

EXECUTIVE SUMMARY
AUTOMOTIVE SALES
SYSTEMS STUDY
CHINA 2009

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OBJECTIVE AND SCOPE

The Automotive Sales Systems Study China 2009 investigates the current status and the requirements of Chinese dealerships concerning their sales tools and systems. In depth interviews provide an overview of what elements would be present in an ideal Point of Sale software system for the Chinese market and how web based information and workflow management could support the sales processes of car dealerships in China more efficiently.

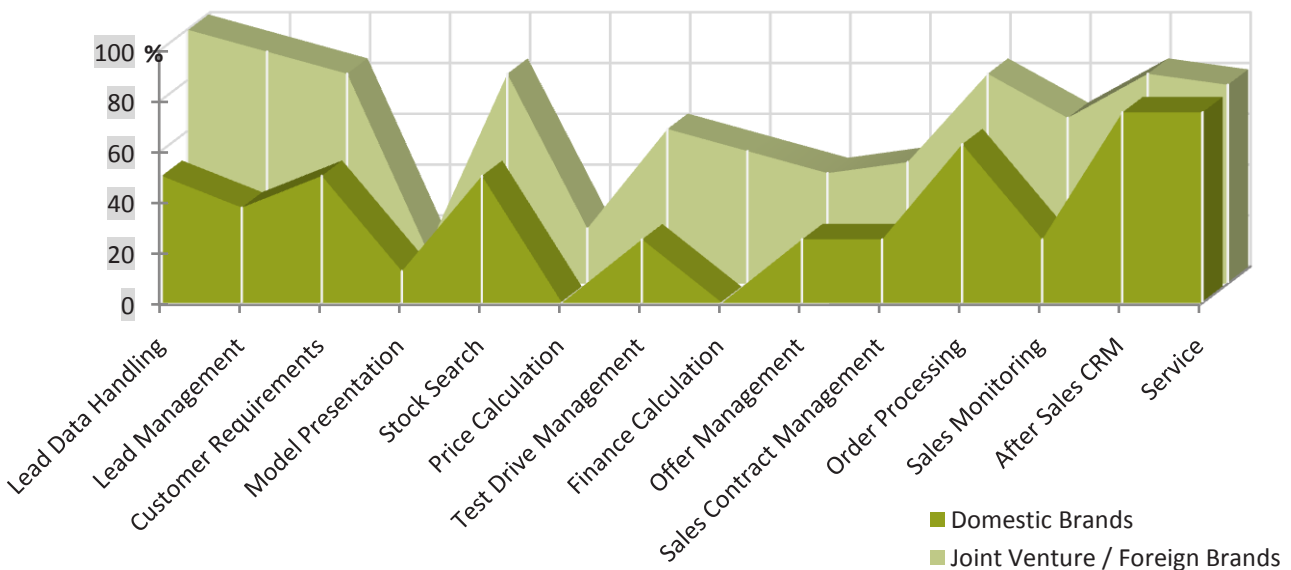
KEY FINDINGS

The survey shows that software solutions for supporting lead management, after sales and other point-of-sale processes are not a matter of course in the Chinese market. Integrated applications are seldom available, and the discontinuities between the interfaces of

individual stand-alone solutions are simply accepted. Dealers affiliated with Chinese manufacturers show a pent-up demand for sales systems: only slightly more than 40 percent of them are able to manage the personal data and vehicle preferences of their leads using professional systems. Less than 10 percent have the option of using a computer to visually present models and model versions to their customers.

Sales managers have an especially strong interest in improved sales support. In the study, more than 70 percent replied that they could significantly improve their sales processes and increase their sales by using electronic point of sales systems. These types of solution generate high expectations, since they hope to use them to increase the level of standardization

Existing IT Support for the Sales Process

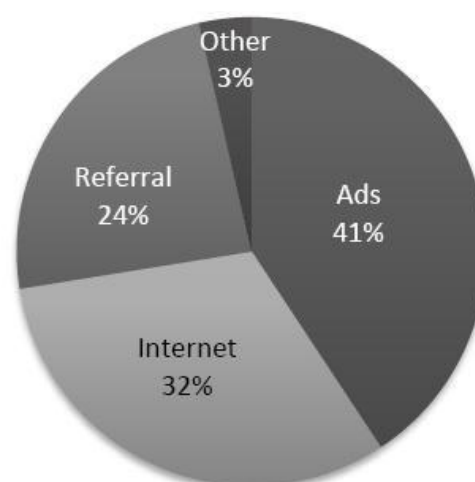


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in the sales talks made by inexperienced salespeople. Dealers also view the current lack of IT support so critically because Chinese consumers have a great affinity to the Internet and place a great deal of trust in professional IT systems. Individual manufacturers such as Toyota have already realized this and have started to provide their dealers with uniform lead and sales systems.

In conclusion, this survey sees the landscape of POS systems in Chinese dealerships as harboring great potential for improvement of the automotive sales process in China. This is in particular true for Chinese OEMs. If they continue their growth and international expansion they will provide more and better POS IT support for their dealerships.

Attracting Customers

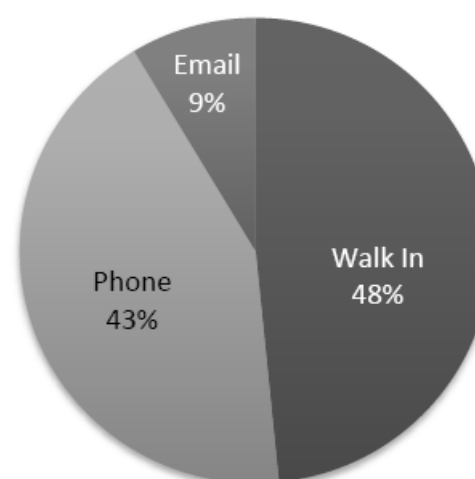


Source: Dealers' Estimates

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First Contact with Dealers



Source: Dealers' Estimates

CONTACT US!

BIG PICTURE GmbH is an internationally oriented consulting firm specializing in online solutions for the automobile industry. The company focuses on analysis, consulting and the design of web-based point-of-sale systems and dealer and brand web sites.

For additional questions and to order the complete study please refer to

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