

Expert Insights

IBM Institute for
Business Value

The expanding auto ecosystem

How to manage leads and
fuel customer engagement

IBM

Experts on this topic



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Armed with knowledge,
today's customers are in
control as never before.

Key takeaways

Leads from almost anywhere.

OEMs and dealers need to understand a customer's entire journey—physical and online—so they can engage the customer at the right time and in the right manner. These moments of engagement should be seamlessly integrated and visible as one consolidated view of the customer across different types of interactions.

It's not just a car anymore.

Traditional sales leads may remain a significant proportion of revenue, but new ownership models, mobility services, and ancillary offerings could constitute major growth areas. OEMs must find ways to proactively promote them to loyal drivers, users, and customers.

Cultivating a data-sharing ecosystem.

OEMs must partner across their collaborative business ecosystems to thoroughly understand their customers and the best ways to meet them at various points in their journeys.

Today's reality

It's difficult to imagine watching television without a cell phone handy. Whether checking movie release dates, actors—what they looked like years ago, what they look like now—directors, plot synopses, or reviews, our entertainment experience has been changed forever by having the world's knowledge at our fingertips.

Who'd have thought the same kind of behavior would upend the automotive industry's interactions with its customers? But it has.

Gone are the days when the only way to buy a car was to walk into a dealership with the fear of being pressured and "sold to." Customers today are much more educated—by the time they engage with a brand or dealership, they've already done price and quality comparisons and know something about financing options. 71% of buyers reported exhaustively researching and comparing vehicles online before purchase, while nearly half (45%) expect to wait until they are very or extremely certain a vehicle is a good fit before contacting a dealer. Armed with this knowledge, today's customers are in control as never before.

One research report cited a client journey that covered hundreds of digital touch points over several months before the customer finally leased the vehicle that met her needs.¹ It included searches, video views, and website visits to the sites of manufacturers, dealers, and auto reviewers. And it covered moments of interest in quality, suitability for her family's needs, value, affordability, financing options, and where best to purchase. The implications for the auto industry are huge.

As a manufacturer, what do you do when your historical primary point of customer contact—the auto dealer, and therefore your chief channel to market—is no longer the only, or even primary, point of contact? And how do auto dealers succeed with their changing status?

Add to this the shifting of the traditional concept of ownership from outright to some variation of shared. And if, at the same time, the primary means of fueling the car—and perhaps the distribution system for that energy source—is also changing, what might that portend for a manufacturer's relationship with its customers?

The challenge ahead

Over the past decade or so, original equipment manufacturers (OEM) have stepped up their role in generating leads, which they then pass on to their dealers. Dealers follow up by facilitating a test drive and then, hopefully, closing the sale. But just as the leading OEMs are becoming proficient at this, the industry is rapidly changing beneath them (see Figure 1).

To many OEMs, “selling a car” and keeping the production line flowing continues to be the main reason to generate leads—in fact, the main reason for the brand’s existence. But the time is rapidly approaching when customers may still buy from a car brand, but they won’t necessarily buy “a car.”

Take just one data point: 80% of automotive OEM executives expect that by 2030 they will have revenue from mobility services—any nontraditional way of getting from one point to another, including ride sharing, ride hailing,

microtransit, and mobility-as-a-service—forecast to generate 10% of their total revenue.² That broad opportunity encompasses consumption models such as pay-by-the-mile, but also others, such as feature-on-demand, charging services, connected transportation, and so on.

Today’s consumers want a seamless experience across all modes of interaction—physical and digital—that requires a correspondingly seamless data exchange among drivers, vehicles, dealers, and OEMs. But the majority of OEMs still separate their interactions with eCommerce purchasers—for example, from their dealers’ interactions with potential drivers—even if they happen to be the same people. This needs to change if the overall driver experience is to become coherent and fluid.

So what’s driving the future of lead management? Being able to manage inquiries from many sources, about many products, to many stakeholders.

Figure 1

Lead roles shift

Transforming capabilities for the evolving marketplace reality

 A lead is a customer...	 who communicates...		 about a product...		 to a recipient.	
Today						
Someone who plans to buy a car	Test drive request		New car	Used car	Dealer	
2025						
Someone who plans to consume products or services, digitally or physically	Test drive request Chatbot handoff Physical agent enquiry	Call center inbound/outbound Financial services request eCommerce help request	New car via dealer Charging capability Digital services	Used car New car via eCommerce Mobility credit	Dealer Direct sale agent	Third parties Call center agents

Today’s consumers want a seamless experience across all modes of interaction, so OEMs need to pick the right time to engage them—wherever they are.

From primary to many—sources, products, stakeholders

Leads from all over

The online test drive request form has been joined—perhaps even replaced—by a host of other ways to express interest in a brand of car. Internet searches are one obvious, but diverse, channel. But there’s also the world of social media, where potential customers can observe, comment, read reviews and reactions, even share horror stories or dream experiences—with accompanying video. And then there’s the emerging market for online car sales, which is growing at a rate of 38.4% year-on-year.

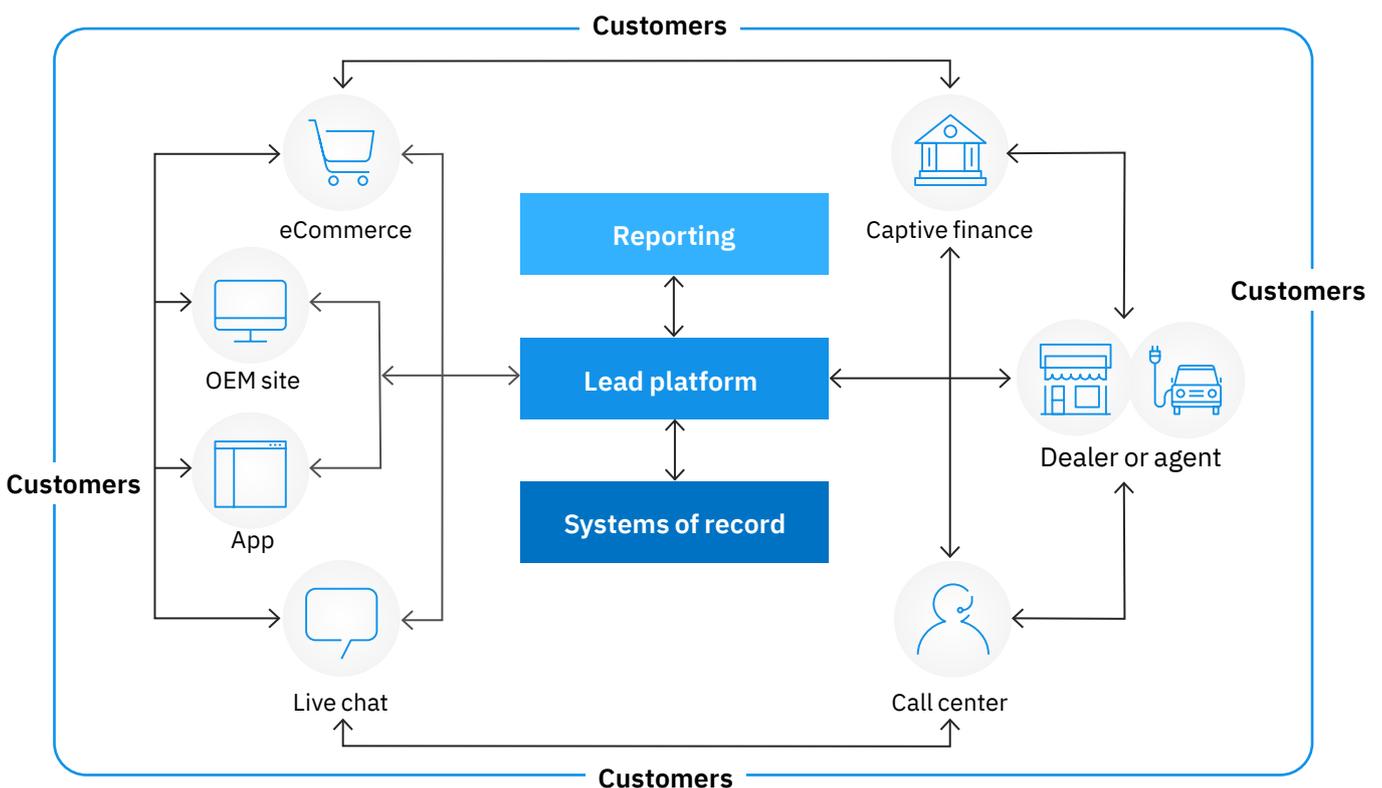
Some assume that the “traditional” buying journey and the “new” online car sales journey are somehow separate, as if conducted by different sorts of buyers on different sorts of journeys, with no overlap or need for compatibility or integration. This is obviously not the case.

Most people fall somewhere on the spectrum between “purely online” and “purely offline.” That means OEMs need to pick exactly the right time to engage their customers—wherever they are. They also need to acknowledge that it’s not just lead channels that are changing. eCommerce sales channels now allow a fully immersive online sales experience for direct buying (see Figure 2).

Figure 2

Proliferating journeys

Anticipating and facilitating the paths customers may take



Understanding who really “owns” the customer—no one—means shifting mindset from ownership to dialogue.

Customers may ask for assistance via chatbot, call center agent, or live chats. Or they may begin to abandon their order and require proactive assistance. They might even enter a video call with a dealer to detail their preferred vehicle. And while some buyers may expect delivery to their door, others may want a face-to-face handover from a local agent. All these interactions are potential leads—and should be treated as such.

There’s also a steadily growing stream of data flowing from connected cars. On the surface, such data tells a story of driver habits, journeys, even driving efficiency. But when combined with analytics and other data—buying history, service history, browser behavior, socioeconomic data, social media activity—deeper stories of customer preference, interest, and opportunities to interact can emerge. This insight can help generate more potential leads.

In short, leads can come from almost anywhere.

But how do you cleverly tap into a customer’s online journey in a way that’s not intrusive and doesn’t detract from the customer’s primary intent? And how do you seamlessly join those digital elements with the physical sales interactions the client may be having? We know there’s a business case for doing this well. In one multi-country study across industries, 67% of respondents said they’d even pay a premium to companies that offer superior experiences.³

Important elements of a solution include developing one consolidated view of the customer across different types of interactions. It also requires understanding who really “owns” the customer—no one. This means shifting from a “customer ownership” mindset to “customer dialogue” as the desired outcome.

First, the consolidated view. This entails being able to learn as much as possible about a customer—or potential customer—from digital and physical interactions. The requires presenting what is known in a single view, regardless of what part of a company or the company’s value chain the person has been engaged with. It also means gathering insights even when the person isn’t currently planning to buy a new car.

Collecting everything a company knows about the customer into one place—digital data, lead data, data from in-person interactions—allows a brand to build customer profiles for personalized communication. This might include specific offers, ongoing service updates, or news likely to be of interest to this particular customer. It can be delivered via the most appropriate channel: call center, social media, email, text, and so forth.

A consolidated view enables the company to build and nurture real relationships with customers. It’s more than grabbing their attention to sell them something, or handing them off to a third-party dealer that may take the same insights and begin the sales relationship almost from scratch.

Being technically able to cultivate a real relationship is critical. But it won’t suffice by itself. Brand and dealer mindsets must move from ownership to actively cultivating and maintaining a dialogue with a valued customer. This entails really understanding that customer. What do they need? Want? Are they already a brand advocate? What products or services might they reasonably be interested in? Importantly, this thinking continues long after the initial sale. It pervades the lifecycle of the customer relationship with the brand.

This view also includes being more expansive in defining who a customer might be. Are there drivers other than the vehicle owner who could be engaged in dialogue? How might a brand get to know them better—or even discern their potential as a customer in the first place?

Obviously, a closer exchange of customer data between OEM brands and dealers would facilitate this more comprehensive picture of individual customers, as well as of the pool of prospective customers. Who drops off or picks up a vehicle for servicing? Instead of the owner, it might be a regular driver of the vehicle in the owner’s circle of family and friends.

This points to another challenge in integrating customer information from many sources: trust and security. Not only do customers need the ability to choose from many potential paths on their physical/digital journey, they also need to choose how much information to share. This includes information they might not even be aware of sharing, such as cookie behavior from their browsers. And customers need to trust the brand to handle their data responsibly.⁴

But making sense of customer information and leads from many sources is just part of today’s lead management challenge. What an OEM is selling is morphing into an array of products and services.

Product proliferation

Car owners form an attachment to the product unlike other utilitarian machines. Rarely will you hear a washer or dryer called by an affectionate name, but many people still name their cars, a phenomenon celebrated with a “National Name Your Car Day” in the US.⁵ And it seems the public’s love affair with cars isn’t about to end anytime soon—and car brands aren’t going to stop supplying cars to people.

Selling cars strictly for traditional car ownership may not be dead, but it isn’t exactly healthy either. Brands expect to sell many products and services that enhance their core offering—as cited earlier, at least 80% by 2030.⁶ 53% of prospective buyers say they’ll consider car subscriptions for their next purchase.⁷

As what a brand sells expands—from cars to services and new innovative offerings—the manner in which it sells them needs to change. In one survey of recent car buyers, 61% said that the car-buying journey has not improved since they last bought a vehicle.⁸

Consider the implications for the traditional lead generation process in the auto industry. Customers still want cars—or perhaps more accurately, want to consume miles in a car of their choice. But how they do so, and how they pay for it, can differ from the traditional model. And therefore, the way to pursue such a lead must differ from the traditional car sales process.

Customers also expect to use digital services and physical products related to a vehicle. Think charging, features on demand, lifetime servicing. Interest in these options also constitutes viable leads. But again, they can’t be handled as traditional car sales leads.

Traditional sales leads may remain a significant proportion of revenue, but these new ownership models, mobility services, and ancillary offerings constitute *the* major growth area. In the IBV study, “Automotive 2030,” industry executives said auto OEM mobility and other service revenue account for an average of 16% today and are expected to grow to 22% in 2030.⁹ OEMs must find ways to proactively promote these services to loyal drivers, users, and customers.

AI-driven analytics help pinpoint where a customer's unique needs intersect with those of the OEM.

Consider what may be required to promote digital car services and features on demand. A well-designed online experience may allow many customers to select and subscribe to services they want. But what human interactions could drive widespread adoption of new services? And how might insight gained from connected vehicles or other customer datapoints proactively generate digital service leads?

Finally, customers have an appetite for many auto-related offerings—insurance, road tolls, bundled charging—that an OEM may not be able to directly provide. Again, these are valid leads and essential to moving beyond the initial car sale of today to a long-term relationship with a customer and, ultimately, brand loyalty.

In fact, a new approach may be needed: business platforms that support interaction across adjacent industries. If properly built and used, such platforms can facilitate lead generation and sharing among companies serving the entire car customer lifecycle. For instance, energy companies that can provide charging services for electric vehicles, or finance companies specializing in new models of ownership.

This requires an adjustment to how customers are managed. Programs designed by developers raised in the traditional car ownership model may not properly account for nonvehicle products. Marketing to customers built around the test drive experience can fail to create interest or demand for new innovations beyond the car. Most importantly, they could fail to engage customers in long-term relationships.

More stakeholders, more at stake

For the auto industry, a clear implication of this widening network of products, services, purchasing models, and business ecosystem platforms is the increased number of stakeholders involved in what used to be thought of as a “car purchase.” While dealer interactions are still critical, more players need to be considered.

Call center and live chat agents, for instance, interacting with customers in online environments, may or may not directly support either the manufacturer or the dealer. They could be from third-party platforms that allow comparison shopping, reviews, referrals, and the like. An entity offering auto financing or mobility services also becomes a prime stakeholder in the process of “purchasing” a car—or better yet, in cultivating a lifetime relationship with customers.

Of course, dealers remain a focal point of the ecosystem. As such, they’ll continue to serve as a central source of customer data. So, for OEMs, obtaining this data is critical if they are to know and engage with their customers. But how?

The multi-brand dealership model could make this challenging for OEMs. In theory, while a dealer wants its customers to have the best possible experience, it doesn’t have the same motivation as the OEM to create a unique experience for each brand it carries. Nor may it ultimately feel compelled to instill customer loyalty to a particular brand. To maintain a sale, it might migrate a customer to another rival brand. What would motivate a dealer to share its detailed—and valuable—customer information?

In some instances, OEMs have attempted to approach this challenge by monitoring the flow of dealer data to infer lead management information. This approach has not worked. One OEM proposed installing a “black box” to monitor network traffic into and out of affiliated dealerships—not the best way to cultivate trust and an open working relationship. Rather than strengthen the partnership, franchises might spend time gaming the system, resulting in no better data for the OEM and often a worse experience for the customer.

The answer lies in finding the right value exchange between OEM and dealer. And OEMs should help dealers improve the dealer experience with shared data and insights—a strong motive for a dealer to give an OEM access to customer experience information.

That’s the carrot. There’s the possibility, too, of the stick. For example, in Europe, some OEMs are experimenting with retaining ownership of the stock of unsold vehicles, then paying a set fee per car for a dealer to deliver it.¹⁰ Such a model might greatly affect the dealer’s role and profit potential, perhaps increasing OEM margins by up to 4%.¹¹ A persistent reluctance by dealers to share data, engage with OEMs and other players in the ecosystem, and co-manage a lifetime customer relationship might nudge OEMs in that restrictive direction.

Another significant challenge in this environment of expanded stakeholders is creating well-integrated customer experiences and deriving leads from specific events in the customer journey. Customer inquiries, regardless of channel—live chat, call center, website form—can yield insight into sales opportunities, not just for new cars, but also for the digital and value-added services an OEM might offer. The same applies for financial services conversations.

When the right data is collected and properly analyzed, it can enable proactive lead generation. An OEM can create reasons for contacting customers that appeal to them, because AI-driven analytics help pinpoint where a customer’s unique needs intersect with those of the OEM.

To do this effectively, OEMs and partners across their collaborative business ecosystem need to thoroughly understand the various journeys customers may undertake and the best ways to meet them along the way. This includes knowing when rapid referral is essential—getting information, or even the customer, to the right person, or chain of people, as quickly as possible regardless of whether the current interaction is digital or face-to-face. In some cases, this could even mean referring a customer to a third-party service for a need that the OEM or dealer is unable to fulfill.

When done well, these new integrated experiences can also help avoid a pitfall common to online, self-service purchasing. Often, in the self-service model, the buyer seeks to work down to a value: getting the most features possible within a set budget.

Guided experiences, which can be integrated across online and physical environments, enable a trusted advisor—especially with assistance from AI—to help clients make value-based decisions. For example, if a customer is leasing a car, increasing its value through more features may actually *lower* the monthly payment because the residual value of the car at the close of the lease could be greater.

Moving to the future of lead management

Adapting to a world where leads can be generated almost anywhere, for multiplying types of products and services, and involving an entire ecosystem of stakeholders, means significant innovation in how OEMs and their partners manage those leads. Fortunately, there are technologies to help.



Generating leads

The business challenge.

Leads from many sources require a multitude of system integrations, including lead generation from within the organization. For example, identifying who bought a car over 3 years ago and may be due for renewal with or without finance, or how the servicing frequency of a customer might imply a timely offer on a new vehicle to reduce servicing costs would be welcome. Having this data within an integrated lead management system could increase leads. Retaining a customer is often much easier than winning a new one. According to some estimates, it costs 5 times as much to attract a new customer than to keep an existing one.¹²

The tech solution.

Use APIs for data capture that feed directly into the lead management solution. Use cloud-based API integration into a standardized data model for third-party data. Incorporate them into marketing solutions such as Adobe Marketing Cloud, Salesforce Marketing or Watson Marketing.

Overall, integrate and consolidate existing customer data—sales, service, finance—and apply AI to generate potential leads.



Knowing the customer

The business challenge.

With customers expanding their digital footprints, it's important to know their preferences before and during the lead cycle. Auto OEMs can also suffer from siloed business units and legacy systems that make master data management (MDM) a continuous challenge.

The tech solution.

A solid MDM strategy can help, tapping solutions such as IBM Infosphere MDM or Microsoft Master Data Services. Beyond just meeting the challenges of disparate systems data within large complex automotive organizations, it can ultimately help OEMs keep customers.

Beyond the strategy, OEMs should directly integrate their lead management platforms with social media platforms. Third-party data can enrich their lead data and help them better understand customers. Finally, they should be able to identify customer interest using online behavior data and their marketing platform.



Processing leads

The business challenge.

Processing leads has become more complex. Based on context, where should a lead be routed: to an internal call center for the initial contact? A dealer? If so, which one? Does the dealer sell the desired car? Is the dealer close to the customer? Or does the lead just require a follow-up email? Once the lead is closed, what further contact will the customer receive? How does the OEM manage regulatory requirements, such as the EU's General Data Protection Regulation (GDPR), through this entire process, especially when sharing data with third-party call centers or dealers? How are their systems integrated?

The tech solution.

By processing data in the cloud while keeping it accessible within transaction systems such as CRM, data can be processed quickly and efficiently. For example, Microsoft Power Automate and Azure processes (Logic Apps) support this functionality. Providing a single database solution, such as Microsoft Dataverse, creates data availability within multiple systems without further integration. Many CRM, ERP, and automation solutions, as well as portals such as IBM Experience Orchestrator and Microsoft Power Portals, enable the OEM to create multiple lead transaction systems used by multiple user types on a single platform. They can support call center platforms, dealer portals, analytics dashboards, and other crucial systems.



Interacting with the customer for a lifetime relationship

The business challenge.

Keeping a customer engaged and happy over the long term is no simple feat. Historically, the time between purchases may be years, and interactions are moving to varied channels—video, online, chat, virtual showrooms, automated communications, and the like. How do you, in effect, automate the customer experience and encourage customer satisfaction in a way that still feels personal, authentic, and engaging?

The tech solution.

Various tools exist to help. Microsoft Virtual Agent and IBM Watson Assistant can be used for virtual dealership visits. Marketing cloud integration helps with customer profiling and follow-up communications. Microsoft Power Automate enables automated status updates and communications to customers—your appointment is at next Tuesday morning at 10:00, for example.



Analyzing the end-to-end customer journey to better understand it

The business challenge.

Analyzing a customer's comprehensive buying journey is the key to making better marketing decisions and investment. OEMs need to model successful campaigns as well as identifying bottlenecks in matching customer leads with sales.

The tech solution.

A centralized cloud-based data analytics strategy backed by strong MDM that pulls in data sources from website to dealer management systems (DMS) can help. Market-leading tools include Microsoft Azure Analytics and PowerBI data visualizer, Cognos Tableau, and IBM Watson Studio.

Overall, apply AI and predictive analytics to enable powerful modeling, then the creation of and iterative improvement on campaigns that drive sales and solidify customer relationships.



The future of the dealer

The business challenge.

The biggest challenge—and impediment to lead management innovation—OEMs face is receiving updates and data back from dealers. While part of the solution is a matter of forging new collaborative partnerships and the culture and incentives that support them, there are technologies that can enable robust data sharing.

The tech solution.

OEMs can use a single integrated DMS across dealers and powerful tools that help—not hinder—dealers. Examples include in-store digital brochures, test drive sign-ins using a driver's license scan, and in-store apps that enable customers to interact directly with the dealer. Also consider apps that track car and driver test drive performance and then take the experience beyond the showroom. Such apps could help customers improve their driving experience by making personalized recommendations based on fuel consumption, range, and the customer's unique pattern of driving.

Overall, integrating digital technology within the showroom increases the ability of an OEM to capture and analyze valuable data from the dealer.

Action guide

The expanding auto ecosystem

1. Recreate your lead management—and customer relationship—model.

Develop a holistic process that allows you to have conversations with your customers via multiple channels and paths to many purchases. Redefine who you think of as a customer, then consider their relationship to the brand—and what you want it to be.

- Build and socialize a business case for this new approach based on an increase in lead conversion and lifetime customer value.
- View all channels and all parties as part of a continuous sales cycle rather than discrete elements in a linear model.
- Understand what other products could be sold beyond the vehicle.
- Seek additional partnerships to bring new products and lead sources into the model.

2. Bring the model to life.

Design and implement a best-in-class platform to support this new interaction model.

- Use accelerators—for example, an automotive functional and data model for CRM—to avoid reinventing the wheel.
- Build for third-party connectivity.
- Build natively for reporting, management intelligence and insight, and data mining, taking care to avoid these being afterthoughts.

3. Spark change across your ecosystem.

Manage the change across all stakeholders—OEM, national sales company, dealer, third parties, customers—so that everyone can benefit as much as possible from the new approach.

- Investigate market readiness for change and then prioritize for adoption, both from a business and a technology perspective.
- Gather continuous feedback and continually implement changes and improvements based on that feedback.
- Manage partner onboarding seamlessly to communicate new products and services to customers and place them at the right point in the sales cycle.

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