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WHAT TECHS WANT

Understand what technicians are looking for so you can secure their business

A photograph of two male mechanics working on a car engine. The mechanic on the left has a beard, a green baseball cap worn backward, and extensive tattoos on his arms. He is wearing a green button-down shirt. The mechanic on the right has a beard and is wearing a blue and white plaid shirt under dark overalls. He is holding a wrench. The background is dark and industrial, showing parts of the car's engine and chassis.

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COMMUNITY

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BY SCOTT LUCKETT | CONTRIBUTING EDITOR

The frequency of cybersecurity incidents has grown exponentially in recent years. As everything becomes connected in our interoperable world, the need for a strong cyber defense strategy cannot be overstated. It is not a question of "if" your network will be the subject of an attack, but a question of "when" the breach will occur and what your response will be.

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BY ALAN R. SEGAL | CONTRIBUTING EDITOR

Despite a cruel summer inflicted by COVID-19, NAPA Parts Place anticipates quarter three sales to trounce its 2019 figures. Learn what Don and Peter Cuzzolino, the father-and-son owners of the four-store chain based in Connecticut, are implementing in their business to keep them thriving, profitable and ahead of their competition.

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RESEARCH



TECHNICIAN ATTITUDE STUDY

WHAT TECHNICIANS WANT

MAKE SURE YOU UNDERSTAND WHAT THE INFLUENCERS IN THE SHOP WANT TO
BEST SECURE THEIR BUSINESS

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BRAKING BOOM

COMPONENT SALES A GROWING CATEGORY DRIVEN BY PRODUCT IMPROVEMENTS AND ADDED FITMENTS

BY **JAMES E. GUYETTE** | CONTRIBUTING EDITOR

There's no stopping the advancements being made in braking technology, with the segment's engineering achievements showing no signs of slowing. Also on-the-go are aftermarket purchases of brake components and do-it-for-me installations as befitting four assemblies of wear parts that every motorist needs to replace with some regularity.

In 2018, the global braking marketplace was valued at \$20.9 billion, and (applying pre-pandemic predictions) it is expected to annually expand by 5.8 percent to approach \$33 billion by 2026.

Manufacturers in this segment are consistently engineering product innovations for improved braking performance while simultaneously adding more fitments for increased coverage of individual vehicle models — a strategy that encourages brand loyalty by making it easier for repairers and end users to pick products from their preferred label of choice.

Keeping pace with a widespread manufacturer-induced pattern of enhanced worldwide availability, Delphi Technologies has added to its European aftermarket braking program by recently introducing more than 130 new brake pads and discs for popular new models.

These add-ons include a growing lineup of Asian applications along with an upswing in hybrids and all-electric vehicles. Already fitted to 19 million cars and trucks across Europe's roadways, the company is now offering more than 97 percent coverage on brake discs and 98.5 percent coverage for pads.

The traditional good-better-best purchasing pattern for component selection parameters across the segment

may face future complexities as evidenced by the increasingly sophisticated manufacturer-developed enhancements being applied by automakers at the assembly line.

This year at least eight OEM vehicle platforms are already using ZF's inaugural Integrated Brake Control (IBC), an electro-hydraulic system that replaces the vacuum booster and pump while integrating electronic stability control in a single module.

Doing business within the braking segment can generate competitive friction as numerous manufacturers vie for market share.

The previously associated collections of cables, sensors, switches and controllers are no longer needed, with IBC offering regenerative braking in a single integrated unit that serves fuel-efficient powertrains without needing supplemental vacuum pumps.

"It helps deliver advanced safety in the form of rapid building of brake pressure for high-dynamic demands such as automatic emergency braking. It will also support the gamut of brake vehicle control and stopping requirements for partially to fully automated driving functions," reported Manfred Meyer, ZF's senior VP of braking systems.

"The Integrated Brake Control system represents the future of braking

INTERNATIONAL NEWSMAKER

Q&A

SAM RUSENOVICH

Director of Consumer Experience, Brake Parts Inc



Q

WHAT ARE SOME OF THE SALES OPPORTUNITIES WITHIN THIS SEGMENT?

A

We have seen a decline in sales of new vehicles since March of this year, and in the face of economic uncertainty, consumers are more inclined to hold on to their vehicles longer. As a result, we are seeing the average age of the fleet start to creep up.

In the post-quarantine world, consumers are relying on personal vehicles for getaways and road trips. Recent research shows that consumers want quality-branded parts to keep their vehicles safe and running longer.

This combination of factors, we think, will provide various sales opportunities, not only to increase the number of brake jobs, but also a chance to upgrade to more premium brake offerings.

We also have seen an increase in activities involving towing/hauling and longer road trips, leading to opportunities for Raybestos Truck and Medium Duty semi-metallic brake pads and Raybestos specialty fleet grade or Element3 coated rotors.

technology and helps to satisfy the global industry trends of CO₂ efficiency, safety and automated driving," he said.

Choosing only high-quality brake components should be an overrid-

“CHOOSING ONLY HIGH-QUALITY BRAKE COMPONENTS SHOULD BE AN OVERRIDING PRIORITY THROUGHOUT THE AUTOMOTIVE MAINTENANCE AND REPAIR INDUSTRY.”

-CARNEY [FDP FRICTION]

ing priority throughout the automotive maintenance and repair industry, said John Carney, VP of sales at FDP Friction Science.

“Whatever the braking hazard or road conditions, when you need to stop you need brake pads that meet OEM specs. That’s especially true for today’s vehicles with ABS systems, which place heavy demands on brake pads,” he said. As a supplier for a wide range of OEM makes and models since 1969, the product lines meet or exceed all the relevant standards, he says.

Temperature swings matter

Proper pad selection is critical for ensuring that the correct components are matched to a vehicle’s designated deployment status.

“Braking applications in tow trucks require a great deal of force and generate a lot of friction, but only do so sporadically,” Carney noted. “Think sudden, unexpected stops or extended, sharp downhill descents.”

High performance applications bring their own sorts of stresses. “Braking in racing generates short periods of extremely intense heat. And seasonal temperature swings matter — a track with ambient temperatures low enough to keep the brake pads cool in March may be hot enough to fry them in July,” said Carney. “FDP compounds for racing applications can handle the highest temperature spikes.”

Specialized fitments such as police cars, ambulances, fire trucks and other heavy-duty fleet vehicles endure forces akin to both towing and racing demands. “Periods of spirited driving, with high speeds and sudden stops can combine with very heavy loads,” Carney pointed out. “FDP’s combination of compounds, design, assembly, quality control and validation enables an extremely high quality range of brake pads and shoes for a range of braking applications.”

The company’s laboratory equipment puts any potential braking part through a multitude of tough tasks. “Rigorous road testing follows, and

even involves drivers from FDP management who test the products on their own vehicles for several months,” said Carney.

The braking segment can generate competitive friction as numerous manufacturers vie for market share.

In 2019, Motorcar Parts of America Inc. introduced calipers to its aftermarket brake offerings, anchored by a new state-of-the-art 410,000-square-foot distribution facility plus an expansion at its factory in Tijuana, Mexico.

“This category represents a significant growth opportunity, leveraging our more than 50-year history in the aftermarket industry and the company’s highly regarded competency in remanufacturing,” said Selwyn Joffe, chairman, president and CEO. “Equally important, the launch of this product line solidifies our position as a full-line brake supplier, which provides the company with solid growth opportunities and favorable financial metrics.”

“We have made significant investments to support our initiatives to become a leading multi-product line supplier and this launch further strengthens our position,” Joffe said, noting that the American aftermarket’s retail caliper category presents an estimated value of \$1.1 billion.

Complimenting Goodyear’s existing array of more than 2,400 service centers offering brake installations, last month the first Goodyear-branded brake line was introduced. Products include bundles, pads, rotors and calipers for passenger cars, SUVs and light trucks.

The selection is being marketed directly to consumers via an online portal, and is designed for both do-it-yourself and do-it-for-me customers; line extensions will be available early next year.

Goodyear also performs employment outreach and extensive in-house educational offerings designed to attract techs for the company’s service location network. Goodyear’s college recruiting program seeks out promising students and recent graduates for a wide range

of internships, cooperative placement opportunities and full-time positions with a focus on furthering an employee’s professional growth.

Full-function lookups

NUCAP, producer of the NRS line of galvanized steel pads, announced in August a new merchandising pact with Canadian Tire’s network of more than 500 retail locations. The pads, marketed as being free from rusting or delamination, can be installed at a Canadian Tire service center or purchased on a do-it-yourself basis.

According to NUCAP CEO Montu Khokhar, the company’s technology mechanically fuses the backing plate to the friction material to create an indestructible bond and a more reliable, longer-lasting and safer brake product.

A recently rolled-out website from ADVICS — introducing a domain now separate from the company’s OE operations — features intuitive navigation, a custom-built catalog and a parts lookup tool complimented by updated individual product pages.

The site’s design delivers a consistent and device-friendly viewing experience on desktops and mobile devices, according to Gil Pulliam, senior manager of aftermarket sales, who noted that the improvements “reinforce our position as innovators of leading-edge technology in the brake industry.”

Akebono Brake Corp. also has a new online product site designed for an improved user experience on desktops, laptops, tablets and mobile devices. “Our web catalog has a full-function application lookup, as well as direct or wildcard part number and cross-reference searches, making it easier than ever to find the right parts,” said Edward Gerhardt, marketing & data services manager. “The platform is designed for minimal data usage, meaning fast page loads and quick return of results.”

With a focus on commercial truck, trailer, off-highway, defense, specialty and aftermarket braking applications, Meritor has adopted additional fea-

tures for its MeritorPartsXpress.com site for streamlining the ordering process and improving its lineup of self-service tools.

"Meritor is incorporating features that many customers are familiar with — and now expect — as part of their online shopping experiences," observed Christy Westrich, director of customer loyalty, about the benefits rendered to OEMs, warehouse distributors, dealers, fleets and independent shops.

"These enhancements not only help Meritor differentiate itself in the industry, but are also one of the ways that we are continually improving the customer experience," she said.

Meritor's trainers have been able to support the needs of its customers during the global health emergency with dedicated "WebEx" training sessions on the company's EX+ air disc brake.

"In these times of social distancing and still trying to manage a business and educate our techs, this worked well — and feedback has been very good," said Jerry Garlitz, fleet maintenance manager at Republic Services.

Meritor has enhanced its aftermarket product training program for dealers, distributors, fleets and service centers to include live instructor-led interactive distance training (IDT), 12 new regional training events and options for French and Spanish instruction through its BullPen online training site.

Last year's instructional portfolio, for example, encompassed close to 260 web-based, classroom and onsite programs. Since the online portal Bullpen launched in 2004, more than 350,000 courses have been completed online. In 2018, 1,500 customers attended more than 60 instructor-led sessions.

"The breadth of our multiplatform offerings demonstrates our commitment to meet industry needs for training wherever and whenever customers need help expanding their knowledge base," said Doug Dole, Meritor's director of technical products and training.

Meritor plans to continuously expand its programs, which last year saw high instructional demand from a customer base that averaged more than 9,000 online courses per month.

"Live interaction with an instructor during sessions where participants see, hear and receive direct feedback improves the customer experience with

Meritor products," noted training manager Joe Baumer.

IDT seminars offer live, online contact with instructors, reducing the expense and travel time to remote training locations. Maintaining social distancing, Baumer points out that the instructors provide the same level of interpersonal communication the students would experience in a physical classroom, including the ability to obtain direct answers to questions about specific technical issues.

Traveling training trailer

Serving the Wagner and Monroe brands, in August DRiV's Garage Gurus instructional initiative reopened all of its in-person, hands-on training locations throughout the U.S., including its on-the-road Mobile Automotive Training Center (MATC).

The re-launched program consists of ASE-certified master trainers covering brake repairs and of other topics. Created to bring training directly to techs, the Garage Gurus' MATC takes place in a 53-ft. double-expandable trailer converted into a state-of-the-art traveling training trailer.

Offering in-class and hands-on training experiences, the trailer, along with all the other in-person training locations, is configured to meet local safety guidelines for social distancing standards and other health guidelines.

Attendees and trainers are equipped with the necessary personal protective equipment (PPE), while class capacity has been reduced to a maximum of 12 students. Other safety improvements include the addition of interior dividers between workstations, an upgraded ventilation system and a UV lighting package to aid sanitization practices.

The unit is also equipped with a vehicle lift so that the students can experience applied learning outside the trailer during each training class.

"Since inception, Garage Gurus has made it its mission to address the tech shortage and growing skills gap in the aftermarket," reported program director Dennis Sheran. "We've been the go-to place for training since 2015, and with this mobile trailer, we are able to reach our customers who may not otherwise be able to take advantage of our training courses, whether it be due to distance or time constraints."

Online brake courses cover subjects such as "Brake Symptom Diagnostics" and "Fundamentals of Automotive Brake Systems," joining webinar topics that include "Preventing Brake Comebacks" and "Servicing Brake Systems with Vehicle Stability Control."

Garage Gurus technical education centers are located in 12 U.S. markets: Atlanta; Baltimore; Boston; Chicago; Dallas/Fort Worth; Houston; New Hyde Park, N.Y.; Rancho Dominguez, Calif.; South Florida; St. Louis; Suburban Detroit; and Van Nuys, Calif. They additionally will visit repair facilities and educate techs on the latest tools, part solutions and technology using its fleet of product technology vans.

Raybestos also offers training resources free-of-charge, including how-to videos, technical bulletins, braking news and tech tips.

"Customers can visit when it's most convenient for them to learn about product advancements, brake repair techniques and view technical bulletins," said Kristin Grons, marketing manager at Brake Parts Inc.

With a library of more than 75 videos, techs can watch how-to sessions with Raybestos trainers discussing a wide variety of topics, including "How Electronic Parking Brakes Work," "How to Repair a Brake Hose" and "Adjusting Parking Brakes."

An assortment of technical bulletins covers various brake conditions that can help techs troubleshoot a problem and aid in finding a solution. Each bulletin contains the vehicle involved, the condition and the repair procedure.

A selection of free training videos from Dorman Products Inc. are specifically designed for techs, service managers and counter people, conveying "a great way to keep up with the latest technologies," complimenting the company's lineup of nine tech training courses taught by ASE-certified instructors at classes conducted evenings and weekends at onsite locations.

A virtual tour of Dorman's headquarters is available at DormanProducts.com/tour. "While we're more than a century old and have long been leaders in growing the aftermarket, we still feel that much of the amazing work our people do has been something of a best-kept secret," said Jeff Darby, senior VP of sales and marketing. □

ARE YOU CYBERSECURE?

Understand how great the threat is and what every business should know

Recently, I got an email, allegedly from Microsoft, that my password was about to expire and I needed to click the link to reset my credentials. Of course, this message was fraudulent and if there was any doubt, the domain the message was sent from didn't resemble Microsoft in the least. But it was clever enough to get past our filters and required that I think before I hit delete. Given the volume of messages you likely receive daily and since 70 percent of the world's email is spam or junk, it is not impossible to absent-mindedly click the wrong message and unleash all kinds of nastiness.

The frequency and audacity of cybersecurity incidents has grown exponentially in recent years. And as everything becomes connected in our interoperable world, the need for a strong cyber defense strategy cannot be overstated. It is not a question of "if" your network will be the subject of an attack, but a question of "when" the breach will occur and what your response will be. Your network is being confronted with new threats every day. Antivirus and malware detection systems do deny access to most threats.

But it only takes one click to unleash a virus, ransomware or other malware on your systems, data and users. A cybersecurity strategy is comprised of people, processes and technology.

This is a problem that affects organizations of all sizes. There are a number of strategies and technologies that can be deployed before the unthinkable happens to your enterprise.

- Employ multiple layers of antivirus and malware detection, DNS monitoring, firewall and behavioral monitoring. These tools reinforce one another

and reduce the vulnerability of a single weakness.

- Operationalize security and compliance by making the process part of standard operating procedures. Prepare for an incident by practicing the response plan twice a year.

- Prepare and rehearse your incident response plan. Your IT and all other teams should have the information and training to respond and handle potential incidents. Other response components include: promptly identifying the incident and urgency, containment, eradication and recovery. Finally, don't omit a postmortem to document lessons learned.

- Do not rely on a single back-up and disaster recovery strategy. Not all applications and services are created equal. So, the speed of recovery will vary depending on the application — month-end reporting does not have the same urgency as real-time transaction processing, for example. Disaster Recovery as a Service (DRaaS) is available and can ensure that your resiliency is measured in minutes or hours — not days.

Technologists love their acronyms, and two that are especially important are CISO and SOC. A Chief Information Security Officer (CISO) is an IT executive, independent of the business, with ultimate responsibility over the policies and processes that safeguard the computing environment. In 2018, The Global State of Information Security Survey 2018 concluded that 85 percent of businesses have a CISO. Ask yourself who has the ultimate responsibility for your data, IT assets and computing environments, free of conflict of interests with the CIO or IT directors.

SOC stands for Service Organization



It is not a question of "if" your network will be the subject of an attack, but a question of "when" the breach will occur and what your response will be.

Control and SOC audit reports provide detailed information about the controls at an organization. Since your service providers may be relying on other service providers, such as Cloud Services, you may certainly require an SOC audit to report on controls relevant to security, availability, processing integrity, confidentiality or privacy.

There's a lot to know about cybersecurity and the steps to take to prevent an incident or quickly recover from one that occurs. As Steven Smith, founder and CEO of GCommerce said following their cybersecurity incident, "No one wants to wake up to learn the news that their company is a victim of a malware attack. No one or no company should have to experience that."

To pay it forward, GCommerce hosted a webinar following their incident, and the conversation is available at www.gcommerceinc.com/cybersecurity.

It may be inevitable that your enterprise be the target of an attack one day. How you survive and recover is a direct byproduct of the processes that you put in place today. □

STAYING THE COURSE

AUTOMECHANIKA SHANGHAI'S DECEMBER DATE REMAINS ON THE AFTERMARKET'S SCHEDULE AMID ROLLOUTS AND ONGOING WEBINARS

BY **JAMES E. GUYETTE** | CONTRIBUTING EDITOR

Organizers of the Dec. 2-5 Automechanika Shanghai trade show are still inviting you to arrive in China for the event, even as they continue to present a steady stream of online educational offerings for those who are unable to be personally present.

Shanghai's National Exhibition and Convention Center is again hosting the 16th edition of the fair, with an anticipated 5,350 vendors from all channels of the worldwide aftermarket covering more than 3 million square feet of exhibit space. Nearly 160,000 global attendees are expected onsite.

Forming and nurturing mutually beneficial and insightful trans-continental relationships remains a key goal, reflecting a shift towards consumer-driven business models, digitalization and cooperation within inter-related sectors.

"With the industry developing rapidly, players have to adapt their business strategies by moving into emerging areas of the supply chain," said Fiona Chiew, deputy general manager of show-producer Messe Frankfurt (HK) Ltd. "The road ahead requires collaboration to increase market presence and offer consumer-centric services in the connected aftermarket. We are emulating this form of integration in the aftermarket through enhanced hall planning."

"Navigating a dynamic automotive ecosystem" is this year's theme, designed to create a driving force for integrating industry resources across

seven dedicated sectors and three specialized product, service and instructional zones.

A revamped Diagnostics & Repair/Body & Paint sector will present separate product categories for Body & Paint and Intelligent Diagnostics — positioned next to Accessories, Customizing and REIFEN (Tires & Wheels) displays plus an upgraded Services & Supply Chain layout.

The moves come "as a response to the synergy of resources those sectors share," according to Chiew, as they aim to attract additional international exhibitors and visitors representing OEMs, dealers, parts providers, tire suppliers and service centers.

"Companies are now maximizing data gathered from information systems, databases and software, as well as optimizing supply channels and immersing end users into processes," she explained. The Services & Supply Chain zone is to reflect these changing distribution networks in the supply chain along with future developments within the service sector.

"What's more," added Chiew, "the area continues to see increased participation from players adopting internet-based business practices and new integrated systems. It will offer more breadth of coverage from chain stores, data management, e-commerce platforms and supply chain specialists, on top of auto finance, insurance, talent acquisition, training and education."

Known as "fringe events" at the show, associated seminars and educa-

INTERNATIONAL NEWSMAKER

Q&A

FIONA CHIEW

Deputy General Manager, Messe Frankfurt



Q

WHAT IS THE IMPACT OF THE CORONAVIRUS PANDEMIC ON THIS YEAR'S SHOW?

A

As the industry starts to spring back from the effects of COVID-19, we believe that highly influential platforms like Automechanika Shanghai play a crucial role in rejuvenating the market.

It is our mission to help players unlock their potential. Therefore, we are continuing to realign our resources by utilizing new digital tools, spurred on from the pandemic, to support global automotive industry recovery before, during and after the show.

This year, the show expects to host approximately 5,300 exhibitors across 300,000 sqm of exhibition space. On top of this, in the view that many Asian countries and regions are showing strong signs of early market recovery from COVID-19, Automechanika Shanghai is stepping up its online resources to reconnect players in the automotive ecosystem.

These channels will facilitate communication between exhibitors and visitors prior to the 16th edition of the show, as well as allow players to capture the latest global industry developments in response to a rapidly evolving business environment.

“THE RECENT OUTBREAK OF CORONAVIRUS BRINGS DRASTIC CHANGES TO OUR WAYS OF LIVING AND DOING BUSINESS. COPING WITH THE CHANGES AND REVIVING BUSINESSES ARE THE PRIORITIES FOR ALL KINDS OF INDUSTRIES.”

-FIONA CHIEW [MESSE FRANKFURT]

tional sessions “will encourage players to forge new relationships with others in the supply chain and foster cross-sector cooperation.”

Other specialized zones inhabit crucial roles in the industry’s supply chain. The Auto Manufacturing zone showcases advanced equipment and technology to boost efficiency in the production process. “It will see even more exhibitors with manufacturing technologies that play up to the heightened sophistication of auto parts,” said Chiew.

The Remanufacturing zone, located within Parts & Components, is to “delve into the sustainability of a circular economy to lengthen the product and service lifecycle,” she reported, citing the exhibitors in the Parts & Components, Tomorrow’s Service & Mobility and the extended Electronics & Connectivity units who are slated to address the fundamental industry changes brought forward as a result of digitalization.

To illustrate, the Tomorrow’s Service & Mobility section at Automechanika Shanghai has evolved into “an international epicenter for innovation where upstream and horizontal participants can forge new partnerships with one another,” Chiew says.

“The area has become an incubation hub for companies, which reflects the show’s pioneering position in the automotive ecosystem.”

She notes that a lineup of promising start-ups will be exposed to high-quality buyers offering enticing possibilities for commercializing their forward-thinking products, technologies and concepts. The program also supports industry/academia research with a collection of local and overseas associations, research institutes, commercial corporations and venture capital companies. “Here, they will further the development of new energy, mobility, autonomous driving and road infrastructure through wider engagement with industry players,” Chiew pointed out.

“With digital trends molding consumer demands and expectations, questions arise as to how new technologies are transforming the future car,” observed Cheng Yongshun, vice president of China National Machinery Industry International. “The sectors will share resources that promote intelligent transformation, digitalization, energy-saving and sustainability. Together, these areas will highlight the value of new co-created technologies and the growing opportunities in the market.”

A “Buyers Group Programme” for overseas attendees who gather in a grouping of 15-plus like-minded executives delivers multiple benefits that include fast-track entry privileges, discounts and other gifts. Eligibility applies to automakers, manufacturers, dealers, agents, distributors, wholesalers, retailers, maintenance & repair service providers, gas station personnel and private or governmental fleet operators.

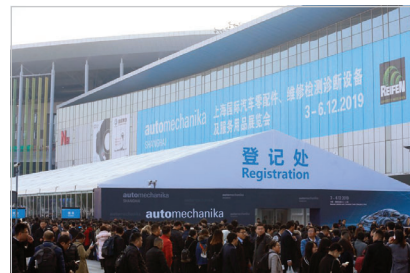
These same classifications of overseas visitors can also assemble to join the “Premium Buyers Club” loyalty program offering “a range of benefits designed to enhance buyers’ visiting experience” before, during and after the show.

Perks include complimentary accommodations, admission to the Premium Buyers Club lounge, access to the convention’s business matching service, subsidized local transportation throughout Shanghai and a valued welcome kit and gift upon arrival.

For members of the tire industry, the “REIFEN Club” brings you added benefits such as entry into an exclusive lounge, business-matching consultations and other standout privileges.

Grasping the market situation

In keeping with worldwide established protocols pertaining to curtailing COVID-19 — which is expected to remain a major concern extending into the December date of the fair — the



event’s producers “are working with local authorities to ensure appropriate safety parameters are upheld. These measures are to safeguard the health and safety of all stakeholders so that the show remains a secure platform for business.”

Social distancing is further emphasized — while at the same time reaching out to a much broader array of (far-away) attendees — through an ongoing and ever-expanding compliment of webinars.

Starting in July, the trade show’s educational team has been presenting an expert-laden lineup of online productions with additional sessions being consistently added to the curriculum.

“In order to help the automotive industry to better grasp the market situation,” according to Chiew, “Automechanika Shanghai has organized a series of webinars, putting together top executives, scholars, specialists and association representatives from different fields to discuss both challenging and positive aspects in the automotive supply chain, shedding light to the future recovery and development of the automotive industry.”

A variety of topics are being addressed in considerable detail, taking a global approach to the subject being discussed.

“The recent outbreak of coronavirus has posed tremendous impacts on economic activities at a global scale, including in the automotive industry,” said Chiew. “It also brings drastic changes to our ways of living and doing business. Coping with the changes and reviving businesses are the priorities for all kinds of industries.” □

THREE-STEP DISTRIBUTION SUCCESS

Store offers a hands-on touch despite COVID-19

Despite the cruel summer inflicted by COVID-19, Napa Parts Place anticipates quarter three sales to trounce its 2019 figures. Pent-up demand inside New Haven County, where they compete in Connecticut's most densely traveled region, has been, so far, the perfect storm. Now approaching autumn, as the pandemic's unpredictable nature poses further uncertainty in the economy, this independently owned parts merchant aspires for stability.

Thanks in part to the NAPA program group's three-tiered pipeline network to the final mile, Don and Peter Cozzolino, the father and son owners of the four-store chain based in Milford off Interstate 95 — a money-making corridor linking New York City to Boston — are streamlining product flow with minimal disruption.

One reason why Parts Place's alliance with NAPA has thrived, especially during the pandemic, is that its hubs in New York, New Jersey and Connecticut have flawlessly performed by offsetting the factory backorders, recalls Peter Cozzolino. For nearly three weeks straight at the near beginning of the outbreak, the manufacturers of ride control, spark plugs and brake systems faced bottlenecks procuring and delivering their products. Meanwhile, every night in clockwork predictability, the Middletown, Ct. branch shipped the backlogs to the Parts Place stores.

"We try to have high volume through our locations," says Peter Cozzolino. His goal is to win the New Haven and

Bridgeport markets through a blend of digital technology and on-site services that e-commerce cannot touch. Even though Cozzolino provided few details about the inner workings of the stronger-than-expected sales, he and his father found the coronavirus era an opportunity to fill the category gaps in the marine, small engine and industrial tool consumer segment. Unlike structured annual product reviews that can take time to fill the shelves, the Cozzolinos use a hands-on touch to convert the West Marine and Grainger shoppers over to their facilities.

"The market continued to grow on the commercial side, but it expanded greatly on the retail side," says the family patriarch. Don Cozzolino explained that they had poured money into remodeling the 4,000-square-foot retail space, bucking theories that e-commerce may displace local parts store visits.

Due to the variable buying patterns that the younger Cozzolino identified from online sales orders, he immediately began merchandising the stores within weeks.

"It starts with the basics — keeping the appropriate warehouse space and breadth of inventory coverage to maintain just-in-time hotshot delivery to the professional installers and the retail customers who could walk into any of our four stores today."

Long before the coronavirus influenced how shoppers research and purchase products online, the Cozzolinos had already moved past the curbside



pickup model. Timely arrivals through hotshot delivery service have been the norm for the commercial repair shop ever since Don joined the NAPA distribution network in 1978.

The instant gratification of Uber-style delivery to the bay door has gained traction, Peter says. A believer in the lowest inventory investment that augments (assuming the unit sells before the invoice payment due date) coverage in every city, Peter practices the just-in-time model. According to his vision, moments before the garage hoists the car on the lift, the supplier produces the replacement part so that no one vehicle unnecessarily occupies the service bay for any longer than originally scheduled.

Overall, most shops enjoy the transparency in tracking placed orders via ProLink, NAPA's proprietary parts procurement app. But widening the visual spectrum, starting with when the part first departs the factory, remains underdeveloped. Peter insists that real-time visibility in the NAPA network will dramatically improve inventory availability for locations.

He also believes that, by extension, when the consumers get their cars serviced by shop, they, too, naturally take for granted that the techs have the same tools and technology to always make good on their time estimates.

Collaboration with the installers, asserts Peter, must belong to the supply chain management calculus. Shared inventory purchases and past histories of the vehicle models serviced would allow a proper mix of hard



The newly remodeled retail showroom at a recent open house at their Milford, CT store.

part car applications to the nearest installer. If left to second guess which items to stock based on local vehicles in operation and product failure rates, Peter cautions that the likelihood of shipping an order within the hour is challenging. "I tell our professional installers that the more you go to our competitor's e-commerce site, I'm not going to have that purchase history. I may not keep that inventory locally for you to serve as your customer. I'm not going to see the demand. It's a self-serving cycle. You want to have it fast, but you need to support us so I can see the demand, and I will make the investment in you locally."

Amazon, and to a slighter degree, Rock Auto, Peter says, has raised the bar on graphically rich electronic cataloging and competitive pricing. Undoubtedly, Amazon's Prime 24-hour delivery guarantee will always attract consumers away from visiting the store, which Peter stresses is only ideal if the time factor doesn't matter. E-commerce-dependent commercial repair shops, he feels, are not sure to profit just because something costs less. Shops need local support for more than processing used cores,

labor claims and defective units.

Peter questions how an e-commerce merchant can assist an installer in troubleshooting a part that turns out to be the incorrect fit. "When the installer gets into a job and thought they needed X, and now it needs Y, who do they call? They don't call the commerce site."

NAPA Parts Place appreciates the frustration that techs endure because they lack the luxury of studying online options and specifications. That's where Peter's team distinguishes itself by setting up on-demand consultations over live video calls to guide the tech to the proper part. "They can educate themselves online with the e-commerce site, but that takes time, and time is money. So we have the edge."

NAPA Parts Place offers accessible education designed to enlighten the commercial installers, including courses in inventory control, financial literacy and vehicle systems. "We're getting a lot of young people, and we're encouraging them to stay engaged with the technology and the industry as far as the repair side on hybrid and electric vehicles."

"As the team moves forward with



Don and Margaret Cozzolino standing with their son Peter.

the technology and nuances of the changing market," says Don, "it isn't always easy, but it is fun." He credits the NAPA patrons for setting the industry standard. "I've seen a lot of changes. Fortunately, most of them have been pretty good. I've made friendships, and I have a lot of respect for the smart people in the NAPA system." □

DEEMED ESSENTIAL

PART 2 OF THIS FOUR-PART CASE STUDY DELVES INTO HOW FOUR SERVICE REPAIR SHOPS TACKLED COVID-19 AND MANAGED TO STAY HEALTHY BOTH PHYSICALLY AND FINANCIALLY

BY **ALAN R. SEGAL** | CONTRIBUTING EDITOR

PART 1 OF THIS SERIES DEBUTED ONLINE LAST MONTH AT AFTERMARKETBUSINESS.COM/DEEMEDESSENTIAL, AND INTRODUCED US TO FOUR SHOP OWNERS: KYLE LOGUE, ESSEX COUNTY REPAIR IN MIDDLETON, MASS.; AMY MATTINAT, AUTO CRAFTSMEN IN MONTPELIER, VT.; DAVID ROMAN, DONE WITH CARE AUTO REPAIR, KANSAS CITY, KAN.; AND LUCAS UNDERWOOD, L&N PERFORMANCE AUTO CARE, BLOWING ROCK, NC. DIVE INTO PART 2 TO CONTINUE LEARNING HOW THESE BUSINESSES NAVIGATED SUCCESS AMID COVID-19.

Early April had been hellish to Amy Mattinat of Auto Craftsmen in Montpelier, Vt. Tire changing season in Montpelier, which was typically the most significant source of revenue for Auto Craftsmen, was about to begin. If social distancing proved ineffective, or if an employee were to become infected, Auto Craftsmen would cease to exist. Worries about Mattinat's financial health played out in her mind, where she repeatedly worked out various cash flow models to keep the shop running.

First, she contemplated using credit cards. Fortunately, however, the local Sanel NAPA and O'Reilly auto parts stores agreed to a payment schedule. Most of all, at the top of mind, it was about making payroll. "I don't see the light at the end of the tunnel. Right now, I'm focusing on what I need to do about keeping my business healthy," explained Mattinat.

Congress threw out a comprehensive federal aid lifeline — the Payroll Protection Plan — valued at \$349 billion to the nation's small businesses.

But in execution, Mattinat said the local credit union initially struggled to interpret the terms tied to PPP. Failure to comply could result in a financial penalty, defeating the purpose of protecting a business. Just in case the government accused Mattinat of fraud, she set aside a cache of payroll stubs, utility bills and other overhead invoices. Would Auto Craftsmen receive enough monies to carry a full staff load through June? Not knowing when the pandemic will end, Mattinat said, "My goal is to keep my business solvent."

"I don't see the light at the end of the tunnel. Right now, I'm focusing on what I need to do about keeping my business healthy," — Mattinat

Mid-April

"We're not having a super busy week," groaned David Roman, owner of Done with Care Auto Repair in Kansas City, Kan. Despite hurting his lower back a few days earlier, he shifted his focus to economic pain. Even though customers were dropping off their trucks, cars and SUVs for routine maintenance work, few seemed in a hurry to return as Kansas City adjusted to the reality of staying indoors.

INTERNATIONAL NEWSMAKER

Q&A

DAVID SHAPIRO

VP of Business Marketing, Shapiro, Riefberg, Slemmer Marketing



WHAT ARE KEY BEST PRACTICES FOR INVENTORY MANAGEMENT?



Having seen its effectiveness firsthand, technology like GCommerce's Virtual Inventory Cloud (VIC) program will help any customer or manufacturer handle inventory management. If you're unfamiliar with this technology, I highly recommend investigating how VIC can benefit your business. We know as a major issue that the aftermarket faces parts proliferation. It makes carrying 100 percent of the parts needed impossible.

VIC gives you access and visibility beyond what is on your shelf to see what is sitting in the manufacturer's DC. You will see what they have available to drop-ship to your customer, how long it will take to get there, and the costs involved. This accelerates the ordering process on hard-to-find components and essentially makes the WD's offering limitless. I can see adoption of a program like this being a prerequisite for doing business in the future.

Roman scorned the idea of cutbacks. "We just hired a tech who I'm going to hold onto," said Roman, while pointing to a higher-than-average ticket price for each approved estimate. If anything, Roman added, "my customers have

“WE ARE BACK TO HALF THROTTLE. MY CUSTOMERS WILL ONLY SPEND SO MUCH ON THEIR VEHICLES UNTIL THEY CAN GET BACK TO THEIR REAL SPENDING WAYS,”

-MATTINAT [AUTO CRAFTSMAN]

been gracious toward my shop where I see a greater sense of community.”

Roman speculated that his clientele was quietly adjusting to converting their homes into virtual offices. He projected optimism about new drugs and vaccines, and when it does arrive, “COVID-19 will come to an abrupt end.” But Roman did not specify when he thought commerce would kick back to life.

Factory Motor Parts, his first-call supplier, shuttered three of their nearby pick-up warehouses. WORLDPAAC delayed orders from hours to days and Amazon suspended their 24-hour turnaround time. Thankfully, Roman said that few of his customers were anxious to get their vehicle at the end of the day.

A simple tweet reversed weeks of single-digit customer intakes. Three jobs averaging \$650 each marked a record low for five days. Then Logue went digital. “I texted 700 customers, reminding them that we’re open for business. Forty-four of them inquired, and 24 approved the quote,” he says. It was a lesson learned in implementing a low-cost, high-tech customer engagement as Americans spent more time online shopping and working from home.

Late-April

Knee-deep in a first-of-its-kind recession caused by a forced lockdown, Roman’s bookings were falling. “Business is slowing down, but we’re holding our head above water. We took fewer calls this week, but I’m doing my best to spread the word.”

To Roman, he viewed preparedness for any unforeseen event as the proprietor’s responsibility to protect the company. “When the coronavirus broke loose,” said Roman, “we had a short supply of cash on hand.” Roughly two weeks to be exact, and Roman vowed to raise enough cash reserves to carry him for at least six months.

Roman wanted no part of government intervention, let alone the



Mattinat poses next to the key drop — used much more often now — at Auto Craftsmen in Montpelier, Vt.

Paycheck Protection Program. At some later point in time in the nation’s recovery, he believes that the taxpayers will ultimately shoulder the price tag to support the relief package approved by Congress. He blamed the “draconian measures imposed on my state of Kansas with unreliable data that generated crappy models.” Too many people, he believes, were unnecessarily furloughed or laid off. Noting that Kansas is unlike New York City, strictly enforced face mask rules and social distancing measures in public spaces should have been enough.

And people are growing agitated, he observed. “Things could quickly turn into a powder keg,” he said, but then respects the reality of the consequence to the country’s economy if a second or a third wave were to hit.

Unsure what the future would hold for Done with Auto Care and the country, Roman focused on the next steps and said, “If the government extends the closure through the end of May, I’ll cycle back to email blasts.”

Meanwhile, Mattinat nearly broke out into a happy dance. The monies approved by the Paycheck Payment Program filled her bank account. “That’s a heavy boulder off my shoul-



Kyle Logue at his shop, Essex County Repair in Middleton, Mass.

ders,” she giggled. “Now I’ve got an eight-week money supply. The first thing I’m going to do is pay my team full time.” Ever since mid-March, to conserve expenses, Mattinat paid her employees for 25 hours out of 40 put in for the week. Right from the start, Mattinat sacrificed her entire take-home pay. She reasoned that if she had to let someone go — even just temporarily — that employee may never return when Montpelier comes back to life. Besides, it’s not just six employees that she supports; it is their families, too.

Despite the monetary lifeline approved by the PPP, Mattinat treaded cautiously with future expenses until the gates officially swing open. She was optimistic that declining sales are about to bottom out for Auto Craftsmen. “We are back to half throttle. My customers will only spend so much on their vehicles until they can get back to their real spending ways.”

Peering into May

Like most of the nation, the 51,000 citizens of Watauga County — where L&N Performance Auto Repair in Blowing Rock, NC, enjoys a solid reputation — had been lingering in a restrictive hold-

ing pattern. Since mid-March, 22 million Americans filed for jobless claims.

Month-to-date revenues were falling by 30 percent. Yet, outwardly, owner Lucas Underwood chatted undistracted by the financial turbulence. Whatever happened to L&N Performance Auto Repair, Underwood renewed his focus on navigating his business through the bumpy ride.

Part of his business psychology of coping with COVID tied into adapting to and equipping himself and others to emerge stronger. Over Facebook, Underwood moderated a support group called Auto Shop Owner's Group, where he ministered best practices to the highly motivated membership. During spring, the highpoint of maintenance season, Underwood reminded his peers to take advantage of continuous communication with their target audience with postings and videos about how their repair shops intend to keep everyone safe. A few days later, Underwood, wearing an L&N stitched black polo shirt, appeared over a LinkedIn video, updating his audience on more safety measures and a new promotion for the week.

Other forces converged. As spring warmed North Carolina, quarantine fatigue tempted people to move outdoors, said Underwood. Fringe movements protested their frustrations in Raleigh and other state capitals.

Roman has been monitoring the demonstrations. He pointed out that angry citizens have been pressuring their politicians to decide between protecting people's health or reopening the marketplace. Too many businesses, he told me, felt unfairly punished by something they didn't cause.

No one disagreed. Giving commerce the green light too early, Roman believed, may result in the second wave of infections. Georgia's governor, a former businessman, announced that he okayed a phased-in plan to allow tattoo parlors, beauty salons and restaurants to resume operations.

When policy falls on the politicians to make an informed decision guided by science, Underwood said, "nobody wants to be on the wrong side of history. I am not in a hurry. I'd rather follow the state guidelines." As might be expected, Underwood looked forward to seeing the tourists and sum-

mer residents return to his part of North Carolina.

Back in Massachusetts, Kyle Logue of Essex County Repair in Middleton, Mass., stressed differently. "We can't source parts! Our standard ordering procedure, through no fault of our own, flew out of the window," he grumbled. Ordering hard parts, particularly OE applications, from the local retailers and auto dealerships had been worsening due to supply chain disruptions. What typically took 15 minutes to finalize the repair estimate could last one hour, sometimes longer. In one case, to find a popular clutch for a Ford 350, Essex County waited three days, resulting in losing out on billable productivity.

Adding to Logue's headaches, he and his girlfriend still couldn't find a babysitter to look after 18-month old Maeve. That prevented him from opening Essex County Repair on Fridays. Four days of income fell short of its full potential to turn a profit.

Ebb and flow

"We caught up the following Monday, and that morning's bookings had become "one crazy busy week so far," laughed Logue. He speculated that he absorbed a share of new customers from two closed service garages. Good news aside, Logue intended to hold a 12-week money supply. Even though it expired on July 31, the PPP cash infusion wouldn't carry him through the summer in the event of a relapse of lower bookings.

One job applicant who initially showed promise in becoming the next service writer flopped on the first day of the probation period, lamented Logue. Despite the best intentions, the applicant fumbled aimlessly about the software system. Logue said, "It was painful to watch him make repeated mistakes over the computer keyboard."

Back to square one, Logue posted a job listing for someone to process customer intakes and persuasively sell the repair estimate. In mid-May, state residents readied themselves for phase one reopening. But to Logue, the start date seemed artificial as more people were driving to work or maybe enticed by warm spring temperatures.

Frustration weighed heavily on Roman. Light traffic during the week-



Lucas Underwood hard at work at L&N Performance Auto Care in Blowing Rock, NC.

days on one of the city's most congested roadways resembled a Sunday. "Things have died down here even with the restaurants open, and the streets are dead," said Roman.

So were the email inbox and the phones, except for cancellations. Roman scaled back the techs' shifts and encouraged them to take the day off without pay. This trend, Roman prayed, should at its worst last weeks. With no PPP monies, layoffs would only serve as the last resort for Done with Care whose sales — about 90 percent — depended on repeat business.

Most of Roman's clients had been driving less because they had been working from home. Technologies such as video conferencing apps had been working out, which could strengthen telecommuting's appeal. A handful told Roman how the twin health and economic crisis are directly impacting their budgets. "After the stimulus checks arrived, people spent their monies, and the appointments began to peter off. I'm looking at a \$900 job, another one at \$850, and there's a lot of paperwork to do this week," said Roman.

Notwithstanding the pressure, Roman was determined to attract new customers through a targeted advertising campaign. Ideally, he wanted to appeal to the consumers who treat their cars as they would their health. Typically, Roman said that during economic booms, that kind of multi-platform marketing approach may take months to pay off, which was still risky at best. But as the unknowing of what is to come continued, the timeline of a profitable outcome may last longer than a few months.

Look for Part 3 of the "Deemed essential" series online in November at AftermarketBusiness.com/deemedessential3 to continue learning how these shops endured during a pandemic. □

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TECHNICIAN ATTITUDE STUDY



WHAT TECHS WANT

MAKE SURE YOU UNDERSTAND WHAT THE INFLUENCERS IN THE SHOP WANT TO BEST SECURE THEIR BUSINESS

BY **KRISTA MCNAMARA** | EDITORIAL DIRECTOR

TECHnicians are driving the majority of buying decisions in today's shop. So make sure you understand what they are looking for and where they are going when purchasing products to ensure you can best meet their needs and retain their business.

The majority of respondents from this year's survey — 60 percent — work in a full-service operation, with 11 percent reporting they work in fleet operations and another 9 percent in specialty shops.

Those responding to our questions were primarily the owner/president of

their operation, making up 57 percent of respondents, followed by 19 percent being technicians and 8 percent service managers.

Most respondents operated in smaller shops, with 97 percent reporting that their business had 1 to 3 shop locations; 38 percent reported 1 to 3 bays, and another 66 percent reported working with a staff of 1 to 3 technicians.

The *Aftermarket Business World Technician Attitude Study* is fielded to readers of sister publication *Motor Age*. Respondents are asked questions about select product categories. □

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AUXILIARY LIGHTING

WHAT
TECHS
WANT

Purchasing source

Jobber	50%
Auto parts retailer	50%
Warehouse distributor	50%
Internet	33%
Direct from manufacturer	17%

Preferred purchasing channel

Warehouse distributor	50%
Auto parts retailer	17%
Two-step distributor	17%
Jobber	17%

Primary reason for preferred supplier

Parts availability	50%
Carries specific brand	33%
Price	17%
Fast delivery	0%

Margins

100% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	0%
6-10%*	0%
11-15%*	0%
16-25%*	0%
More than 25%*	0%

What techs think they pay

1-5%*	0%
6-10%*	50%
11-15%*	0%
16-25%*	50%
More than 25%*	0%

*Percent over jobber

17% of technicians always give recommendations to their shop owner for buying a specific brand of auxiliary lighting.

Amount of auxiliary lighting returned monthly

None	100%	5-9%	0%
1-2%	0%	10% +	0%
3-4%	0%	I don't know	0%

100% do not purchase auxiliary lighting from a dealership.

Reasons:

Convenience	50%
Too expensive	25%
Limited stock/don't stock	25%

Frequency of supplier contact

Once a week	0%
Every two weeks	0%
Once a month	14%
Every three months	29%
Every six months	0%
Yearly	0%
No contact necessary	57%

Brand vs. supplier loyalty

If a primary supplier of auxiliary lighting replaced a brand with another of like quality, a tech would:

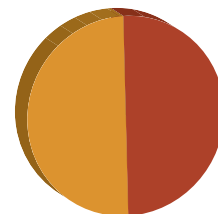
Change suppliers to continue purchasing original brand	33%
Keep primary supplier and purchase new brand	67%

National brands vs. private label purchases

50%
National

0%
Private

50%
Both



Reason for buying a particular auxiliary light

Quality	14%
Performance	14%
Availability	7%

Internet ordering frequency

0-10% of the time	86%
11-25% of the time	0%
26-50% of the time	14%
51-75% of the time	0%
76-99% of the time	0%
All the time	0%

Some chart totals exceed 100 percent because respondents could provide multiple answers. Other charts do not reach 100 percent because all answer options are not represented.

BATTERIES



WHAT TECHS WANT

Purchasing source

Auto parts retailer	66%
Warehouse distributor	51%
Jobber	31%
Direct from manufacturer	9%
Dealership	9%

Preferred purchasing channel

Warehouse distributor	37%
Auto parts retailer	29%
Jobber	17%
Direct from manufacturer	9%

Primary reason for preferred supplier

Carries specific brands	29%
Parts availability	23%
Fast delivery	20%
Good relationship	20%

Margins

79% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	34%
6-10%*	0%
11-15%*	33%
16-25%*	33%
More than 25%*	0%

What techs think they pay

0-5%*	0%
6-10%*	50%
11-15%*	17%
16-25%*	17%
More than 25%*	16%

*Percent over jobber

46% of technicians always give recommendations to their shop owner for buying a specific brand of batteries.

Amount of batteries that are returned monthly

None	33%	5-9%	0%
1-2%	67%	10% +	0%
3-4%	0%	I don't know	0%

75% do not purchase **batteries** from a dealership.

Reasons:

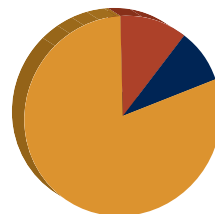
Too expensive	56%
Limited service	33%
Slow delivery	22%

National brands vs. private label purchases

80%
National

9%
Private

11%
Both



Reason for buying a particular battery

Quality	58%
Warranty	58%
Availability	45%

Frequency of supplier contact

Once a week	11%
Every two weeks	11%
Once a month	23%
Every three months	11%
Every six months	6%
Yearly	3%
No contact necessary	34%

Brand vs. supplier loyalty

If a primary supplier of batteries replaced a brand with another of like quality, a tech would:

Change suppliers to continue purchasing original brand	43%
Keep primary supplier and purchase new brand	57%

Internet ordering frequency

0-10% of the time	88%
11-25% of the time	0%
26-50% of the time	0%
51-75% of the time	0%
76-99% of the time	3%
All the time	9%

Some chart totals exceed 100 percent because respondents could provide multiple answers. Other charts do not reach 100 percent because all answer options are not represented.



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BELTS & HOSES



WHAT TECHS WANT

Purchasing source

Auto parts retailer	82%
Jobber	32%
Warehouse distributor	25%
Dealership	25%
Internet	18%

Preferred purchasing channel

Auto parts retailer	45%
Jobber	24%
Warehouse distributor	21%
Dealership	7%

Primary reason for preferred supplier

Parts availability	48%
Good relationship	28%
Fast delivery	14%
Carries specific brands	10%

Margins

72% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	33%
6-10%*	0%
11-15%*	0%
16-25%*	50%
More than 25%*	17%

What techs think they pay

1-5%*	29%
6-10%*	29%
11-15%*	18%
16-25%*	24%
More than 25%*	0%

*Percent over jobber

50% of technicians always give recommendations to their shop owner for buying a specific brand of belts & hoses.

Amount of belts & hoses that are returned monthly

None	54%	5-9%	0%
1-2%	29%	10% +	0%
3-4%	13%	I don't know	4%

52% do not purchase belts & hoses from a dealership.

Reasons:

Too expensive	61%
Convenience/time limits	39%
Aftermarket products as good as or better than OEM	33%

Frequency of supplier contact

Once a week	17%
Every two weeks	4%
Once a month	17%
Every three months	4%
Every six months	3%
Yearly	7%
No contact necessary	48%

Brand vs. supplier loyalty

If a primary supplier of belts & hoses replaced a brand with another of like quality, a tech would:

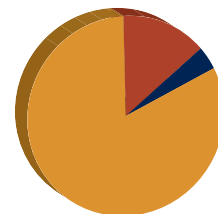
Change suppliers to continue purchasing original brand	41%
Keep primary supplier and purchase new brand	59%

National brands vs. private label purchases

82%
National

4%
Private

14%
Both



Reason for buying particular belts & hoses

Availability	55%
Quality	52%
Brand	34%

Internet ordering frequency

0-10% of the time	48%
11-25% of the time	8%
26-50% of the time	8%
51-75% of the time	12%
76-99% of the time	20%
All the time	4%

Some chart totals exceed 100 percent because respondents could provide multiple answers. Other charts do not reach 100 percent because all answer options are not represented.



BRAKES

WHAT
TECHS
WANT

Purchasing source

Auto parts retailer	62%
Jobber	42%
Warehouse distributor	31%
Dealership	27%
Internet	15%

Preferred purchasing channel

Auto parts retailer	54%
Jobber	23%
Warehouse distributor	15%
Direct from manufacturer	4%

Primary reason for preferred supplier

Parts availability	38%
Carries specific brands	23%
Good relationship	15%
Fast delivery	12%

Margins

75% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	50%
6-10%*	0%
11-15%*	0%
16-25%*	33%
More than 25%	17%

What techs think they pay

1-5%*	16%
6-10%*	5%
11-15%*	32%
16-25%*	42%
More than 25%	5%

*Percent over jobber

62% of technicians always give recommendations to their shop owner for buying a specific brand of brakes.

Amount of brakes that are returned monthly

None	48%	5-9%	4%
1-2%	30%	10% +	0%
3-4%	9%	I don't know	9%

56% purchase brakes from a car dealership.

Reasons:

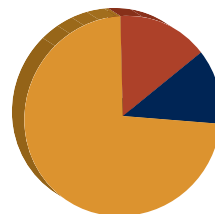
OEM form/fit/function	67%
Only place it is available	53%
Customer request	27%

National brands vs. private label purchases

73%
National

12%
Private

15%
Both



Reason for buying particular brakes

Quality	63%
Availability	59%
Brand	41%

Frequency of supplier contact

Once a week	19%
Every two weeks	0%
Once a month	15%
Every three months	8%
Every six months	8%
Yearly	8%
No contact necessary	42%

Brand vs. supplier loyalty

If a primary supplier of brakes replaced a brand with another of like quality, a tech would:

Change suppliers to continue purchasing original brand	28%
Keep primary supplier and purchase new brand	72%

Internet ordering frequency

0-10% of the time	52%
11-25% of the time	0%
26-50% of the time	8%
51-75% of the time	4%
76-99% of the time	28%
All the time	8%

Some chart totals exceed 100 percent because respondents could provide multiple answers. Other charts do not reach 100 percent because all answer options are not represented.

DIAGNOSTIC TOOLS



WHAT TECHS WANT

Purchasing source

Tool truck/tool dealer	74%
Auto parts retailer	35%
Internet	26%
Warehouse distributor	22%
Jobber	22%

Preferred purchasing channel

Tool truck/tool dealer	48%
Internet	13%
Jobber	13%
Direct from manufacturer	13%

Primary reason for preferred supplier

Good relationship	39%
Carries specific brand	22%
Price	22%
Fast delivery	13%

Margins

89% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	0%
6-10%*	0%
11-15%*	100%
16-25%*	0%
More than 25%	0%

What techs think they pay

1-5%*	0%
6-10%*	0%
11-15%*	25%
16-25%*	0%
More than 25%	75%

*Percent over jobber

50% of technicians always give recommendations to their shop owner for buying a specific brand of diagnostic tool.

Amount of diagnostic tools that are returned monthly

None	50%	5-9%	0%
1-2%	25%	10% +	0%
3-4%	0%	Don't know	25%

82% do not purchase **diagnostic tools** from a dealership.

Reasons:

Too expensive	83%
Too difficult to work with	50%
Convenience/time limits	33%

Frequency of supplier contact

Once a week	31%
Every two weeks	4%
Once a month	13%
Every three months	9%
Every six months	4%
Yearly	9%
No contact necessary	30%

Brand vs. supplier loyalty

If a primary supplier of diagnostic tools replaced a brand with another of like quality, a tech would:

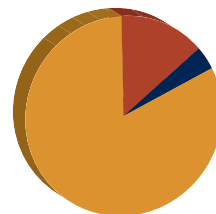
Change suppliers to continue purchasing original brand	38%
Keep primary supplier and purchase new brand	62%

National brands vs. private label purchases

82%
National

4%
Private

14%
Both



Reason for buying a particular diagnostic tool

Quality	52%
Brand	48%
Compatibility	48%

Internet ordering frequency

0-10% of the time	71%
11-25% of the time	5%
26-50% of the time	9%
51-75% of the time	5%
76-99% of the time	0%
All the time	10%

Some chart totals exceed 100 percent because respondents could provide multiple answers. Other charts do not reach 100 percent because all answer options are not represented.



FILTERS

WHAT
TECHS
WANT

Purchasing source

Auto parts retailer	70%
Jobber	40%
Warehouse distributor	40%
Dealership	30%
Two-step distributor	10%

Preferred purchasing channel

Jobber	30%
Warehouse distributor	30%
Auto parts retailer	20%
Two-step distributor	10%

Primary reason for preferred supplier

Fast delivery	40%
Good relationship	30%
Price	20%
Parts availability	10%

Margins

60% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	75%
6-10%*	0%
11-15%*	0%
16-25%*	25%
More than 25%	0%

What techs think they pay

1-5%*	25%
6-10%*	0%
11-15%*	75%
16-25%*	0%
More than 25%	0%

*Percent over jobber

50% of technicians always give recommendations to their shop owner for buying a specific brand of filter.

Amount of filters that are returned monthly

None	60%	5-9%	0%
1-2%	30%	10% +	0%
3-4%	10%	I don't know	0%

60% do not purchase filters from a car dealership.

Reasons:

Slow delivery	50%
Convenience/time limits	50%
Too expensive	38%

Frequency of supplier contact

Once a week	33%
Every two weeks	11%
Once a month	11%
Every three months	33%
Every six months	0%
Yearly	0%
No contact necessary	11%

Brand vs. supplier loyalty

If a primary supplier of filters replaced a brand with another of like quality, a tech would:

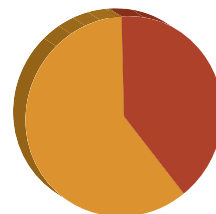
Change suppliers to continue purchasing original brand	40%
Keep primary supplier and purchase new brand	60%

National brands vs. private label purchases

60%
National

0%
Private

40%
Both



Reason for buying a particular filter

Quality	75%
Brand	42%
Availability	42%

Internet ordering frequency

0-10% of the time	60%
11-25% of the time	0%
26-50% of the time	0%
51-75% of the time	20%
76-99% of the time	20%
All the time	0%

Some chart totals exceed 100 percent because respondents could provide multiple answers. Other charts do not reach 100 percent because all answer options are not represented.

FUEL INJECTORS

WHAT
TECHS
WANT

Purchasing source

Dealership	71%
Auto parts retailer	57%
Warehouse distributor	57%
Internet	29%
Jobber	14%

Preferred purchasing channel

Auto parts retailer	43%
Warehouse distributor	29%
Dealership	14%
Jobber	14%

Primary reason for preferred supplier

Parts availability	43%
Good relationship	29%
Return policy	14%
Fast delivery	14%

Margins

86% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	0%
6-10%*	100%
11-15%*	0%
16-25%*	0%
More than 25%	0%

What techs think they pay

1-5%*	0%
6-10%*	33%
11-15%*	33%
16-25%*	0%
More than 25%	34%

*Percent over jobber

57% of technicians always give recommendations to their shop owner for buying a specific brand of fuel injector.

Amount of fuel injectors that are returned monthly

None	75%	5-9%	0%
1-2%	25%	10% +	0%
3-4%	0%	I don't know	0%

75% purchase **fuel injectors** from a car dealership.

Reasons:

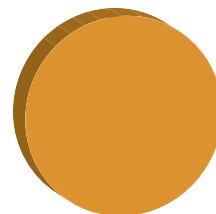
OEM form/fit/function	83%
For OEM brand name	13%
Warranty	17%

National brands vs. private label purchases

100%
National

0%
Private

0%
Both



Reason for buying a particular fuel injector

Warranty	71%
Quality	57%
Brand	43%

Internet ordering frequency

0-10% of the time	50%
11-25% of the time	0%
26-50% of the time	38%
51-75% of the time	12%
76-99% of the time	0%
All the time	0%

Frequency of supplier contact

Once a week	0%
Every two weeks	0%
Once a month	0%
Every three months	13%
Every six months	0%
Yearly	0%
No contact necessary	87%

Brand vs. supplier loyalty

If a primary supplier of fuel injectors replaced a brand with another of like quality, a tech would:

Change suppliers to continue purchasing original brand	38%
Keep primary supplier and purchase new brand	62%

Some chart totals exceed 100 percent because respondents could provide multiple answers. Other charts do not reach 100 percent because all answer options are not represented.



MOTOR OIL

WHAT
TECHS
WANT

Purchasing source

Auto parts retailer	56%
Two-step distributor	33%
Warehouse distributor	22%
Jobber	22%
Direct from manufacturer	11%

Preferred purchasing channel

Auto parts retailer	22%
Two-step distributor	22%
Jobber	22%
Direct from manufacturer	22%

Primary reason for preferred supplier

Price	44%
Fast delivery	22%
Good relationship	22%
Carries specific brands	11%

Margins

37% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	0%
6-10%*	100%
11-15%*	0%
16-25%*	0%
More than 25%	0%

What techs think they pay

1-5%*	0%
6-10%*	0%
11-15%*	100%
16-25%*	0%
More than 25%	0%

*Percent over jobber

33% of technicians always give recommendations to their shop owner for buying a specific brand of motor oil.

Amount of motor oil that is returned monthly

None	50%	5-9%	0%
1-2%	0%	10% +	0%
3-4%	50%	I don't know	0%

27% purchase motor oil from a car dealership.

Reasons:

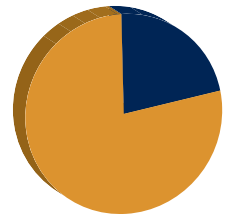
OEM form/fit/function	67%
For OEM brand name	33%
Warranty	33%

National brands vs. private label purchases

78%
National

22%
Private

0%
Both



Reason for buying a particular motor oil

Price	78%
Quality	67%
Availability	56%

Internet ordering frequency

0-10% of the time	90%
11-25% of the time	0%
26-50% of the time	0%
51-75% of the time	10%
76-99% of the time	0%
All the time	0%

Some chart totals exceed 100 percent because respondents could provide multiple answers. Other charts do not reach 100 percent because all answer options are not represented.

Frequency of supplier contact

Once a week	9%
Every two weeks	9%
Once a month	46%
Every three months	9%
Every six months	0%
Yearly	9%
No contact necessary	18%

Brand vs. supplier loyalty

If a primary supplier of motor oil replaced a brand with another of like quality, a tech would:

Change suppliers to continue purchasing original brand	30%
Keep primary supplier and purchase new brand	70%

OXYGEN SENSORS

WHAT
TECHS
WANT

Purchasing source

Auto parts retailer	100%
Jobber	33%
Two-step distributor	33%
Dealership	33%
Warehouse distributor	0%

Preferred purchasing channel

Auto parts retailer	67%
Jobber	33%
Two-step distributor	0%
Dealership	0%

Primary reason for preferred supplier

Good relationship	33%
Parts availability	33%
Price	33%
Fast delivery	0%

Margins

75% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	100%
6-10%*	0%
11-15%*	0%
16-25%*	0%
More than 25%	0%

What techs think they pay

1-5%*	0%
6-10%*	100%
11-15%*	0%
16-25%*	0%
More than 25%	0%

*Percent over jobber

67% of technicians always give recommendations to their shop owner for buying a specific brand of oxygen sensors.

Amount of oxygen sensors that are returned monthly

None	100%	5-9%	0%
1-2%	0%	10% +	0%
3-4%	0%	I don't know	0%

75% purchase oxygen sensors from a car dealership.

Reasons:

OEM form/fit/function	75%
For OEM brand name	25%
Good relationship	25%

Frequency of supplier contact

Once a week	67%
Every two weeks	33%
Once a month	0%
Every three months	0%
Every six months	0%
Yearly	0%
No contact necessary	0%

Brand vs. supplier loyalty

If a primary supplier of oxygen sensors replaced a brand with another of like quality, a tech would:

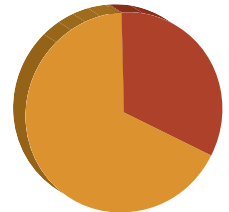
Change suppliers to continue purchasing original brand	0%
Keep primary supplier and purchase new brand	100%

National brands vs. private label purchases

67%
National

0%
Private

33%
Both



Reason for buying a particular oxygen sensor

Quality	75%
Brand	50%
Warranty	25%

Internet ordering frequency

0-10% of the time	75%
11-25% of the time	0%
26-50% of the time	0%
51-75% of the time	25%
76-99% of the time	0%
All the time	0%

Some chart totals exceed 100 percent because respondents could provide multiple answers. Other charts do not reach 100 percent because all answer options are not represented.



SHOCKS & STRUTS

WHAT
TECHS
WANT

Purchasing source

Jobber	67%
Auto parts retailer	64%
Warehouse distributor	44%
Dealership	28%
Internet	14%

Preferred purchasing channel

Jobber	37%
Auto parts retailer	26%
Warehouse distributor	23%
Dealership	9%

Primary reason for preferred supplier

Parts availability	54%
Price	14%
Good relationship	11%
Fast delivery	9%

Margins

84% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	20%
6-10%*	40%
11-15%*	40%
16-25%*	0%
More than 25%	0%

What techs think they pay

1-5%*	11%
6-10%*	19%
11-15%*	37%
16-25%*	22%
More than 25%	11%

*Percent over jobber

49% of technicians always give recommendations to their shop owner for buying a specific brand of shocks & struts.

Amount of shocks & struts that are returned monthly

None	70%	5-9%	0%
1-2%	20%	10% +	3%
3-4%	0%	I don't know	7%

41% purchase shocks & struts from a car dealership.

Reasons:

OEM form/fit/function	54%
Only place available	46%
For OEM brand name	46%

Frequency of supplier contact

Once a week	0%
Every two weeks	3%
Once a month	14%
Every three months	14%
Every six months	3%
Yearly	8%
No contact necessary	58%

Brand vs. supplier loyalty

If a primary supplier of shocks & struts replaced a brand with another of like quality, a tech would:

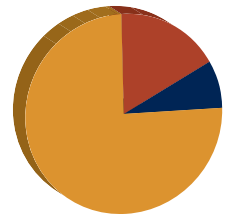
Change suppliers to continue purchasing original brand	43%
Keep primary supplier and purchase new brand	57%

National brands vs. private label purchases

75%
National

8%
Private

17%
Both



Reason for buying particular shocks & struts

Quality	59%
Brand	49%
Warranty	41%

Internet ordering frequency

0-10% of the time	75%
11-25% of the time	6%
26-50% of the time	10%
51-75% of the time	0%
76-99% of the time	0%
All the time	9%

Some chart totals exceed 100 percent because respondents could provide multiple answers. Other charts do not reach 100 percent because all answer options are not represented.

STARTERS & ALTERNATORS



WHAT TECHS WANT

Purchasing source

Auto parts retailer	69%
Jobber	65%
Warehouse distributor	55%
Dealership	31%
Internet	10%

Preferred purchasing channel

Auto parts retailer	38%
Jobber	34%
Warehouse distributor	21%
Dealership	3%

Primary reason for preferred supplier

Parts availability	52%
Good relationship	17%
Fast delivery	14%
Return policy	10%

Margins

86% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	50%
6-10%*	33%
11-15%*	17%
16-25%*	0%
More than 25%	0%

What techs think they pay

1-5%*	12%
6-10%*	17%
11-15%*	38%
16-25%*	21%
More than 25%	12%

*Percent over jobber

50% of technicians always give recommendations to their shop owner for buying a specific brand of starters & alternators.

Amount of starters that are returned monthly

None	43%	5-9%	0%
1-2%	46%	10% +	4%
3-4%	3%	I don't know	4%

63% do not purchase starters from a car dealership.

Reasons:

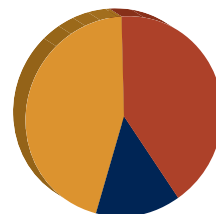
Too expensive	73%
Limited stock/don't stock	41%
Convenience/time limits	41%

National brands vs. private label purchases

45%
National

14%
Private

41%
Both



Reasons for buying a particular starter

Quality	71%
Warranty	65%
Availability	65%

Internet ordering frequency

0-10% of the time	73%
11-25% of the time	7%
26-50% of the time	7%
51-75% of the time	3%
76-99% of the time	0%
All the time	10%

Some chart totals exceed 100 percent because respondents could provide multiple answers. Other charts do not reach 100 percent because all answer options are not represented.

Frequency of supplier contact

Once a week	0%
Every two weeks	0%
Once a month	10%
Every three months	10%
Every six months	13%
Yearly	10%
No contact necessary	57%

Brand vs. supplier loyalty

If a primary supplier of starters & alternators replaced a brand with another of like quality, a tech would:

Change suppliers to continue purchasing original brand	43%
Keep primary supplier and purchase new brand	57%



WATER PUMPS

WHAT
TECHS
WANT

Purchasing source

Auto parts retailer	70%
Jobber	59%
Warehouse distributor	48%
Dealership	30%
Internet	22%

Preferred purchasing channel

Auto parts retailer	39%
Jobber	39%
Warehouse distributor	14%
Internet	4%

Primary reason for preferred supplier

Parts availability	50%
Fast delivery	18%
Carries specific brands	14%
Price	11%

Margins

85% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	50%
6-10%*	25%
11-15%*	25%
16-25%*	0%
More than 25%	0%

What techs think they pay

1-5%*	5%
6-10%*	32%
11-15%*	32%
16-25%*	18%
More than 25%	13%

*Percent over jobber

58% of technicians always give recommendations to their shop owner for buying a specific brand of water pump.

Amount of water pumps that are returned monthly

None	64%	5-9%	0%
1-2%	36%	10% +	0%
3-4%	0%	I don't know	0%

48% purchase water pumps from a car dealership.

Reasons:

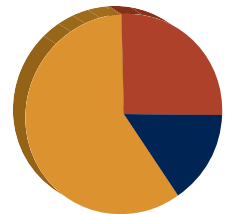
OEM form/fit/function	62%
Only place available	54%
Warranty	31%

National brands vs. private label purchases

59%
National

15%
Private

26%
Both



Reason for buying a particular water pump

Quality	72%
Availability	66%
Warranty	62%

Internet ordering frequency

0-10% of the time	78%
11-25% of the time	4%
26-50% of the time	7%
51-75% of the time	0%
76-99% of the time	0%
All the time	11%

Frequency of supplier contact

Once a week	0%
Every two weeks	0%
Once a month	11%
Every three months	7%
Every six months	4%
Yearly	14%
No contact necessary	64%

Brand vs. supplier loyalty

If a primary supplier of water pumps replaced a brand with another of like quality, a tech would:

Change suppliers to continue purchasing original brand	21%
Keep primary supplier and purchase new brand	79%

Some chart totals exceed 100 percent because respondents could provide multiple answers. Other charts do not reach 100 percent because all answer options are not represented.

WHEEL BEARINGS



WHAT TECHS WANT

Purchasing source

Auto parts retailer	68%
Jobber	48%
Warehouse distributor	40%
Dealership	40%
Internet	16%

Preferred purchasing channel

Auto parts retailer	38%
Jobber	27%
Warehouse distributor	19%
Dealership	8%

Primary reason for preferred supplier

Parts availability	50%
Price	19%
Carries specific brand	12%
Fast delivery	12%

Margins

87% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	25%
6-10%*	0%
11-15%*	0%
16-25%*	50%
More than 25%	25%

What techs think they pay

1-5%*	10%
6-10%*	20%
11-15%*	35%
16-25%*	20%
More than 25%	15%

*Percent over jobber

67% of technicians always give recommendations to their shop owner for buying a specific brand of wheel bearings.

Amount of wheel bearings that are returned monthly

None	62%	5-9%	10%
1-2%	24%	10% +	0%
3-4%	0%	I don't know	4%

48% purchase wheel bearings from a car dealership.

Reasons:

Only place available	82%
OEM form/fit/function	55%
Easy to work with	27%

Frequency of supplier contact

Once a week	4%
Every two weeks	0%
Once a month	8%
Every three months	8%
Every six months	0%
Yearly	15%
No contact necessary	65%

Brand vs. supplier loyalty

If a primary supplier of wheel bearings replaced a brand with another of like quality, a tech would:

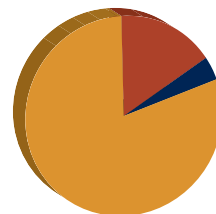
Change suppliers to continue purchasing original brand	36%
Keep primary supplier and purchase new brand	64%

National brands vs. private label purchases

80%
National

4%
Private

16%
Both



Reason for buying a particular wheel bearing

Brand	63%
Quality	63%
Availability	56%

Internet ordering frequency

0-10% of the time	74%
11-25% of the time	0%
26-50% of the time	4%
51-75% of the time	9%
76-99% of the time	0%
All the time	13%

Some chart totals exceed 100 percent because respondents could provide multiple answers. Other charts do not reach 100 percent because all answer options are not represented.



WIPERS

WHAT
TECHS
WANT

Purchasing source

Warehouse distributor	67%
Auto parts retailer	67%
Dealership	33%
Jobber	17%
Internet	17%

Preferred purchasing channel

Warehouse distributor	50%
Auto parts retailer	50%
Dealership	0%
Jobber	0%

Primary reason for preferred supplier

Carries specific brand	33%
Parts availability	33%
Good relationship	17%
Fast delivery	17%

Margins

80% of technicians report they DO NOT know how much over the jobber they pay.

What techs know they pay

1-5%*	0%
6-10%*	100%
11-15%*	0%
16-25%*	0%
More than 25%	0%

What techs think they pay

1-5%*	33%
6-10%*	0%
11-15%*	34%
16-25%*	0%
More than 25%	33%

*Percent over jobber

50% of technicians always give recommendations to their shop owner for buying a specific brand of wipers.

Amount of wipers that are returned monthly

None	80%	5-9%	0%
1-2%	20%	10% +	0%
3-4%	0%	I don't know	0%

67% do not purchase wipers from a car dealership.

Reasons:

Too expensive	75%
Limited stock/don't stock	50%
Difficult to work with	25%

Frequency of supplier contact

Once a week	0%
Every two weeks	0%
Once a month	33%
Every three months	17%
Every six months	17%
Yearly	17%
No contact necessary	16%

Brand vs. supplier loyalty

If a primary supplier of wipers replaced a brand with another of like quality, a tech would:

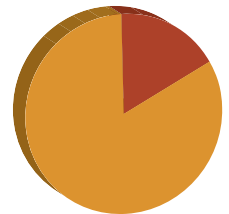
Change suppliers to continue purchasing original brand	33%
Keep primary supplier and purchase new brand	67%

National brands vs. private label purchases

83%
National

0%
Private

17%
Both



Reason for buying a particular wiper

Brand	67%
Availability	67%
Quality	67%

Internet ordering frequency

0-10% of the time	50%
11-25% of the time	17%
26-50% of the time	0%
51-75% of the time	0%
76-99% of the time	33%
All the time	0%

Some chart totals exceed 100 percent because respondents could provide multiple answers. Other charts do not reach 100 percent because all answer options are not represented.



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