

Preparing to be CIC Chairman

- 38 years full-time in the industry
- Coaching from past chairs
- Sat down with 308 shop owners
- Spoke with multiple segments
- Surveys

My Three Beliefs (relevant to CIC)

- **Respect**
 - Being disrespectful to one another is counter-productive to our goal
- **Education**
 - Solves most challenges
- **Passenger Safety**
 - We should all want the families riding in the vehicles our industry repairs to be as safe as possible

Gathering Feedback & Mapping Issues

Organize Feedback

- Better perspective

ADAS/Safety Systems	Staff	Tech Recruitment	Establishing new role	Understanding skillsets needed	
		Training	Technical training	Process training	
		Processing time to document	Growing time and cost to document		
			Matching tech with work		
	Scanning (pre/post)	OEM	Position Statements		
		Data	Who owns the data Privacy & Permission Releases		
	Recalibration	Acceptance of OEM procedures	Time/effort required to properly reset/recalibrate		
	Equipment	Tech Support	Equipment/service companies gearing up tech support		
		Access	Information for purchase/usage decisions		
		Types of equipment options			
	Estimates	Training	Justification for scans/recal	Codes generated by repair	
	Repair Planning	Documentation			
	Windshield/Glass	General repair planning			
		OEM	OEM -Aftermarket		
	Legal	Sublet	Sublet knowledge of windshield's role		
Improper Repair		Liability			
Related Issues	Privacy & Permission Releases	Who owns the data		Liability	
	General industry lack of knowledge	Questions repair procedures or excessive use of scanning		Challenge for all segments to keep up with speed of technology change and impact to repair	
	Hacked systems				

Here's What We Learned

308 Shop Owners

- 249 (81%) had never attended CIC
- 209 (68%) didn't know what CIC was
- 77 (25%) made it a point to read and keep up with CIC related articles

I am asking for your help:

- CIC Marketing Task Force
- Industry Press
- 20 Group Leaders
- Anyone

Here's What We Learned

A Tale of Two Repairer Groups

Actively connected with industry

- Understands their role in a larger industry
- Comprehends industry dynamics
- Engages with others/sees & hears other perspectives
- Plans & responds to future challenges
- Takes responsibility for what happens to their business
- Works to be a more attractive employer
- Keeps up with changes in Technology/Equipment/Techniques
- Has overcome many small business challenges

Only connected locally

- Faced with typical small business challenges
- Gets most information locally
- Reacts to changes at last minute, if at all
- Owner works in business, often answering phones & working on vehicles
- Unable to take time off
- Feels they do not have time to train and can't afford it
- Is often under funded and struggles just to keep doors open
- Feels they are completely victimized by outside agendas
- Can't get beyond lack of technician availability

Here's What We Learned

2018 Survey Story

January 2018

117 participants - 36% Repairers
83% attend CIC additional 10% read about CIC

Survey Results – Top Three Challenges

1. Vehicle Repairability
 2. Vehicle Repairability
 3. Tech Availability
- Other top challenges
- Insurer/Repairer Relations
 - Data Sharing

November 2018

253 participants – 64% Repairers
40% attend CIC additional 24% read about CIC

Top Three Challenges

1. Vehicle Repairability
 2. Vehicle Repairability
 3. Tech Availability
- Other top challenges
- Insurer/Repairer Relations
 - Data Sharing

Additional Feedback

Estimating – keeping up with technology changes
Growth of OEM networks (seen as a notable shift)
Growing awareness of liability