

ICDP Strategy Forum 2010
Wednesday 20th – Thursday 21st October, Brooklands, Weybridge, UK
Building the foundations for a strong recovery

ICDP's member meetings are a unique opportunity for senior managers from across the auto retailing and after-sales sectors to consider dedicated research results and debate their implications with peers in a closed environment. They are also an ideal occasion for informal networking and sharing of experiences.

For our 2010 Strategy Forum, we will be meeting at Brooklands, a location steeped in automotive history, to address a number of key questions and future challenges related to distribution and aftermarket structure and viability as we strive to recover from the recession:

- Previous research has examined in detail the components of dealer financial performance. Building on this, what are the opportunities to take differentiated approaches to sales and after-sales for targeted customer segments in order to improve overall performance?
- The fleet segment is now recovering, although financing remains difficult and replacement cycles extended. A variety of approaches to market can be seen, and some buyers are using independent intermediaries. How does this impact on manufacturers and dealers, and are some strategies better suited to these developments? Are there examples from other industries which we can follow?
- During the recession, finished vehicle inventories have been cut and build-to-order rates increased. Is this low-stock operating mode now recognised as the correct operating model for the future, or will stock-push behaviour return as markets improve?
- Our projections to 2015 show reduced aftermarket demand as a result of lower car usage, longer service intervals, and improved reliability. We have now extended the model out to 2020, and extended the geographical coverage. How can the franchised and independent channels respond to these trends in respect of infrastructure, offer and operations?
- The Block Exemption framework is now complete, but with a three-year delay before the new vehicle sales provisions take effect. As the new framework is less restrictive, there is an opportunity to shape networks more around business needs than legal constraints. What sales channel scenarios might exist, and what knock-on for the aftermarket?
- We will look at developments beyond Western Europe. Have the Chapter 11 restructuring actions in the USA led to permanent structural change, or are we back to business as usual? Do the largest dealer groups in China, Russia, and elsewhere deliver superior performance to those previously studied in Western Europe, and if so, why?

Our guest speaker on the Wednesday evening will be Martin Leach, who in a long career in the industry has held positions including head of Ford Global Light Trucks Division, VP Engineering of Mazda, President of Ford of Europe, CEO of Maserati and President of GAZ LCV Division. He will give his perspectives on the state of the industry, and specifically the challenges and opportunities for all parties in the distribution sector.

Brooklands is one of the birthplaces of British motorsport and aviation, and also one of the first permanent racing circuits in the world. On the 20th October, we will be based at the Mercedes-Benz World brand experience, sales, and service centre on the Brooklands estate, giving you an opportunity to learn more about this major retail initiative which provides network presence for the company's brands across the whole London region. Dermot Kelly, ex-MD of Mercedes-Benz UK will join us to introduce us to the concept and to answer any of your questions. On the 21st October, our meeting will be at the brand-new Brooklands Hotel next door. The venue is close to both Heathrow and Gatwick airports and the M25.

Please complete and return your Booking Form to the Project Office to secure your place.

DRAFT AGENDA

Wednesday 20th October – Mercedes-Benz World



Mercedes-Benz World Brooklands

- 12.00 p.m. Check-in available at Brooklands Hotel
- Then walk over to Mercedes-Benz World (next door!)
- 3.00 p.m. Welcome coffee in Maybach Suite
- 3.10 p.m. **Welcome and introduction**
- Taking advantage of the Block Exemption:
channel scenarios for 2020**

**Rationalisation or temporary retreat?
The post-recession environment for US networks**

Introduction to Mercedes-Benz World

Dermot Kelly, ex-MD
Mercedes-Benz UK

5.00 p.m. **Tour of Mercedes-Benz World**

6.30 p.m. Pre-dinner cocktail served outside the Gullwing Restaurant

7.30 p.m. Dinner in the Gullwing Restaurant

After dinner speech

Martin Leach

Thursday 21st October – Brooklands Hotel



Brooklands Hotel

8.15 a.m. Meeting starts in the Brooklands Meeting Room
on the ground floor of the hotel

Welcome and introduction

**Channels, finance, mobility:
shifting approaches to the fleet market**

**Unbundling the dealer model:
options for a more differentiated approach**

10.00 a.m. Coffee served outside the meeting room

Discussion session on aligning channels
with shifting customer segments

Feedback from discussion session

**Declining aftermarket demand: projection to 2015,
and structural and operational responses**

Panel discussion on how different aftermarket players
can respond to the challenge of declining demand

12.45 p.m. Lunch in the hotel's brasserie (on the ground floor)

**New vehicle supply: how to lock in
the benefits of low system inventories**

Discussion session on supply strategies for the recovery

Feedback from the discussion session

**Dealer groups around the world:
what lessons for Europe?**

**Building the foundations for a strong recovery:
conclusions and next steps**

4.15 p.m. Meeting ends

Transfers available to Heathrow and Gatwick airports, and
Weybridge railway station for access to London

BOOKING FORM

PART ONE: Contact Details In order make a booking, please complete all parts of this form and fax it back to Jane Trace in the Project Office 00 44 1564 782 555, thank you.

Name			
Title			
Company			
Tel		Fax	
Email			
Special Dietary Requirements			
<i>If you do not wish your contact details to be passed onto another delegate, please tick the box</i>			
			<input type="checkbox"/>

PART TWO: Credit Card/Purchase Order Bookings will only be accepted with a Visa, MasterCard or American Express number and expiry date, or a company purchase order number. Cancellations will not be accepted after Friday 8th October 2010 (unless a straight forward swap with a colleague). The price is €475 per package. Check-out from the hotel is **12 noon** on the day of departure when all extras should be settled directly with the hotel.

Credit Card – OR - Purchase order No.			
Expiry Date		Visa/MasterCard/ American Express	
Name on Card			

PART THREE: Delegate Package €475 includes:

- Strategy Forum Package 20th and 21st October
- Accommodation B&B at Brooklands Hotel 20th October

If you wish to be accompanied by your partner, please enter their details below and the Project Office will contact you to confirm the additional cost.

Name of Partner	
Special Dietary Requirements	