

The logo features the word "OEM" in a large, bold, blue sans-serif font. The letter "O" is stylized as a blue circle with a white crescent shape inside. To the right of "OEM", the words "COLLISION REPAIR" are stacked above "ROUNDTABLE" in a smaller, bold, blue sans-serif font.

OEM COLLISION REPAIR
ROUNDTABLE

OEM1STOP.COM | CRASHREPAIRINFO.COM

OEM Roundtable Industry Update

Collision Industry Conference – Oklahoma City, OK

April 14, 2022



HONDA



KIA



NISSAN
GROUP OF THE AMERICAS

STELLANTIS



TOYOTA

VOLKSWAGEN
GROUP OF AMERICA



Panel Participants

- **Dan Ducharme** – Volkswagen of America – Wholesale Parts Sr. Manager
- **Devin Wilcox** – Subaru of America – Collision Certification Manager
- **Mark Allen** – Audi of America – Collision Programs and Workshop Equipment Specialist



HONDA



KIA



NISSAN
GROUP OF THE AMERICAS

STELLANTIS



TOYOTA

VOLKSWAGEN
GROUP OF AMERICA



Agenda

- History of the Roundtable
- Who are We?
- What is Our Purpose?
- Quarterly Meetings
- Collision Industry Engagement and Support
- Concerns
- Moving the Industry Forward
- Q & A



HONDA



KIA



NISSAN
GROUP OF THE AMERICAS



TOYOTA

VOLKSWAGEN
GROUP OF AMERICA



Brief History

- 1997 – Emergence of numerous non-competitive issues faced by all OEMs sparked idea for group meetings, suggested by George Gilbert (Ford) and Rick Sherwood (Campbell & Co.)
- 1998 – Six exploratory meetings held with numerous OEMs
- 1999 – Group seen as viable and quarterly meetings began
- 2008 – OEM1Stop.com repair information website launched
- 2022 – 13 member companies



HONDA



KIA



NISSAN
GROUP OF THE AMERICAS

STELLANTIS



TOYOTA

VOLKSWAGEN
GROUP OF AMERICA





HONDA



VOLKSWAGEN
GROUP OF AMERICA

**OEM COLLISION REPAIR
ROUNDTABLE**



TOYOTA



NISSAN
GROUP OF THE AMERICAS



OEM COLLISION REPAIR ROUNDTABLE

Board of Directors

Ford – Chris Wallace



GM – John Eck



Honda – John Chambers



Hyundai – Manoj Sinha



Kia – Alicia Gafford



Mazda – Anita Rexwinkle



Mercedes – Benito Cid



Board of Directors

Nissan – Dan Dent



Stellantis – Dustin Pedley



Subaru – Devin Wilcox



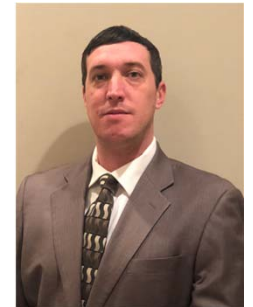
Toyota – Scott Henderson



Volkswagen – Dan Ducharme



Volvo – Ken Park



Leadership History

- **2013 – 2014** Paul Massie – Ford
- **2015 – 2016** Gary Ledoux – Honda
- **2017 – 2019** John Eck – General Motors
- **2020 – 2021** Rossana Alvarez – Honda
- **2021** Mark Zoba – Nissan
- **2022** Dan Ducharme – Volkswagen



HONDA



KIA



NISSAN
GROUP OF THE AMERICAS

STELLANTIS



TOYOTA

VOLKSWAGEN
GROUP OF AMERICA



What is Our Purpose?

Mission Statement

Continuously improve the quality of collision repair available to vehicle owners.



HONDA



KIA



NISSAN
GROUP OF THE AMERICAS



TOYOTA

VOLKSWAGEN
GROUP OF AMERICA



What is Our Purpose?

Guiding Principles

- 1) The interests of all parties involved in the collision repair process are best protected when **vehicle owners** are allowed to make informed decisions regarding collision repairs to their vehicles.



HONDA



KIA



NISSAN
GROUP OF THE AMERICAS

STELLANTIS



TOYOTA

VOLKSWAGEN
GROUP OF AMERICA



What is Our Purpose?

Guiding Principles

- 2) Active participation by all parties in the collision repair process is necessary if the **quality of collision repair** available to vehicle owners is to continuously improve.



HONDA



KIA



NISSAN
GROUP OF THE AMERICAS

STELLANTIS



TOYOTA

VOLKSWAGEN
GROUP OF AMERICA



What is Our Purpose?

Guiding Principles

- 3) Open discussion among those involved in the collision repair process and **reliable sources of collision repair data** are paramount if the quality of collision repair is to continuously improve.



HONDA



KIA



NISSAN
GROUP OF THE AMERICAS

STELLANTIS



TOYOTA

VOLKSWAGEN
GROUP OF AMERICA



Quarterly Meetings – Discussion Topics

Under Strict Anti-Trust Guidelines, Frequent Topics Include:

- Improving access to and repairer use of OEM repair procedures
- Issue awareness
 - ❖ Technician shortage
 - ❖ Challenges faced by repairers and parts sellers
 - ❖ New industry programs and technologies
- Certified shop and collision program updates
- Legislative and legal updates



HONDA



KIA



NISSAN
GROUP OF THE AMERICAS

STELLANTIS



TOYOTA

VOLKSWAGEN
GROUP OF AMERICA



Quarterly Meetings – With Whom Do We Meet?

Under Strict Anti-Trust Guidelines, Guest Presenters May Include:

- Information providers
- Industry associations
- Training organizations
- Service/Equipment providers
- MSOs / Dealers / Shop owners
- Insurers



HONDA



KIA



NISSAN
GROUP OF THE AMERICAS

STELLANTIS



TOYOTA

VOLKSWAGEN
GROUP OF AMERICA



Industry Engagement and Support

The Roundtable and Member OEMs are Involved in a Number of Ways:

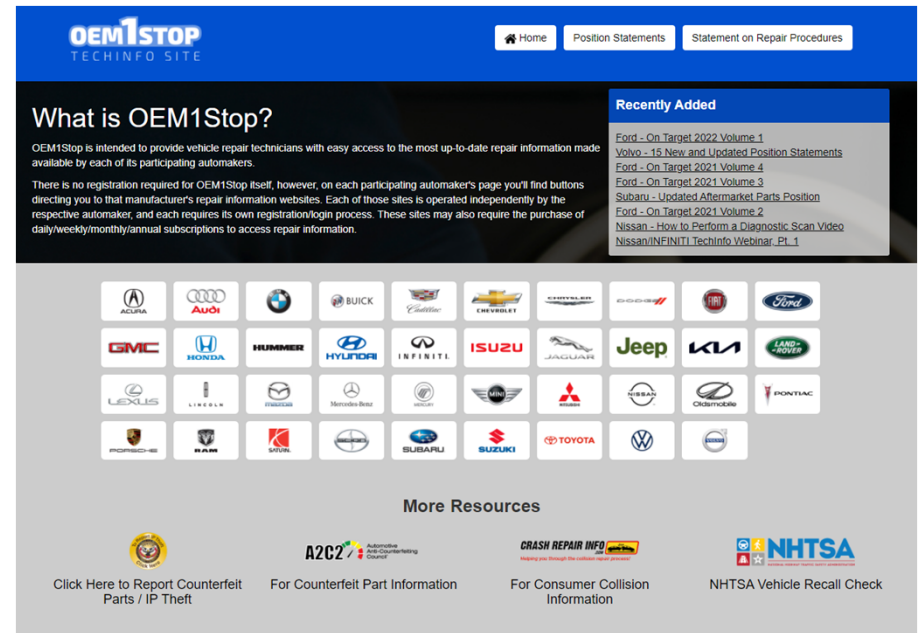
- Financial support and issue engagement with numerous organizations



Industry Engagement and Support

The Roundtable and Member OEMs are Involved in a Number of Ways:

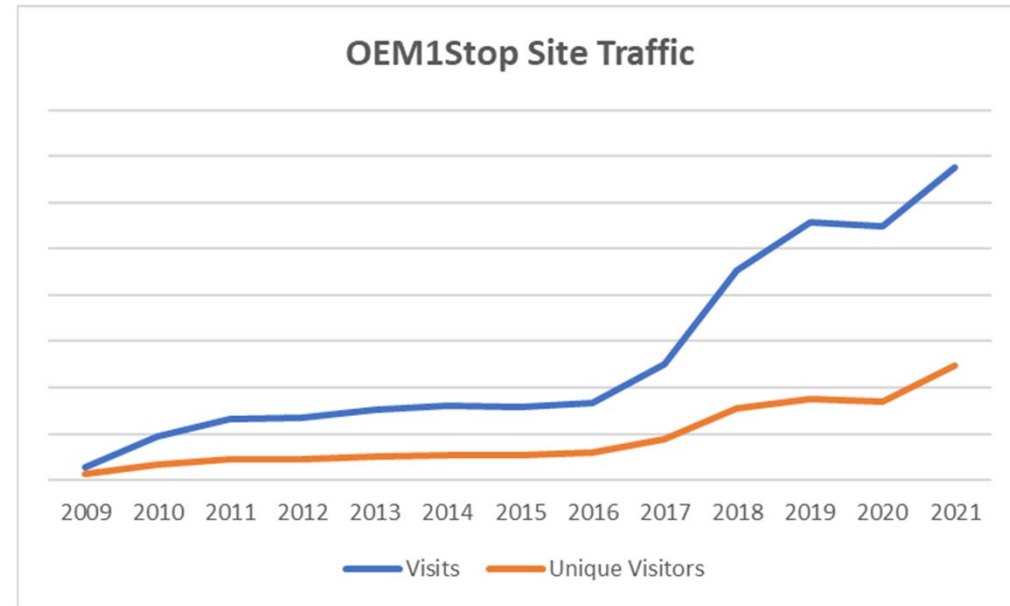
- OEM1Stop.com
 - ❖ Launched in 2008
 - ❖ Answered industry request for easier access to OEM repair procedures and information
 - ❖ Position statements added in 2016



Industry Engagement and Support

The Roundtable and Member OEMs are Involved in a Number of Ways:

- OEM1Stop.com
 - ❖ Total visits to the site eclipsed 300,000 for the first time in 2021
 - ❖ More than 120,000 unique visitors in 2021
 - ❖ Number of visits has jumped over 300% since 2016



HONDA



KIA



NISSAN
GROUP OF THE AMERICAS

STELLANTIS



TOYOTA

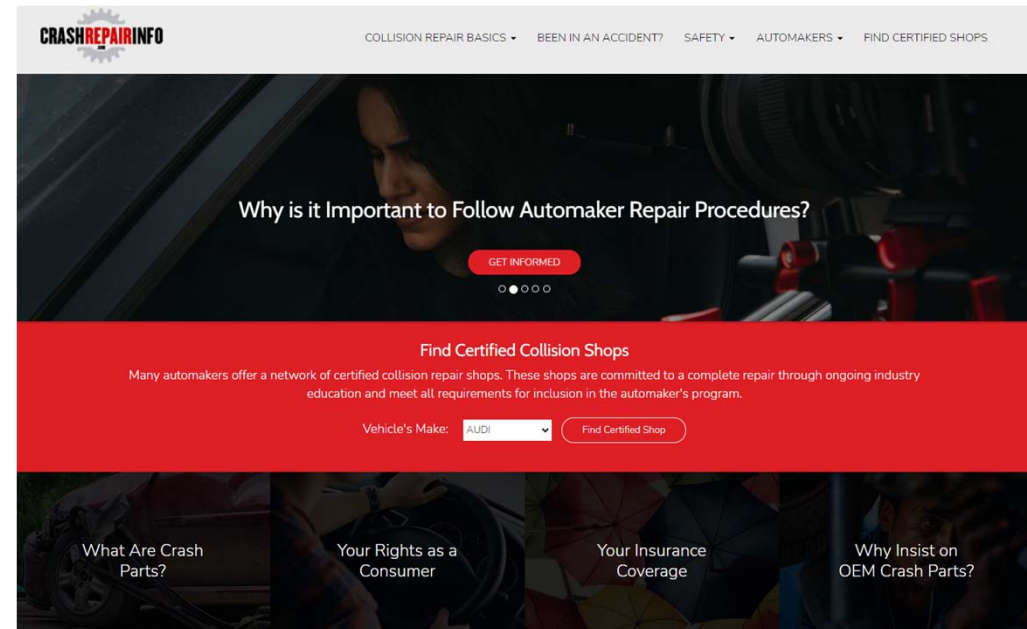
VOLKSWAGEN
GROUP OF AMERICA



Industry Engagement and Support

The Roundtable and Member OEMs are Involved in a Number of Ways:

- CrashRepairInfo.com
 - ❖ Launched in 2014
 - ❖ Direct outreach to consumers
 - ❖ Guiding vehicle owners through collision repair process
 - ❖ Focus on importance of proper repairs



HONDA



KIA



NISSAN
GROUP OF THE AMERICAS

STELLANTIS



TOYOTA

VOLKSWAGEN
GROUP OF AMERICA



Industry Engagement and Support

The Roundtable and Member OEMs are Involved in a Number of Ways:

- Member companies constantly enhance their repair information and utilize numerous ways to communicate that to all segments of the industry
- Active participants on several industry committees
- Frequent participants in industry events and panels, include SMEs from other parts of their companies



HONDA



KIA



NISSAN
GROUP OF THE AMERICAS

STELLANTIS



TOYOTA

VOLKSWAGEN
GROUP OF AMERICA



Concerns

- Enhancing repair procedures – availability and functionality
- Improving usage of and adherence to repair procedures
- Technician availability
- Training at all levels is not keeping up with advancements
- Preparation for wave of BEVs and AVs



HONDA



KIA



NISSAN
GROUP OF THE AMERICAS

STELLANTIS



TOYOTA

VOLKSWAGEN
GROUP OF AMERICA



Concerns

- Engaging the industry on technologies that come with BEVs and AVs
- Parts availability
- Working with engineers—what needs to be done post-collision?
- Increasing engagement with IRFs



HONDA



KIA



NISSAN
GROUP OF THE AMERICAS

STELLANTIS



TOYOTA

VOLKSWAGEN
GROUP OF AMERICA



Moving the Industry Forward

- Increased collaboration with all segments
- Increased transparency amongst all segments
- Greater use of tools that are made available
- Continue to learn from all key stakeholders



HONDA



KIA



NISSAN
GROUP OF THE AMERICAS



TOYOTA

VOLKSWAGEN
GROUP OF AMERICA



Questions?



Thank You!



HONDA



KIA



NISSAN
GROUP OF THE AMERICAS



TOYOTA

VOLKSWAGEN
GROUP OF AMERICA

