



PORTFOLIO MANAGER™

An equity mining solution powered by AutoData

Keep your customers for life. Automatically.

Our integrated equity mining solution not only gives you the power to be proactive in retaining your customers, but it's all done automatically. **Portfolio Manager** gives you the tools and services to stay connected with your customers with minimal effort. The interface is easy to use and resides within the GM Global Connect portal. This low cost solution has been the preferred tool for most GM dealers for years and all data feeds directly from GM financial and ALLY, which allows for more accurate and up to date information.



Do you know your current equity opportunities?

How large is your Finance and Lease customer portfolio?

How many Finance contracts are there?

How many Lease contracts are there?

How many are close to End-of-Term and are in positive equity?

Do you have a process(es) to focus on retaining your customer portfolio?

Portfolio Manager is the right solution for your equity mining needs!

Functionality within Portfolio Manager include:

Portfolio Manager Tool - This powerful equity mining tool allows you to identify near and/or long term sales opportunities based on the amount of equity in your customer's vehicle.

Concierge Services - Our Concierge Service is designed to create targeted lists, contact customers and schedule appointments - It can even notify you when it's done! Choose from either our base or full service. Either way, our Concierge is at your service!

Third Party Vendor Web Service - This web service allows your dealership to supply customer data and records to certified third party vendors.