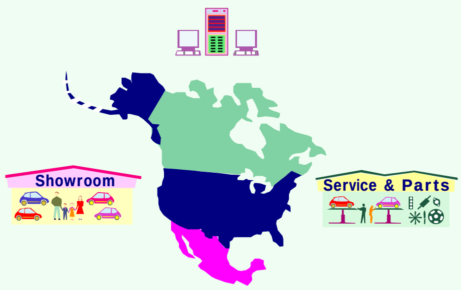
Automotive Systems & Communications Service

Contents Lists and Prices



North American Developments & Trends

Volumes 1 and 2 - November 2006

The Market, OEMs and Dealer System Providers

Compiled and Published by ESTABLISHED 1973 Woods & Seaton Research

Automotive Retailing in North America
Developments & Trends in Systems & Processes

There is so much to cover in North America that two volumes are being provided for Subscribers...

Volume 1 - Topics covered

This volume covers two of the three main influences on Dealer system developments, the OEMs and the DSPs, and endeavours to provide a clear picture of the way the market as a whole is developing.

- **This year, events have made it one of the most difficult times in which to assess what will happen in the next 2 or 3 years.**

However, the facts, probabilities and possibilities have been set out in 8 Sections...

1. **Executive Summary -** an overview for those with very little time - with the warning that this is not a market which can be fully understood via a brief scan.
2. **The Market -** the current key issues in context - a more detailed review for those who need a deeper understanding of what is happening.
3. **STAR, Hubs, Integration, Data Exchange and Security - This is a critical area of the market, especially in its influence on the ability of Dealers, OEMs and their business Partners to choose and use the systems which they prefer**.

   North American Dealer Systems are not yet an "open" market, and there is a risk that they could become even less open at a time when more competition is considered by many to be essential.
4. **The "FANs" - Finance and Insurance networks -** The move towards paperless transactions between Dealers and their Finance and Insurance product sources continues, with strong competition between the two market leaders. Another "Big 2" situation has evolved.
5. **OEM Strategies -** concentrating on the main changes affecting Dealer-related systems in the past year.
6. **Division 1 DSPs -** This category is down to two - ADP and R&R-UCS - who dominate the market holding about 80% between them.
7. **Division 2 DMS Providers -** The numbers here are not reducing, and there could be more coming. But their market share is so far minor - 20% or less.

   This is an area in which freedom of DSPs to connect their systems to all OEMs is a key factor if there is to be genuinely open competition with the Division 1 DSPs.
8. **Specialist DSPs -** This is where the innovation happens. A wide variety of specialist applications are available to surround the DMS - sometimes complementary, and sometimes competitive with the application range of the major DMS providers.

   It is also an area in which open interfaces and freedom of integration are critical.

Volume 2 - Topics covered

We are always looking for new projects and systems which aim to improve Dealer performance, and for Dealers who operate in an especially interesting way.

This edition covers...

1. **Dealer-related developments in context -** why those reviewed are of interest.
2. **OEM-led projects involving Dealers**... Two very different situations illustrate the range of possibilities...

2.1. General Motors - USA and Canada - DMS and Lead Management.

GM is trying to "*make it easiest for Dealers to do business with GM*", and has three main projects affecting Dealer systems.

2.2. Toyota-Lexus Canada - Co-operative processes and systems for customer retention.

Dealer CRM projects led by OEMs are, so far, small in number and variable in their results.

Toyota Canada has a step-by-step approach to co-ordinating and enhancing its Network's performance in retaining customers.

Two brief reviews of Dealers using the recommended systems are included...

2.2.8. Heffner Toyota-Lexus - Kitchener (Ontario)

2.2.9. Brimell Toyota - Scarborough (Ontario)

3. Dealer Group projects

3.1. AutoNation - annual update: Sales processes and Showroom systems.

3.2. United Auto Group - currently the largest user of Reynolds & Reynolds systems.

4. Individual Dealers and their systems

4.1. Hawkinson Nissan - using ADP's *Web2006 and* WEBCRM.

4.2. Aloia's Nissan - using the 5Square showroom system developed by its owners.

4.3. Galpin: this year's update on Dealer Solutions *CARMan* and the Specialist systems in use.

4.4. JM Lexus - overview of the systems in use.

4.5. Brian Finch Pontiac Buick - an effective user of Quorum's *XSellerator* DMS, which has been adopted by GM as one of the two *IDMS*.

Note: Subscribers to these Analyses will receive any updates on the evolving policies and actions of R&R-UCS, and their implications for the market, until the end of February 2007.

Prices

These North American analyses - Volumes 1 and 2 - are supplied to all "annual" Subscribers as part of our ***Automotive Systems & Communications Service***.

They are offered separately as follows...

- **For use in North America...**
  - **Volumes 1 and 2 together in Book format...** $2,950.00 delivered
  - **Additional copy of Volumes 1 and 2 together in pdf format on CD-ROM...** $950.00 delivered
- ***Note***: **Purchase of the two volumes of North American analyses automatically includes supply of a year's e-mail *Briefings* service.**

For prices for...

- Multiple copies of the Book format
- Use in Europe or other parts of the world...

...please contact Mike Seaton.

- ***Note***: **The purchase price of these North American analyses can be set against the price of a full subscription for the March 2007 - February 2008 Service at any time in the year.**

  The full subscription includes...

  - 6 Analyses in the year mainly covering developments in automotive systems and processes in North America and Europe.
  - The e-mail *Briefings* service.
  - A telephone and e-mail query service relating to the contents of the analyses supplied.

  The last page of this document lists the analyses we have provided for subscribers in the past 6 years.

  Any purchase of other Analyses from this list with the 2006 North American analyses attracts "bundled" pricing - i.e. the bundled price is less than the total of the individual prices.

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North American Developments & Trends

Volume 1 - November 2006

The Market, OEMs and Dealer System Providers

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  - **The Market - an overview of developmens and trends.**
  - **OEMs - Vehicle Manufacturers and their Dealer-related systems.**
  - **DSPs - Dealer Systems and Services Providers.**
- **Volume 2** - concentrating on...
  - **Dealers - interesting situations**
  - **Groups - strategies and developments**
  - **OEM projects involving their Dealer Networks.**

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The evolving position of R&R-UCS in North America

Subscribers to this Analysis will receive any updates on the evolving policies and actions of R&R-UCS until the end of February 2008.

North American Developments & Trends

Volume 2 - November 2006

OEM-Dealer Projects, Dealers & Groups

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