**PLUG-IN AUTOMOTIVE RETAIL WORKSHOP**

“Delivering the Best Customer Experience for Plug-in Vehicle Buyers”

Wednesday, June 4th, 2014, 9:30 a.m. to 5:30 p.m.
1605 Tilia Street Ste. 100, Davis, CA 95616

Hosted social hour: 5:30 p.m. to 7:00 p.m.
Bistro 33 – 226 F Street, Davis, CA 95616

**Workshop Objectives:**

- To share key initial PEV retail study insights with dealers and other stakeholders
- To learn how various state incentive programs are being leveraged to grow PEV sales
- To share PEV sales best practices with stakeholders
- To vet policy recommendations with CEC, ARB, and other state agencies

9:30 a.m. **Registration and breakfast**

9:50 a.m. **Welcome to ITS-Davis and West Village**
Tom Turrentine, Director, Plug-in Hybrid & Electric Vehicle Research Center

10:00 a.m. **Opening Keynote**
Brian Maas, President, California New Car Dealers Association

10:15 a.m. **Why do we need to transition to Zero Emission Vehicles?**
Daniel Sperling, Professor and Director, ITS-Davis

10:30 a.m. **World Plug-in Electric Vehicle market and infrastructure trends**
Tom Turrentine, Director, Plug-in Hybrid & Electric Vehicle Research Center

11:00 a.m. **California’s Zero Emission Vehicle mandate and action plan**
Dr. Elise Keddie, Manager, ZEV Program Implementation, California Air Resources Board

11:20 a.m. **Visualizing the market: plug-in driver survey data dashboard**
Colin Santulli, Senior Manager, Vehicle Electrification Research, California Center for Sustainable Energy

11:40 a.m. **Selling Plug-in Vehicles: lessons from the California retail market**
Eric Cahill, Ph.D. Candidate, Transportation Technology & Policy, ITS-Davis

12:30 p.m. **Lunch**

1:30 p.m. **What have we learned about the business of selling plug-in vehicles?**
Brendan Dolan, Marketing Director, Boardwalk Auto Group
1:50 p.m. **What’s different about selling Plug-in Vehicles?**
Randall Blaum, Internet Sales & Leasing Specialist, Jimmie Johnson Chevrolet

2:10 p.m. **Panel 1: What opportunities and challenges do Plug-in Electric Vehicles pose to dealers?**
*Moderator:* Sandra Berg, Board Member, California Air Resources Board

Panelists:
- **Rob Louisell**, Business Development Specialist, Ford Motor Company
- **Taz Harvey**, President, Harvey Automotive Group (Nissan/Honda/Mazda)
- **Heath Carney**, EV Sales Consultant, John L. Sullivan Auto Group
- **Andrew McCargar**, District Sales Manager, Nissan North America
- **Brendan Dolan**, Marketing Director, Boardwalk Auto Group

3:00 p.m. **Panel 2: Should Plug-in Vehicles be sold like any other car or are innovations needed?**
*Moderator:* Eric Cahill, Ph.D. Candidate, Transportation Technology & Policy, ITS-Davis

Panelists:
- **Bill Bayne**, EV Sales Manager, Kearny Pearson Ford/Kia
- **Michael Nieling**, Founder, Autowatts
- **Chelsea Sexton**, Co-Founder, Plug-in America and former EV1 Specialist, Saturn
- **Geoff Ryder**, Sustainability Principal for Transportation & Energy, SAP Labs
- **Randall Blaum**, Internet Sales & Leasing Specialist, Jimmie Johnson Chevrolet

3:45 p.m. **Break**

4:00 p.m. **Breakout Sessions**
*Moderator:* Joel Pointon, Electric Transportation Manager, San Diego Gas & Electric

**Topic A:** How do we improve customer satisfaction with the plug-in purchase experience?

**Topic B:** How can we align and enhance incentive programs with the purchase experience?

4:45 p.m. **Report findings from each breakout session group**

5:00 p.m. **Closing remarks**
- Brief closing comments from participants

5:30 p.m. **Hosted Social Hour**
Bistro 33 – 226 F Street, Davis, CA 95616
About this research

State regulators recognize that automakers and new car dealers face challenges introducing the plug-in vehicles stipulated by California’s ZEV mandate. The California Energy Commission awarded UC Davis, through its multi-disciplinary NextSTEPS research arm, a grant for a comprehensive study of California’s automotive retail market.

Anecdotal accounts in the early market for plug-in vehicles suggest a number of issues affecting dealer engagement in PEV sales and the quality of the retail experience perceived by customers. Dealers report lengthy sales transactions, complex incentives, and uncertain policy support. Customers cite under-informed and/or disinterested sales staff, attempts to switch would-be PEV buyers into conventional models, and poor after-sale support (e.g., charger selection, home installation, “away from home” charging, equipment use, and public charging etiquette). This study addresses the need for retail-level understanding via a study of the PEV buying experience. The research asks the following questions:

- How does the retail experience for PEV buyers compare with buyers of conventional vehicles?
- How might differences in the retail experience impact sales growth and market development?
- What retail-level influences help or hinder new PEV sales and are there opportunities for policy?
- Which retail practices and innovations yield higher PEV customer satisfaction and/or PEV sales?

We consider these questions using multi-method primary and secondary research in California’s core PEV markets, including interview data from new car dealers, automakers, electric utilities, and other supporting organizations. “Voice of the customer” survey data from PEV buyers and rejecters is obtained from J.D. Power & Associates’ 2013 Sales Satisfaction Index (SSI) Study. Additional PEV buyer data is obtained from the state’s Clean Vehicle Rebate Program (CVRP) survey.
Speaker highlights

**Brian Maas**
Brian Maas is the President of the California New Car Dealers Association representing over 1,200 franchised new car dealers in the state. Brian directed CNCDA’s political activities and served as the Association’s chief legislative advocate for twelve years before becoming President. Previously, he was a lobbyist with the California Bankers Association. Prior to working with trade associations, Brian spent 12 years practicing law with Pillsbury Winthrop Shaw Pittman LLP as a specialist in political law and lobbying in San Francisco and Sacramento. He also worked as a district/capitol staffer and committee consultant for Assembly Member Johan Klehs (1982-1988). A native of San Leandro, Brian graduated from McGeorge School of Law in Sacramento with honors, and the University of California, Berkeley with a double major in Political Science and Rhetoric. He lives in Sacramento with his wife, Lisa, and two children, Jared and Natalie.

**Daniel Sperling**
Dr. Daniel Sperling is Professor of Civil Engineering and Environmental Science and Policy, and founding Director of the Institute of Transportation Studies at the University of California, Davis (ITS-Davis). His research is directed at accelerating the global transition to cleaner, more efficient transportation and energy, and mitigating climate change. As director, he has led ITS-Davis to international prominence by building strong partnerships with industry, government, and the environmental community, integrating interdisciplinary research and education programs, and connecting research with public outreach and education. In June 2013, he was named a recipient of the Blue Planet Prize from the Asahi Glass Foundation. In the past 25 years, he has authored or co-authored over 200 technical papers and 12 books, has testified 10 times to the US Congress and state legislatures. In January 2008 he was confirmed as the “automotive engineering” seat on the California Air Resources Board. His chief responsibilities are oversight and design of the state’s climate change, alternatives fuels, vehicle travel and land use, and zero emission vehicle programs. He also served as co-director of the California Low Carbon Fuel Standard study, requested in the Governor’s January 2007 Executive Order. He is recognized as a leading international expert on transportation technology assessment, energy and environmental aspects of transportation, and transportation policy.

**Tom Turrentine**
Dr. Tom Turrentine is the director of the California Energy Commission’s Plug-in Hybrid & Electric Vehicle Research Center at the UC Davis Institute of Transportation Studies. For the past 20 years, he has been researching consumer response to alternative fuels, vehicle technologies, road systems, and policies with environmental benefits. His most recent work includes “Taking Charge”, California’s plan for electrification of transport, multi-year projects to study consumer use of the BMW MINI E, PRIUS PHEV conversions, the Nissan Leaf, and specially designed energy feedback displays in vehicles. In the coming years, his center will be working with several car companies and power utilities on purchase and use patterns of new electric and plug-in hybrids, developing tools to advise deployment of infrastructure, integration of plug in vehicles to California’s grid.
Elise Keddie

Elise Keddie is Manager of the Zero Emission Vehicle (ZEV) implementation section at the California Air Resources Board (CARB). Her group is responsible for California’s ZEV Regulation, which requires vehicle manufacturers to produce and sell advanced technology and ZEVs. Prior to joining ARB in 2001, Elise held a research position at the University of California, Davis. She holds a Bachelor of Science degree from the University of California, Davis and a Ph.D. from the University of Alabama at Birmingham.

Manager, ZEV Implementation, CARB

Colin Santulli

Colin Santulli is Senior Manager of Transportation Programs at the California Center for Sustainable Energy (CCSE), an independent nonprofit dedicated to accelerating the transition to clean energy technologies. He directs CCSE’s statewide transportation programs including the California Clean Vehicle Rebate Project (for the California Air Resources Board) and the development of regional plug-in electric vehicle readiness plans. Santulli works regularly with local, regional and state public and private stakeholders to develop and implement air quality improvement and GHG reduction programs. Prior to his involvement in the sustainable energy sector, Colin led maritime law enforcement units as a Lieutenant in the U.S. Coast Guard. He holds a master’s degree in international affairs, with an emphasis in environmental policy, from the University of California, San Diego.

Senior Manager, Transportation Programs, CCSE

Eric Cahill

Eric Cahill is a Ph.D. Candidate in the Transportation Technology & Policy program of the Institute of Transportation Studies at UC Davis. His focus is on innovation strategy and processes behind the growth of new markets for advanced clean vehicle technologies. Eric is the lead researcher for the Plug-in EV Research Study. Prior to UC Davis, Eric led a diversity of technology efforts for the U.S. Navy, General Motors, Boeing, and tier one automotive supplier Quantum Fuels Systems. He went on to direct the Automotive X PRIZE, a global competition that awarded $10 million to teams fielding the top production-capable cars achieving at least 100 MPGe (miles per gallon equivalent). Eric earned a B.S. in Aerospace Engineering from the University of Southern California. He also holds graduate degrees in Engineering & Management from MIT’s Sloan School of Management, and Technology & Policy from MIT’s Engineering Systems Division.

Ph.D. Candidate, ITS-Davis
Sandra Berg

Sandra Berg is a proven leader and experienced board member of private, public policy and non-profit boards. As President & CEO of Berg Family of Companies, Chairman of the Board of American Coating Association and a board member of the California Air Resource Board, Ms. Berg’s leadership has successfully combined two worlds that are often seen as oil and water – the chemical business and air quality public policy. In 2004, Ms. Berg was appointed to the California Air Resources Board (CARB) by Governor Schwarzenegger. CARB is the lead policy agency responsible for the air quality in the state, recognized nationally and internationally as a leader in policy, innovative technology and driving green business to California for clean air solutions. Combining her leadership in business and community efforts, Ms. Berg brings a practical yet dedicated perspective to her board service, having chaired several committees overseeing a billion dollars of public incentive funding dollars and facilitated key policy implementation groups as well as influencing policy to protect health and environment while keeping business strong.

Rob Louisell

Rob Louisell is the Business Development Specialist in Ford Motor Company’s San Francisco Regional Office. As part of the Sales and Marketing team, his responsibilities include advancing the company’s ‘alternative fuel’ vehicle efforts. This endeavor involves promoting hybrid, plug-in hybrid, and ‘all-electric’ vehicle technologies at public and private events, as well as with the company’s franchised dealers. Rob has deep family roots in the auto industry. He was raised in a Detroit suburb (Grosse Pointe), is the grandson of a Packard Motor Company engineer and has various family connections with manufacturers and industry suppliers. He has spent the past 17 years with Ford in California.

Taz Harvey

Taz Harvey entered the car business in 1987 after working for the family motorcycle business for almost ten years. Starting out part time as the janitor and working his way up to a Honda certified Motorcycle technician, and eventually the general manager of the power products and motorcycle business. After attending the National Auto Dealers Assn. Dealer candidate school he went on to be a general manager of the family Honda car dealerships and eventually bought several other dealerships Tracy Mazda, Dublin Mazda and Dublin Nissan. The Honda dealerships are the core business and account for the majority of sales and income. Total sales are about $200 million annually on over 8000 new and used vehicles. Elected to serve on the California New Car Dealers association 's board of directors in 2011 and have in the past served as the Chairman of the Tracy Chamber of Commerce. A former professional motorcycle and race car driver, Taz has driven over 45 different racing circuits in the USA, Canada, Mexico and Europe. Retired from professional motorcycle and car racing since 2003, he still races a 1972 Datsun 240z in in vintage races like the La Carrera Pan-American in Mexico. He resides in Danville with his wife Milena and two high school age sons.
Andrew McCarger

I have worked in the automotive industry since 1992 with a wide range of responsibilities. I began my career with Chrysler Corporation and experienced several mergers and acquisitions during my 16 year stint there. After leaving Chrysler in 2008, I took a couple of year hiatus from the auto industry and got involved with a startup initiative developing alternative fuel infrastructure in Northern California including EV, E85, Bio-Diesel and Hydrogen opportunities. I returned to the car business with Mazda North American Operations and have now been with Nissan North America for the past two years. My experience has included parts and service operations and distribution, but the majority of my focus has been supporting the various aspects of sales and marketing operations within the dealer network.

Michael Nieling

Michael Nieling is co-founder of Autowatts, Creative Director at Ocupop and teaches design at MIAD. Splitting time between offices in Hawaii, Colorado, California and Wisconsin, if he’s not on an airplane, he’s likely somewhere shouting about marketing and design. Michael has been helping to define the visual language of our digital experience for over a decade. As Creative Director and founder of Ocupop, he has led projects for companies at all ends of the spectrum – from Google, Facebook, Mozilla, and the W3C to countless successful (and horribly failed) startups, Michael has directed his small, super-powered team in creating some of the most influential logos, campaigns, and user interfaces on the web.

Prior to founding Autowatts, Michael received his Masters of Science in Mechanical Engineering from the University of Wisconsin in 2003 with a focus on product design. His graduate studies centered around the hybrid vehicle powertrain research for the University of Wisconsin, the Environmental Protection Agency and Ford Motor Company.

Chelsea Sexton

Chelsea Sexton is a veteran in electric transportation; her work on General Motors’ EV1 program was featured in the Sony Pictures Classics film, Who Killed the Electric Car?, and she was a Consulting Producer on the follow-up, Revenge of the Electric Car. Chelsea served as Director of the Automotive X PRIZE, Senior Advisor to VantagePoint Capital Partners’ Cleantech practice, and co-founder of Plug In America, an electric drive advocacy group. She currently works as an industry advisor and consultant, and has written for multiple outlets including Wired and Popular Science.
Dr. Geoff Ryder helps lead R&D and business development projects for connected cars, electric vehicles, and energy management at SAP Labs, Palo Alto. As a company, SAP brings 40 years of business application experience and the newest technology—mobility, cloud services, big data analytics and enterprise-scale computing—to enable electric vehicle businesses, and offer EV drivers a delightful and sustainable ownership experience. Geoff is a member of the Connected Cars Team, and works closely with industry business units, SAP Research, and SAP field sales teams to roll out new connected vehicle solutions to our customers. He helped lead EV dealership-electric utility integration workshops in 2012. In partnership with SAP Facilities Management Geoff has contributed to workplace EV infrastructure projects at SAP Palo Alto, and shares our lessons learned to external and internal customers around the world. He has a PhD and MS in Computer Engineering, a BSEE, and BA in Asian Studies.

Joel has been involved in the SDG&E's preparation for the region's aggressive introduction of plug-in electric vehicles (PEVs) since he began the Clean Transportation program in 2006. He has worked directly with automakers, charging vendors, government and other stakeholders in assisting in the development of regulations, standards and guidelines associated with PEVs for the U.S. Joel has served on the boards of the California Electric Transportation Coalition, the Electric Drive Transportation Association, San Diego Regional Sustainable Partnership Transportation Committee and was past Chairperson of San Diego's Regional Clean City Coalition. He has also is been active in the Electric Power Research Institute's (EPRI) Infrastructure Working Council for PEVs; the UC Davis Plug-in Hybrid and Electric Vehicle Research Center and NextSTEPS Programs; Rocky Mountain Institute's "Project Get Ready" Advisory Group; and a Multi-unit Dwelling, Workplace and Public Plug-in Vehicle Charging Workgroup for the GM/EPRI/Utility Coalition and currently co-chairs the California Multi-unit Dwelling Vehicle Charging Workgroup. Prior to joining SDG&E in 2006, his 25-year career in environmental health sciences involved positions in government regulatory agencies, private industry and consulting.

Randall Blaum is the Co-Founder of EVGreen an automotive consulting company that creates successful sales programs for dealers so that plug-in vehicles are sold more effectively, efficiently, productively, and profitably in the short- and long-term. EVGreen specializes in enjoyable, very profitable, easy-to-use programs that allow dealers to train local, regional, and national sales teams on how to sell EV’s whilst retaining additional gross and selling more units. The EVGreen training process provides sales consultants a way to absorb information and retain over 80% of that information a year later. Prior to Co-founding EVGreen, Randall lead the design and creation of the international advertising and trailer programs for LucasFilm THX and was in the entertainment business for over 25 years and his marketing, advertising, and sales strategies have been experienced by over five-hundred-million people worldwide -- using the same strategies within the EVgreen "sustainable profits" process. He has consulted for Fortune 500, 100 and 50 companies like NEC America, Panasonic, and American Express bringing new, reliable, and sustainable customer-centric ways of prospecting, selling, increasing productivity, customer satisfaction and profitability. Randall has personally sold over 200 EV’s since 2010 and has helped automotive dealer’s sales consultants and sales teams reach and exceed their EV sales goals.
About ITS-DAVIS

ITS-Davis is the leading university center in the world on sustainable transportation. It is home to more than 60 affiliated faculty and researchers, 120 graduate students, and has roughly $15 million in funding. While our principal focus is research, we also emphasize education and outreach. Our mission is to serve the needs of society by organizing and conducting multidisciplinary research on emerging and important transportation issues, disseminating this research through conferences and scholarly publications, and enhancing the quality and breadth of transportation education.

The Institute is unique in hosting a graduate program in transportation, matching interdisciplinary research with interdisciplinary education. Our Transportation Technology and Policy (TTP) graduate curriculum draws from 34 different academic disciplines. Our more than 225 alumni are becoming leaders in government and industry. We are partnering with government, industry and non-governmental organizations to inform policy making and business decisions, and advance public discourse on key transportation, energy and environmental issues. The Institute is focused on issues important to society.

Plug-in Hybrid & Electric Vehicle Research Center (PH&EV)

The Plug-in Hybrid & Electric Vehicle (PH&EV) Research Center launched in early 2007, with the support of the California Energy Commission’s allocation of Public Interest Energy Research (PIER) funds for transportation research. The Center collaborates closely with California utilities, the Electric Power Research Institute, automakers, and other research institutions on research aimed at developing a sustainable market for plug-in vehicles. The Center began with three initial research projects, and with the development of a PH&EV Research Roadmap, identified high-priority research areas for future research, including consumer perspectives and vehicle use, charging infrastructure, fleet market development, battery studies, and the impact of human-machine interfaces on behavior. Moving forward our research is focused on measuring, monitoring and understanding multiple aspects of the quickly evolving market for plug-in vehicles internationally.

Sustainable Transportation Energy Pathways Program (NextSTEPS)

NextSTEPS is a four-year (2011-2014) multidisciplinary research consortium, part of the Institute of Transportation Studies at the University of California, Davis. Our mission is to:

- generate new insights and tools to understand the transitions to a sustainable transportation energy future for California, the US and the world (Research)
- disseminate valued knowledge and tools to industry, government, the environmental NGO community, and the general public to enhance societal, investment, and policy decision making.
- support the training of the next generation of transportation and energy leaders and experts.

NextSTEPS is supported by 23 government and industry sponsors:

- Auto: BMW, Chrysler, Ford, GM, Honda, Nissan, Renault, Toyota, Volkswagen, Westport
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