Reboot: Developing a New Automotive Dealer Experience for Connecting Drivers to their In-car Technologies
We’ve evolved from a place where *cars have technology*, to a place where *technology has wheels* – *the auto dealer experience also needs to evolve*.

The rush to *infotainment innovation* is placing immense pressure on auto dealerships, which face an expansion of their role from purely selling cars, to helping consumers understand, set-up and troubleshoot their new in-car technologies.

With automakers all implementing different strategies to support their dealer networks (including the much-hyped Genius Bars), SBD has partnered with Gamivation to analyze and highlight *best practices and innovative solutions* to overcome the disconnect between consumers, in-car technologies, and the auto dealers on the front lines of this ever changing landscape. We hope you enjoy the whitepaper, and let us know your own perspectives or if you have any questions.
The evolution of In-Car Technology

1930 - First commercial car radio
1953 - First auto-tuner
1970 - First cassette player in car
1985 - First digital in-car navigation
Late 1990s - First telematics services

You can have any color as long as it's black
Henry Ford - 1922

Average # of pages in car owner manuals: 460
Average # of acronyms that a consumer is faced with: 18
Average # of features available on leading Infotainment systems: 233
Growth in # of apps being offered by car makers since 2013: 130%

In the beginning...
What is the disconnect?

Consumers
Increasingly expect it...
A new class of on-line savvy car buyers is placing a greater importance on both CE and in-car technologies.

Automakers
Have to offer it...
In addition to mounting pressure from competitors, automotive OEMs (now more than ever) face technology trends beyond their control (e.g. CarPlay & Android Auto).

In-car Technology

Auto Dealers
Struggle with it...

<table>
<thead>
<tr>
<th>Sales targets</th>
<th>Limited time</th>
<th>High turnover</th>
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<tbody>
<tr>
<td>Dealer’s primary role is to sell cars – not technology</td>
<td>Pressure to reduce the time-to-purchase / delivery &gt; 3hrs</td>
<td>35% of their personnel leave each year, making training hard</td>
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### Common challenges across the value chain

<table>
<thead>
<tr>
<th></th>
<th>Multiple systems per brand</th>
<th>Frequent software updates</th>
<th>Growing complexity of systems</th>
<th>Customer support services</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Buyers</strong></td>
<td>No rhyme or reason as to which models get the best technology</td>
<td>Is this car compatible with my Smartphone?</td>
<td>I just want it to work ‘out of the box’</td>
<td>UGH! For a $60,000 car, a little help please!</td>
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<tr>
<td><strong>OEMs</strong></td>
<td>More fragmentation = lower risk (avoid putting all our eggs in one basket)</td>
<td>Lots of pressure to make new announcements during Trade Show!</td>
<td>It tested fine in the focus groups</td>
<td>Dealers never use the support we provide</td>
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<tr>
<td><strong>Dealers</strong></td>
<td>Even on the same model there are dozens of tech configurations</td>
<td>Every few months there is something new – how can we keep up?</td>
<td>I wish there was a 2-tiered system: one for dummies, one for tech-savvies</td>
<td>Everything is focused on a number – in-car tech makes “CSI” even harder</td>
</tr>
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</table>
Recent SBD tests reveal trouble ahead

% of consumers who required support to complete one or more basic tasks when testing infotainment systems
(e.g. enter destination, call a friend, find a radio station)

- Command: 100%
- Online Services: 91%
- Digital DriveStyle: 83%
- HondaLink Next Gen: 83%
- Tesla Services: 68%
- uConnect: 57%
- Connect Apps: 52%

Source: SBD Connected Car USA Usability Benchmarking - July 2014
The evolving role of dealerships

**Selling**
Primary role of dealers is to sell cars, rarely incentivized to ‘sell’ technology.

**Educating**
Dealers face an avalanche of training requirements which are nearly impossible to fulfill.

**Setting up**
Ever-expanding set-up process for dealers includes device pairing, registration, and activation.

**Troubleshooting**
First point of contact when consumers have trouble with technologies in their cars.

**Emerging: Security**
Protection of consumer data, and guarding against growing cyber-security threats.

**How are dealers adapting?**

- **54% of car models have option-fit systems**
- **Dealer training ‘equivalent of going to Med School’**
- **Service registration & set-up up to 1 hour**
- **Re-connect phones, fixes, and updates for 10+ years**
- **Cyber-Panic**
<table>
<thead>
<tr>
<th>Easier Position</th>
<th>Multiple systems per brand (based on # of different headunits offered by automakers in USA)</th>
<th>Frequent software updates (based on rate of new feature/service introductions by each OEM)</th>
<th>Growing complexity of systems (based on UX evaluation of headunits &amp; set-up/registration processes)</th>
<th>Customer support services (based on interviews with dealerships &amp; assessment of online support)</th>
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<tbody>
<tr>
<td>Tesla</td>
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<td>Subaru</td>
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<td>Infiniti</td>
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<td>Mitsubishi</td>
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Current solutions adopted by car makers

The ‘Lonely Genius Bar’
Mimic trendy consumer electronic chains with dedicated area, dynamic content, and “geeks”

The ‘Frustrated Tech Specialist’
“Certify” a few targeted individuals to answer questions, on-board customers, provide demos

The Basic Infantry
Provide base level of training to everyone in the dealership, every salesperson can explain features

The ‘Sell The Car & Worry About Tech Later’ Dealership
Focus on efficiency in selling and delivering car
**Strengths & Weaknesses of each approach**

`There's no perfect solution`  

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**Strengths**
- + Proven C.E. Model  
- + Targeted Training  
- + Natural Sales Flow  
- + Reduced Time

**Weaknesses**
- - Doesn’t Scale to Mainline  
- - Continuity: 1-2 Per Dealer  
- - Lack of Expertise  
- - Customer Inherits Problem
What’s missing from these solutions?

How do OEMs communicate & measure dealers today?

Infotainment training
Calling customers
Selling time with customers
New product launches
CSI Scores
OEM Sales Training
Paperwork & data entry
Sales operations
F&I Information
Customer Surveys

What is this leading to?

Focused and On-Going Engagement
Competitive Messaging
Metrics and Measurement (Training and Effectiveness)
Targeted Incentives
Dedicated channel to salespeople
Multi-Platform Solutions

What’s missing?
How Gamivation & SBD can help

- Dealership-proven gamified learning platform
- Certification testing and quizzing engine to change behaviors and measure retention
- Big data on sales people with better visibility
- Increase sales and support new product and service launches
- Low risk and low-cost deployment options for OEMs to use with their dealers nationally

- 20+ plus years linking automotive technology strategies to vehicles sales
- Industry-first Tech Advantage Tool to message competitive differentiation
- Expert analysis and support for OEM go-to-market initiatives
- Industry leader in Infotainment consumer usability testing

Tech-Advantage Tool
Comparing infotainment & safety features across 1000’s of vehicle models in real-time
To find out more information...

Learn.

Compete.

Win.

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