National Automobile Dealers Association

2007 Bi-Annual Survey of Dealership Satisfaction with Dealer System Providers' Products and Services

Market Research Study

September 2007

FRIEDMAN-SWIFT ASSOCIATES

NADA — NATIONAL AUTOMOBILE DEALERS ASSOCIATION ®

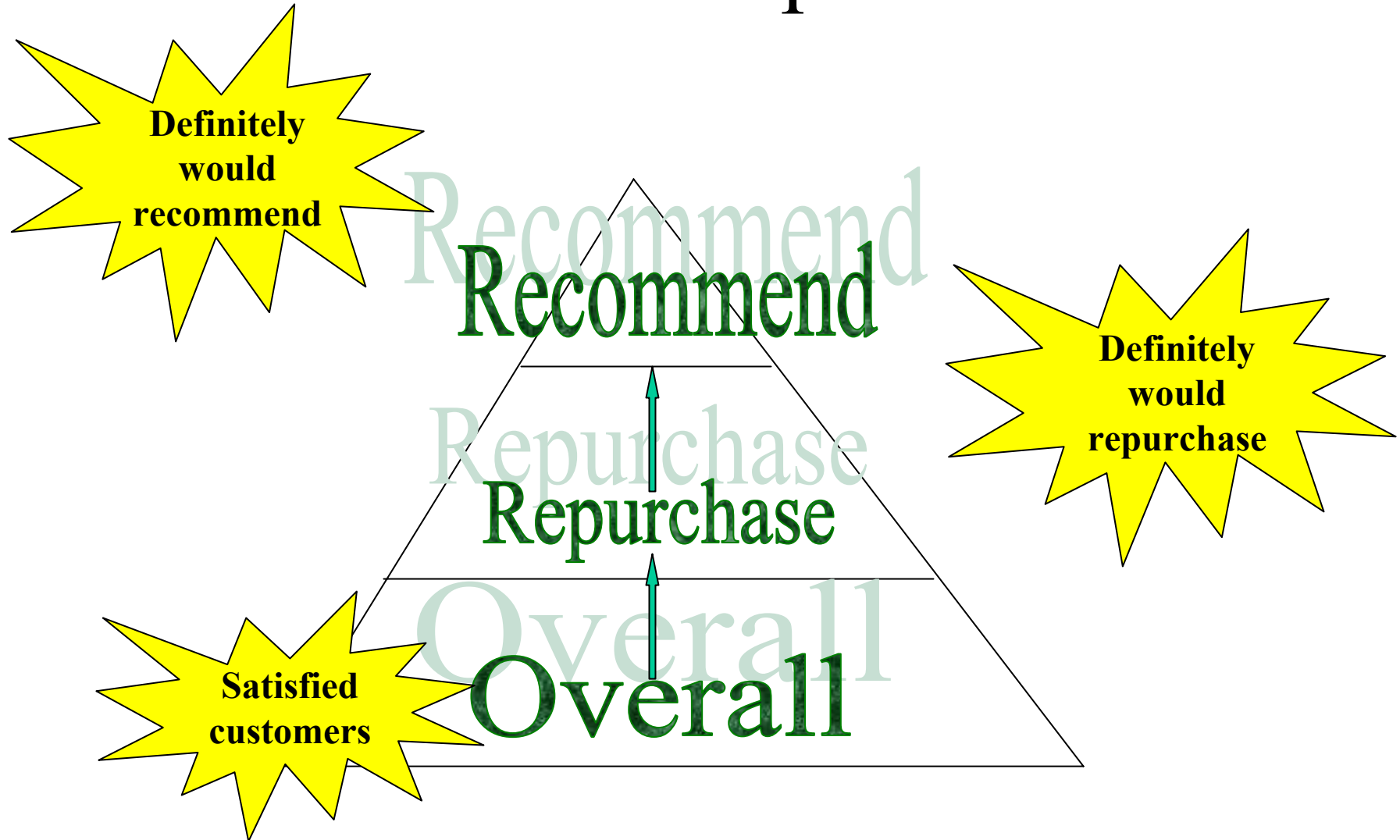# National Automobile Dealers Association

I.   Overall Dealership Satisfaction

II.   DSP Customer Service Satisfaction

III.   System Functionality

IV.   Vendor Training and Education

V.   Additional Survey Findings

Introduction and Study Methodology

- 995 telephone surveys were completed by Friedman-Swift Associates from June 2007 to July 2007.

- Dealerships included in this study have used their current DSP vendor for at least one year.

- Dealership personnel interviewed have personally used their current DSP vendor for at least 6 months.

- Infiniti and Saturn dealerships were excluded from the study since these dealers do not choose their DSP.

- DSP vendors active in the U.S. market that were below the survey threshold for number of customers included: DPC, Jarvis, NeoSynergy, PBS and Quorum.

- Maximum margin of error:
  - Total sample is plus or minus 3%
  - Per dealership management group is plus or minus 6%
  - Per individual vendor is plus or minus 7%

- The following dealership positions were interviewed and grouped accordingly:
  - Dealers/General Managers (GM)
  - General Sales Managers/New Car Sales Managers
  - Office Managers (OM)/Controllers
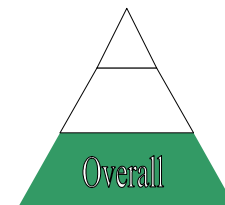 - Parts Managers
  - Service Managers

I. Overall Dealership Satisfaction

Overall Dealership Satisfaction

Recommend

Definitely would recommend

Definitely would repurchase

Repurchase

Satisfied customers

Overall

Overall Dealership Satisfaction

All Dealership Positions surveyed

How satisfied are you overall with the products and services received from *(your DSP vendor)*?

GOAL = 90% Satisfaction

Legend:
- ■ **Very & Somewhat Satisfied** (blue)
- ■ **Neither** (gray)
- ■ **Very & Somewhat Dissatisfied** (red)

Year	Very & Somewhat Satisfied	Neither	Very & Somewhat Dissatisfied
2001	71%	18%	10%
2003	82%	10%	7%
2005	78%	13%	8%
2007	79%	14%	7%

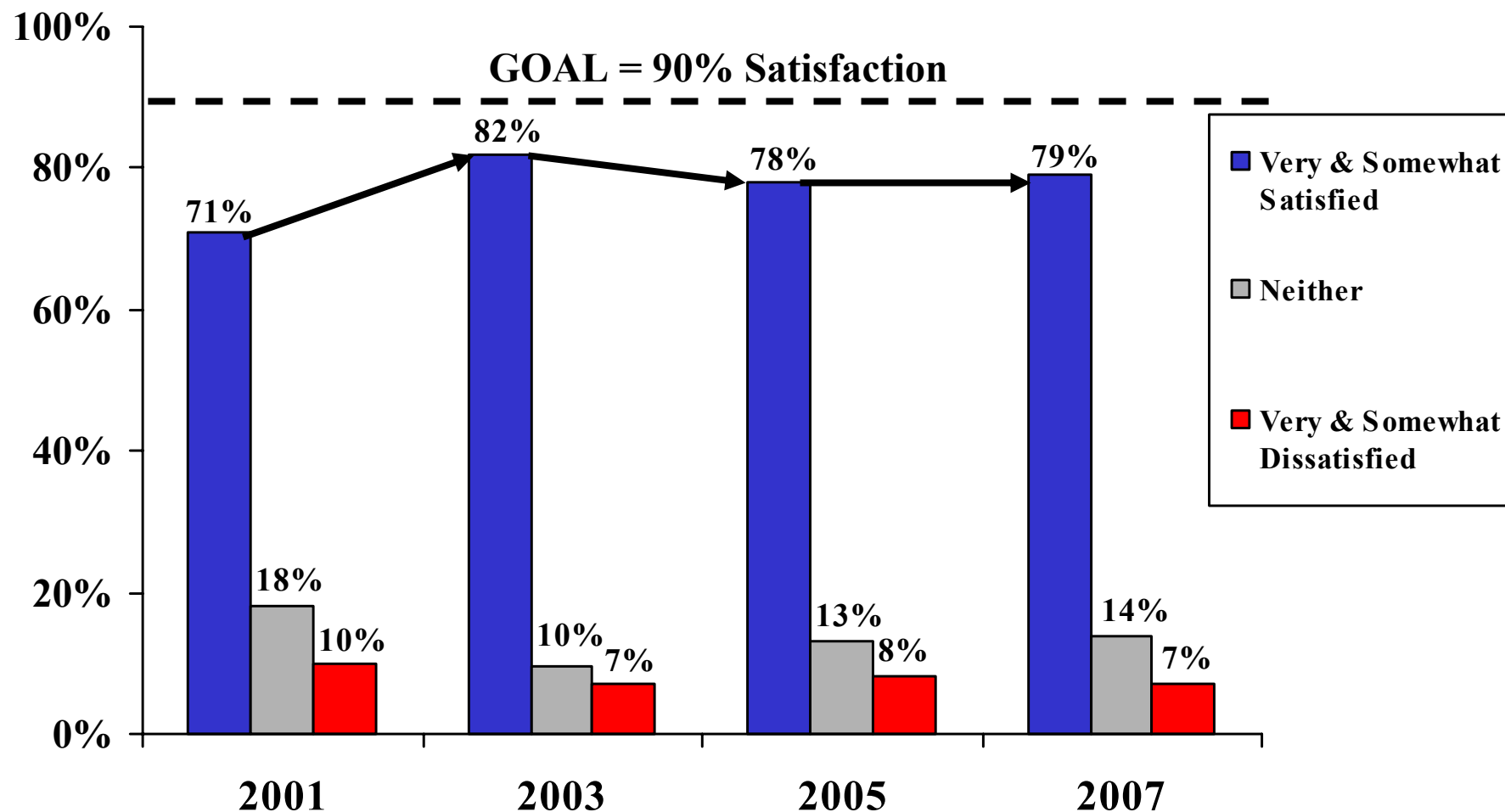2007 Weighted Base = 995
2007 Actual Base = 995

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Q.28

Overall Dealership Satisfaction
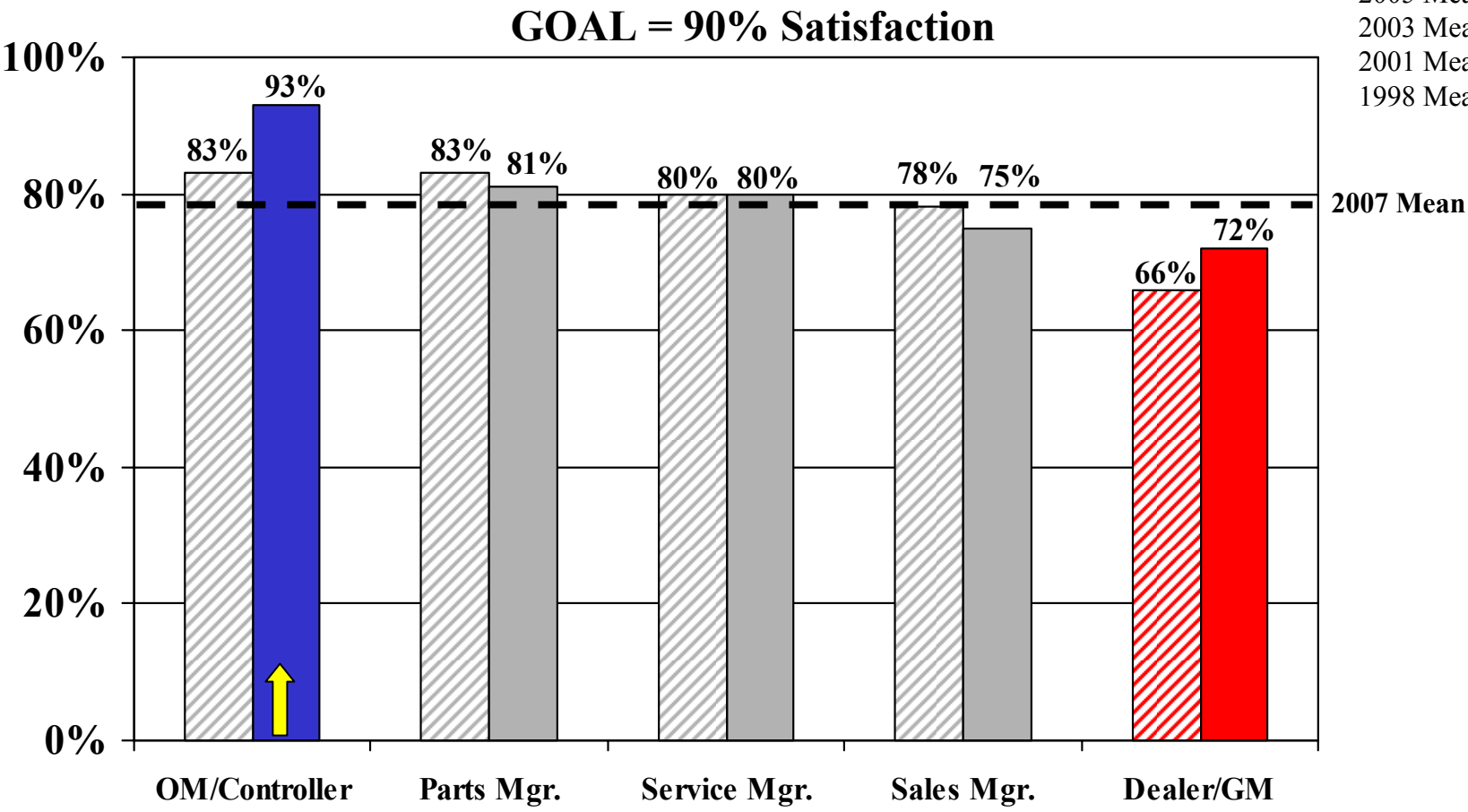
All Dealership Positions surveyed

How satisfied are you overall with the products and services received from *(your DSP vendor)*?

Overall

■ Greater than mean ■ Equivalent to mean ■ Less than mean

▨ Stripes = 2005 Data   ■ Solids = 2007 Data

2007 Mean = 79%
2005 Mean = 78%
2003 Mean = 82%
2001 Mean = 71%
1998 Mean = 66%

GOAL = 90% Satisfaction

	OM/Controller	Parts Mgr.	Service Mgr.	Sales Mgr.	Dealer/GM
2005	83%	83%	80%	78%	66%
2007	93%	81%	80%	75%	72%

2007 Mean (dashed line)

Percentages represent very satisfied and somewhat satisfied ratings

7

Q.28

How satisfied are you overall with the products and services received from *(your DSP vendor)*?

Overall

| ■ Greater than mean | ■ Equivalent to mean | ■ Less than mean |

▨ Stripes = 2005 Data   ■ Solids = 2007 Data

GOAL = 90% Satisfaction

2007 Mean = 79%
2005 Mean = 78%
2003 Mean = 82%
2001 Mean = 71%
1998 Mean = 66%

2007 Mean

Bar chart values:

- **ACS**: 74% (2005), 90% (2007) — upward arrow
- **AutoSoft**: 85% (2005), 86% (2007)
- **Auto/Mate**: 87% (2005), 79% (2007) — downward arrow
- **R&R**: 85% (2005), 79% (2007)
- **ADP**: 74% (2005), 78% (2007)
- **Arkona**: 82% (2005), 74% (2007) — downward arrow
- **ADAM**: 75% (2005), 73% (2007)

Percentages represent very satisfied and somewhat satisfied ratings

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Q.28
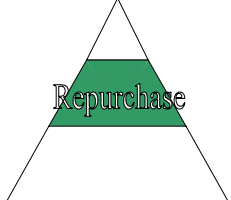
Overall Dealership Satisfaction

Off. Mgr./Controller, Sales Mgr., Service Mgr., Parts Mgr. surveyed

Repurchase

If you could choose which DSP vendor your dealership used, would you switch from *(your DSP vendor)* to another vendor?
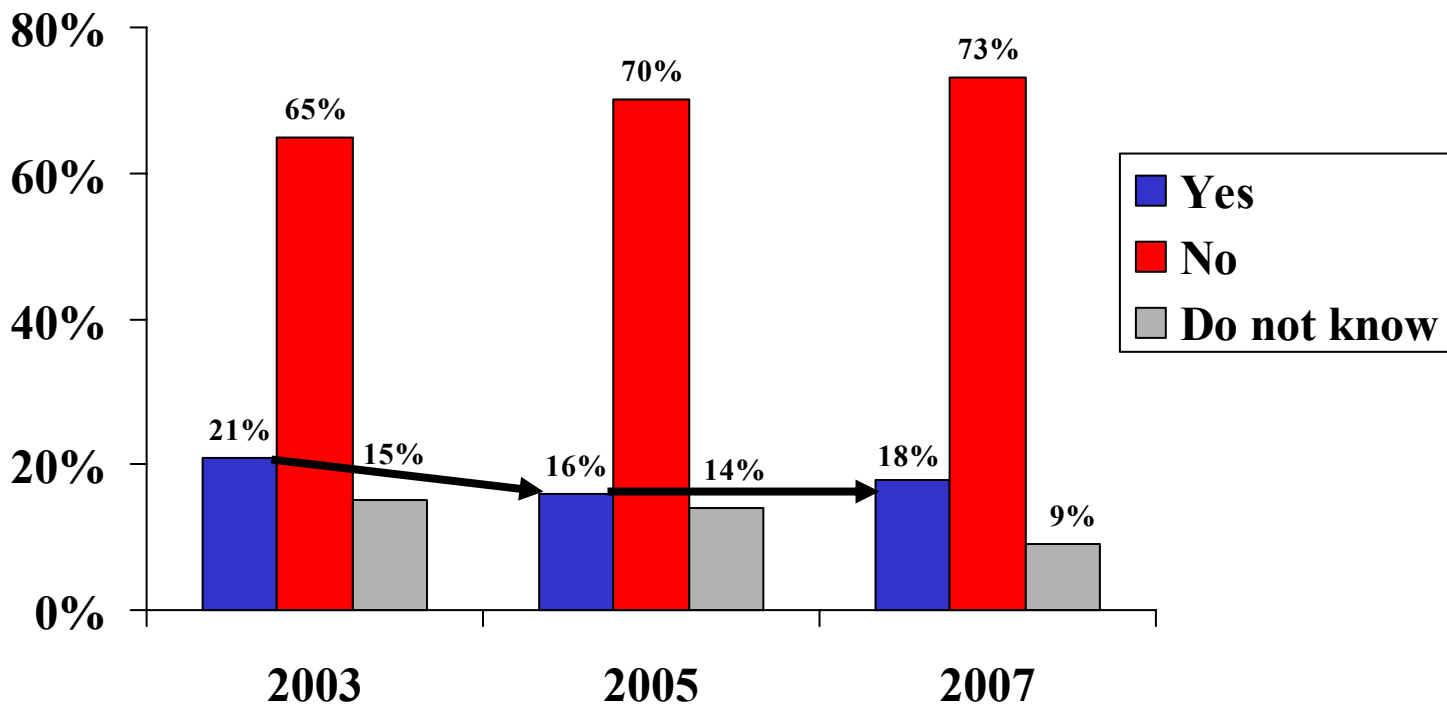
25% of 2007 Dealer/GMs surveyed plan on switching vendors when their contract is up, while 13% are undecided

2007 Weighted Base = 778
2007 Actual Base = 796

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Q.25

Overall Dealership Satisfaction

Dealer/GM surveyed

Repurchase
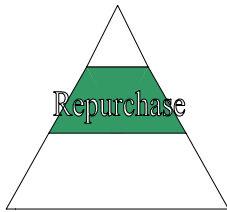
When your contract is up, do you plan to switch from *(your DSP vendor)*?

Legend:
- **Yes** (blue)
- **No** (red)
- **Do not know** (gray)

Year	Yes	No	Do not know
2001	18%	51%	31%
2003	14%	53%	31%
2005	16%	58%	22%
2007	25%	60%	13%

Q.7

Overall Dealership Satisfaction

All Dealership Positions surveyed

Would you be very likely, somewhat likely or not at all likely to recommend *(your DSP vendor)* to another dealership?

Recommend

GOAL = 90% Satisfaction

Legend:
- **Very Likely** (blue)
- **Somewhat Likely** (hatched)
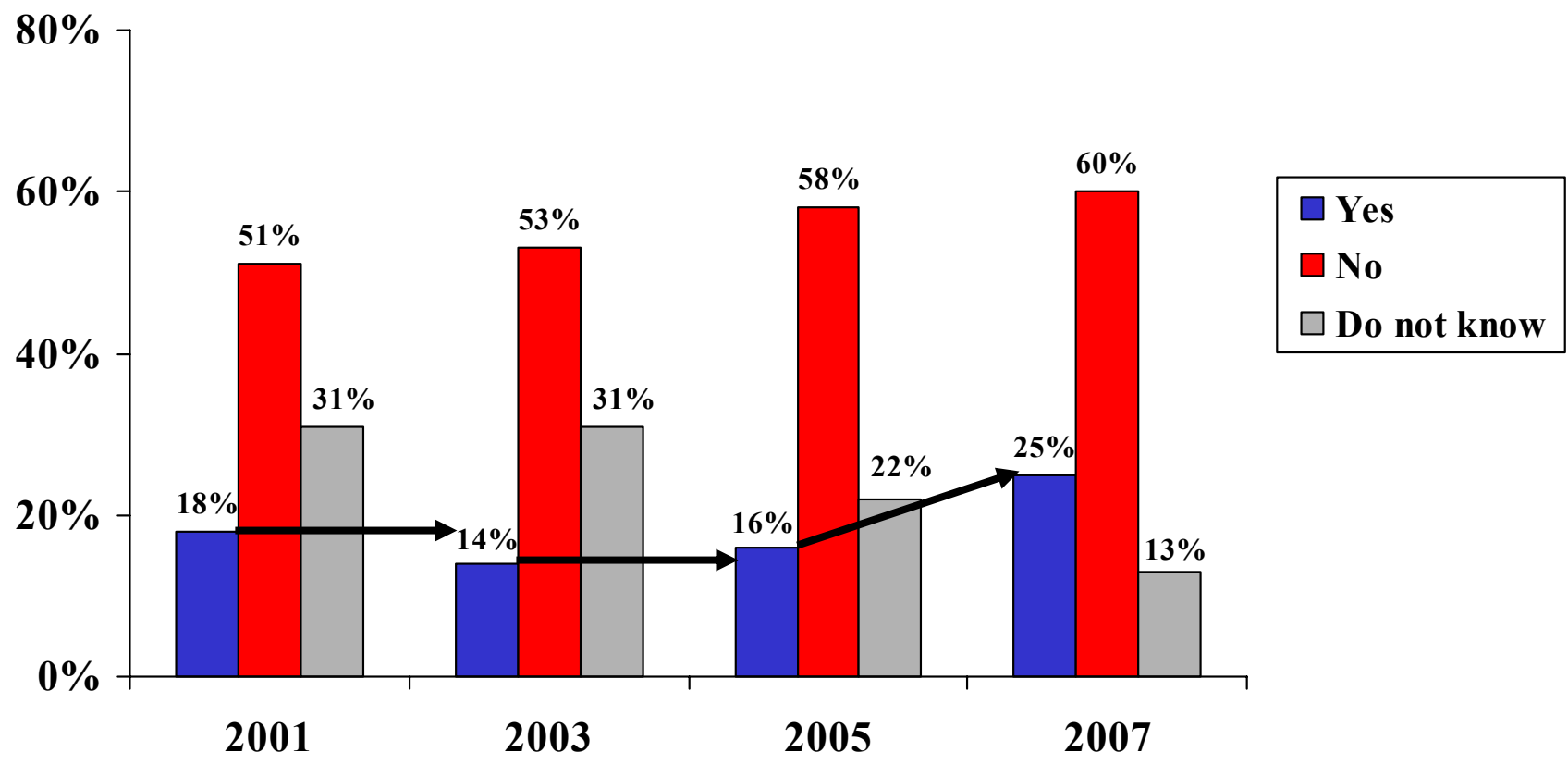- **Not at all Likely** (red)
- **Do not know** (gray)

Year	Very Likely	Somewhat Likely	Not at all Likely	Do not know
2001	54%	31%	14%	0%
2003	55%	28%	13%	3%
2005	64%	21%	11%	3%
2007	55%	30%	14%	2%

2007 Weighted Base = 995
2007 Actual Base = 995

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Q.29

Overall Dealership Satisfaction

All Dealership Positions surveyed

Would you be very likely, somewhat likely or not at all likely to recommend *(your DSP vendor)* to another dealership?

| ■ Greater than mean | ■ Equivalent to mean | ■ Less than mean |

▨ Stripes = 2005 Data   ■ Solids = 2007 Data

2007 Mean = 55%
2005 Mean = 64%
2003 Mean = 55%
2001 Mean = 54%

GOAL = 90% Satisfaction

Chart data:
- OM/Controller: 69% (2005), 75% (2007)
- Service Mgr.: 60% (2005), 67% (2007)
- Parts Mgr.: 71% (2005), 50% (2007)
- Sales Mgr.: 68% (2005), 50% (2007)
- Dealer/GM: 48% (2005), 42% (2007)

2007 Mean (dashed line)

Percentages represent very likely responses

2007 Weighted Base = 995
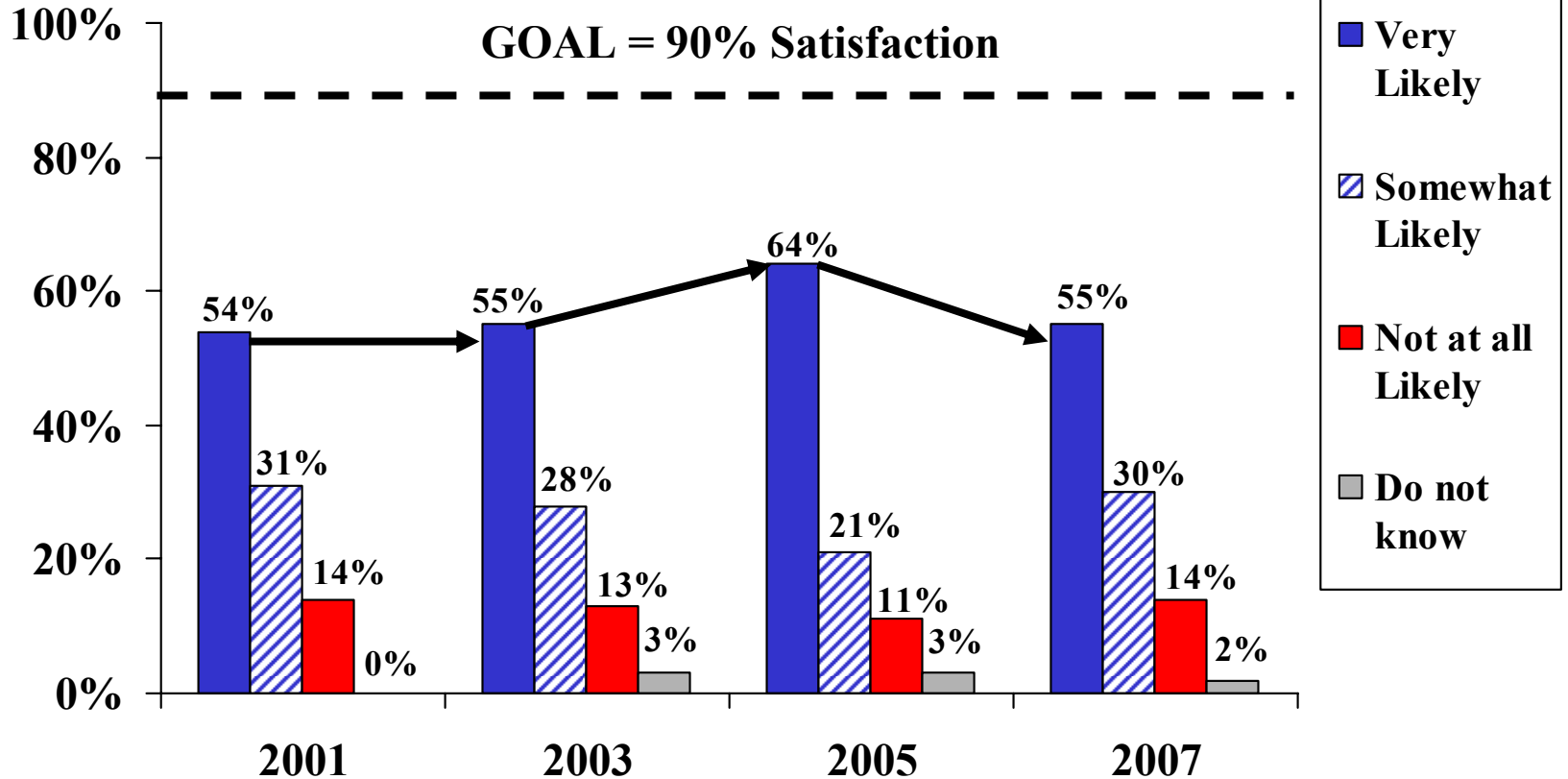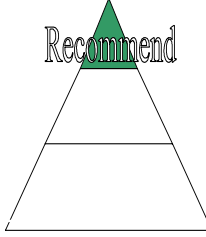2007 Actual Base = 995

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Q.29

Likelihood of Recommending
Overall Dealership Satisfaction
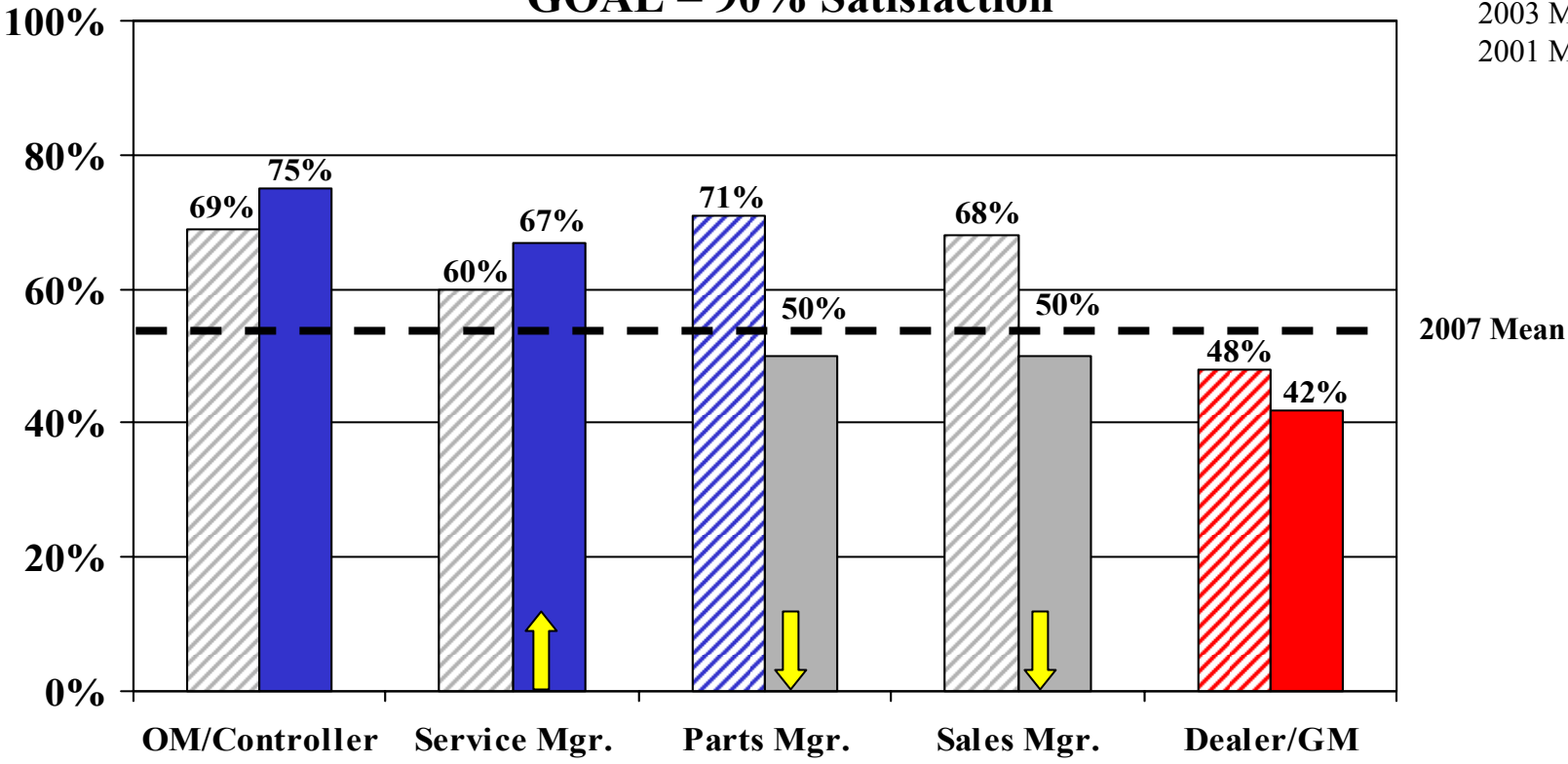All Dealership Positions surveyed

Would you be very likely, somewhat likely or not at all likely to recommend *(your DSP vendor)* to another dealership?

■ Greater than mean　　　■ Equivalent to mean　　　■ Less than mean

▨ Stripes = 2005 Data　　　■ Solids = 2007 Data

2007 Mean = 55%
2005 Mean = 64%
2003 Mean = 55%
2001 Mean = 54%

GOAL = 90% Satisfaction

Chart data (percentages represent very likely responses):

Vendor	2005 Data	2007 Data
AutoSoft	82%	74%
ACS	64%	66%
Auto/Mate	76%	65%
Arkona	71%	59%
R&R	68%	56%
ADAM	67%	52%
ADP	61%	50%

2007 Mean (dashed line)

Percentages represent very likely responses

2007 Weighted Base = 995
2007 Actual Base = 995

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Q.29
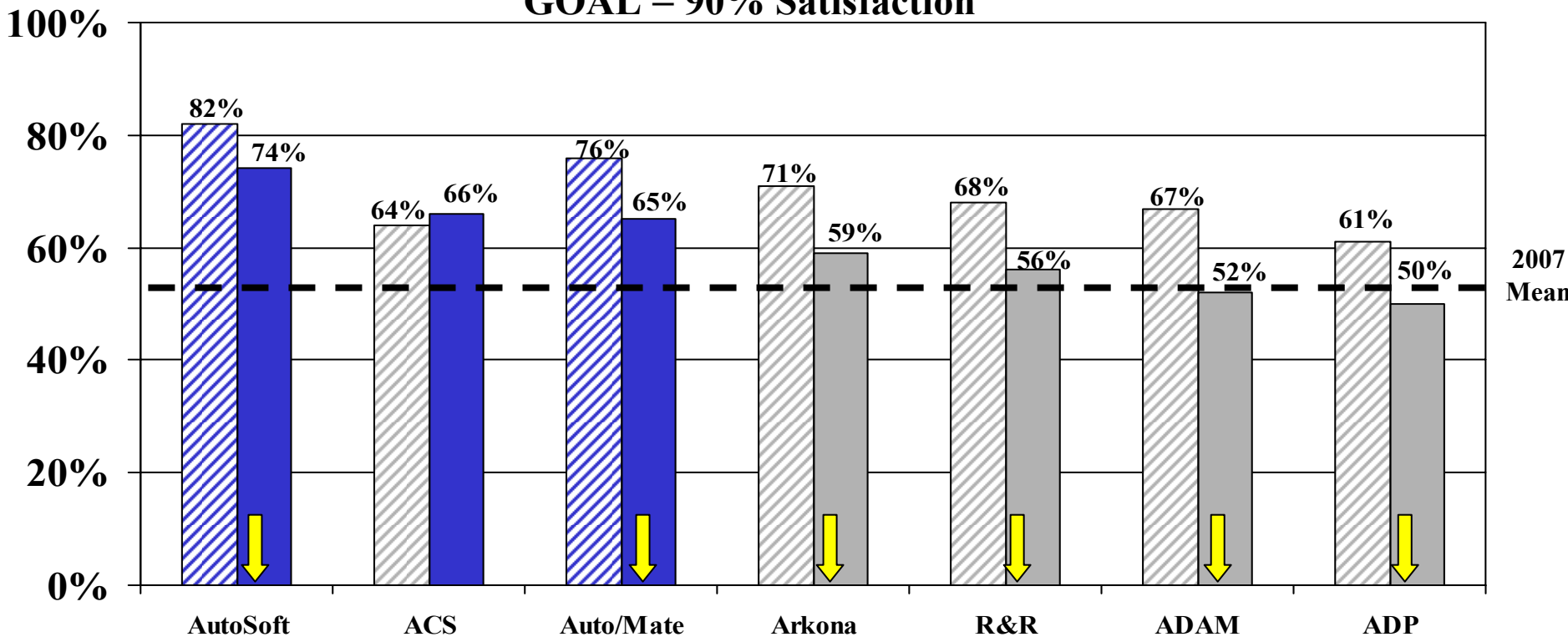
2007 Key Drivers of Dealership Satisfaction

Correlation (r value) to overall dealership satisfaction

Customer Service   .75
  - ➤ Satisfaction with overall customer service
  - ➤ Problems and concerns being fixed correctly the first time

System Functionality .72
  - ➤ Flexibility of system software to adapt to your business needs
  - ➤ Ability to customize the software

Training   .50
  - ➤ Effectiveness of technical training
  - ➤ Effectiveness of technical training compared to all costs associated with training

What do you like best about *(your DSP vendor)* system?

■ Better than mean	■ Equivalent to mean	■ Worse than mean

	Mean	ACS	ADAM	ADP	Arkona	Auto/ Mate	Auto Soft	R&R
User friendly/simple to use	38%	46%	38%	37%	40%	35%	47%	39%
Nothing in particular	17%	7%	15%	21%	8%	10%	6%	15%

2007 Respondents

2007 Weighted Base = 995
2007 Actual Base = 995

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Q.1
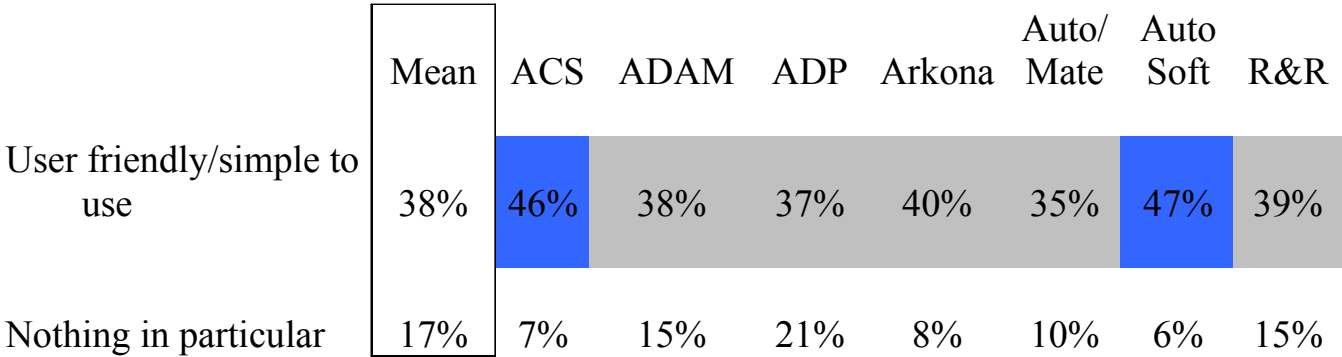
Overall Dealership Satisfaction

All Dealership Positions surveyed

What do you like least about *(your DSP vendor)* system?

■ Better than mean	■ Equivalent to mean	■ Worse than mean

	Mean	ACS	ADAM	ADP	Arkona	Auto/ Mate	Auto Soft	R&R
Too expensive/not cost effective	9%	0%	2%	6%	2%	0%	1%	15%
Difficult to navigate	7%	4%	4%	7%	4%	5%	1%	8%
Not user friendly	6%	4%	8%	8%	6%	4%	5%	5%
Poor customer/technical service	5%	4%	7%	8%	8%	8%	4%	3%
Slow system	5%	3%	3%	7%	4%	0%	1%	4%
Inadequate report generator	5%	5%	7%	5%	6%	4%	5%	4%
Nothing in particular	32%	43%	30%	30%	27%	44%	42%	31%

2007 Respondents

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Q.1

Overall Dealership Satisfaction

All Dealership Positions surveyed

Aside from price, what makes one dealer system provider better than another?

	Mean	ACS	ADAM	ADP	Arkona	Auto/ Mate	Auto Soft	R&R
User friendly/simple to use	30%	30%	36%	31%	42%	31%	35%	28%
Customer/technical support service	24%	34%	20%	22%	23%	33%	22%	27%
Nothing in particular	9%	10%	12%	9%	7%	13%	10%	9%

2007 Respondents

2007 Weighted Base = 995
2007 Actual Base = 995

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Q.2
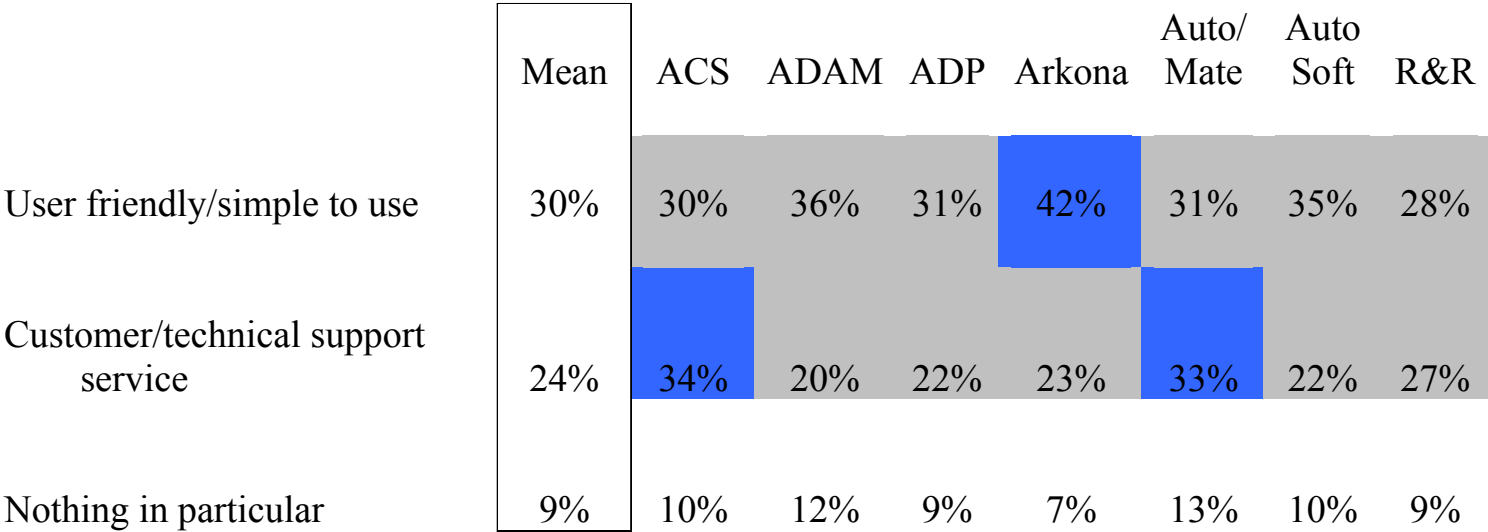
II. DSP Customer Service Satisfaction

DSP Customer Service Satisfaction

All Dealership Positions surveyed

Overall, how satisfied are you with *(your DSP vendor's)* customer service department?

Legend:
- **Very & Somewhat Satisfied**
- **Neither**
- **Very & Somewhat Dissatisfied**

Year	Very & Somewhat Satisfied	Neither	Very & Somewhat Dissatisfied
2001	76%	16%	8%
2003	80%	10%	7%
2005	76%	13%	8%
2007	79%	13%	6%

2007 Weighted Base = 995
2007 Actual Base = 995

Q.13f

DSP Customer Service Satisfaction

All Dealership Positions surveyed

Overall, how satisfied are you with *(your DSP vendor's)* customer service department?

Legend:
- 🟦 Greater than mean
- ⬜ Equivalent to mean
- 🟥 Less than mean
- ▨ Stripes = 2005 Data
- ⬛ Solids = 2007 Data

2007 Mean = 79%
2005 Mean = 76%
2003 Mean = 80%
2001 Mean = 76%

2007 Mean

Chart data:

Position	2005	2007
OM/Controller	80%	93%
Parts Mgr.	87%	84%
Service Mgr.	78%	79%
Sales Mgr.	65%	74%
Dealer/GM	72%	71%

Percentages represent very satisfied and somewhat satisfied ratings

2007 Weighted Base = 995
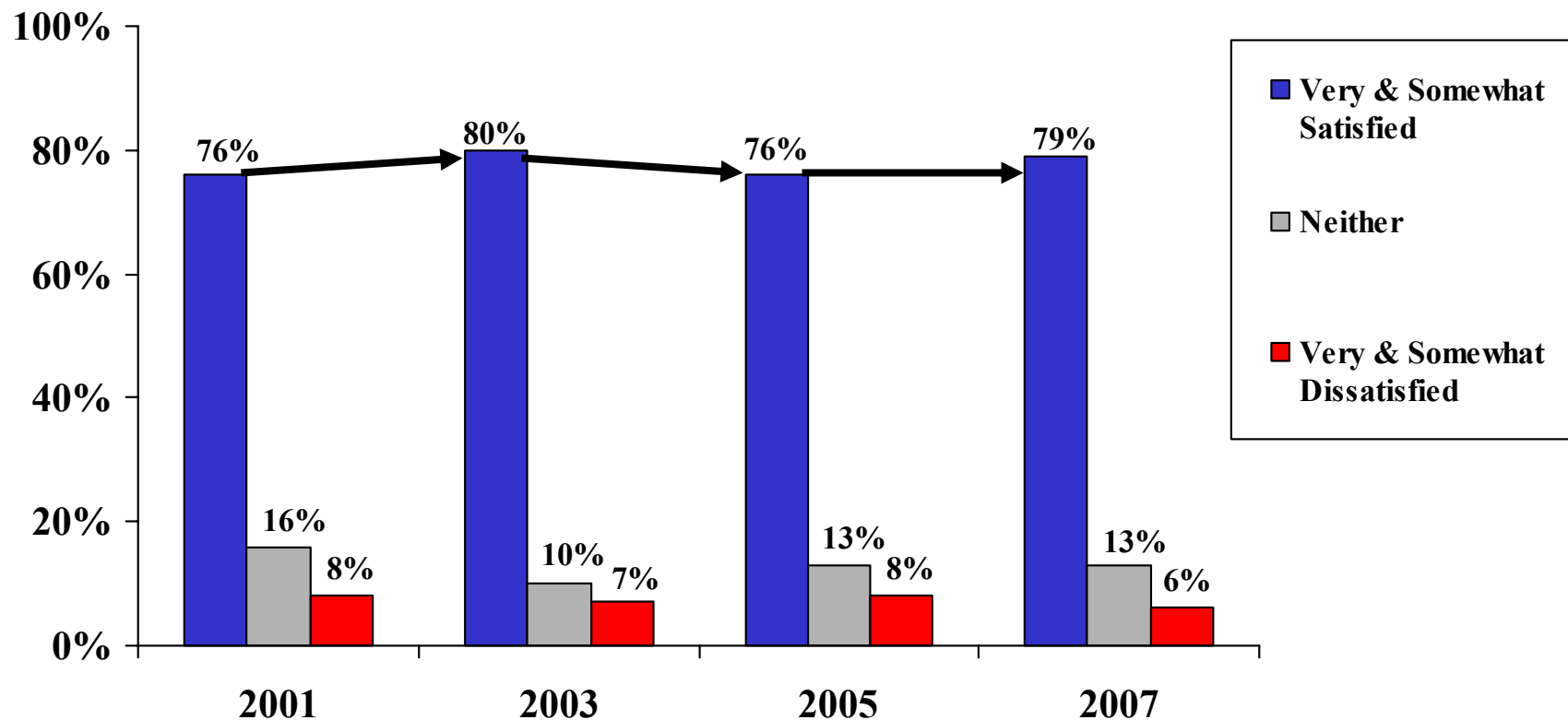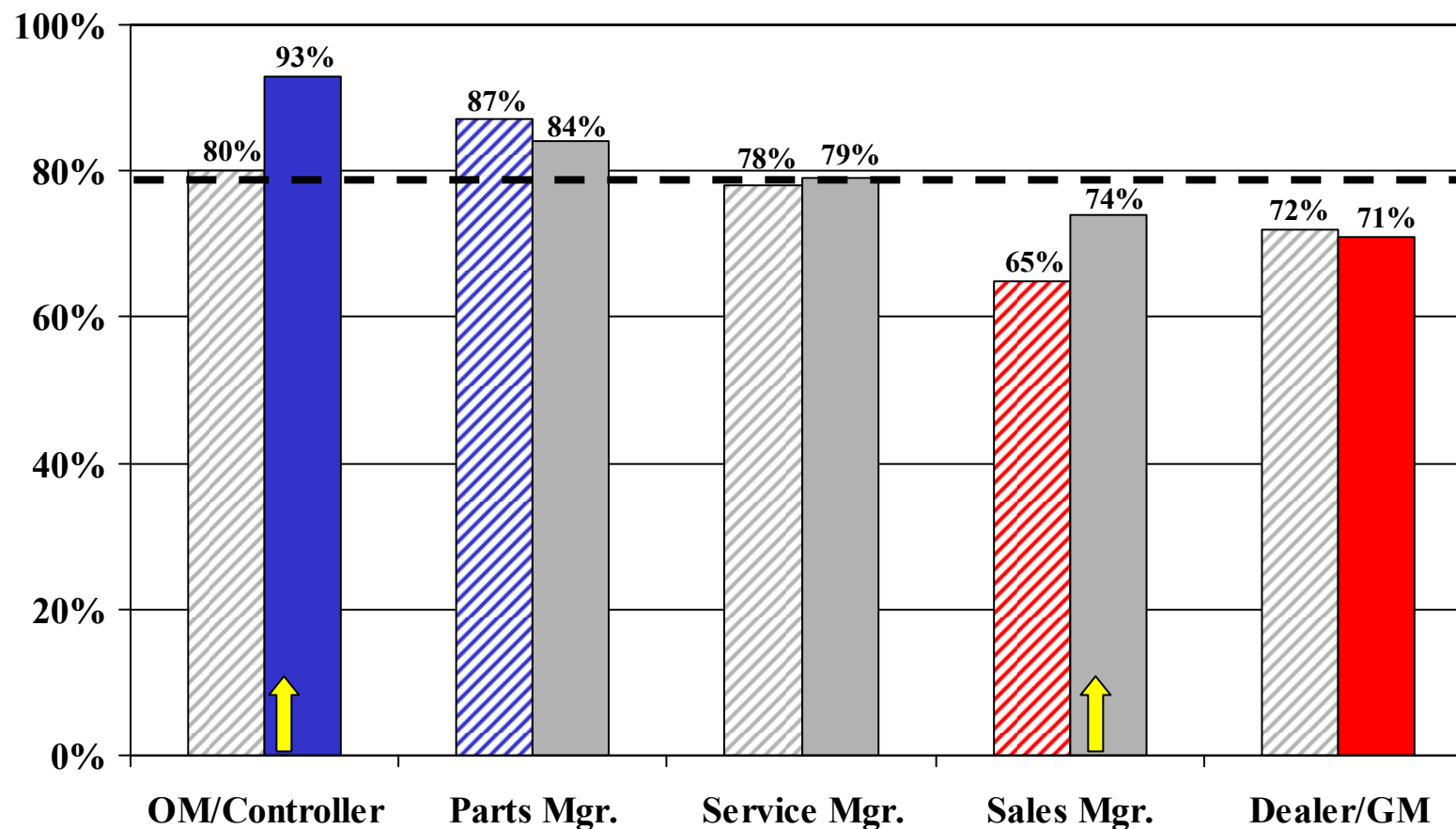2007 Actual Base = 995

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Q.13f

DSP Customer Service Satisfaction

All Dealership Positions surveyed

Overall, how satisfied are you with *(your DSP vendor's)* customer service department?

■ Greater than mean   ■ Equivalent to mean   ■ Less than mean

▨ Stripes = 2005 Data   ■ Solids = 2007 Data

2007 Mean = 79%
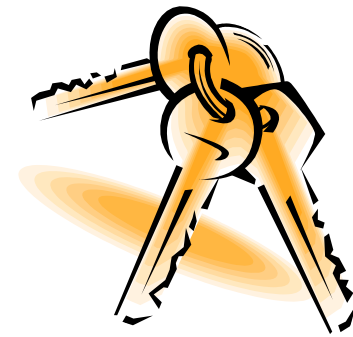2005 Mean = 76%
2003 Mean = 80%
2001 Mean = 76%

2007 Mean

Chart data (AutoSoft, Auto/Mate, ACS, R&R, Arkona, ADP, ADAM):
- AutoSoft: 87%, 90%
- Auto/Mate: 90%, 85%
- ACS: 75%, 82%
- R&R: 79%, 81%
- Arkona: 81%, 78%
- ADP: 72%, 76%
- ADAM: 79%, 71%

Percentages represent very satisfied and somewhat satisfied ratings

2007 Weighted Base = 995
2007 Actual Base = 995

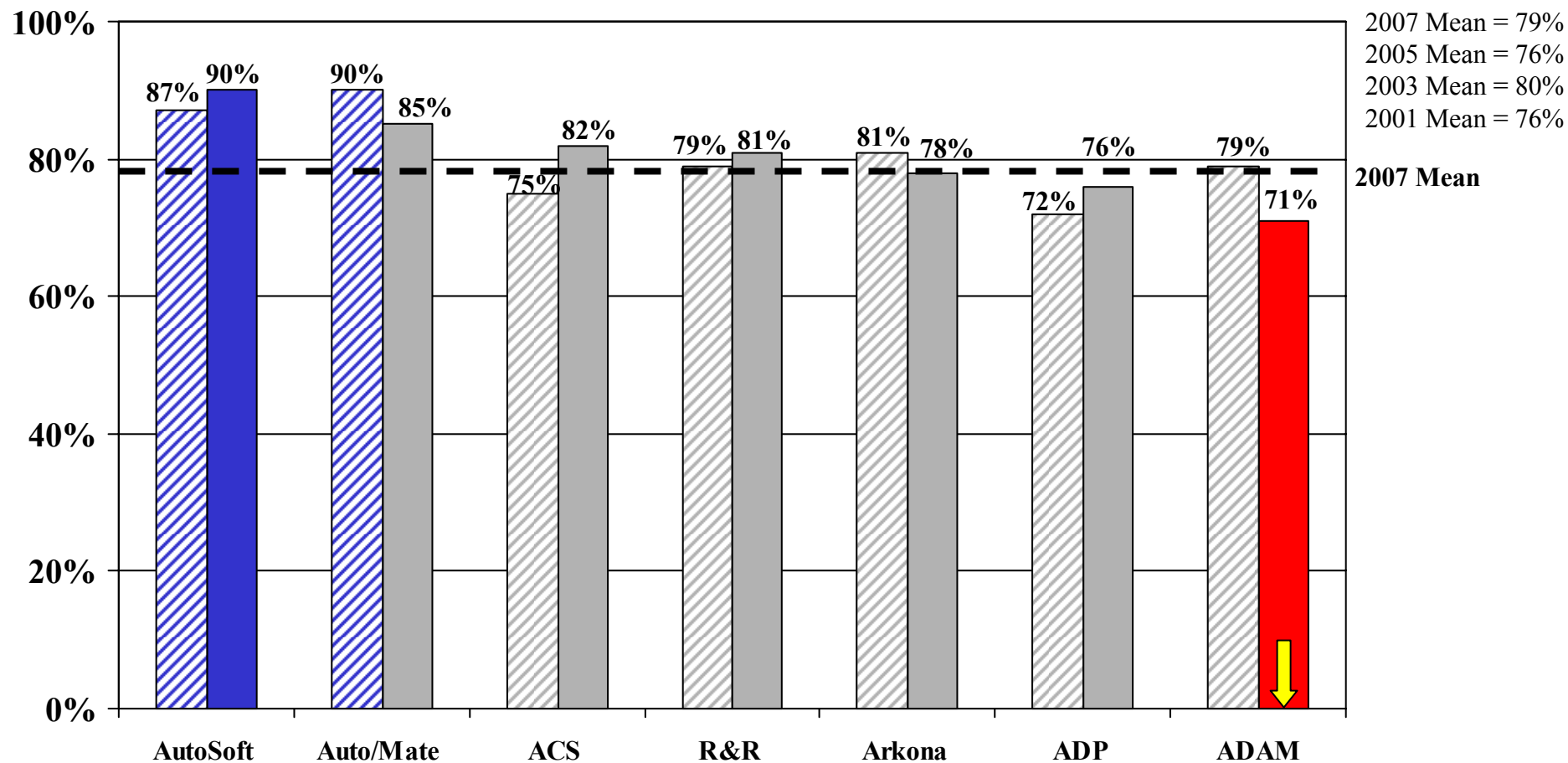Copyright © 2007, NADA All Rights Reserved. 09/18/07

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Q.13f

DSP Customer Service Satisfaction

All Dealership Positions surveyed

How satisfied are you with *(your DSP vendor's)* customer service department in regard to your problems and concerns being fixed correctly the first time you call?

Legend:
- ■ (blue) Very & Somewhat Satisfied
- ■ (gray) Neither
- ■ (red) Very & Somewhat Dissatisfied

Year	Very & Somewhat Satisfied	Neither	Very & Somewhat Dissatisfied
2001	73%	16%	11%
2003	78%	11%	10%
2005	73%	14%	9%
2007	79%	11%	7%

2007 Weighted Base = 995
2007 Actual Base = 995

Q.13e

DSP Customer Service Satisfaction

All Dealership Positions surveyed

How satisfied are you with *(your DSP vendor's)* customer service department in regard to your problems and concerns being fixed correctly the first time you call?

Legend:
- **Greater than mean** (blue)
- **Equivalent to mean** (gray)
- **Less than mean** (red)
- Stripes = 2005 Data
- Solids = 2007 Data

2007 Mean = 79%
2005 Mean = 73%
2003 Mean = 78%
2001 Mean = 73%

2007 Mean

Chart data:
Position	2005 (Stripes)	2007 (Solids)
OM/Controller	80%	92%
Parts Mgr.	79%	84%
Service Mgr.	78%	81%
Sales Mgr.	62%	73%
Dealer/GM	66%	70%

Percentages represent very satisfied and somewhat satisfied ratings

2007 Weighted Base = 995
2007 Actual Base = 995

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Q.13e

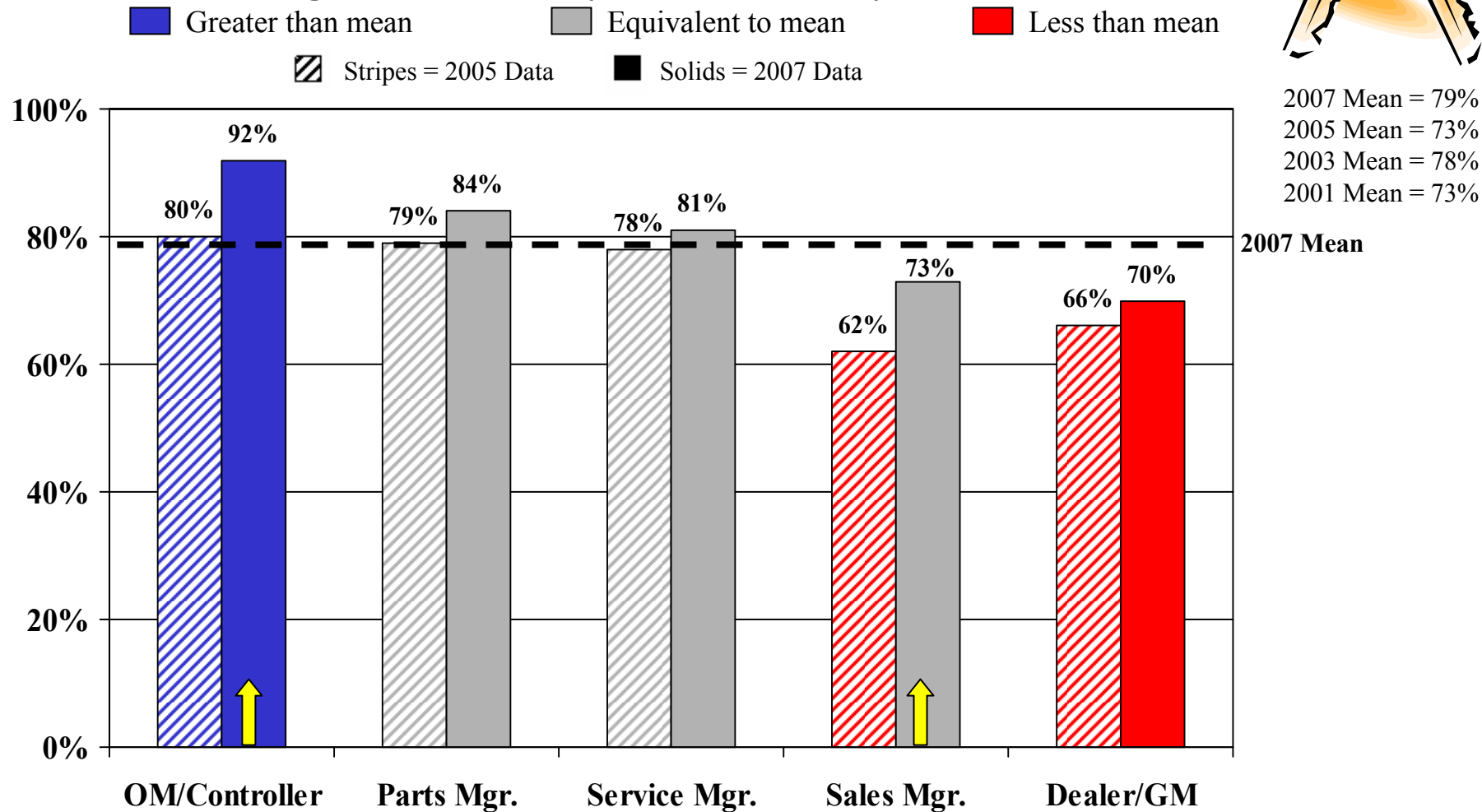# DSP Customer Service Satisfaction

All Dealership Positions surveyed

How satisfied are you with *(your DSP vendor's)* customer service department in regard to your problems and concerns being fixed correctly the first time you call?

■ Greater than mean   ■ Equivalent to mean   ■ Less than mean

▨ Stripes = 2005 Data   ■ Solids = 2007 Data

2007 Mean = 79%
2005 Mean = 73%
2003 Mean = 78%
2001 Mean = 73%

2007 Mean

Vendor	2005	2007
AutoSoft	82%	87%
ACS	69%	86%
R&R	79%	80%
Auto/Mate	89%	78%
ADP	68%	77%
Arkona	74%	71%
ADAM	70%	70%

Percentages represent very satisfied and somewhat satisfied ratings
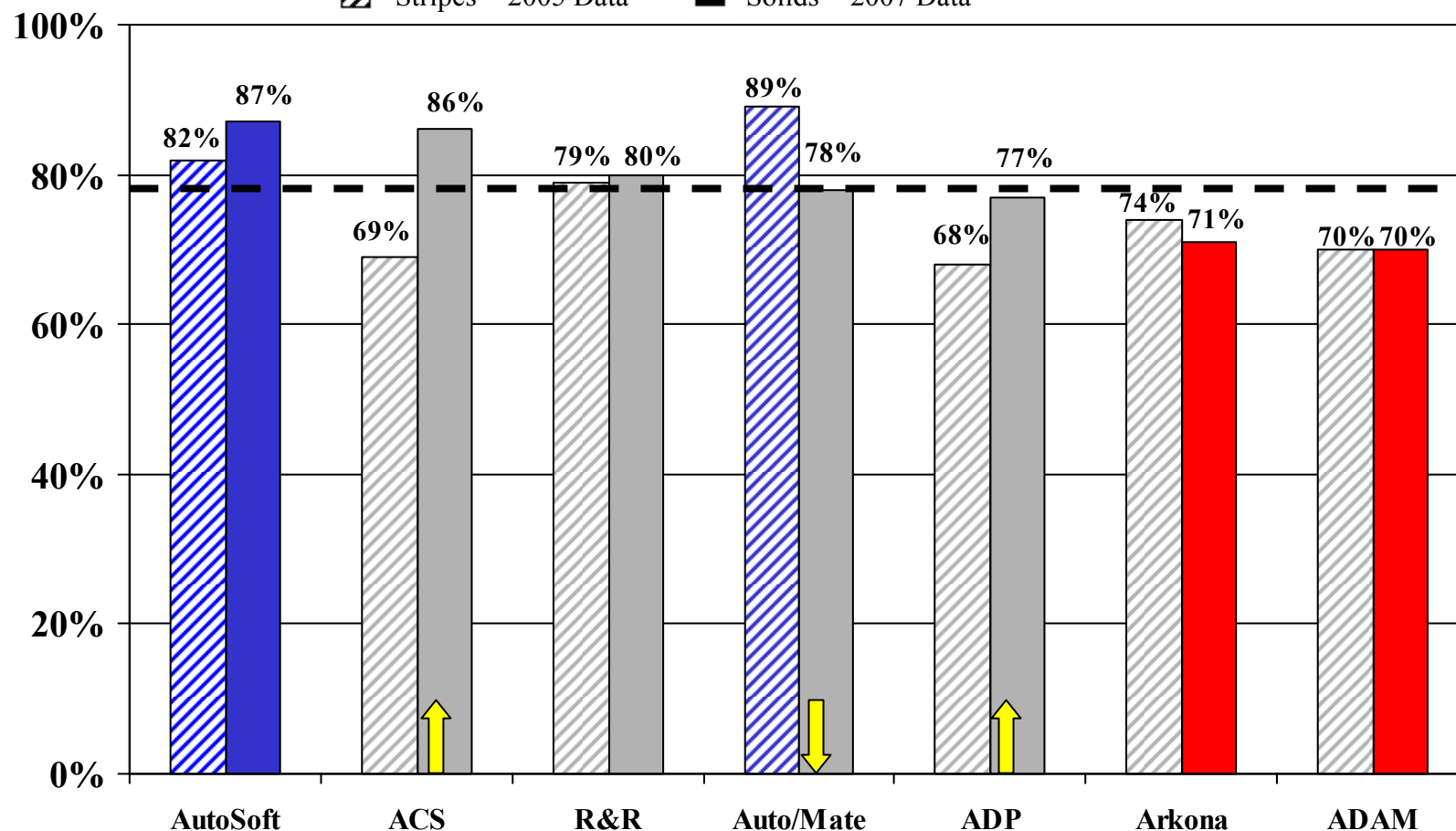
24

Q.13e

DSP Customer Service Satisfaction

All Dealership Positions surveyed

How satisfied are you with *(your DSP vendor's)* customer service department in regard to the maintenance of your daily business with minimal interruptions?
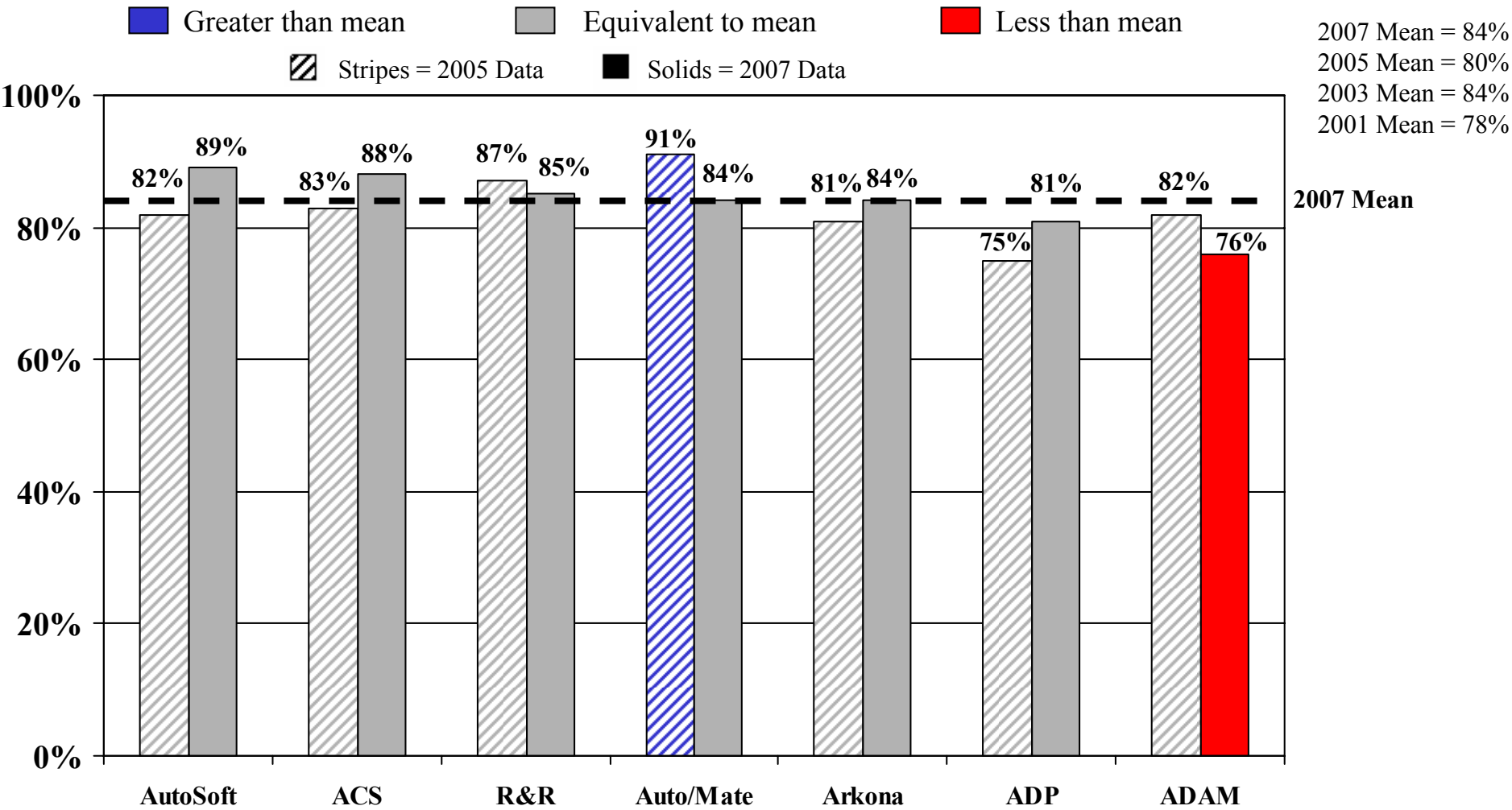
Legend: Greater than mean (blue) — Equivalent to mean (gray) — Less than mean (red)
Stripes = 2005 Data — Solids = 2007 Data

2007 Mean = 84%
2005 Mean = 80%
2003 Mean = 84%
2001 Mean = 78%

Vendor	2005	2007
AutoSoft	82%	89%
ACS	83%	88%
R&R	87%	85%
Auto/Mate	91%	84%
Arkona	81%	84%
ADP	75%	81%
ADAM	82%	76%

Percentages represent very satisfied and somewhat satisfied ratings

2007 Weighted Base = 995
2007 Actual Base = 995

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Q.13a

DSP Customer Service Satisfaction

All Dealership Positions surveyed

How satisfied are you with *(your DSP vendor's)* customer service department in regard to the availability of customer service representatives?
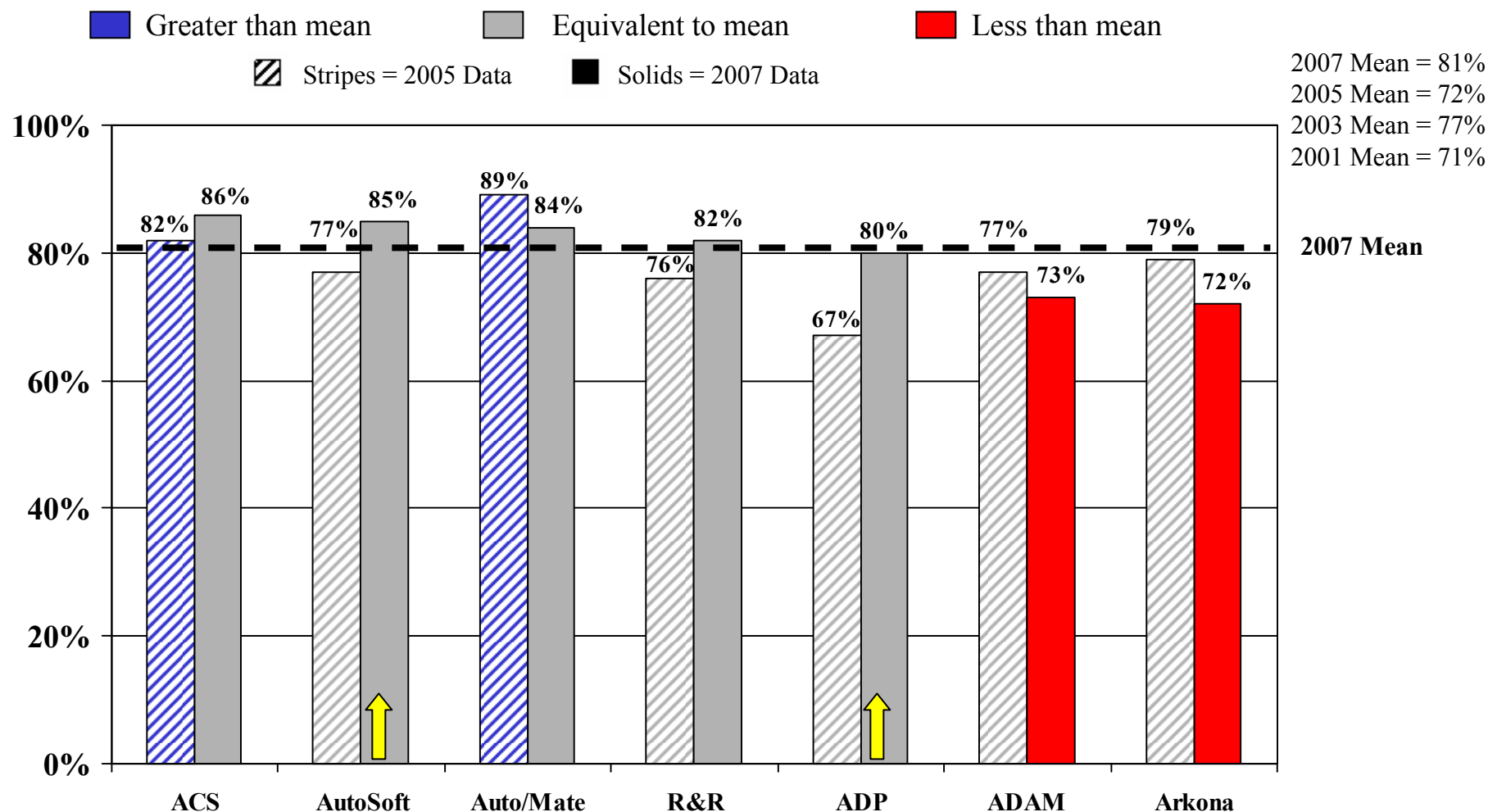
Legend: Greater than mean (blue) • Equivalent to mean (gray) • Less than mean (red)
Stripes = 2005 Data • Solids = 2007 Data

2007 Mean = 81%
2005 Mean = 72%
2003 Mean = 77%
2001 Mean = 71%

2007 Mean

Vendor	2005	2007
ACS	82%	86%
AutoSoft	77%	85%
Auto/Mate	89%	84%
R&R	76%	82%
ADP	67%	80%
ADAM	77%	73%
Arkona	79%	72%

Percentages represent very satisfied and somewhat satisfied ratings

2007 Weighted Base = 995
2007 Actual Base = 995

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Q.13c

DSP Customer Service Satisfaction

All Dealership Positions surveyed

How satisfied are you with *(your DSP vendor's)* customer service department in regard to the customer service representative's prompt follow-up to handle the needs of you and your staff?

Legend:
- **Greater than mean** (blue)
- **Equivalent to mean** (gray)
- **Less than mean** (red)
- Stripes = 2005 Data
- Solids = 2007 Data

2007 Mean = 79%
2005 Mean = 73%
2003 Mean = 77%
2001 Mean = 69%

Chart data (2005 striped / 2007 solid):
- AutoSoft: 79%, 87%
- ACS: 71%, 82%
- R&R: 76%, 80%
- Auto/Mate: 85%, 79%
- ADP: 69%, 78%
- Arkona: 74%, 75%
- ADAM: 77%, 74%

2007 Mean line at 79%

Percentages represent very satisfied and somewhat satisfied ratings

2007 Weighted Base = 995
2007 Actual Base = 995
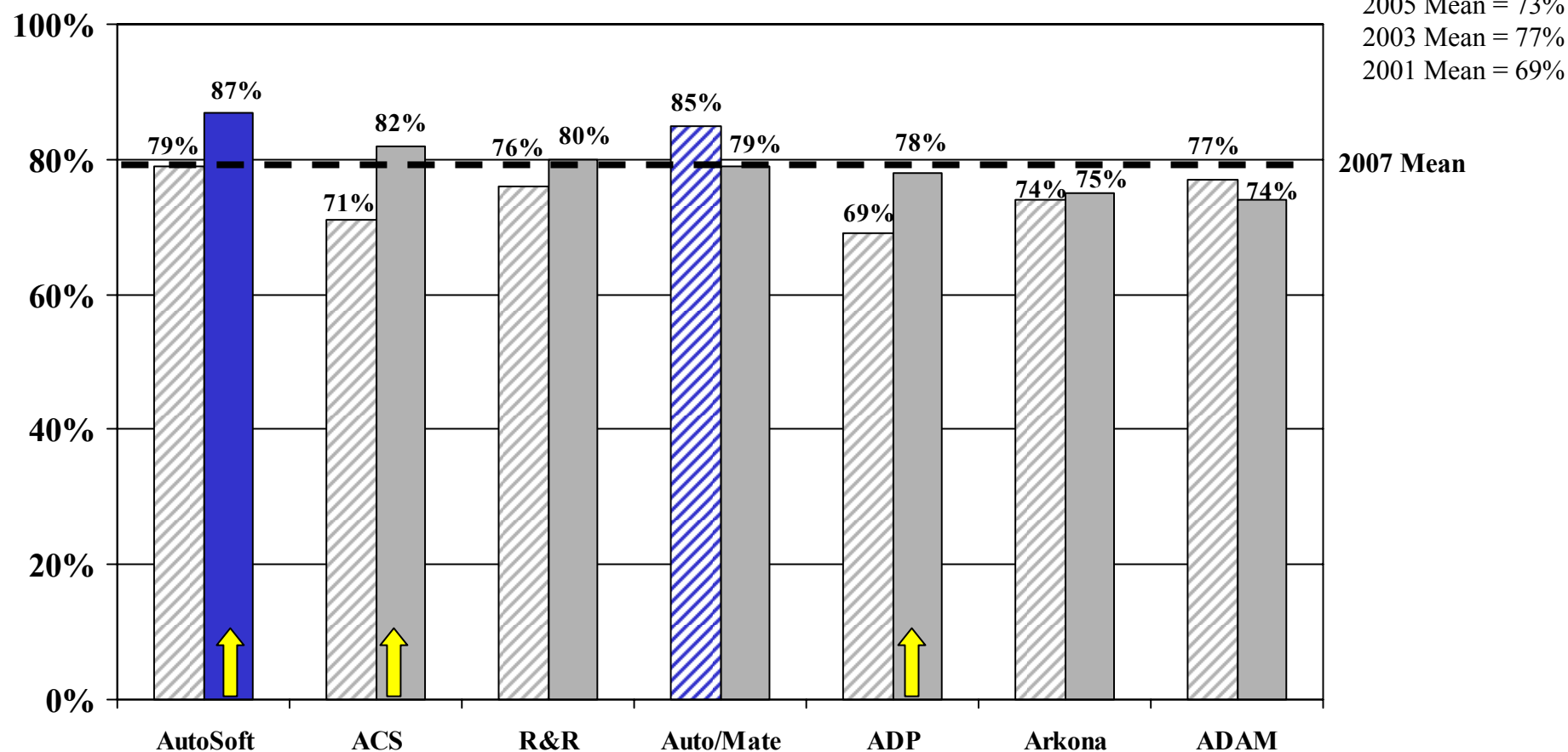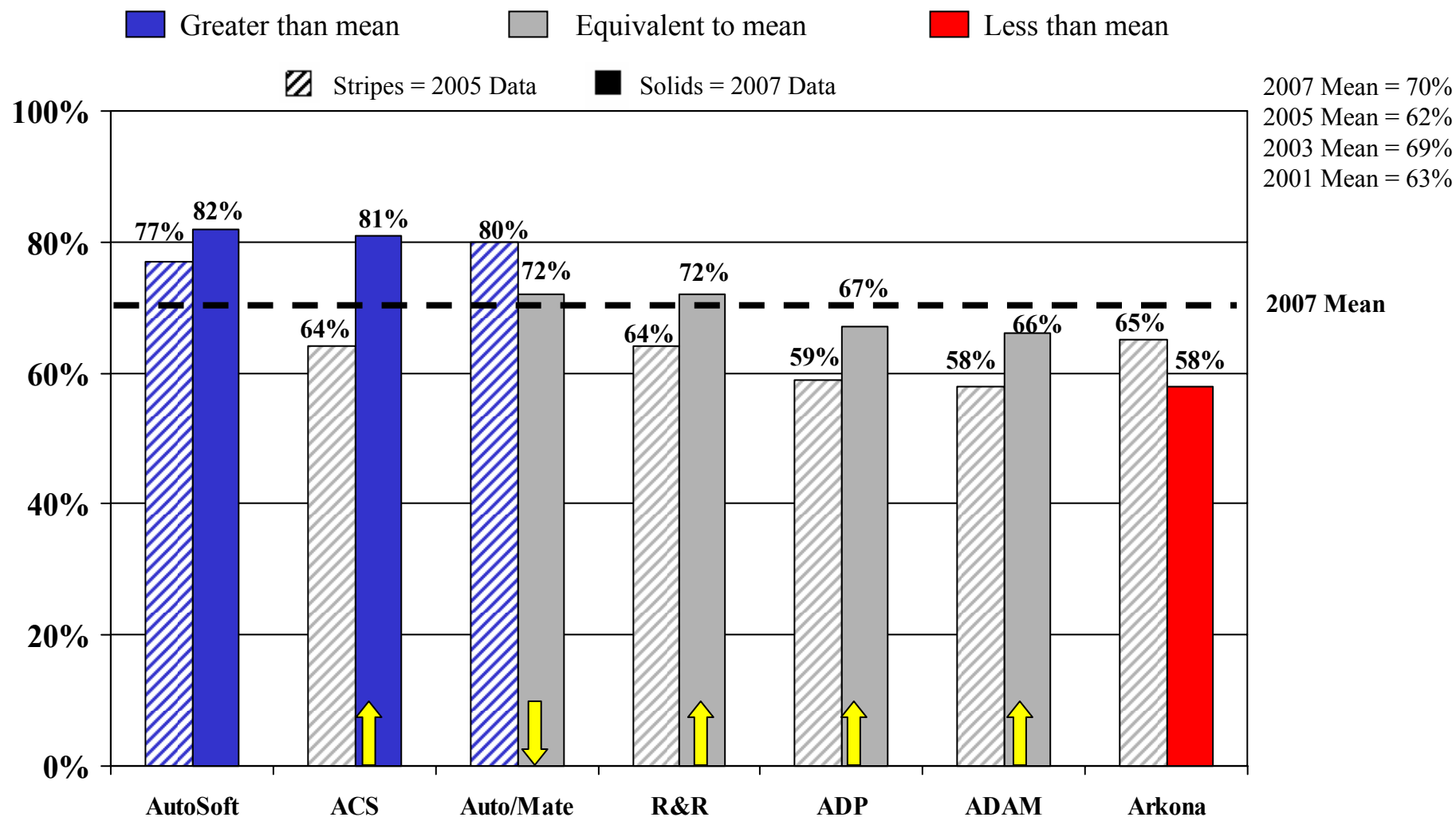
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Q.13b

DSP Customer Service Satisfaction

All Dealership Positions surveyed

How satisfied are you with *(your DSP vendor's)* customer service department in regard to the speed of getting changes and modifications made?

Legend:
- ■ Greater than mean (blue)
- ■ Equivalent to mean (gray)
- ■ Less than mean (red)
- ▨ Stripes = 2005 Data
- ■ Solids = 2007 Data

2007 Mean = 70%
2005 Mean = 62%
2003 Mean = 69%
2001 Mean = 63%

2007 Mean (dashed line at 70%)

Vendor	2005	2007
AutoSoft	77%	82%
ACS	64%	81%
Auto/Mate	80%	72%
R&R	64%	72%
ADP	59%	67%
ADAM	58%	66%
Arkona	65%	58%

Percentages represent very satisfied and somewhat satisfied ratings
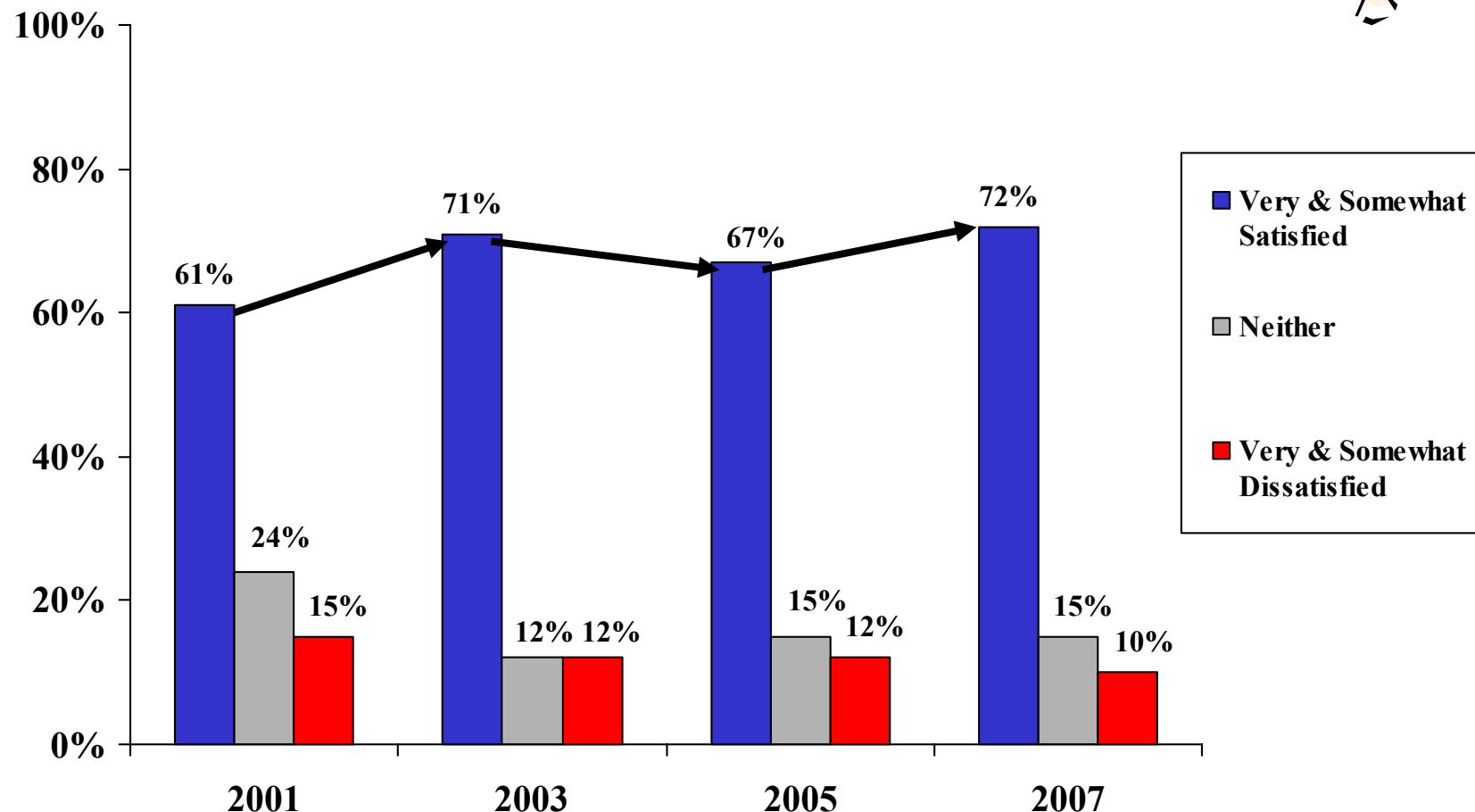
2007 Weighted Base = 995
2007 Actual Base = 995

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Q.13d

III. System Functionality

How satisfied are you with *(your DSP vendor)* in the flexibility of the software to adapt to your business needs?

Legend:
- **Very & Somewhat Satisfied**
- **Neither**
- **Very & Somewhat Dissatisfied**

Year	Very & Somewhat Satisfied	Neither	Very & Somewhat Dissatisfied
2001	61%	24%	15%
2003	71%	12%	12%
2005	67%	15%	12%
2007	72%	15%	10%

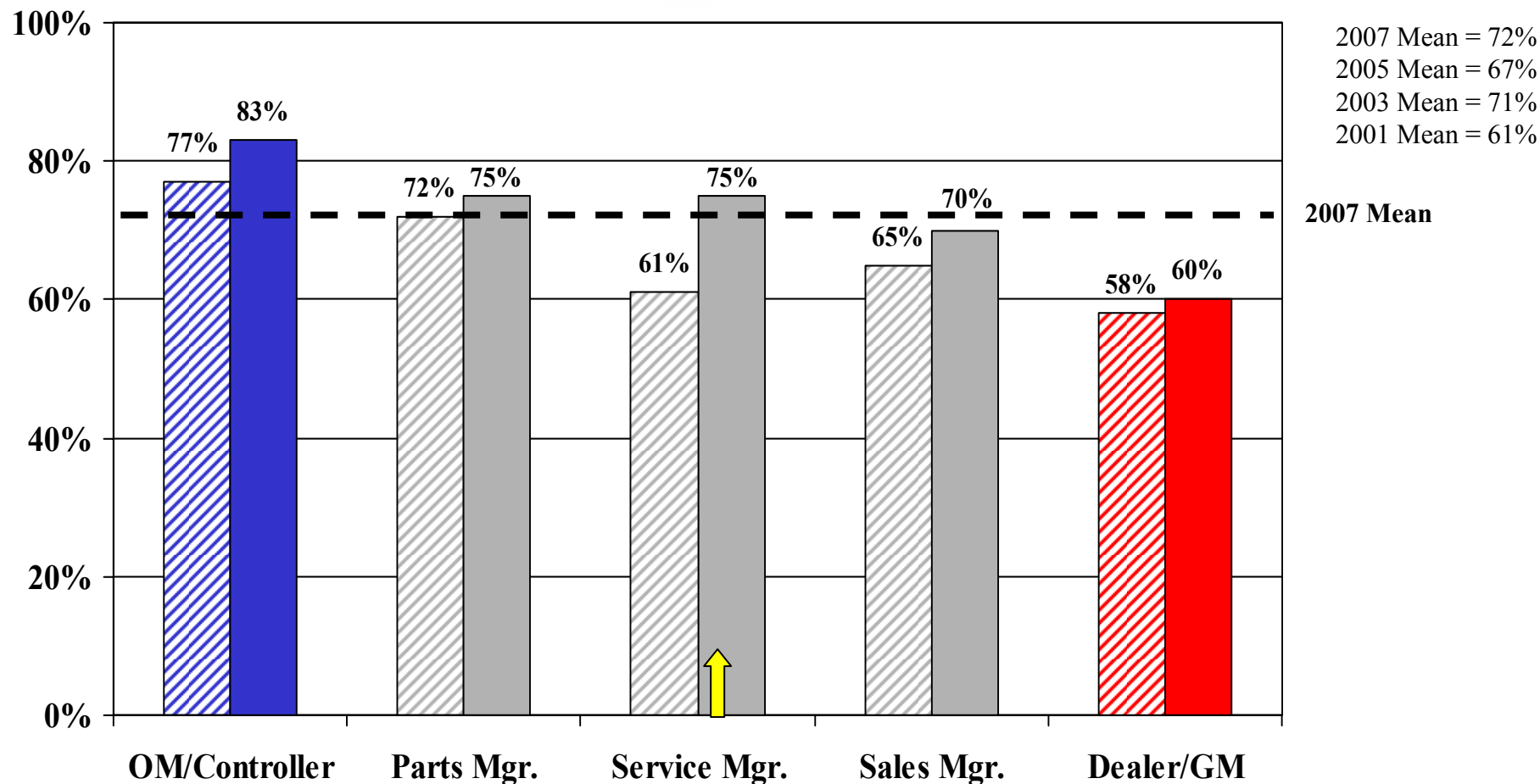**Q.14c**

System Functionality

All Dealership Positions surveyed

How satisfied are you with *(your DSP vendor)* in the flexibility of the software to adapt to your business needs?

■ Greater than mean   ■ Equivalent to mean   ■ Less than mean

▨ Stripes = 2005 Data   ■ Solids = 2007 Data

2007 Mean = 72%
2005 Mean = 67%
2003 Mean = 71%
2001 Mean = 61%

2007 Mean

OM/Controller: 77%, 83%
Parts Mgr.: 72%, 75%
Service Mgr.: 61%, 75%
Sales Mgr.: 65%, 70%
Dealer/GM: 58%, 60%

Percentages represent very satisfied and somewhat satisfied ratings

2007 Weighted Base = 995
2007 Actual Base = 995

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Q.14c

System Functionality

All Dealership Positions surveyed

How satisfied are you with *(your DSP vendor)* in the flexibility of the software to adapt to your business needs?

■ Greater than mean   ■ Equivalent to mean   ■ Less than mean

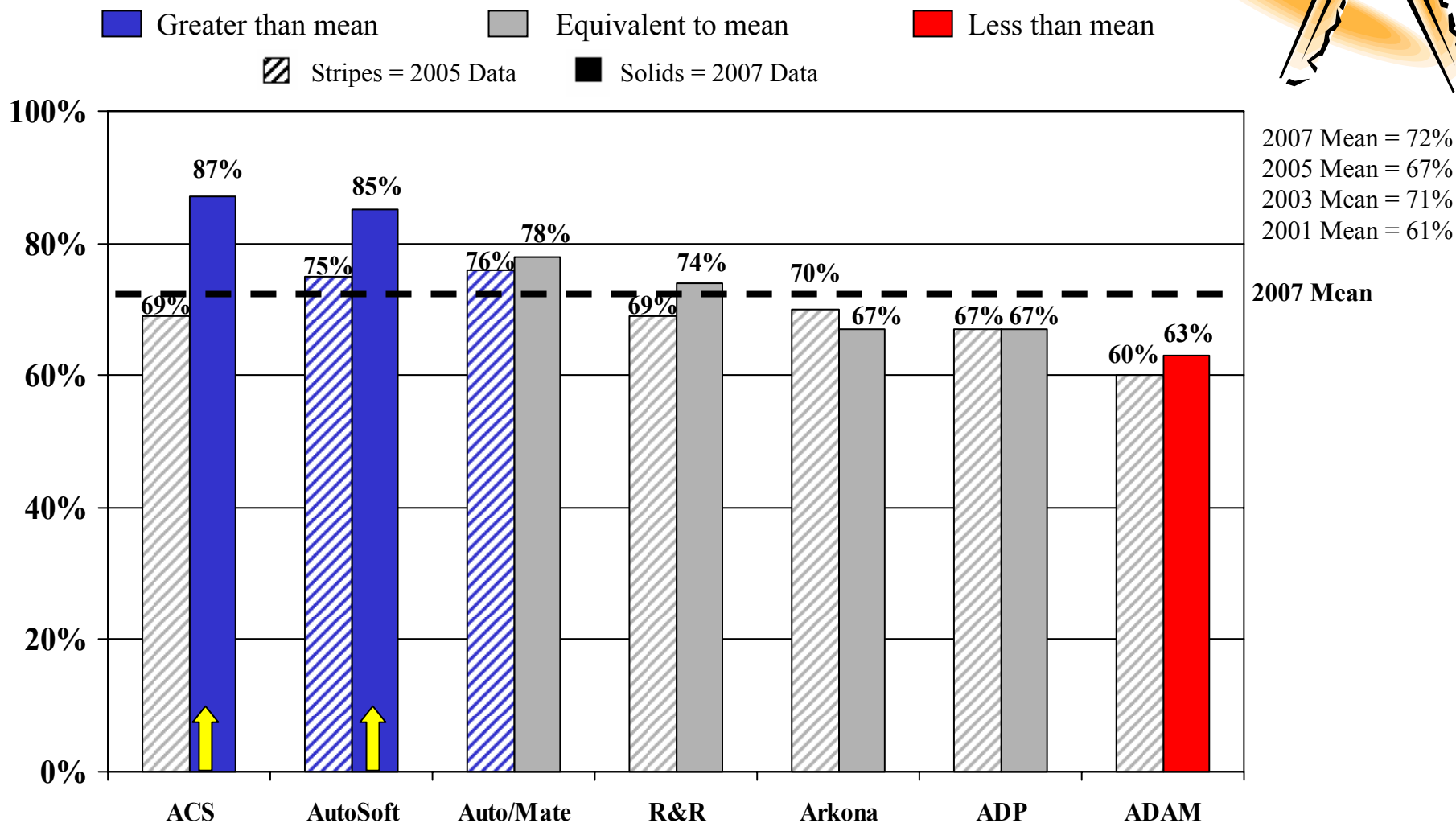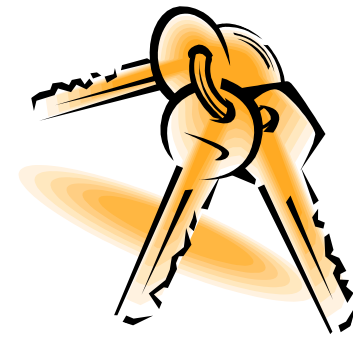▨ Stripes = 2005 Data   ■ Solids = 2007 Data

2007 Mean = 72%
2005 Mean = 67%
2003 Mean = 71%
2001 Mean = 61%

2007 Mean

	ACS	AutoSoft	Auto/Mate	R&R	Arkona	ADP	ADAM
2005	69%	75%	76%	69%	70%	67%	60%
2007	87%	85%	78%	74%	67%	67%	63%

Percentages represent very satisfied and somewhat satisfied ratings

2007 Weighted Base = 995
2007 Actual Base = 995

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Q.14c

System Functionality

All Dealership Positions surveyed

How satisfied are you with the ability of *(your DSP vendor)* to customize the software to meet your needs?

Legend:
- **Very & Somewhat Satisfied** (blue)
- **Neither** (gray)
- **Very & Somewhat Dissatisfied** (red)

Year	Very & Somewhat Satisfied	Neither	Very & Somewhat Dissatisfied
2001	56%	26%	18%
2003	60%	13%	13%
2005	59%	16%	16%
2007	69%	14%	11%

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Q.14d

System Functionality

All Dealership Positions surveyed

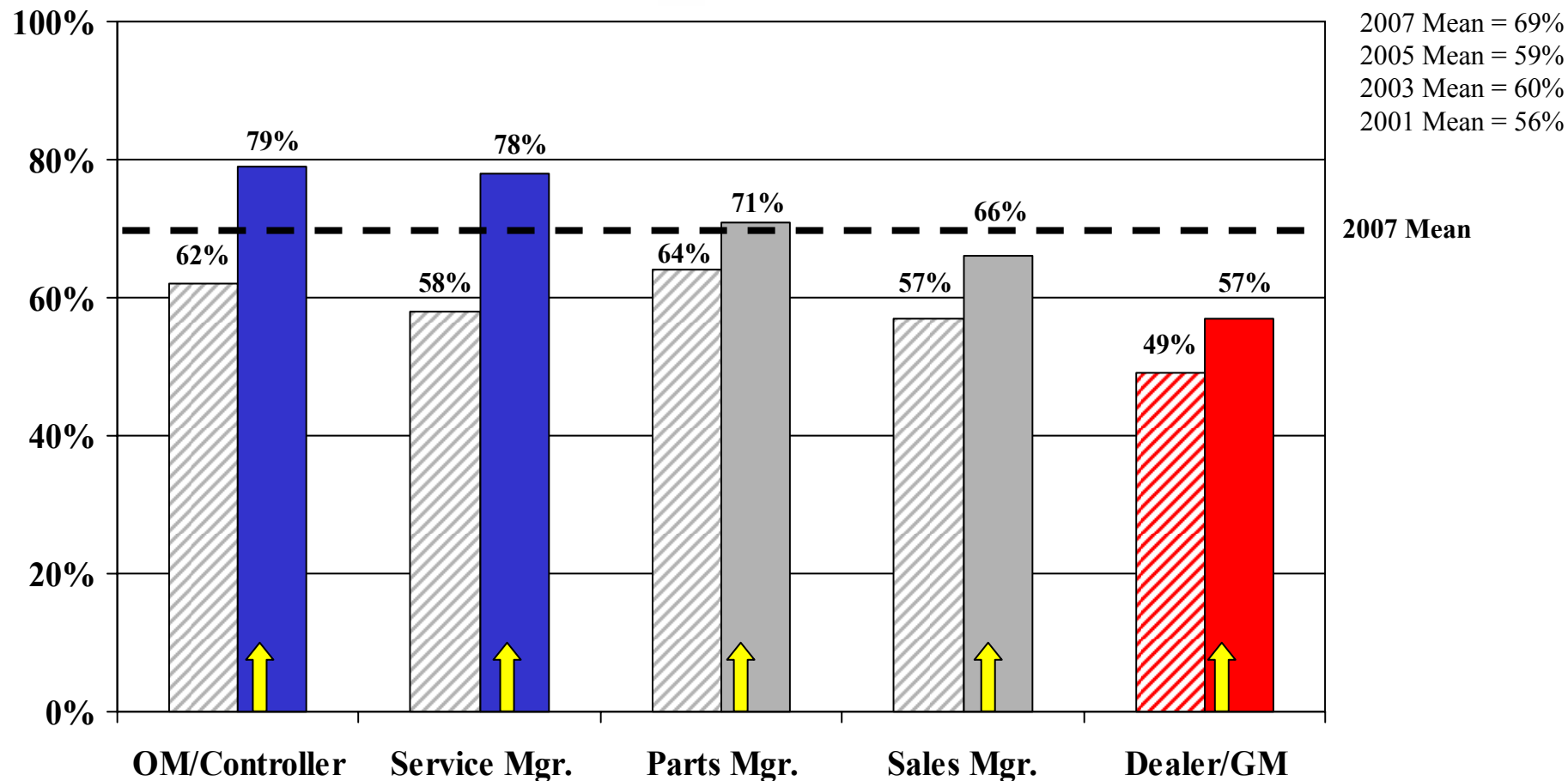## How satisfied are you with the ability of *(your DSP vendor)* to customize the software to meet your needs?

■ (blue) Greater than mean   ■ (gray) Equivalent to mean   ■ (red) Less than mean

▨ Stripes = 2005 Data   ■ Solids = 2007 Data

2007 Mean = 69%
2005 Mean = 59%
2003 Mean = 60%
2001 Mean = 56%

2007 Mean

Position	2005	2007
OM/Controller	62%	79%
Service Mgr.	58%	78%
Parts Mgr.	64%	71%
Sales Mgr.	57%	66%
Dealer/GM	49%	57%

Percentages represent very satisfied and somewhat satisfied ratings

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2007 Weighted Base = 995
2007 Actual Base = 995

34

Q.14d

How satisfied are you with the ability of *(your DSP vendor)* to customize the software to meet your needs?

- ■ Greater than mean
- ■ Equivalent to mean
- ■ Less than mean

Stripes = 2005 Data   Solids = 2007 Data

2007 Mean = 69%
2005 Mean = 59%
2003 Mean = 60%
2001 Mean = 56%

2007 Mean

Vendor	2005	2007
ACS	67%	82%
AutoSoft	62%	81%
Auto/Mate	71%	78%
R&R	63%	69%
ADP	56%	68%
Arkona	62%	65%
ADAM	56%	58%

Percentages represent very satisfied and somewhat satisfied ratings

2007 Weighted Base = 995
2007 Actual Base = 995

35

Q.14d

How satisfied are you with the amount of time *(your DSP vendor's)* system can store data?
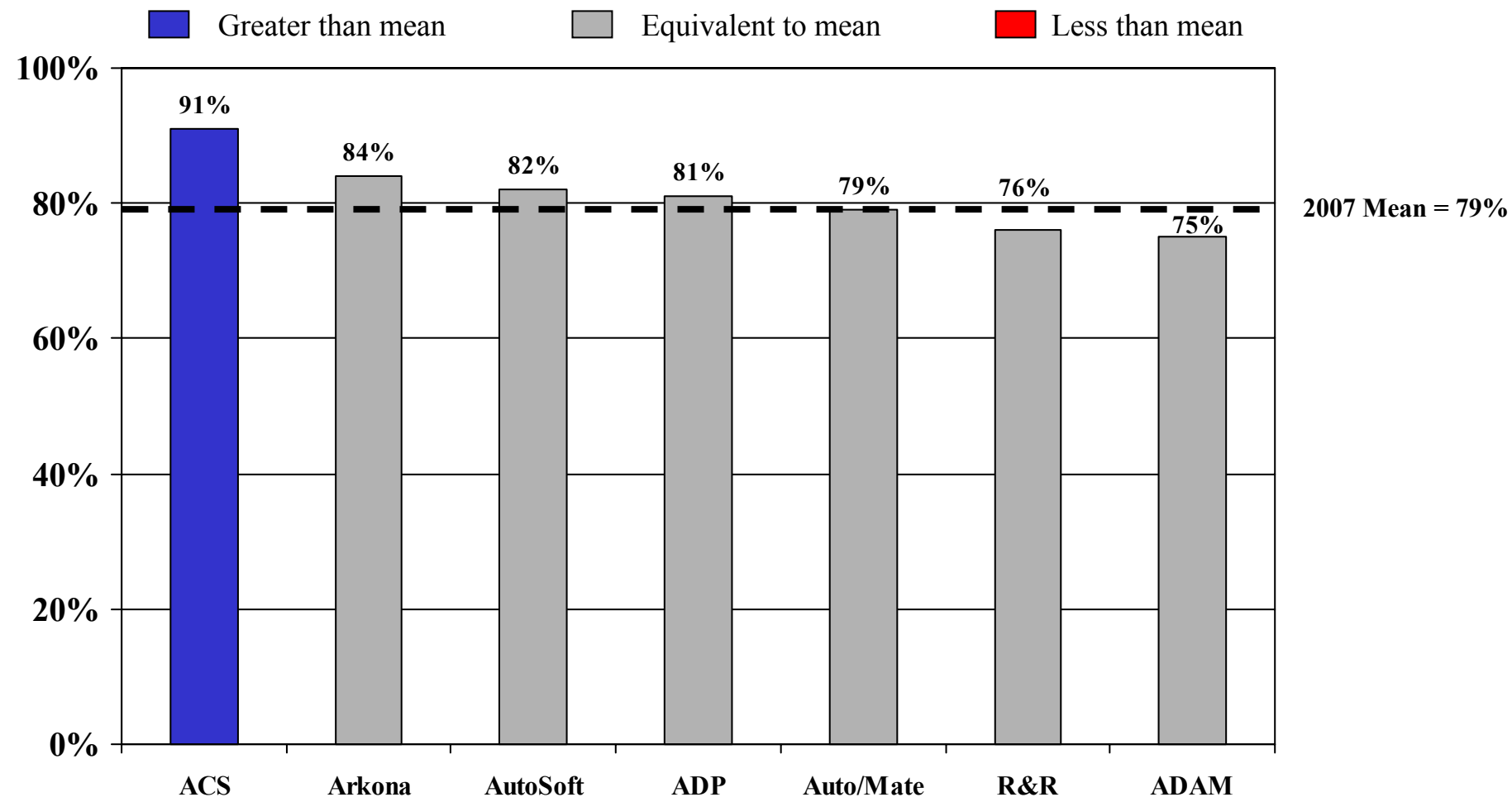
2007 Respondents
Percentages represent very satisfied and somewhat satisfied ratings

2007 Weighted Base = 995
2007 Actual Base = 995

36

Q.14g

System Functionality

All Dealership Positions surveyed

How satisfied are you with the speed of *(your DSP vendor's)* system?

■ Greater than mean ■ Equivalent to mean ■ Less than mean
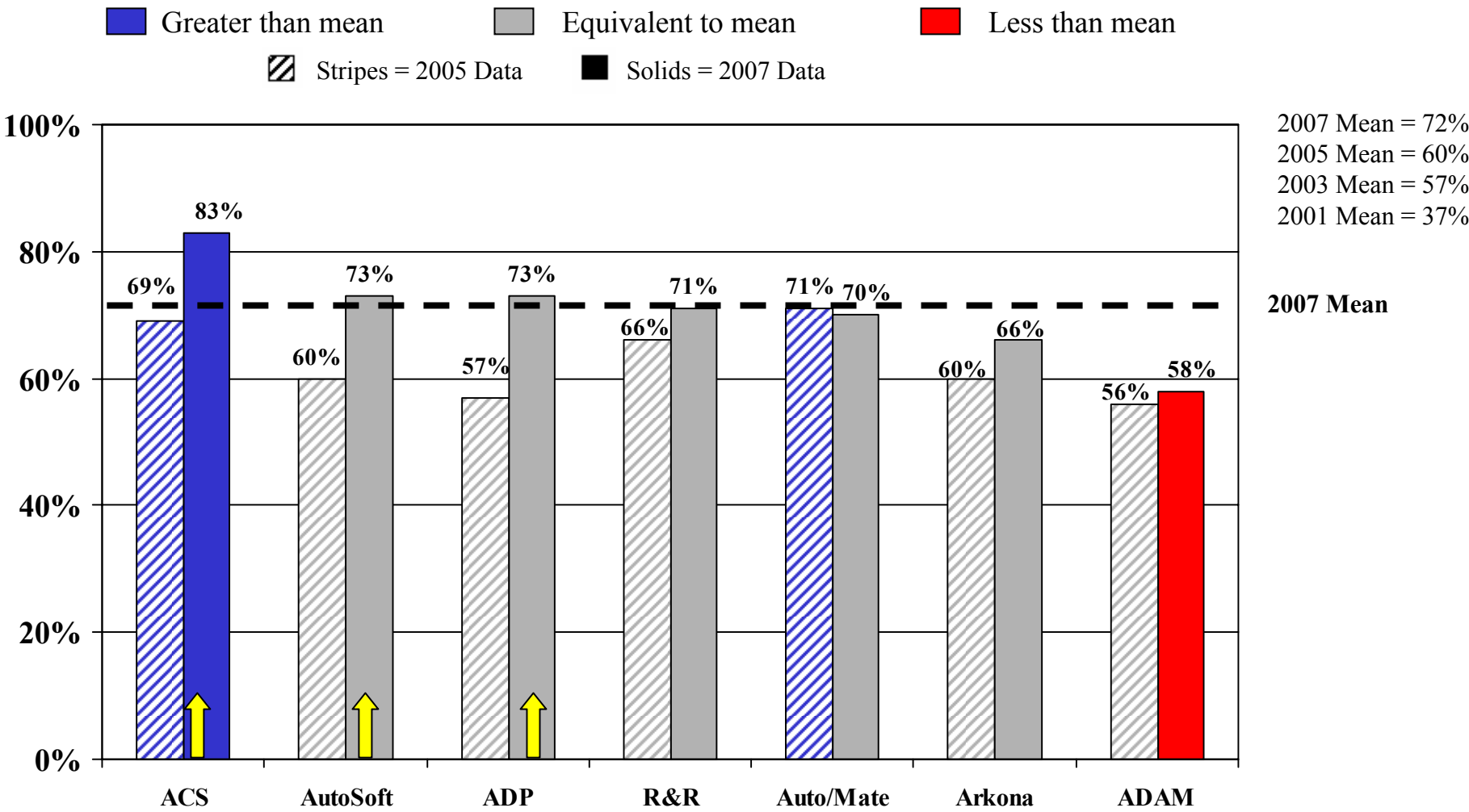
▨ Stripes = 2005 Data ■ Solids = 2007 Data

2007 Mean = 79%
2005 Mean = 75%
2003 Mean = 83%
2001 Mean = 68%

2007 Mean (dashed line at 80%)

Vendor	2005	2007
ACS	83%	94%
AutoSoft	88%	88%
Auto/Mate	87%	88%
R&R	81%	81%
ADAM	74%	77%
Arkona	81%	75%
ADP	70%	75%

Percentages represent very satisfied and somewhat satisfied ratings

2007 Weighted Base = 995
2007 Actual Base = 995

37

Q.14e
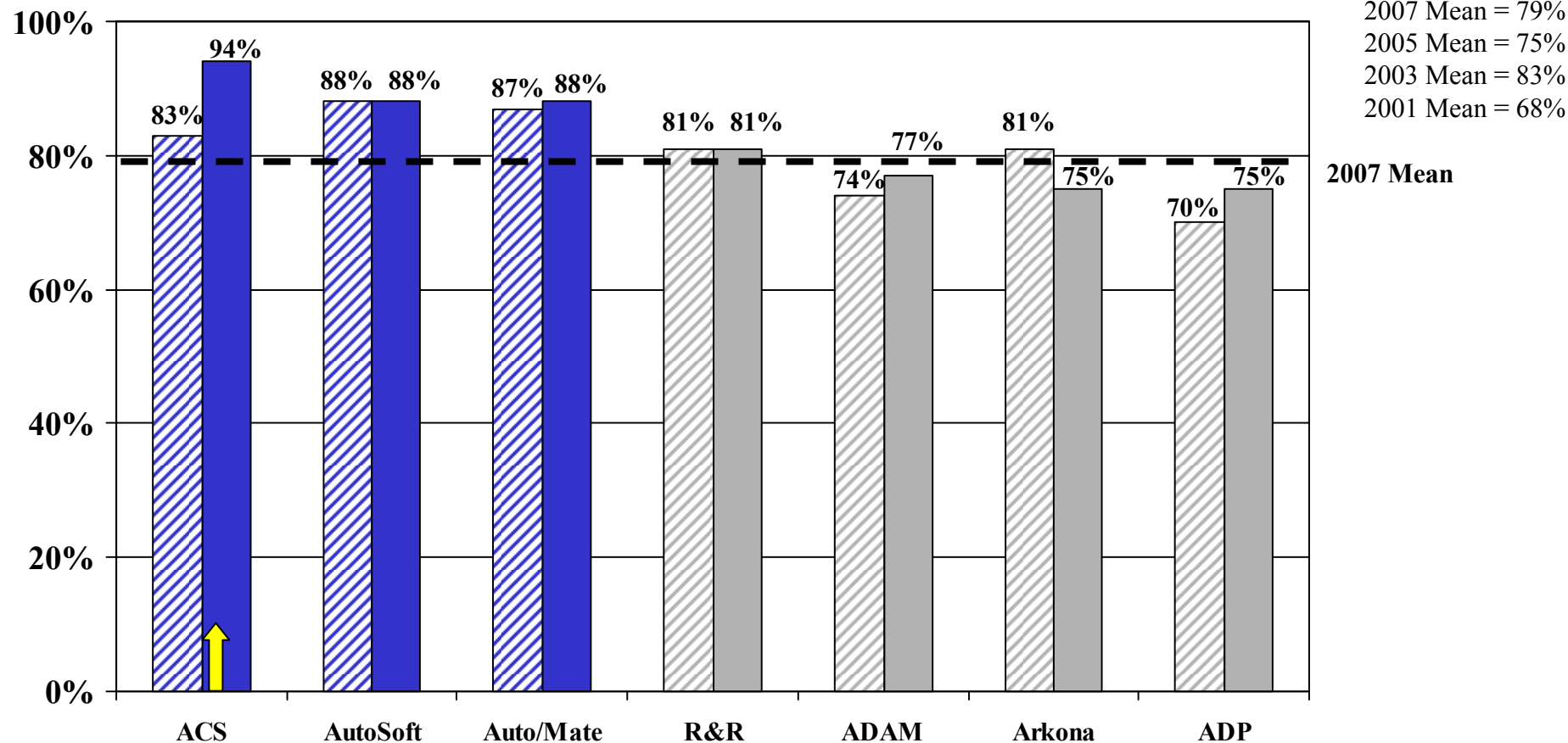
System Functionality

All Dealership Positions surveyed

How satisfied are you with *(your DSP vendor)* in the ability to integrate with Internet-based DCS (Dealer Communication Systems) applications (email and the Web)?

Legend:
- Greater than mean (Blue)
- Equivalent to mean (Gray)
- Less than mean (Red)
- Stripes = 2005 Data
- Solids = 2007 Data

2007 Mean = 72%
2005 Mean = 60%
2003 Mean = 57%
2001 Mean = 37%

2007 Mean

Chart values by vendor:
- ACS: 69% (2005), 83% (2007)
- AutoSoft: 60% (2005), 73% (2007)
- ADP: 57% (2005), 73% (2007)
- R&R: 66% (2005), 71% (2007)
- Auto/Mate: 71% (2005), 70% (2007)
- Arkona: 60% (2005), 66% (2007)
- ADAM: 56% (2005), 58% (2007)

Percentages represent very satisfied and somewhat satisfied ratings

2007 Weighted Base = 995
2007 Actual Base = 995
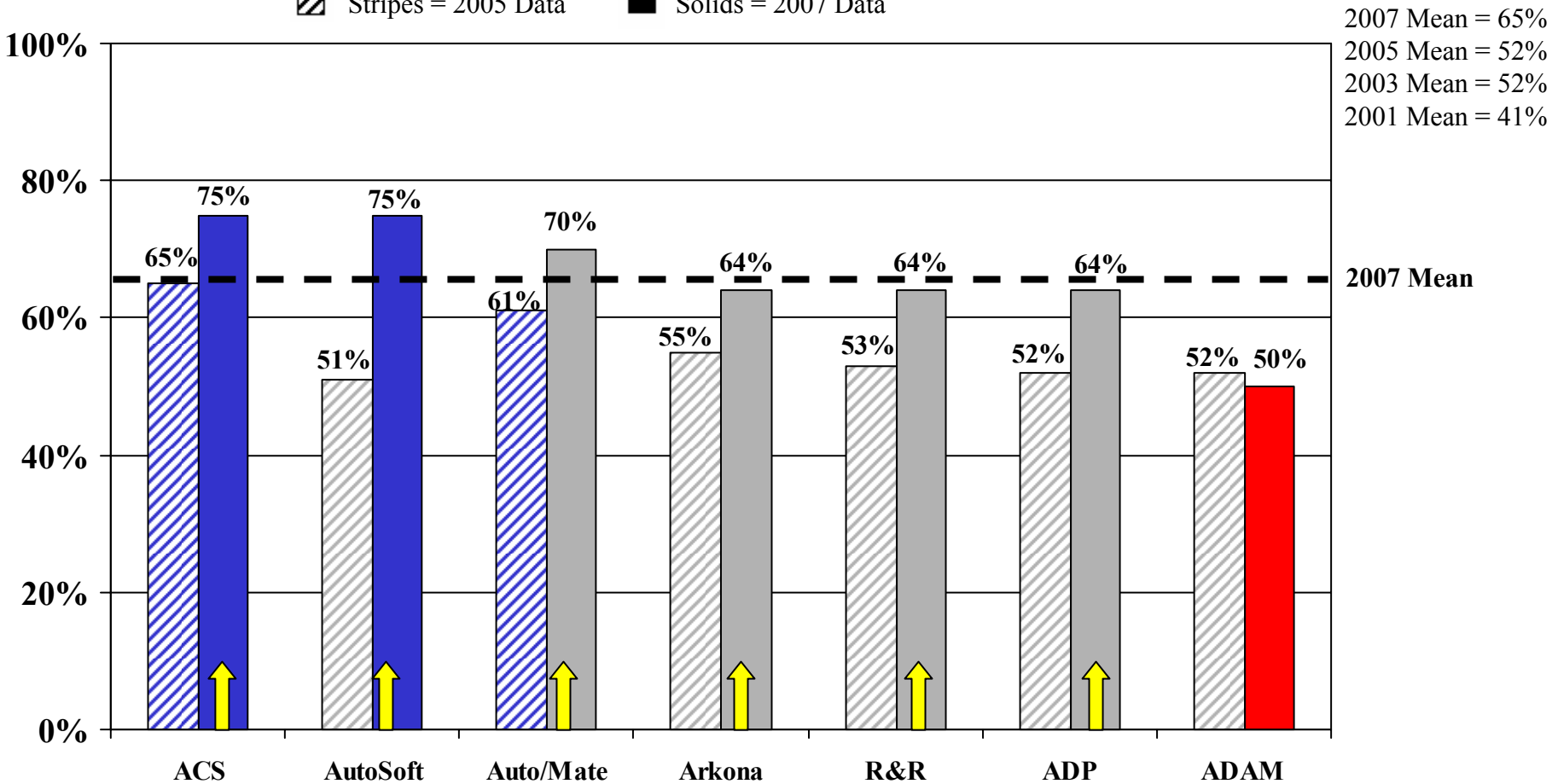
38

Q.14b

System Functionality

All Dealership Positions surveyed

How satisfied are you with *(your DSP vendor)* in the ability to access data through common software applications such as Microsoft Word or Excel?

Legend:
- Greater than mean (blue)
- Equivalent to mean (gray)
- Less than mean (red)
- Stripes = 2005 Data
- Solids = 2007 Data

2007 Mean = 65%
2005 Mean = 52%
2003 Mean = 52%
2001 Mean = 41%

2007 Mean

Vendor	2005 Data	2007 Data
ACS	65%	75%
AutoSoft	51%	75%
Auto/Mate	61%	70%
Arkona	55%	64%
R&R	53%	64%
ADP	52%	64%
ADAM	52%	50%

Percentages represent very satisfied and somewhat satisfied ratings

2007 Weighted Base = 995
2007 Actual Base = 995

39

Q.14a

System Functionality

All Dealership Positions surveyed

Overall, would you say it is very important, somewhat important or not at all important for the *(your DSP vendor)* system to have the ability to allow third party vendors to share information?

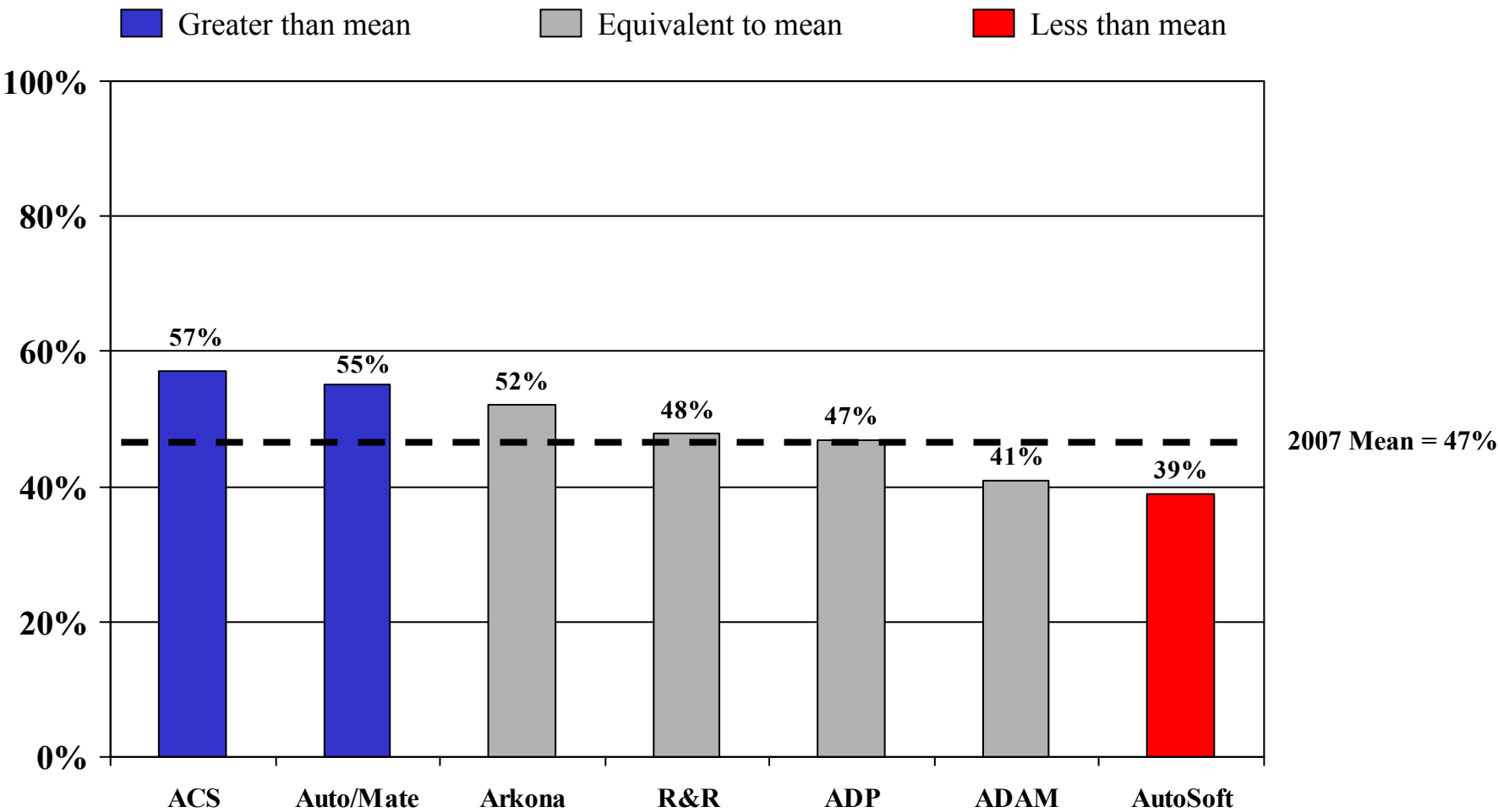■ Greater than mean   ■ Equivalent to mean   ■ Less than mean

2007 Mean = 68%

2007 Respondents
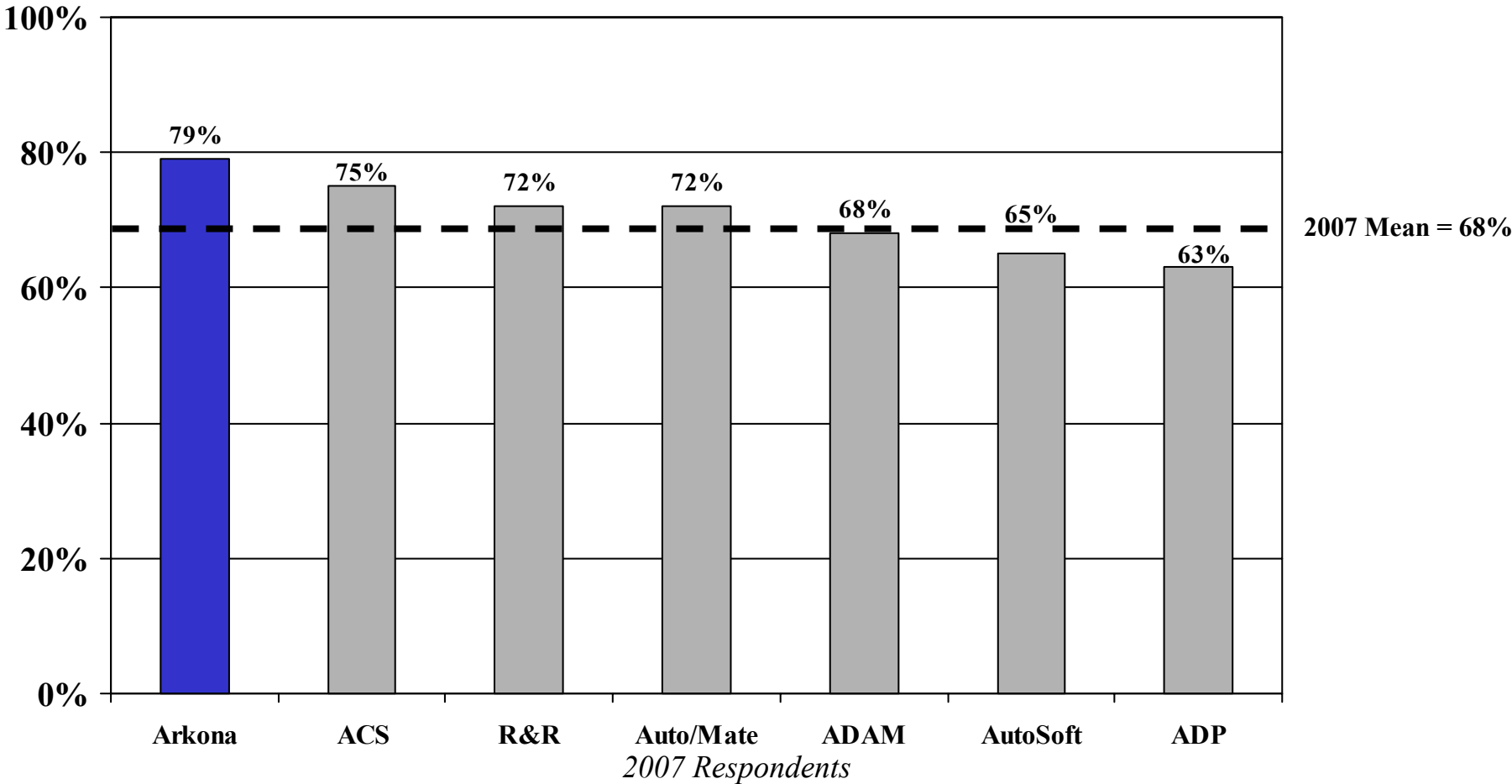
Percentages represent very important and somewhat important ratings

2007 Weighted Base = 995
2007 Actual Base = 995

40

Q.22

System Functionality

How satisfied are you with the ability of the *(your DSP vendor)* system to allow third party vendors to share information?

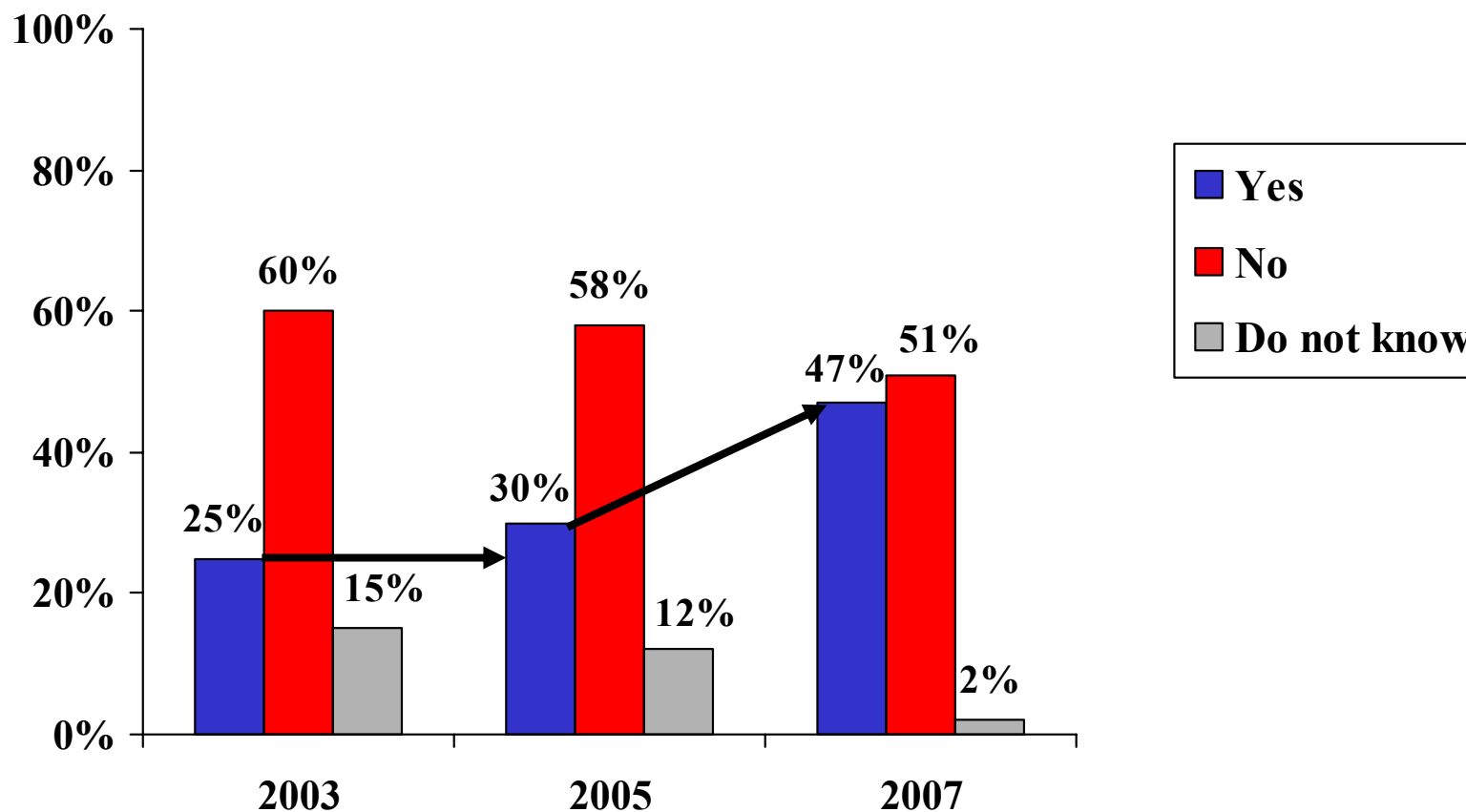■ Greater than mean   ■ Equivalent to mean   ■ Less than mean

57%	55%	52%	48%	47%	41%	39%
ACS	Auto/Mate	Arkona	R&R	ADP	ADAM	AutoSoft

2007 Mean = 47%

2007 Respondents
Percentages represent very satisfied and somewhat satisfied ratings

2007 Weighted Base = 995
2007 Actual Base = 995

41

Q.23

System Functionality

Sales Mgr. surveyed

Are you currently using a customer relationship management (CRM) system?

2007 Weighted Base = 188
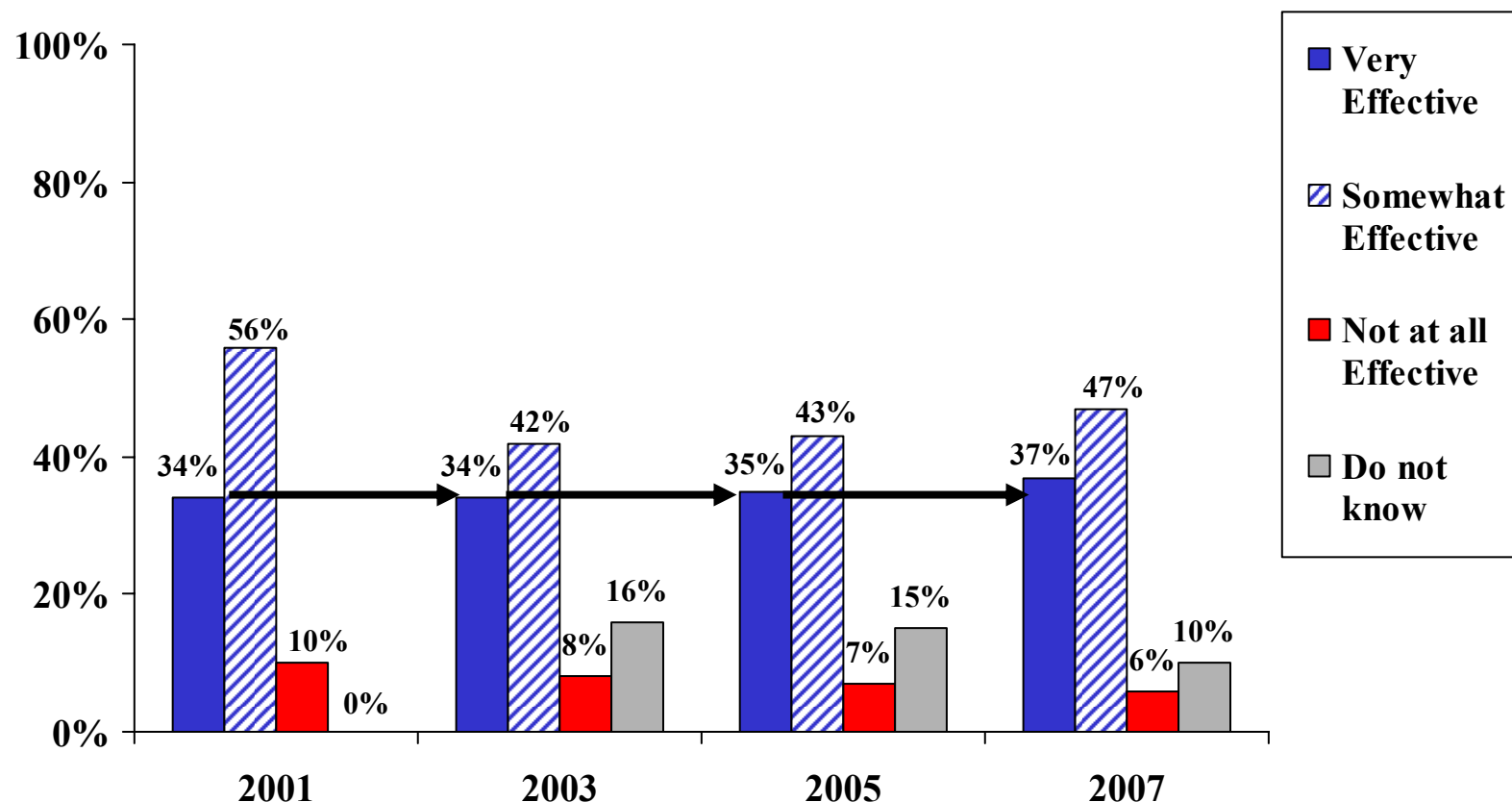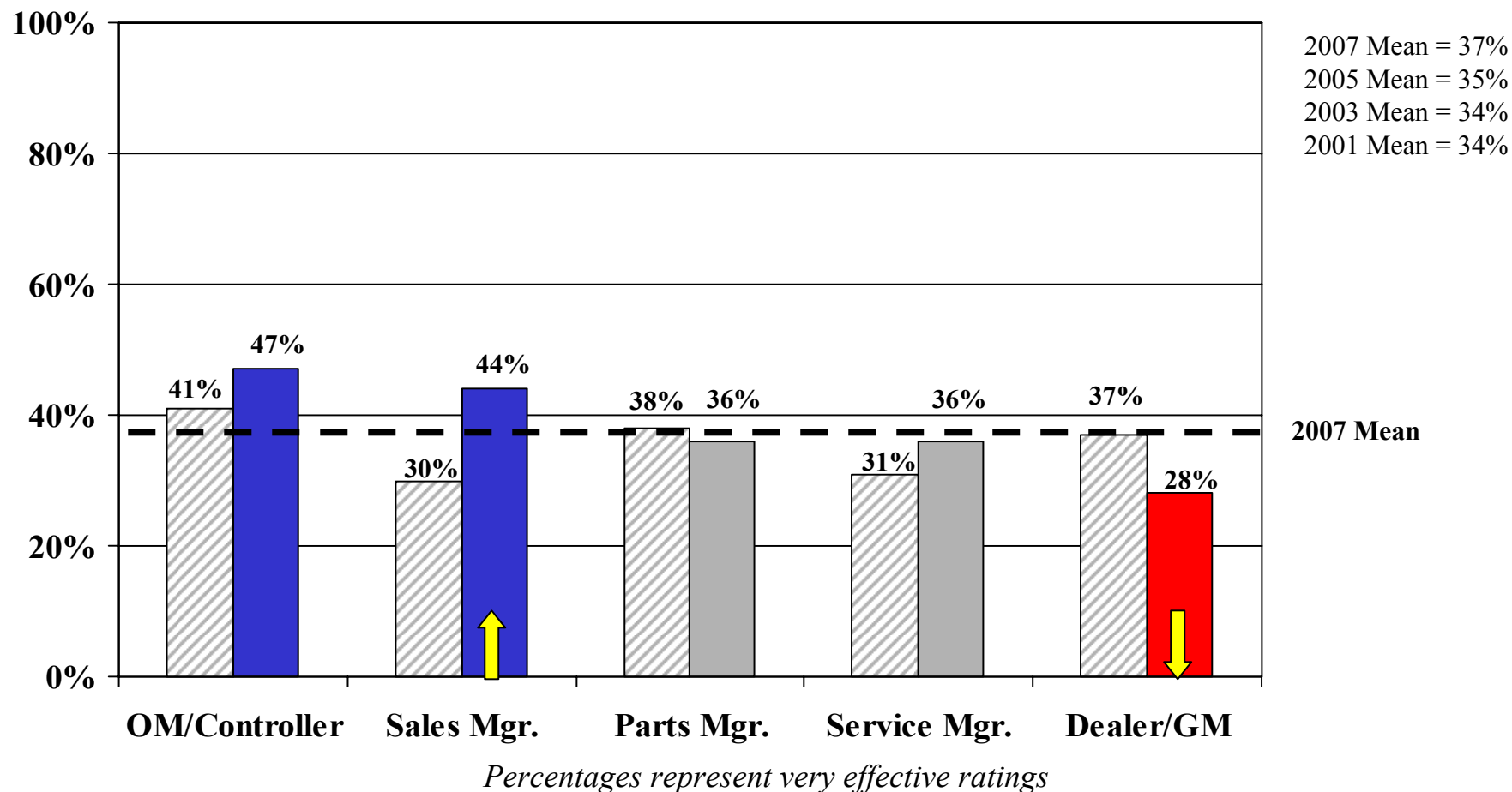2007 Actual Base = 199

Q.15

IV. Vendor Training and Education

All Dealership Positions surveyed

How would you rate the effectiveness of the technical training provided in helping you use your system?

Legend:
- ■ **Very Effective**
- ▨ **Somewhat Effective**
- ■ **Not at all Effective**
- ▨ **Do not know**

Chart data:

Rating	2001	2003	2005	2007
Very Effective	34%	34%	35%	37%
Somewhat Effective	56%	42%	43%	47%
Not at all Effective	10%	8%	7%	6%
Do not know	0%	16%	15%	10%

2007 Weighted Base = 995
2007 Actual Base = 995

Q.20

How would you rate the effectiveness of the technical training provided in helping you use your system?

■ Greater than mean   ■ Equivalent to mean   ■ Less than mean

▨ Stripes = 2005 Data   ■ Solids = 2007 Data

2007 Mean = 37%
2005 Mean = 35%
2003 Mean = 34%
2001 Mean = 34%

2007 Mean

Position	2005	2007
OM/Controller	41%	47%
Sales Mgr.	30%	44%
Parts Mgr.	38%	36%
Service Mgr.	31%	36%
Dealer/GM	37%	28%

Percentages represent very effective ratings

2007 Weighted Base = 995
2007 Actual Base = 995

Vendor Training and Education

All Dealership Positions surveyed

How would you rate the effectiveness of the technical training provided in helping you use your system?

Greater than mean ■ (blue)　　**Equivalent to mean** ■ (gray)　　**Less than mean** ■ (red)

▨ Stripes = 2005 Data　　　■ Solids = 2007 Data

2007 Mean = 37%
2005 Mean = 35%
2003 Mean = 34%
2001 Mean = 34%

2007 Mean

	ACS	AutoSoft	Auto/Mate	ADAM	Arkona	R&R	ADP
2005	47%	52%	54%	43%	43%	33%	31%
2007	58%	52%	50%	46%	46%	35%	35%

Percentages represent very effective ratings

2007 Weighted Base = 995
2007 Actual Base = 995

46

Q.20

Considering all costs associated with training, i.e. travel, lost time on the job, etc. vs. the benefits received, how cost effective would you say the computer system training received from *(your DSP vendor)* is?

Legend:
- Very Cost Effective
- Cost Effective
- Somewhat Cost Effective
- Not at all Cost Effective

Year	Very Cost Effective	Cost Effective	Somewhat Cost Effective	Not at all Cost Effective
1998	13%	29%	35%	20%
2001	14%	25%	36%	16%
2003	17%	26%	33%	10%
2005	20%	28%	26%	9%
2007	19%	30%	29%	9%

47

Q.19

Vendor Training and Education

All Dealership Positions surveyed

Considering all costs associated with training, i.e. travel, lost time on the job, etc. vs. the benefits received, how cost effective would you say the computer system training received from *(your DSP vendor)* is?

Legend:
- ■ Greater than mean
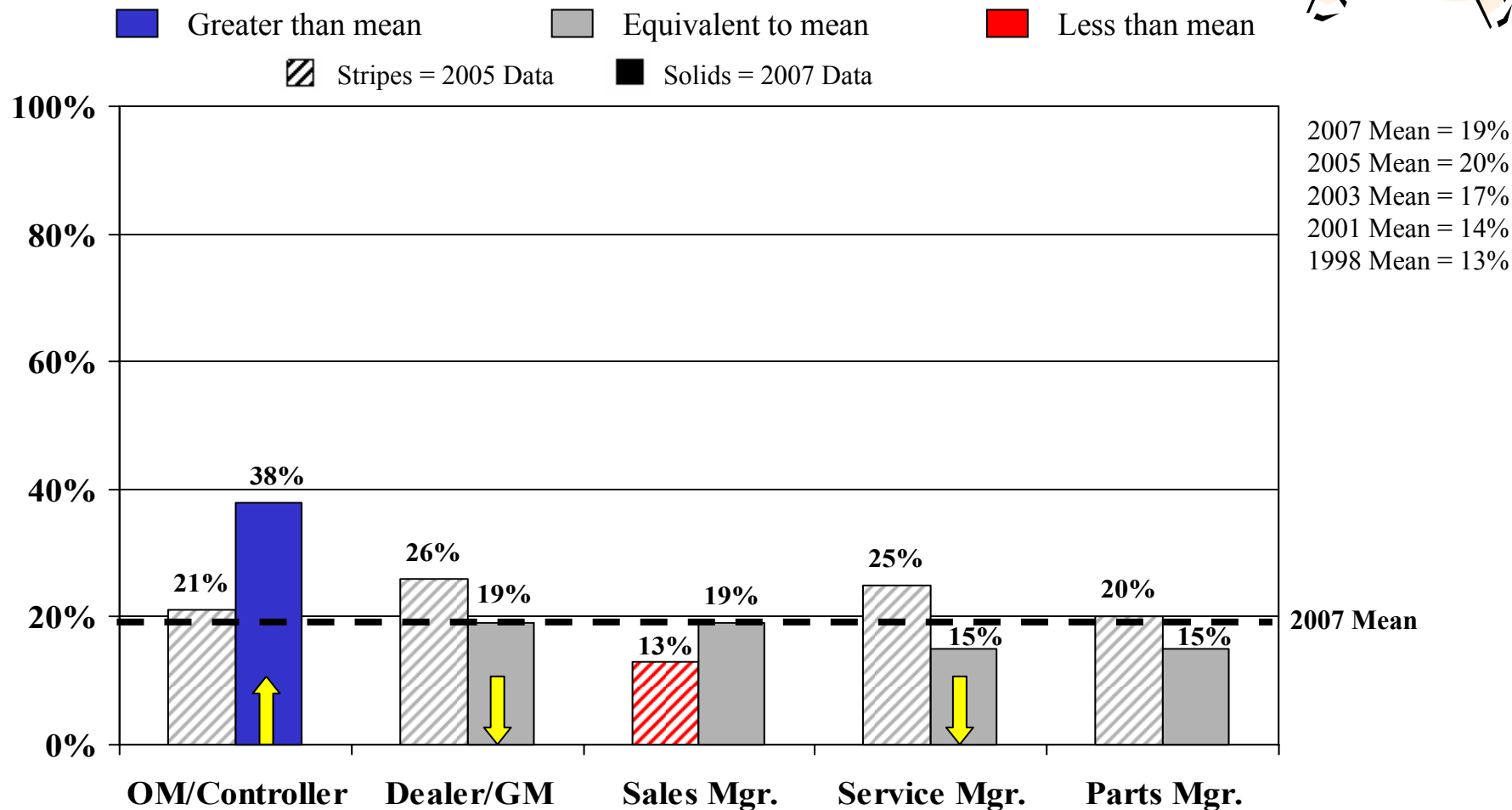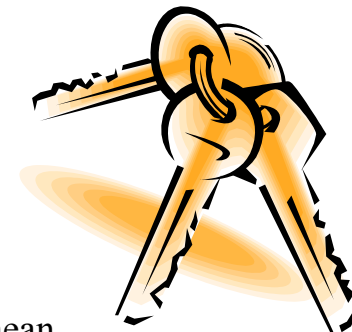- ■ Equivalent to mean
- ■ Less than mean
- ▨ Stripes = 2005 Data
- ■ Solids = 2007 Data

2007 Mean = 19%
2005 Mean = 20%
2003 Mean = 17%
2001 Mean = 14%
1998 Mean = 13%

Chart values:
- OM/Controller: 21%, 38%
- Dealer/GM: 26%, 19%
- Sales Mgr.: 13%, 19%
- Service Mgr.: 25%, 15%
- Parts Mgr.: 20%, 15%

2007 Mean (dashed line at ~19%)

Percentages represent very cost effective ratings

2007 Weighted Base = 995
2007 Actual Base = 995

48

Q.19

Vendor Training and Education

All Dealership Positions surveyed

Considering all costs associated with training, i.e. travel, lost time on the job, etc. vs. the benefits received, how cost effective would you say the computer system training received from *(your DSP vendor)* is?
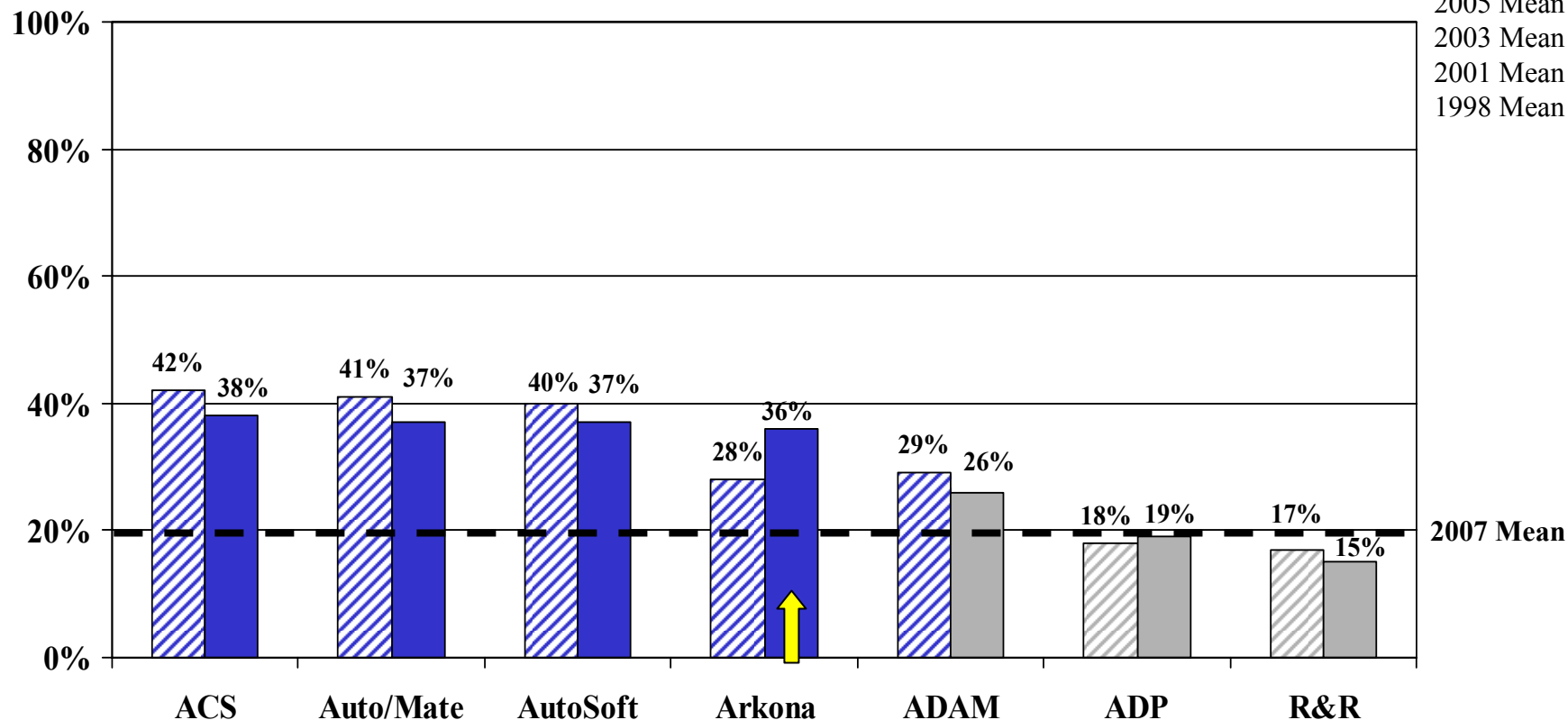
■ Greater than mean   ■ Equivalent to mean   ■ Less than mean

▨ Stripes = 2005 Data   ■ Solids = 2007 Data

2007 Mean = 19%
2005 Mean = 20%
2003 Mean = 17%
2001 Mean = 14%
1998 Mean = 13%

	ACS	Auto/Mate	AutoSoft	Arkona	ADAM	ADP	R&R
2005	42%	41%	40%	28%	29%	18%	17%
2007	38%	37%	37%	36%	26%	19%	15%

Percentages represent very cost effective ratings

2007 Weighted Base = 995
2007 Actual Base = 995

Q.19

What types of system training should *(your DSP vendor)* offer that would be most convenient, as well as cost effective, for your dealership's needs?

In-house training	Web-based training (self-study)	Web-based training (interactive)	CD/DVD/VHS tutorials	Off-site classroom training	Telephone	Podcasts
79%	73%	71%	60%	44%	37%	25%
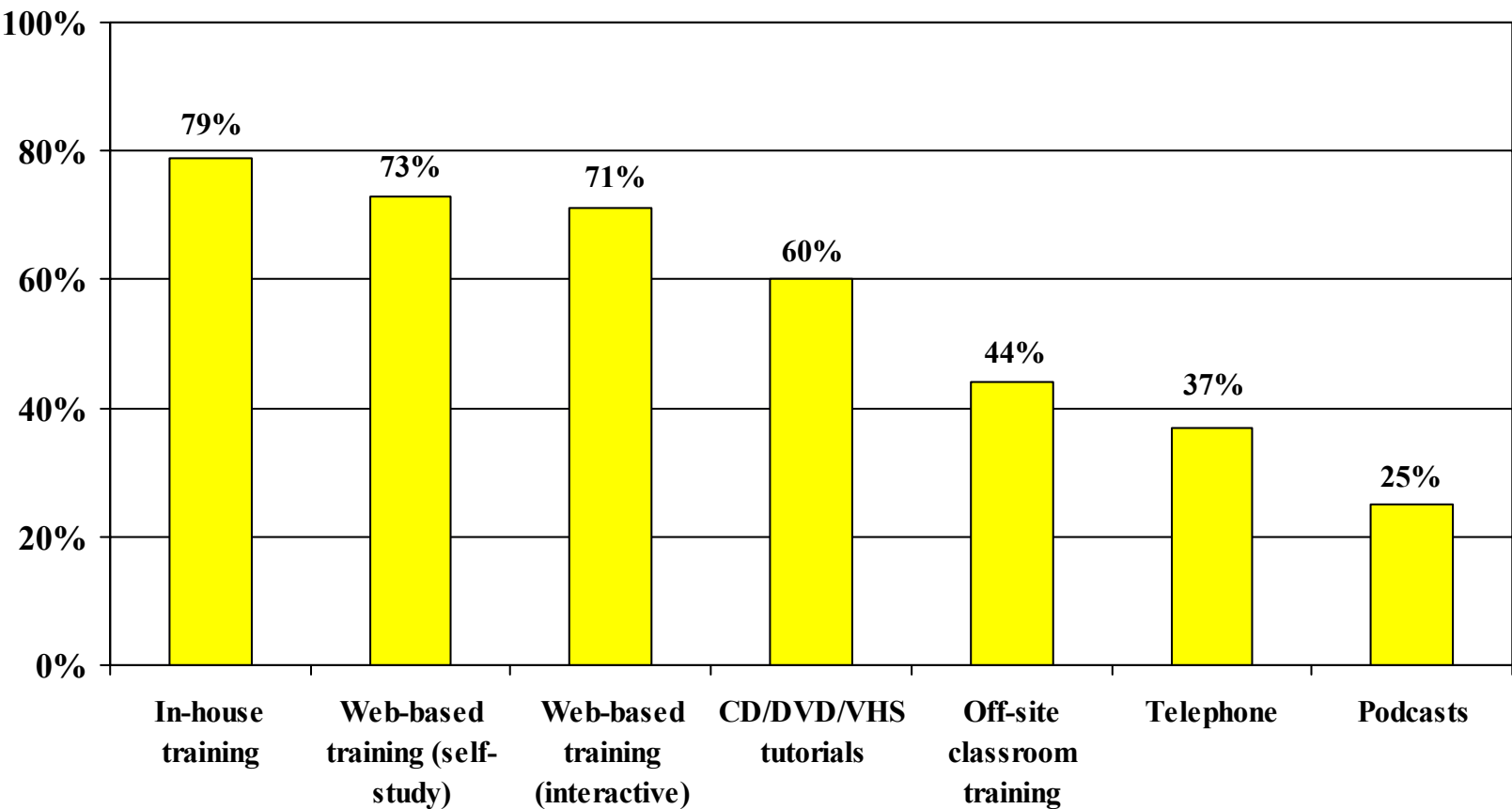
2007 Respondents
Percentages represent yes responses

2007 Weighted Base = 995
2007 Actual Base = 995

Vendor Training and Education

All Dealership Positions surveyed

Thinking of all the capabilities that you know *(your DSP vendor's)* system has, what percentage of these computer applications specific to your department do you use?

	Mean	ACS	ADAM	ADP	Arkona	Auto/ Mate	Auto Soft	R&R
Less than 20%	10%	7%	3%	11%	6%	6%	7%	11%
20% up to 40%	18%	12%	8%	20%	13%	15%	9%	19%
40% up to 60%	20%	20%	14%	21%	17%	16%	18%	18%
60% up to 80%	22%	26%	30%	19%	27%	27%	25%	23%
80% up to 100%	27%	36%	43%	26%	36%	32%	40%	26%

2007 Respondents

2007 Weighted Base = 995
2007 Actual Base = 995

Q.12

Vendor Training and Education

All Dealership Positions surveyed

2001-2005 - Overall, how important would you say it is to have the ability to have electronic reference manuals and monthly parts price tapes via CD-ROM, DVD or the Internet?
2007 - Overall, how important would you say it is to have the ability to have electronic reference manuals and monthly parts price updates downloadable via the Internet?

Legend: ■ Greater than mean ■ Equivalent to mean ■ Less than mean
▨ Stripes = 2005 Data ■ Solids = 2007 Data

2007 Mean = 71%
2005 Mean = 74%
2003 Mean = 56%
2001 Mean = 55%

AutoSoft: 74%, 82%
Arkona: 70%, 77%
Auto/Mate: 75%, 75%
R&R: 75%, 71%
ADP: 71%, 69%
ACS: 75%, 66%
ADAM: 79%, 59%
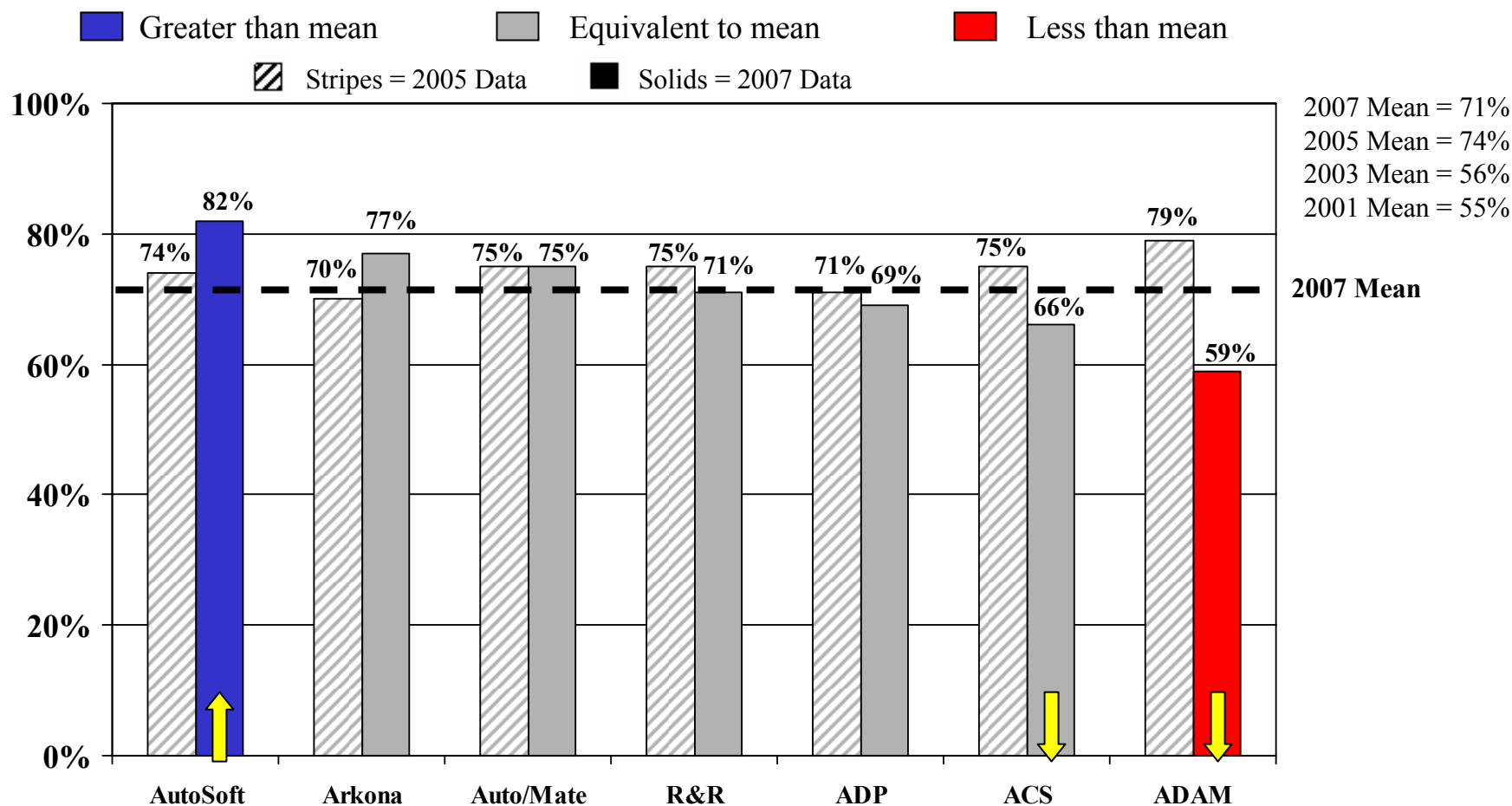
Percentages represent very important ratings

2007 Weighted Base = 995
2007 Actual Base = 995

52

Q.21
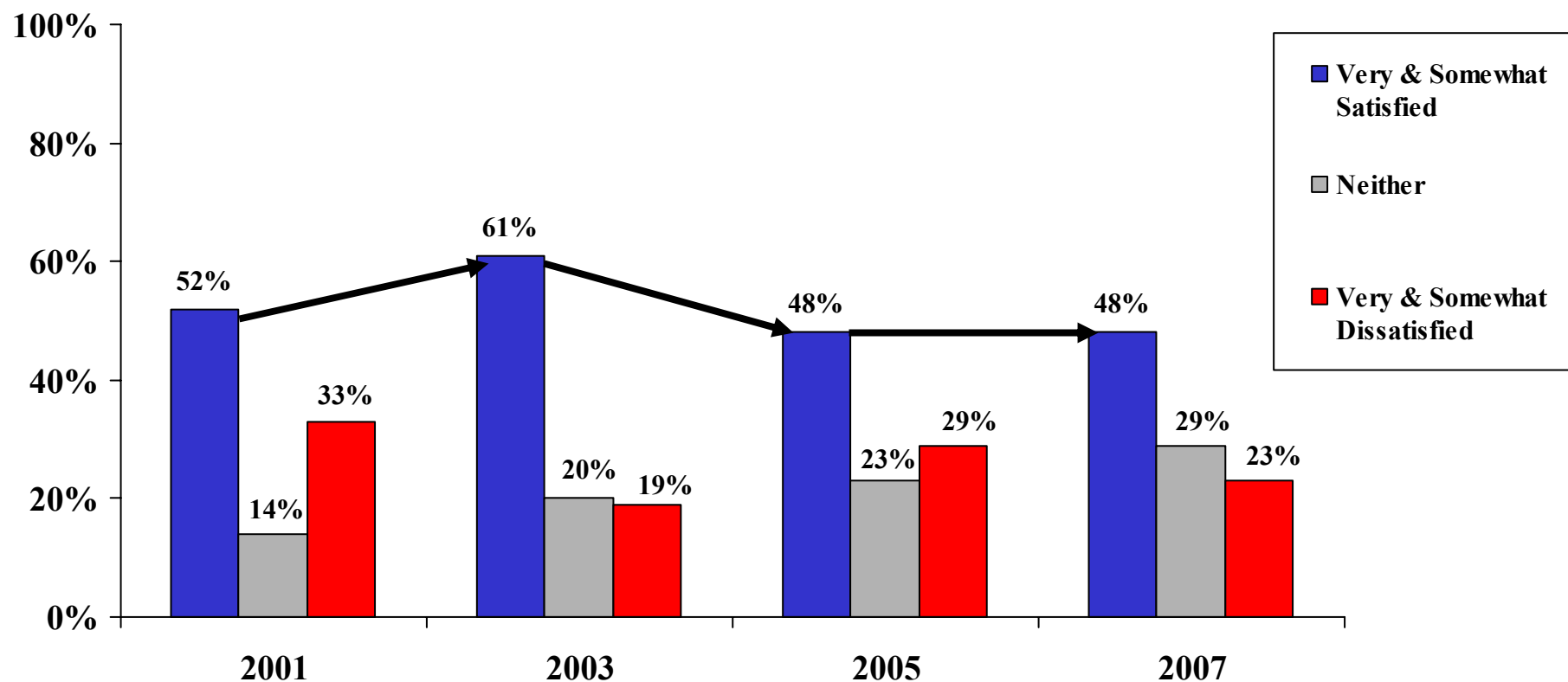
V. Additional Survey Findings

Additional Survey Findings

Dealer/GM surveyed

How satisfied are you with the value or benefit you receive from the system compared to all costs, including initial purchase cost, lease cost, and monthly fees?
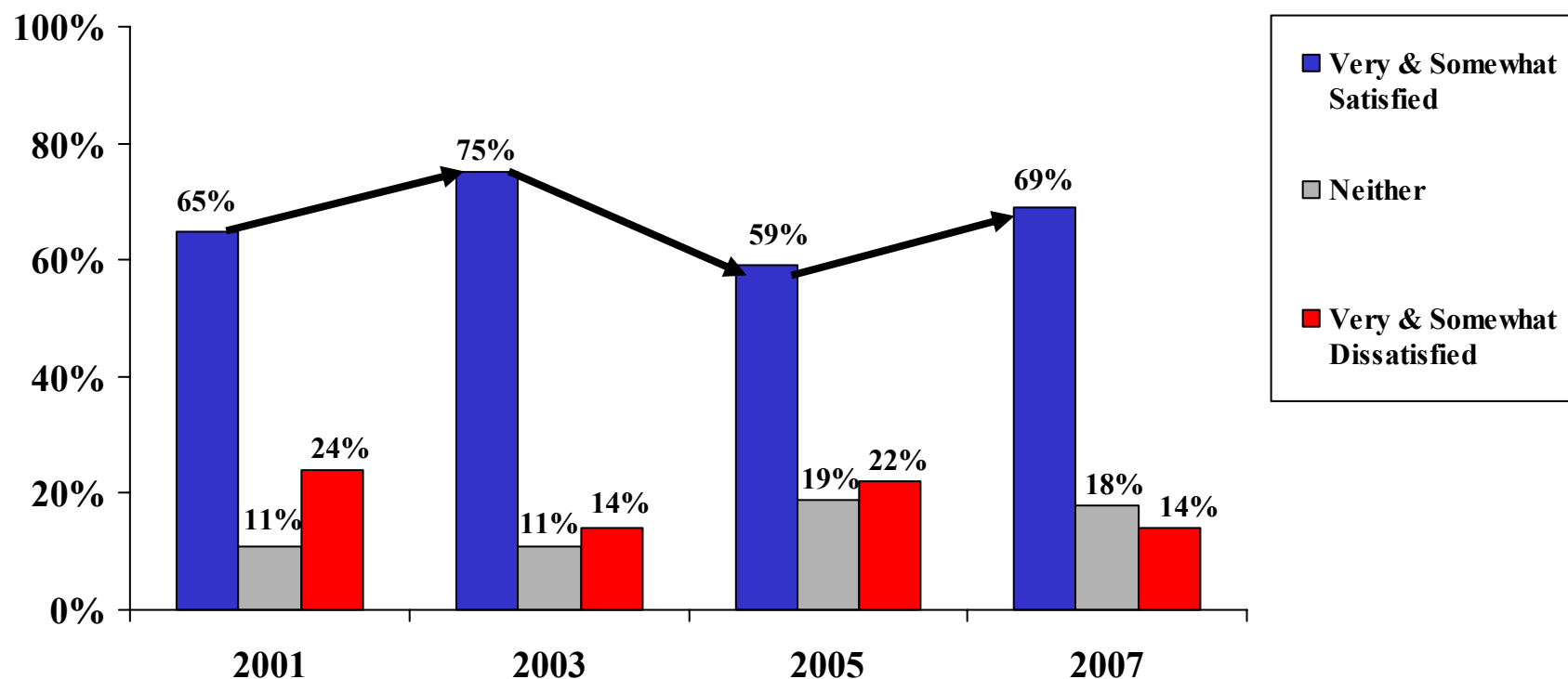
Q.3f

How satisfied are you with how well *(your DSP vendor)* understood your dealership's needs?

Legend:
- Very & Somewhat Satisfied (blue)
- Neither (gray)
- Very & Somewhat Dissatisfied (red)

Year	Very & Somewhat Satisfied	Neither	Very & Somewhat Dissatisfied
2001	65%	11%	24%
2003	75%	11%	14%
2005	59%	19%	22%
2007	69%	18%	14%

Q.3d

Do you believe the dealership received what *(your DSP vendor's)* salesperson promised?
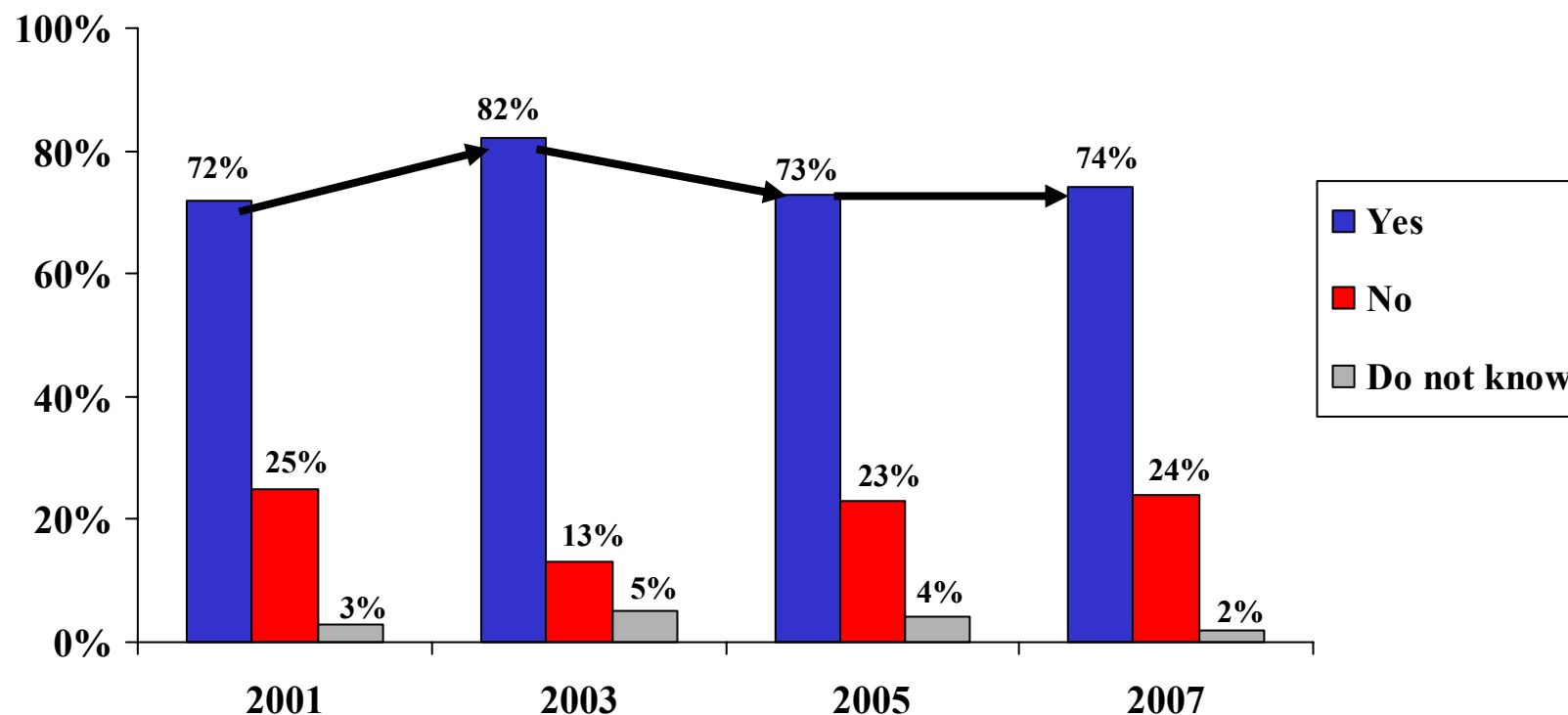
Dealer/GMs who were involved in the decision to choose their DSP vendor

2007 Weighted Base = 143
2007 Actual Base = 143

Q.6

Dealer/GM surveyed

How satisfied are you with the fairness of the contract?

Legend:
- Very & Somewhat Satisfied
- Neither
- Very & Somewhat Dissatisfied

Year	Very & Somewhat Satisfied	Neither	Very & Somewhat Dissatisfied
2001	53%	20%	28%
2003	62%	19%	19%
2005	53%	30%	17%
2007	48%	31%	21%

2007 Weighted Base = 217
2007 Actual Base = 199

Q.3a

How satisfied are you with the term of the contract agreement (length of time)?

Very & Somewhat Satisfied

Neither

Very & Somewhat Dissatisfied

	2001	2003	2005	2007
Very & Somewhat Satisfied	55%	62%	55%	47%
Neither	24%	21%	25%	32%
Very & Somewhat Dissatisfied	21%	17%	20%	21%

Q.3c

Dealer/GM surveyed

How satisfied are you with the overall length of the document (# of pages in the contract)?

Legend:
- Very & Somewhat Satisfied (blue)
- Neither (gray)
- Very & Somewhat Dissatisfied (red)

Year	Very & Somewhat Satisfied	Neither	Very & Somewhat Dissatisfied
2001	51%	29%	20%
2003	51%	36%	13%
2005	40%	38%	22%
2007	40%	42%	18%

2007 Weighted Base = 217
2007 Actual Base = 199

59

Q.3b
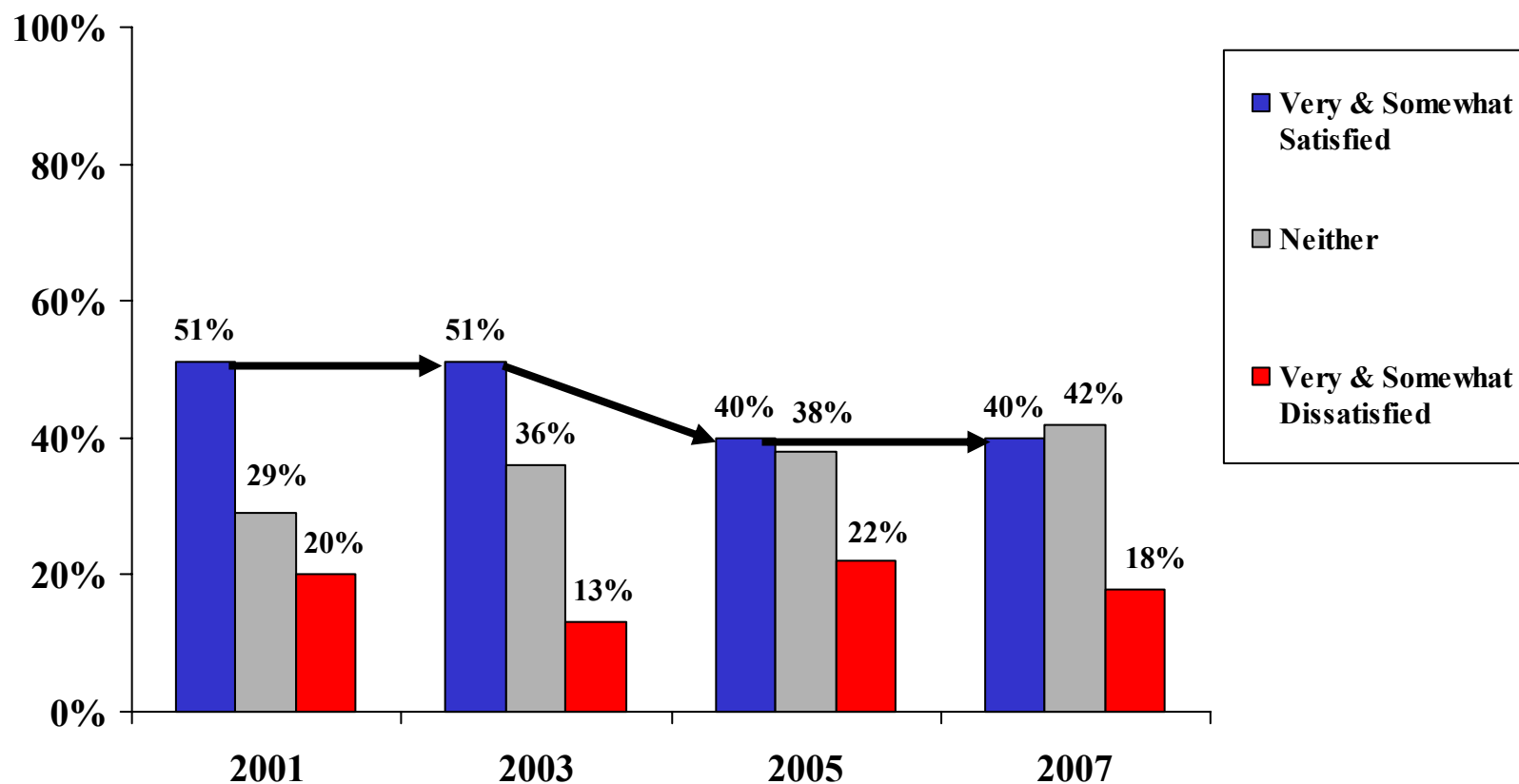
How easy to understand is your monthly bill?

Legend:
- **Very & Somewhat Easy** (blue)
- **Neither** (gray)
- **Very & Somewhat Difficult** (red)

Year	Very & Somewhat Easy	Neither	Very & Somewhat Difficult
2001	69%	16%	15%
2003	70%	16%	14%
2005	66%	21%	14%
2007	65%	19%	17%

2007 Weighted Base = 327
2007 Actual Base = 398

Q.11

Are you aware of the benefits that the Standards for Technology in Automotive Retail (STAR) has provided your manufacturer(s) as they've converted DCS processing to the Internet?

Do not know 5%

Yes 33%

No 62%

2007 Respondents

2007 Weighted Base = 217
2007 Actual Base = 199
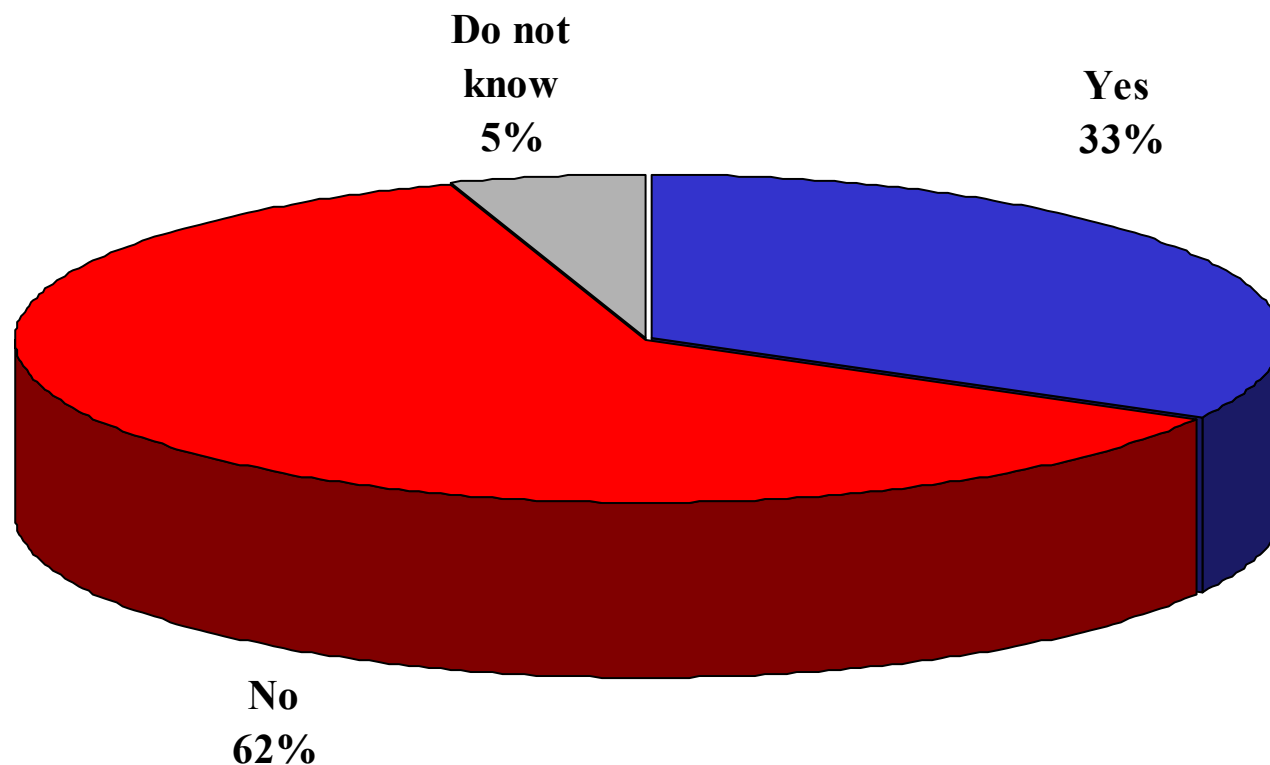
Additional Survey Findings

All Dealership Positions surveyed

Are you aware of the NADA PC Purchasing Program available to dealers and dealership employees?

Legend:
- Yes (blue)
- No (red)
- Do not know (gray)

2005:
- Yes: 18%
- No: 81%
- Do not know: 1%

2007:
- Yes: 27%
- No: 73%
- Do not know: 0%

2007 Weighted Base = 995
2007 Actual Base = 995

Q.24