E-mobility sales readiness assessment for car manufacturers

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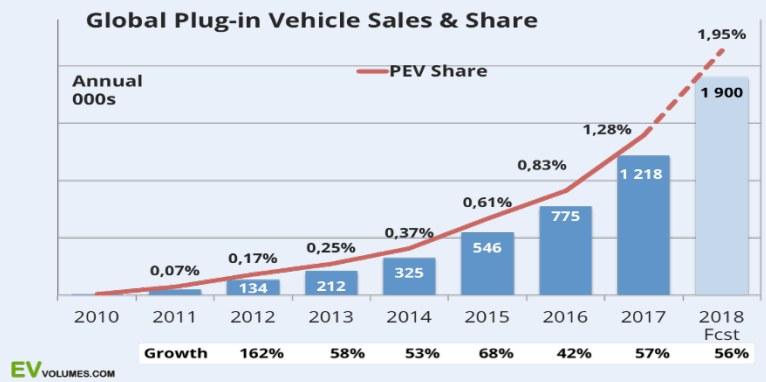
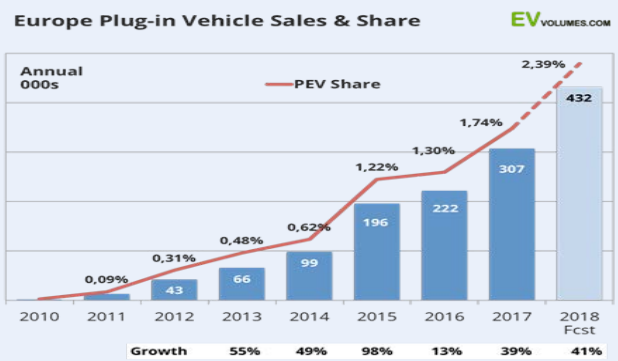
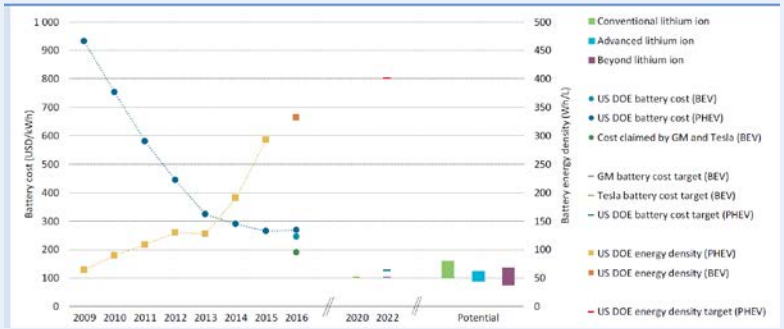
Market context





- Batteries become denser and cheaper (IEA 2017)



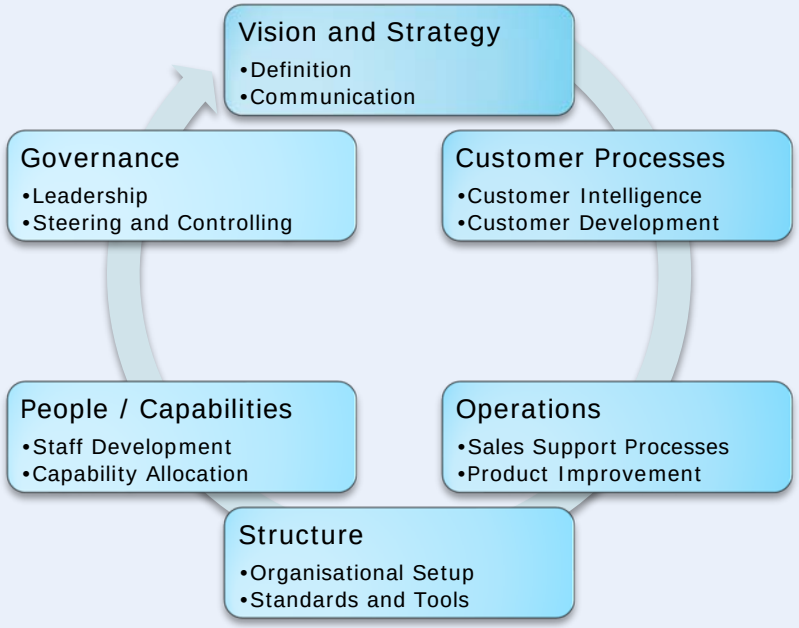
- The incumbent **automotive manufacturers need** to rethink and **adapt** their **business model** due to:
  - Changed customer behaviour,
  - Different service requirements and
- The **requirement** is to shift from a product-driven to a **customer-centric approach** due to:
  - Faster product and service replacement rates
  - Higher expectations for service and response times

There is a role change ahead from a car producer to a mobility solutions provider.

OEM sales organisations and their customers were interviewed in order to evaluate the level of e-mobility sales readiness.

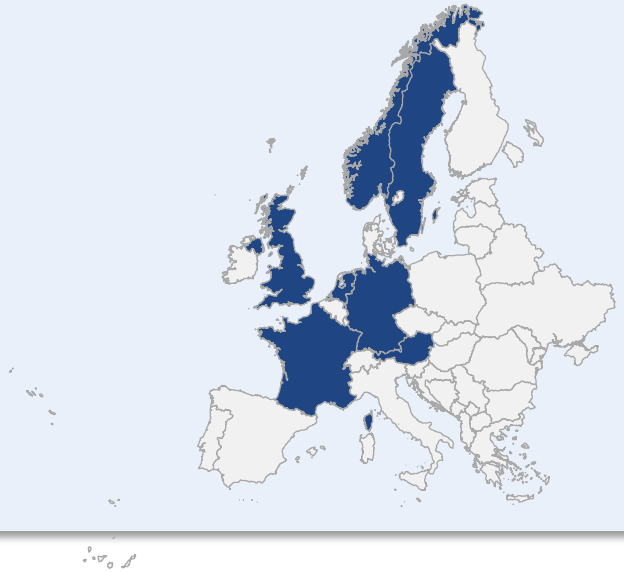
Key success areas

- 6 main themes established as key success areas



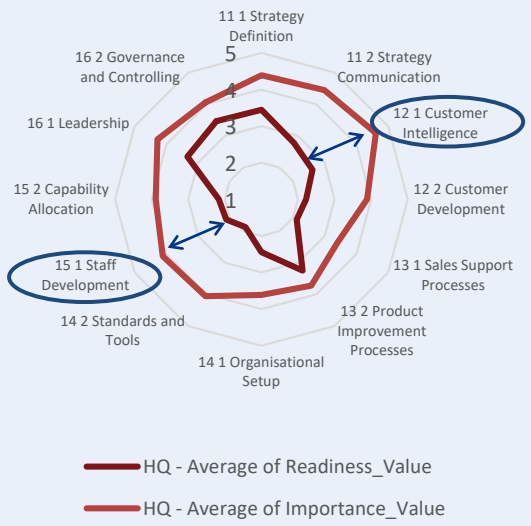
Scope of research

- Face to face interviews with headquarters, national sales organisations and fleet customers from 3 OEMs in 7 countries.
- Customers had a total electric car park of 11.200.

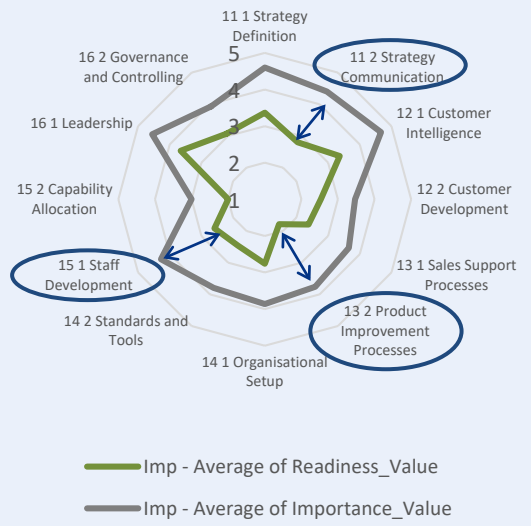


Different groups show different priorities and gaps in the organisational readiness index.

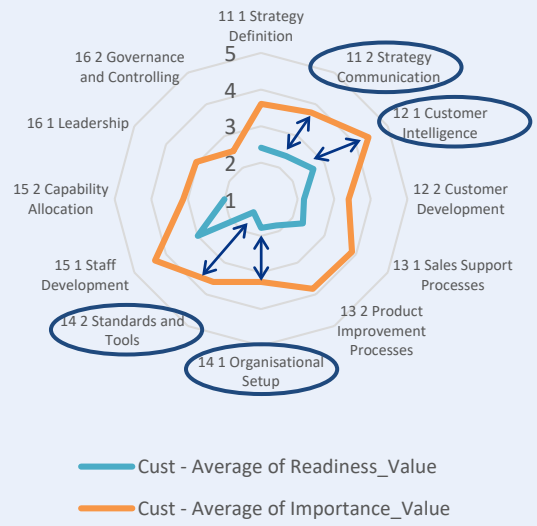
Headquarter view



National sales organisation view



Fleet customer view

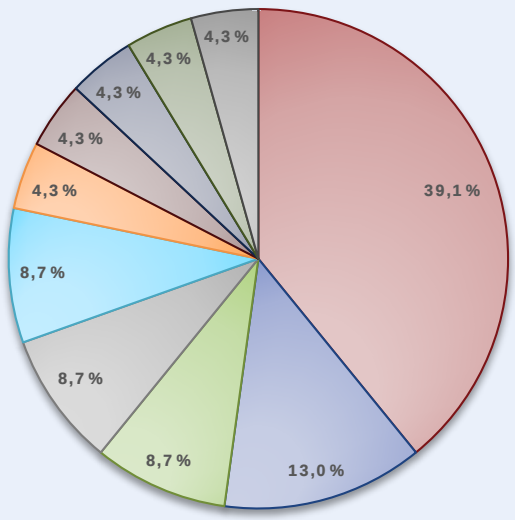


Readiness evaluation of different factors from headquarters, national sales organisations and customers

All people were asked to rate both aspects on a scale from 1 to 5, from not existing / necessary to perfectly well developed / top priority

Question: What is your favourite E-manufacturer? Customers favour Tesla or have no preference.

All customers (n=23)



All people were asked what their favourite e-manufacturer was.

All customers (n=23)

- More than half of the customers favour Tesla or have no preference.
- Other brands appear sporadically.
- There is no clear favourite from the incumbent manufacturers.
- Customers state a lack of readiness across all their suppliers, in particular the lack of competence concerning their mobility needs.

The interview results show a lack of sales readiness for e-mobility across all OEMs.

Domain	Comments / Findings
Strategy	Customers and importers **require more details about the e-mobility strategy.** The **communication** focuses on technical aspects and **lacks passion**.
Customer	Discuss and **find mobility solutions, not only cars** with the fleet accounts. For this **sales people need to learn a different language** and skill portfolio. Sales **people lack own e-mobility experience.**
Operations	Clinics are too far down the road in product improvement, **customers want to get involved earlier in the product development stage.** E-mobility needs **a separate and dedicated service hotline to allow fast answers**, especially in “petrol” countries, such as DE, UK, not in NOR.
Organisation	**A separate EV organisational setup** on HQ and NSC level **is key to develop a market such as DE or UK** (NOR started, NL is doing it now). **New heads are needed** and a new HR and recruiting process needs to take place **to allow a cultural change** and allow creativity and **pro-activity to be lived** and not doubted or feared.
People	**Current incentive systems do not** help the development of e-mobility (numbers and targets). There is a general **lack of** competence in **understanding customer mobility** requirements.
Leadership	**Old style thinking and management** has proven successful for sustainable innovation but **hinders** a **fast decision making** process in a disruptive environment. In a disruptive environment **speed beats perfection** and lives from imperfect solutions to advance.

The following aspects have been required and recommended repeatedly.

Headquarter	National sales organisation	Corporate customer
• **Top management involvement and "walk the talk" is key** to drive the business and to steer the implementation of concepts. • Implement **speed beats perfection** in the organisation, development of solutions and business case evaluation! • Give as much **independence to e-mobility** as possible to allow a disruptive market approach (**P&L responsibility**). • Design and implement **e-mobility incentive** and motivation **scheme.** • **Allow errors!**	• **Conduct market workshops** in order **to** identify local priorities and **focus on mobility solutions and not only cars.** • **Ensure EV** and **mobility competence** team for corporate sales **(new heads)**. • Identify and **implement best** possible **organisational setup.** • **Launch local** in depth **readiness and market research** with corporate customers. • Design and implement **e-mobility dealer development plan.**	• **Don't fear your customers, talk with them about mobility** solutions and not only about cars. • **Organise future mobility workshops** to identify strategic opportunities. • **Expand** and intensify two-way **expert communication** with corporate customers and leasing companies. • **Involve corporate customers earlier** in the development of new products and mobility solutions (co-creation).

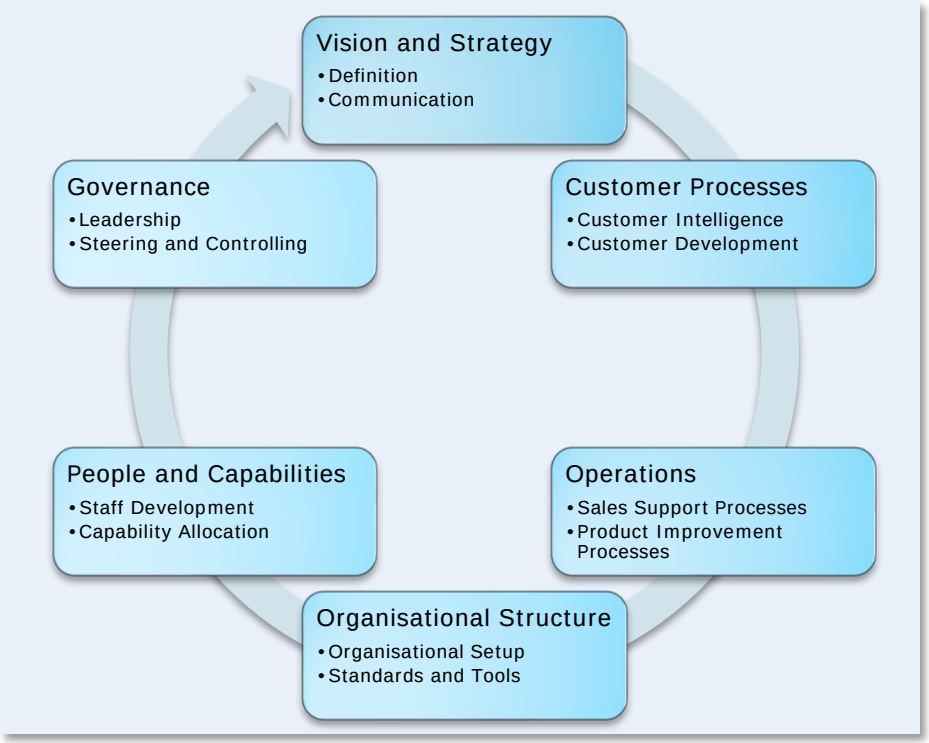
A disruptive approach is not doing the same things faster!

Our service portfolio in automotive

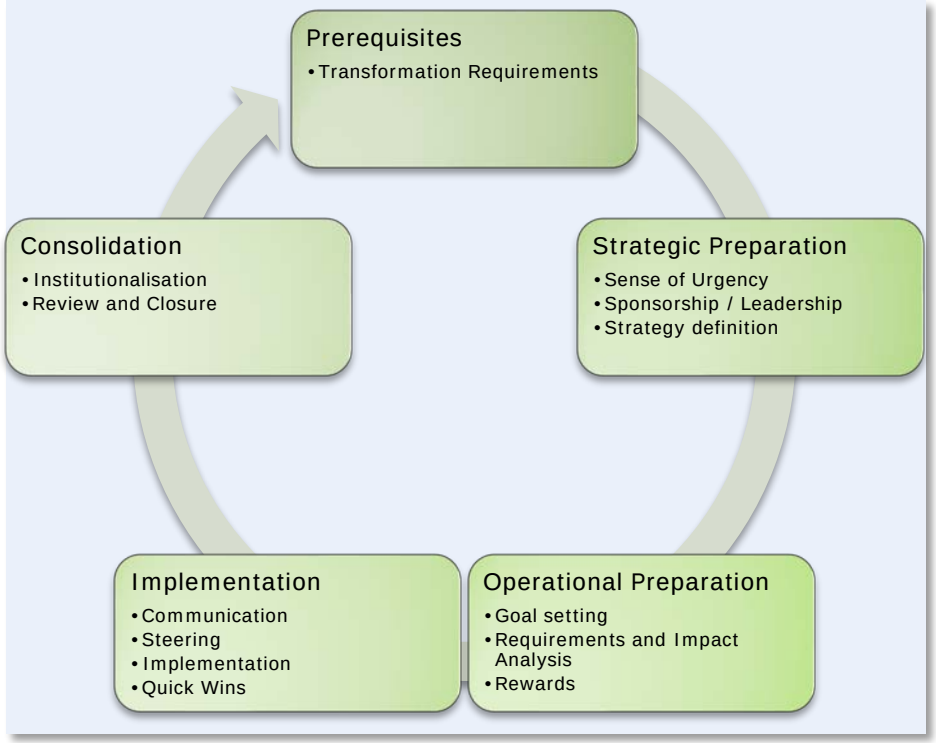
What to do	**Where** to go	**How** to do it	**What tools** to use	**Whom** to start with
Organisational diagnostic	Strategy development	Organisational transformation	Traditional programme management	Headquarter
Readiness evaluation	Operational goal setting	Change management	Agile project management	National sales organisation
				Local distributor (dealer)
				Customer

Our organisational development approach

1. Identifying gaps
Readiness assessment



2. Closing gaps
Organisational transformation



So what’s next?

Let’s talk about it

Kind Regards, André Latendorf

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