

E.N.G.'s 12th senior executive summit

AUTOMOTIVE RETAIL & DISTRIBUTION

27 & 28 March 2012 | The Metropole Hotel | Brussels

Maximising opportunity in an evolving retail landscape

These are challenging times for the automotive industry. Industry players need proactive strategies to accommodate potential recession, over capacity and changing customer demands. This means it is imperative for OEMs and dealers to retain customers and maximise each source of profit.

This year there will be an intense focus on new distribution formats and strategies, improving external customer contact and experience and focusing on creating a strong online presence. The goal must be to manage a strong network and increase conversion and sales volume while controlling risk.

The following key issues will be discussed:

- Overview of how the projected economic situation will impact manufacturers and dealerships
- Focusing on increasing dealers' protection
- Improving dealer satisfaction due to new consumer trends and technologies
- Insight of new customer demands to maximise business success
- Effective restructuring of retail outlets and the occurring challenges
- Gaining insight of new distribution methods in an increasingly competitive marketplace

High level presentations and interactive panel discussions assure to make this event an interesting and important occasion for those involved in the retail and distribution sector.

With leading senior executive speakers including

Dr. Kim Jüngst
Office of the General Counsel



Jan Svensson
Senior Legal Counsel



Sérgio Almeida
Manager Service Loyalty Program



Luc van Bussel
Chief Executive Officer



Bernard Swiecki
Assistant Director, Automotive Communities
Partnership (ACP)



Koen Maes, Vice President Customer Quality &
Dealer Network Development, Europe
Paolo Colurcio, General Manager Customer Quality
& Dealer



Leonid Kuznetsov
Executive Director Business Development
Hyundai CIS
Patrick Reimers
European Remarketing Manager



Jacques de Selliers
Founder and Managing Director



Sue Robinson
Director



Marçal Ferreras,
Managing Director Spain



Gert-Jan Geerse
Head of Business Development



Jo Willems
Marketing Manager Nearly New Car, Mercedes
Europa, The Mercedes House & Wholesales
Nearly New Car



Mischa van Werkhoven
Lead Consultant Mobility Solutions



Graham Donald
Network Development Manager Serbia, Russia,
Turkey & Extra Europe



Peter Cooke
Professor of Automotive Management



Ivo Willems
Commercial Director



Giorgio Elefante
European Automotive Retail Leader



Bernard Lycke
Executive Director



Mark Oliver
Managing Director for RPS in EMEA



Registration

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08:00	Registration and welcome coffee	14:35	Panel discussion Connecting your enterprise to evolving customer demands ▶ Building a clear image of the consumer: What makes them decide to buy a car ▶ Does customer satisfaction imply customer loyalty when buying the next car? ▶ Are desires being met: Is a new model of their favourite car what satisfies our consumer? ▶ Incorporating this information into the Dealer Development Strategy ▶ Introducing strategies to increase consumer satisfaction and insight of long-term investments Facilitator: Marçal Farreras, Managing Director Spain URBAN SCIENCE Panellists: Sue Robinson, Director RETAIL MOTOR INDUSTRY FEDERATION Koen Maes, Vice President Customer Quality & Dealer Network Development, Europe NISSAN EUROPE Patrick Reimers, European Remarketing Manager HYUNDAI MOTOR EUROPE
08:45	Opening remarks from E.N.G. and the chair Marçal Farreras, Managing Director Spain URBAN SCIENCE	15:45	Case study Analyse why importers work with the parallel market: What is their advantage? ▶ Insight of purchasing: Essential stock management and solutions in case stock surplus occurs ▶ Reduce sale conflicts and how to establish new opportunities for successful import ▶ Reparations on the parallel market: Positive advantages ▶ Identifying threats that could cause dealer competition ▶ Conclusions and recommendations: Analysing how working within the parallel market will avoid market upset Ivo Willems, Commercial Director CARDOEN
09:00	Opening panel discussion – Setting the scene How the next phase of the economic crisis will impact the automotive industry Financial caution continues to dominate the Eurozone and all business activities. This session will analyse the effect of the foreseen scenario on your future sales and expected consumer demand. ▶ How can the industry cope with the expected changes? ▶ Analysing how to effectively manage competition and preparing the business for recovery ▶ A look at the possibilities of implementing structural changes due to potential overcapacity Short remarks: Glenn Terry, Global Retail & Distribution Leader Facilitator: Christian Zamet, European Retail & Distribution Leader ERNST & YOUNG Panellists: Graham Donald, Network Development Manager Serbia, Russia, Turkey & Extra Europe FIAT Gert-Jan Geerse, Head of Business Development SEAT Leonid Kuznetsov, Executive Director Business Development HYUNDAI MOTOR CIS	16:30	Networking coffee break
10:15	Case study Just another crisis? ▶ Is the delicate situation of the automotive industry due to the economical crisis only? ▶ Are there indications regarding the current business model that indicate structural issues? ▶ Is the financial crisis a threat or maybe an opportunity for change? ▶ What could the future look like? Gert-Jan Geerse, Head of Business Development SEAT	17:00	Case study Exploiting the used car business: Developing the appropriate retail and wholesale strategy ▶ Analysing the Belgian market & the Nearly New Car case ▶ Developing a retail and wholesale strategy: Setting up a strategic marketing plan - Market related issues: External analysis of the used car market and factors to be taken into account - Identifying goals and appropriate KPI's within the used car business - Translating insights towards an optimised marketing mix Jo Willems, Marketing Manager Nearly New Car, Mercedes Europa, The Mercedes House & Wholesales Nearly New Car MERCEDES-BENZ BELGIUM LUXEMBOURG
11:00	Networking coffee break	17:45	Case study The Alwaysbemobile approach: Creating a profitable and growing business model within a complex and changing automotive landscape ▶ A decade of changes: How Alwaysbemobile has adapted its business throughout the regulatory changes between 2002-2013 ▶ Maximising profit through different business proposals: The keys to success when incorporating in one the retail, servicing and fleet businesses ▶ Integrating new concepts to adapt to the consumer: An online portal that brings all car sales and services together for consumers ▶ Alwaysbemobile, a company's answer to a changing industry: The story through its growth and numbers Luc van Bussel, CEO ALWAYSBEMOBILE COMPANY
11:30	Case study Protecting the dealers' interest ▶ How will dealers cope with the strictness of the OEM's ▶ Multibranding: New challenges in a new landscape ▶ Will current dealers continue using same sales strategies as before? ▶ Are dealers in danger? Analysing how dealers can face the new regulation landscape to guarantee their profitability Bernard Lycke, Executive Director CECRA	18:30	Short remarks from our dinner sponsor SNAP-ON BUSINESS SOLUTIONS
12:15	Partner track A world of opportunity digital lead management at the dealership ▶ Investigating the tools and best practices to set sales targets for the dealer force Mark Oliver, Managing Director for RPS in EMEA RAYTHEON PROFESSIONAL SERVICES	18:35	Closing remarks from the chair URBAN SCIENCE
12:35	Case study Driving service loyalty across europe ▶ Trends and challenges to the dealer network ▶ How to support the dealer network: The contribution from aftersales service ▶ Driving Service Loyalty across Europe: The Toyota Maintenance Reminder Program ▶ Proven results and benefits for the network Sérgio Almeida, Manager Service Loyalty Program TOYOTA MOTOR EUROPE	19:30	Networking dinner for all E.N.G. guests at The Belga Queen Restaurant sponsored by Snap-on  BUSINESS SOLUTIONS
13:20	Lunch		

08:30 **Registration and welcome coffee**

08:55 **Opening remarks from E.N.G. and the chair**
Bridging distribution into a sustainable future
Giorgio Elefante, European Automotive Retail Leader
PwC

09:10 Opening panel discussion

The new framework: Analysing the impact of the new BER framework in the current economic climate and its impact on all major auto industry players
 During this panel we will hear the opinions of experts on the impact of the regulations on the industry and the approaches that both dealers and manufacturers are taking within the new laws. We will also have the opportunity to hear what regulators expect and how they will be monitoring the impact of the regulations. The discussion seeks to be interactive, giving the audience the opportunity to ask questions and give their impression and position towards the upcoming changes.

- ▶ How the changes will affect the current automotive industry within the predicted scenarios for the coming years: Examining potential market definition and market share
- ▶ Identifying possible approaches OEMs will take with the new regulation and what impact will this have on retailing: Predictions about the future of the car industry, multi-branding and non-competes
- ▶ Practical impact on manufacturers, dealers and the aftermarket: Components supply, spare parts distribution and service contracts

Facilitator:
Giorgio Elefante, European Automotive Retail Leader
PwC

Panelists:
Jan Svensson, Senior Legal Counsel
VOLVO TRUCK CORPORATION
Anton Plum, Secretary Manager
BOVAG INDEPENDENTS
Dr. Kim Jüngst, Office of the General Counsel
FORD OF EUROPE

09:55 Case study

The relevance of new channels: Making the prospect feel wanted in the age of the electronic marketplace

- ▶ How to diversify distribution methods and business models successfully to encourage multiple sale streams that satisfy each customer
- ▶ Bringing the buyer into the dealership: Developing strategies that drive the buyer into the showroom in times of increasing online purchasing
- ▶ New retail platforms which can be developed to adapt to the needs of the customer
- ▶ Does the attractive internet really exist?
- ▶ Defining the balance of sales channels and the role of the dealer in each sales scenario to guarantee success
- ▶ Regaining the initiative from the knowledgeable prospect

Peter Cooke, Professor of Automotive Management
UNIVERSITY OF BUCKINGHAM

10:40 Partner track

Incorporating auction house excellence into your retail strategy

- ▶ How to give the best possible price for any part exchange
- ▶ Pro-actively building up an attractive used car offer for retail
- ▶ Monitoring the workflows and results
- ▶ Doubling the used car profit with the same headcount: A reasonable target

Ulrich Heske - Business Intelligence Manager BCA Germany
BCA EUROPE

11:00 **Networking coffee break**

11:30 Partner track

Warranty innovation – a UK case study

- ▶ State of the nation – perceptions of distributors and customers in the UK
- ▶ The strategic importance of warranty programmes in driving sustainable profit and customer retention
- ▶ Taking a fresh look at warranty product development and the provision of support to distributors

Steve Burgess, Head of Partnership & Distribution
MAPFRE WARRANTY

11:50 Case study

Gaining insight from successful American network restructuring

Examining how U.S. auto companies underwent a dramatic restructuring process to save the U.S. auto market from a catastrophic collapse.

- ▶ Challenges from the beginning of the struggle and how they were overcome
- ▶ Strategies for successful restructuring that can be imported to Europe

Bernard Swiecki, Assistant Director, Automotive Communities Partnership (ACP)
CENTER FOR AUTOMOTIVE RESEARCH (CAR)

12:35 Partner track

Mobility system architecture: The future of automotive finance and leasing industry

- ▶ Developing an innovative mobility system architecture in times of changing technology trends to satisfy demanding customers and consumers
- ▶ Integrating new back-office processes across borders for leasing companies by using shared service centers
- ▶ Establishing a co-operative approach between partners in the supply chain of mobility services: Sharing technology and services to maximize business opportunities and growth

Mischa van Werkhoven, Lead Consultant Mobility Solutions
CO-MAKER

12:55 **Lunch**

14:10 Case study

Identifying and evaluating dealers' risk in order to mitigate impact on business

- ▶ Standardised process for risk monitoring
- ▶ Risks and costs in case of dealer failure
- ▶ Risk management: from symptoms to actions

Paolo Colurcio, General Manager Customer Quality & Dealer Network development
NISSAN EUROPE

14:55 Case study

Re-examining and operating within dealer network development

- ▶ Presenting business processes: Insight on finance/controlling, IT and HR
- ▶ Making strategy cuts to save cost and reduce risk while meeting customer need
- ▶ Understanding the need to mix growth and efficiency

Leonid Kuznetsov, Executive Director Business Development
HYUNDAI MOTOR CIS

15:40 **Networking coffee break**

16:10 Presentation & workshop

The future of retailing: Electric vehicles

Session will summarise findings and conclusions about the current e-mobility market and give insight into evaluating the product in order to develop an efficient retail scheme and processes which will have to be implemented by dealers.

(20 minutes presentation followed by brainstorming session 40 minutes)

Following this brief presentation we will have a workshop discussing how the retail network must adapt to these new products of electric vehicles and mobility schemes.

- ▶ Opportunities to secure the service level for manufacturers
- ▶ Finding the best way to put potential customers in contact with EVs; New technology to improve sales processes
- ▶ Designing the best service scheme: Who should service your new technology?
- ▶ How to integrate spin off products: Finance, warranty and service
- ▶ Store and business model changes
- ▶ Is the industry being forced to employ new qualified staff for e-mobility?
- ▶ How much investment should be allocated to electric cars and will it pay off?
- ▶ How can dealers participate in car sharing?

Jacques de Selliers, Founder and Managing Director
GOING-ELECTRIC

17:10 **Closing remarks from the chair & E.N.G.**
Close of conference

Thank you E.N.G. would like to thank all who have assisted with the research and preparation of this event. In particular the speakers, sponsors and media partners who have supported the event through direct contribution. For further information, please refer to our website www.engspain.com

Attendees at our previous Automotive Retail and Distribution summits:

Director, Retail Strategy & Customer Service
LAND ROVER AND JAGUAR

Board Member, Director Stock & Pricing
AAA AUTO

Vice President - Managing Director Benelux
ADP

Chief Executive Officer
ALCOPA/ FIDENCO

Director
AUDI UK

Director Business Development
AUTOBINCK

Director-Honda
AUTOCOM MERCE

Assistant General Director for Strategic Development
AUTOCOM MERCE

Chief Executive Officer
AUTOPLOIS

Managing Director
AVAG HOLDING

Director Retail
BARTEL O. STEEN

Group Marketing Director Sales Strategies
BMW

Business Line Management
BMW

Chief Executive Officer
CARDOEN

Director Aftermarket
CLEPA

Director
D'IETEREN

Senior Vice President Development, Finance and Controlling Sales Organisation
DAIMLER

Director of Operations, Bus
DAIMLER

Head of Dealer Network Development
FERRARI

Director
FIA

Director Network Strategies
FIAT

Chief Executive Officer
FIDENCO

Director, Retail Experience
GENERAL MOTORS

Executive Director Central, Eastern Europe and Russia
GENERAL MOTORS

Vice President Strategic Projects & Managing Director
HERTZ

Head of Network Development
HONDA MOTOR EUROPE

General Counsel Europe
HYUNDAI MOTOR EUROPE

Director Sales and Marketing, Automotive
IBS AUTOMOTIVE

Director - Retail Property Investments
INCHCAPE

Vice President Product Manager
INFONIZER

Deputy General Manager
KIA MOTORS EUROPE

Director of Restructuring
KIA MOTORS EUROPE

Sales Director Germany
KPMG DEUTSCHE TREUHAND

Financial Director Car Import
KROYMANS CORPORATION

Head of Dealer Network Development
LAMBORGHINI

Chief Executive Officer
MACADAM

Deputy General Manager
NISSAN OTOMOTIV

Group Director Wholesale
PON'S AUTOMOBIEL HANDEL

Chief Executive Officer
ROLF GROUP

President & CEO
ROLF GROUP OF COMPANIES

Chief Executive Officer
SARACAKIS BROTHERS

General Manager
HVB LEASING

Global Head of Used Car Strategy
SKODA

General Manager, Strategy and Planning
LEXUS

Manager Global Retail Network Development
SAAB AUTOMOBILE

Distribution Strategy Manager
PEUGEOT CITROEN AUTOMOBILE

Manager Dealer Network Development
OPEL

European Project Manager
SUZUKI INTERNATIONAL EUROPE

Managing Director
TC MOTORS

Retail Manager
SARACAKIS BROTHERS

Chief Executive Officer
VOLKSWAGEN

Director of Sales
VOLVO

Testimonials

A great event and a unique experience.

The key word is sharing: experiences, thoughts, strategic views, always among professionals confronted with real life situations, rather than academic views. I recommend it to any network professional, dealer or supplier: it's the type of shake up you must attend once a year!

GM, Customer Quality and Network Development
NISSAN

Really impressive and more than interesting.

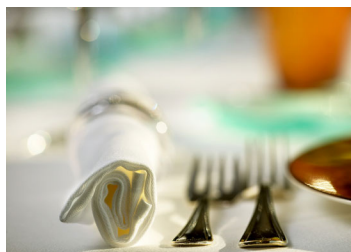
The speakers were really very well selected by E.N.G. and their presentations were well prepared. It was fun listening to people who really know what they are talking about. The audience combined very interesting people from all over the business, and it was possible to do networking at its best.

General Counsel
HYUNDAI MOTOR EUROPE

Networking Dinner

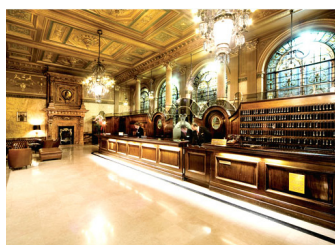
E.N.G. would like to invite delegates, speakers and sponsors to join us for a networking dinner in a relaxed atmosphere to discuss the issues of the day, exchange ideas and make future contacts.

This evening will provide you with ample opportunity to network with your peers while enjoying a good glass of wine. Dinner to take place at the Belga Queen Restaurant.



Hotel Info

More than a century of excellence and world-class service await you at the Hotel Metropole. As the city's only 19th-century hotel still in operation since 1895. Discover a stunning celebration of French Renaissance style and architecture - where the splendour and dignity of the past blend with modern luxury.



Hear

thought leaders discuss latest proposals to fuel profitability across the distribution chain

Investigate

procedures of distribution processes and challenges

Discover

strategies to handle new customer demands in times of online retail

Join

discussions addressing the new legal framework

Network

with peers from all major European markets and beyond

Mitigating

dealers' risk and gaining insight into dealer profitability

Exploiting

new profit opportunities in the automotive industry

Assessing

new approaches and preparing business for the future industry landscape

Exploring

the demands of electric vehicles on the retail network

Maximising

opportunity in a turbulent climate

Automotive Retail and Distribution

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Conference Fee

- 2 Day Conference Fee** € 1995.00 + VAT
- Documentation Only** € 545.00

* **Groups of 3 or more booking on the same day will receive an additional 10% discount**

- * To qualify for discounts, these conditions apply:
- ▶ All delegates to be registered on the same form(s), at the same time.
- ▶ Delegates must be from the same company

Discounts are not reimbursed for previously purchased tickets.
 Prices include the conference documentation, lunches, refreshments, the social dinner and service charge but exclude hotel accommodation. VAT is charged at 21%.

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Payment is required within 5 days. Please quote SP63 as reference.

Hotel Accommodation

The conference fee does not include accommodation rates. Upon receipt of your signed registration form you will receive an email with information on how to secure your accommodation at Metropole Hotel. Please note that after 16th March rooms and rates will be subject to availability.



Business Opportunities

A limited amount of exhibition space is also available at the forum. Sponsorship opportunities covering luncheons, evening receptions and advertising in documentation packs are also available. For further details please contact:

Pam Walter, Business Development Manager

+41 445 864 590

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To Register

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Who Should Attend

This programme has been researched extensively and convened with the cooperation of senior executives responsible for Automotive retail and network performance. The executives that will realise the greatest benefit through attendance are:

Chief Executive Officers, Executive Vice Presidents, Senior Vice Presidents, Chief Operating Officer, Directors and Heads of:

- ▶ Retail and Dealer Networks
- ▶ Network Development and Distribution Strategy
- ▶ Legal Departments
- ▶ New Business Development and Improvement
- ▶ Aftersales: Parts, Services and Finance
- ▶ Brand and Retail Management
- ▶ Corporate Strategy and Planning

Confirmation You will receive an email outlining the details two weeks before the event. For any further information please contact the Operations department at E.N.G.

Terms & Conditions By completing this registration form, I/we (the delegate/s) hereby agree to the following

Cancellations

E.N.G. will not be able to mitigate its losses for any less than 50% of each individual delegate registration, even if cancelled within 1 day after booking. Cancellations must be received by mail, fax or email three weeks before the conference. In case of cancellation thereafter the full conference fee is payable. No credit note will be issued if cancellation is received 3 weeks or less prior to an event. Delegate substitutions are welcome at any time prior to the dates of the conference.

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Data

E.N.G. is allowed to pass on your delegate details to other companies who wish to communicate with you. If you do not wish to receive information from other companies, please contact us at info@engspain.com or +34 91 535 7087.

