



DNDS

Developing New Distribution Skills



Delphi Expert Study Debrief

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Agenda

IDENTIFICATION OF CURRENT AND FUTURE DEALERS SKILLS (WP4)

Delphi Expert Study

1. Procedure and Methodology
2. Analysis
3. Recommendation



Delphi Expert Study

1. Procedure and Methodology

Sample: Experts from various fields (distribution, green mobility, IT, sales, finance etc.); different countries, different organizations (such as automotive enterprises, dealers, training institutions, companies, HEIs, automotive associations)

Focus: skills deficiencies, current best practices and skills, future needed skills, most crucial areas of competences and skills for the future success in distribution



Delphi Expert Study

1. Procedure and Methodology

In each participating country, the Dephi Study approaches following experts for their opinions:

Car enterprise: experts from sales or marketing; representatives of manufactures or NSCs

Motorcycle enterprise: experts from sales or marketing; representatives of manufactures or NSCs

Training institution: companies which are contracted by NSCs or manufacturers to undertake dealership training, key personnel or trainers

HEIs: key professor standing behind degrees in sales or marketing

Association/media: association top representative or experienced automotive journalist



Delphi Expert Study

1. Procedure and Methodology

MINIMUM NUMBER OF INFORMANTS MATRIX

	Austria, Germany	Poland	Italy	Czech Republic	Sum
Car enterprise	1	1	1	1	4
Motorcycle enterprise	1	1	1	1	4
Training institution	1	1	1	1	4
HEIs	1	1	1	1	4
Association/media	1	1	1	1	4
Sum	5	5	5	5	20



Delphi Expert Study

1. Procedure and Methodology

Interviews in a form allowing transcription (such as email, talk n tape, mail, video).

The key is to determine the right informants.

Focus on richness rather than volume of provided information.

Four open-ended or causal questions, essay-format answers expected.

Translation of answers into English. Mother tonque was preferred to capture the richness.



Delphi Expert Study

1. Procedure and Methodology

DELPHI EXPERT STUDY PROTOCOL

- **Expert demographics and relationship to the topic**
- **Five open-ended or causal questions:**
 - > **1. What are the key forces and trends shaping the car and motorcycle markets in <country>? Try to specify short-term and long-term trends.**
 - > **2. How can car or motorcycle dealers address mobility needs of the 21st century?**
 - > **3. To your experience and knowledge, what are the key factors for being a successful car or motorcycle dealer in <country>?**
 - > **4. How can car and motorcycle dealerships address the trends you identified in question 1?**
 - > **5. What skills does personnel working at car and motorcycle dealerships in <country> need to succeed in their profession?**



Delphi Expert Study

1. Procedure and Methodology

IN-COUNTRY ANALYSIS

- **Across transcripts from a country**
- **Content analysis with the aim to identify at least 6 most important areas of skill deficiencies (challenges)**
- **One topic area for each of the following categories:**
 - **Focus on market dynamics in the industry**
 - **Focus on sales dynamics in the industry**
 - **Focus on skill deficiencies of car and motorcycle dealers**



Delphi Expert Study

1. Procedure and Methodology

OVERALL ANALYSIS

- **Across all transcripts and all in-country reports**
- **Content analysis with the aim to identify at least 6 most important areas of skill deficiencies (challenges)**
- **One topic area for each of the following categories:**
 - **Focus on market dynamics in the industry**
 - **Focus on sales dynamics in the industry**
 - **Focus on skill deficiencies of car and motorcycle dealers**



Delphi Expert Study

1. Procedure and Methodology

SCHEDULE

March 2012 – determination of Delphi study protocol

Mid-April 2012 – identification of key informants

Mid-May 2012 – data collection

May 2012 – translation

June 2012 – in-country analysis

July 2012 – overall analysis



Delphi Expert Study

2. Analysis

NUMBER OF INFORMANTS

	Austria, Germany	Poland	Italy	Czech Republic	Sum
Car enterprise	2	1	1	1	5
Motorcycle enterprise	1	1	1	1	4
Training institution	1	1	1	1	4
HEIs	1	1	1	1	4
Association/media	1	1	1	1	4
Sum	6	5	5	5	21



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2. Analysis

KEY FINDINGS (AUSTRIA)

Notable differences between car and motorcycle markets

Orientation towards new technologies

Education reported to play a central role in dealership success



Delphi Expert Study

2. Analysis

AREAS OF SKILL CHALLENGES (AUSTRIA) I.

Market dynamics

- Block exemption regulation
- New technologies (hybrid, electric vehicles)

Sales dynamics

- Role of emotions (vehicle as an emotional product)
- Orientation towards customer satisfaction
- Customer relationship management, dealer local orientation (event management, local promotion)



Delphi Expert Study

2. Analysis

AREAS OF SKILL CHALLENGES (AUSTRIA) II.

Skill deficiencies

- Employee motivation
- Communication skills
- Finance
- Product knowledge

Motorcycle market specifics

- Bikes for mobility in congested areas vs. bikes for fun



Delphi Expert Study

2. Analysis

KEY FINDINGS (POLAND)

Local market conditions are important

Focus on new technology, new mobility needs

Dealers need to maintain stronger relationships to their local customers



Delphi Expert Study

2. Analysis

AREAS OF SKILL CHALLENGES (POLAND) I.

Market dynamics

- Infrastructure and technology development (telematics)
- Imports (used vehicles from EU countries or potentially new vehicles from as far as China)
- Hybrid and electric vehicles

Sales dynamics

- More comprehensive dealer services (incl. multi-brand, online sales)
- Customer relationship management – strong relationships with local and loyal customers



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2. Analysis

AREAS OF SKILL CHALLENGES (POLAND) II.

Skill deficiencies

- Communication skills
- ICT – information and communication technology
- Finance
- Product knowledge

Motorcycle market specifics

- Motorcycle sales staff needs to be more personally involved with the market (passion to ride)



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2. Analysis

KEY FINDINGS (ITALY)

Negative market sentiment

Alignment of demand and supply

Cost and finance focus

New technologies (in a vehicle, electric vehicles)

Mobility as a service for both cars and motorcycles



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2. Analysis

AREAS OF SKILL CHALLENGES (ITALY) I.

Market dynamics

- Technological innovations – electric and hybrid vehicles

Sales dynamics

- Role of emotions – recently, rational arguments become dominant
- Selling mobility – mobility as a service
- New sales channels (online)
- Customer orientation, customer relationship management



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2. Analysis

AREAS OF SKILL CHALLENGES (ITALY) II.

Skill deficiencies

- Employee motivation and passion
- Ability to exploit technology potential
- Product knowledge
- Finance

Motorcycle market specifics

- Bikes for congested areas (new mobility)



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2. Analysis

KEY FINDINGS (CZECH REPUBLIC)

Used imported cars from other EU countries

Customers are price sensitive



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2. Analysis

AREAS OF SKILL CHALLENGES (CZECH REPUBLIC) I.

Market dynamics

- Competitive pressures
- Block exemption regulation, multi-brand

Sales dynamics

- Addressing customer mobility needs (short term rental, substitute vehicles, different vehicles for various purposes)
- Complex services (incl. insurance, finance, multi-brand)
- Customer relationship management, dealer as a local player, event management
- Customer satisfaction and loyalty



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2. Analysis

AREAS OF SKILL CHALLENGES (CZECH REPUBLIC) II.

Skill deficiencies

- Communication skills
- Product knowledge

Motorcycle market specifics

- Role of emotions in the purchase – bikes for fun (however, emotions play some role on the car market as well)



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2. Analysis

COMMON THEMES – MARKET DYNAMICS

- Technological development (whether electric vehicles in AT and IT, or in-vehicle technology in PL and CZ)
- Block exemption regulation (AT, CZ)
- Multibrand car dealerships (all countries)
- Local market conditions (PL, IT)
- Competitive pressures (PL, IT, CZ)



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2. Analysis

COMMON THEMES – SALES DYNAMICS

Sales dynamics

- Customer relationship management – regional customer base, customer satisfaction, events, local promotion (all countries except for PL)
- Online sales (all countries except for AT)
- Customer mobility needs, mobility as a service (all countries)
- More complex dealer offerings, incl. insurance, finance, car rental, accessories rental, substitute vehicles, maintenance (all countries)
- Role of emotions in purchasing (all countries except for IT)



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2. Analysis

COMMON THEMES – SKILL DEFICIENCIES

- Communication skills (all countries)
- Product knowledge (all countries)
- Finance (all countries except for CZ)
- Technology adoption, exploitation (PL, AT)



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2. Analysis

COMMON THEMES – MOTORCYCLE MARKET SPECIFICS

- Bikes for mobility (IT, AT)
- Bikes for fun – role of emotions (all countries)



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2. Analysis

SPECIFIC THEMES I.

Market dynamics

- Mobility in urban areas
- Female and elderly customers
- Manufacturer-dealer relationships - supply-demand balance, brand building

Sales dynamics

- Family fleet management
- Insurance claims
- Individualization
- Eco² thinking – ecological and economical



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2. Analysis

SPECIFIC THEMES II.

Skill deficiencies

- Technology adoption, exploitation
- Direct marketing
- Active selling

Motorcycle market specifics

- Older motorcycle buyers (40+)
- Single brand dealerships



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3. Recommendation

AREAS FOR FURTHER TRAINING

Market dynamics

- Technology (in-the-vehicle and alternative powertrains), Multi-brand dealerships

Sales dynamics

- Complex services, Customer relationship management, Dealers as local actors

Skill deficiencies

- Communication skills and Finance

Motorcycle market specifics

- To be addressed



Project and Contact Information



Thank you for your attention!

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Visit the project website: www.new-distribution-skills.eu

