliance is verified for any payment-adjacent reward flows before the mobile app goes live.

- **App-Level Authentication:** The loyalty app supports biometric authentication (Face ID, Touch ID) for returning users, reducing reliance on passwords while maintaining a secure access barrier to the customer's loyalty wallet.

---

### Security Is Part of the Mobile Experience

A customer who trusts that their loyalty wallet is secure - their points cannot be stolen, their redemptions cannot be hijacked, and their personal information is protected - is a customer who uses the app. Security and mobile engagement are not competing priorities; they are complementary.

---

# 5   Making the Transition: Whether You Are Upgrading or Starting Fresh

Dealership marketing teams come to NextBee's mobile-optimized platform from two different starting points: some are migrating from an existing marketing or loyalty solution, and others are adopting a structured engagement program for the first time. Both paths lead to the same destination - a mobile-first, data-connected loyalty program - but the journey looks different.

## 5.1   For Teams Currently Running Marketing Solutions

If your dealership already has a CRM, an email marketing platform, or even a legacy loyalty program in place, the NextBee mobile platform is designed to integrate with and enhance your existing stack - not replace it wholesale.

- **CRM-First Integration:** The CRM Sync connector operates as a data enrichment layer on top of your existing CRM (Salesforce, HubSpot, Elead, VinSolutions, ProMax, DriveCentric). NextBee does not ask you to abandon your CRM workflows. Instead, it adds real-time loyalty intelligence - points balance, tier level, engagement score, churn risk - as live fields on your existing customer records. Your team continues to work in the CRM they know; they simply see richer data.

- **Campaign Suppression, Not Conflict:** If your marketing team is already running CRM-based email campaigns, the CRM Sync includes built-in campaign suppression logic. Customers who are already enrolled in an active NextBee mobile campaign are automatically suppressed from overlapping CRM campaigns targeting the same audience - preventing communication fatigue without requiring manual list management.

- **Mobile Fills the Gaps CRM Email Cannot:** CRM-managed email campaigns are powerful for scheduled, planned outreach. What they typically cannot do is react to real-time DMS events in under 60 seconds. NextBee's mobile push and SMS layer handles the real-time, transactional dimension of customer engagement - the RO closure confirmation, the missed appointment recovery, the points expiry warning - that batch email campaigns are not architected to deliver. The two systems are complementary: CRM handles the planned; NextBee handles the triggered.

- **Existing Loyalty Program Migration:** If you are running a legacy loyalty program, NextBee's implementation team conducts a Discovery and Mapping workshop (Weeks 1–2 of the deployment process) to document your existing program structure, migrate historical point balances to the new platform, and configure earn rules that reflect your current loyalty logic. Customers experience continuity; the marketing team gains mobile delivery and DMS automation they did not have before.

- **Preserved Reporting Continuity:** NextBee's built-in reports - Service Lane Revenue Attribution, Referral-to-Sale Conversion, CLV Trends, Tier Migration - can be configured to align with your existing KPIs. The platform does not require you to redefine what success looks like; it helps you measure it more accurately, with mobile attribution included.

---

**Transition Tip for Existing CRM Users**

During the initial CRM Sync deployment, NextBee recommends enabling campaign suppression from day one. This prevents any overlap between your existing CRM campaign schedules and newly activated NextBee mobile triggers while your team calibrates the combined communication cadence.

## 5.2   For Teams Adopting Mobile Engagement for the First Time

If your dealership has been relying on manual outreach, ad-hoc promotions, or informal word-of-mouth to retain customers, NextBee's mobile platform represents a foundational shift - from reactive to proactive, from manual to automated, and from fragmented to unified.

- **Day One Data Foundation:** The DMS Bridge connects to your existing DMS platform (CDK, Dealertrack, Reynolds, Tekion, Autosoft, Quorum, or PBS) and immediately begins processing your transaction history as the engine for mobile engagement. You do not need a loyalty program already in place - the DMS is the starting point. Every Repair Order that closes from day one of your deployment triggers automated mobile engagement.

- **Enrollment Without Friction:** First-time adopters benefit from the First-Visit Enrollment flow: every customer whose VIN appears in the DMS receives an automatic SMS invitation to join the loyalty program. There is no staff-led enrollment process, no paper forms, and no manual list building. The DMS does the work.

- **Zero-Burden Automation:** For dealerships that have never run an automated marketing program, the prospect of managing multiple campaigns can be daunting. NextBee's automated communications matrix handles the full outreach lifecycle - service reminders, declined service follow-ups, lease maturity sequences, birthday rewards, win-back campaigns - without requiring a dedicated campaign manager. The marketing team configures the rules once; the platform executes them continuously.

- **Immediate ROI Visibility:** First-time adopters gain access to the full suite of NextBee reporting from their first week of operation: Service Lane Revenue Attribution, New Vehicle Enrollment Rate, Churn Risk Dashboard, and ROI Summary Dashboard. These reports provide an immediate, data-backed view of the program's impact - something that was previously invisible without a structured platform.

- **Staff Readiness in Days, Not Months:** The implementation timeline for a first-time adopter is structured to move quickly: DMS connection in 1–4 weeks (vendor-dependent), CRM sync in 3–7 days, and rewards configuration in 2–5 days. Staff training is minimal - service advisors need to recognize the loyalty QR code and know how to apply a redemption at the DMS terminal; sales reps need to recognize the loyalty badge on a CRM record. The platform is designed to be operable by teams without prior loyalty program experience.

- **Scalability from Day One:** Whether your dealership operates a single rooftop or a multi-location dealer group, NextBee's architecture scales without structural changes. Dealer codes and rooftop segmentation are built into the platform from the start, and shared household logic ensures that customers who visit multiple locations within the group are recognized consistently across all touchpoints.

> **The Mobile Advantage for New Adopters**
>
> Dealerships adopting mobile engagement for the first time gain an immediate competitive advantage: a systematic, automated way to maintain customer relationships between transactions. The average customer visits a dealership's service department two to four times per year. Mobile engagement keeps the dealership's brand present and valued during the 11 months between visits.

## 5.3   A Shared Path Forward

Whether you are enhancing an existing marketing stack or building from scratch, the NextBee mobile-first platform delivers the same core outcome: a dealership that is present, relevant,

and valuable on the customer's mobile device throughout the entire ownership lifecycle. The path to go-live is structured, supported, and designed to minimize disruption - and the mobile experience customers receive on the other side reflects the dealership's commitment to a modern, personalized relationship.

> **Ready to Take the Next Step?**
>
> NextBee's Technical Solutions Architect team is available to assess your current stack, outline a mobile-first integration roadmap, and answer any platform-specific questions. Reach out at: `https://web.nextbee.com/contact-us.html`