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VOLUME 54 | NUMBER 7
 JULY 2015

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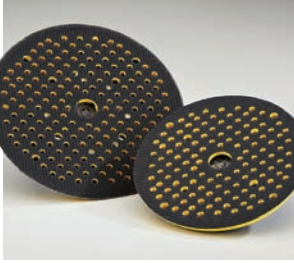




NORTON MULTI-AIR CYCLONIC NORGRIP DISCS

The Norton SG ceramic alumina A975 grain is available in the entire grit range, P80–P1000. The sharp, cool-cutting ceramic grain performs well on conventional paints and primers as well as hard-to-sand surfaces like ceramic clears, E-coated panels, aluminum and composites. Multi-Air Cyclonic discs provide long life, fast cut, and maximum dust extraction.

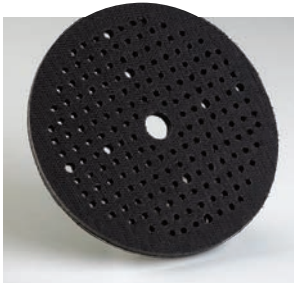
GRIT	5" DISCS	6" DISCS	GRIT	5" DISCS	6" DISCS
P1000B	776960- 07795	776960- 07788	P240B	776960- 07760	776960- 07777
P800B	776960- 07793	776960- 07787	P220B	776960- 07757	776960- 07776
P600B	776960- 07791	776960- 07786	P180B	776960- 07756	776960- 07775
P500B	776960- 07768	776960- 07785	P150B	776960- 07755	776960- 07774
P400B	776960- 07765	776960- 07784	P120C	776960- 07753	776960- 07773
P320B	776960- 07763	776960- 07781	P80C	776960- 07745	776960- 07770
P280B	776960- 07762	776960- 07778	<i>Note: Packed 50/200</i>		



NORTON MULTI-AIR NORGRIP BACK UP PADS

Norton Multi-Air Cyclonic discs can attach to any multi-hole (54+ holes) back up pad since the holes in the disc do not have to be matched up with the holes in the pad, so changeover is fast and easy. However, we do recommend the Norton Multi-Air pad for optimal results.

PART #	DIAMETER x THREAD	DENSITY	COLOR	QTY./PK.	PKS./CASE	RPM
666233- 76000	5" x 5/16-24	Medium	Yellow	1	5	15,000
636425- 06160	6" x 5/16-24	Medium	Yellow	1	5	12,000
636425- 60605	6" x 5/16-24	Soft	Orange	1	1	7,700



NORTON MULTI-AIR NORGRIP INTERFACE PADS

Designed for use with fine grit Norton Multi-Air Cyclonic NorGrip sanding discs to improve both surface finish and cut rate. Use with Multi-Air NorGrip Disc Back-Up Pads. Align the interface pad with the back up pad then simply attach the disc to the interface pad as the holes do not have to be lined up.

PART #	DIAMETER	THICKNESS	QTY./PK.	PKS./CASE
636425- 85864	5"	1/2"	16	1
076607- 19359	6"	1/2"	6	2



DYNORBITAL-SPIRIT – SELF-GENERATING VACUUM

Random Orbital Sander includes #50617 Portable Dust Collection System as shown in the application photo on the front cover. Uses exhaust air to create a vacuum at the sanding surface.

PART #	ORBIT	LEVER COLOR	CASE
6" Self-Generating Vacuum (PSA Pad included)			
616026- 21016	3/8" Orbital	Orange	1
616026- 21036	3/16" Orbital	Gray	1
616026- 21056	3/32" Orbital	Black	1

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AUTOPRO
WORKSHOP

VOLUME 54 | NUMBER 7
JULY 2015



TECHNICAL

OPERATIONS

WAITING FOR

ALUMINUM

SHOPS CAN DO PLENTY TO PREPARE FOR THIS MATERIAL BEFORE THEY SEE A 2015 FORD F-150 AT THEIR DOOR

FINANCIAL INSIGHT

Competitive pressure, customer focus driving jobber change

TECHNICAL TRAINING

CARBON FIBER

How to know when to repair versus replace

MECHANICAL FOCUS

FUSE BOX

Fuel demands have driven major changes

DISRUPTION IN THE AUTOMOTIVE ECOSYSTEM

WHAT TO EXPECT AND HOW TO SURVIVE AND WIN

TRENDING

PBE EVENT DIALS IN ON LEADERSHIP

SPEAKERS STRESS IMPORTANCE OF COMMUNICATION, SHOP SUPPORT FOR SUCCESS

COMMUNITY

KNOW YOUR STRATEGY

DEVELOP A BUSINESS PLAN TO DETERMINE THE BEST PATH FORWARD

Photo: Ford

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24950 Country Club Blvd., Suite 200
North Olmsted, OH 44070
Phone: (440) 243-8100
Fax: (440) 891-2675
WWW.ABRN.COM

EDITORIAL

MICHAEL WILLINS
GROUP CONTENT DIRECTOR
mwillins@advanstar.com
(440) 891-2604

KRISTA MCNAMARA
CONTENT CHANNEL DIRECTOR
kmcnamara@advanstar.com
(440) 891-2746

LARRY MONTANEZ
CONTRIBUTING
TECHNICAL EDITOR
STEPH JOHNSON-BENTZ
ART DIRECTOR

CONTRIBUTORS

BRIAN ALBRIGHT
b-albright@sbcglobal.net
(614) 237-6707

MIKE ANDERSON
mike@collisionadvice.com
(301) 535-3333

MIKE LAVASSEUR
mike@keenautobody.com
(484) 257-5410

JAMES E. GUYETTE
jimguyette2004@yahoo.com
(440) 564-9180

GREG HORN
greg.horn@mtchell.com
(858) 368-7796

KEVIN MEHOK
k.mehok@comcast.net
(708) 516-2936

TONY PASSWATER
tony.passwater@aeei.net
(317) 290-0611

KEITH MANICH
Kmanich@autotraining.net
(888) 471-5800

TIM SRAMCIK
tsramcik@yahoo.com
(330) 475-5969

ALFRED THOMAS
athomas@pct.edu
(570) 329-2712

JOHN YOSWICK
info@crashnetwork.com
(503) 335-0393

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(773) 866-1514
Fax: (773) 866-1314

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NEWS ANALYSIS, INSURANCE MATTERS & LEGISLATION ISSUES

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TRENDING



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ANALYSIS

PBE DISTRIBUTOR EVENT FOCUSES ON LEADERSHIP

BY MIKE WILLINS | GROUP CONTENT DIRECTOR

The PBES 2015 Spring Conference took a look at behavior and its impact on business growth.

ACQUISITIONS

VALSPAR BUYS QUEST'S AUTOMOTIVE COATINGS DIVISION

8 Valspar Corporation completed the purchase of the performance coatings businesses of Quest Specialty Chemicals, which include automotive refinish and industrial coatings.

TOP SHOP RECOGNITION

ENTER THE ABRN TOP SHOPS CONTEST

8 The ABRN Top Shops Contest is open, and the pared down digital-only entry makes it easier than ever to apply. The deadline is July 31!

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FEATURE

KNOW YOUR STRATEGY

BY BRAD MEWES | ABRN BLOGGER

There has never been a greater need to develop a business strategy to determine the best path forward for your shop than now in the collision repair industry.

[COMMUNITY PULSE]

BEST OF THE BLOGS AUDIO WEBCASTS TOP HOW 2 VIDEOS READER PHOTOS INDUSTRY CALENDAR MESSAGE BOARDS INDUSTRY GROUPS VIDEO WEBCASTS

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WHAT IS ABRN COMMUNITY? The ABRN community is an online NETWORK for your business. It's a place to go to post articles, blogs, videos, photos and audio clips to share ideas with other collision repairers. Community content is used in ABRN's twice weekly e-newsletters. Check it out at <http://workshop.search-autoparts.com>



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MINDING YOUR BUSINESS

AUTO ECOSYSTEM DISRUPTION

BY **STEPHEN APPLEBAUM** AND **VINCENT ROMANS** | CONTRIBUTING EDITORS

What to expect and how to survive and win

IN THE NEXT ISSUE OF ABRN
Take a look at your key performance indicators and why they really do matter to your business.

MINDING YOUR BUSINESS

**GIVE A LITTLE, GET A LOT
 REAP THE BENEFITS OF GIVING BACK**

KIM KIMBRIEL / CONTRIBUTING EDITOR

30 Contributing to your community makes good business sense for many reasons.



THE PROFIT MOTIVE

HIT A MOTIVATION BULLSEYE

CHRIS "CHUBBY" FREDERICK / CONTRIBUTING EDITOR

46 Find what is truly important to your employees, and tap into those values to boost production.



HOW2 KNOW-HOW TIPS & TECHNIQUES FROM THOSE IN THE KNOW



COVER FEATURE

WAITING FOR ALUMINUM

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TECHNICAL TRAINING

BY **TIM SRAMCIK** | CONTRIBUTING EDITOR

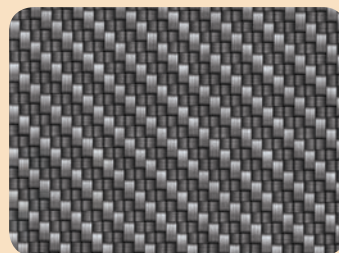
Shops can do plenty to prepare for this material before they see a 2015 Ford F-150 at their door.

TECHNICAL FOCUS

CARBON FIBER

BY **ED STAQUET** | CONTRIBUTING EDITOR

60 Know when and how to either repair or replace to add to your profitability.



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FROM ABRN CONTRIBUTING EDITOR **AL THOMAS**.
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The ABRN Top Shops Contest is taking submissions, and the pared down digital-only entry makes it easier than ever to enter. The deadline is July 31!

»» ABRN.COM/2015TOPSHOPS

NABC ACCEPTING AWARD NOMINATIONS

The National Auto Body Council is seeking nominations for its Award of Distinction and Body Shop Image Award.

»» ABRN.COM/NABCNOMINATE

LAUREN FIX NAMED 2015 WOMAN OF INFLUENCE

The Women's Industry Network named Fix the 2015 Woman of Influence.

»» ABRN.COM/FIXAWARD

TAKATA EXPANDS AIRBAG INFLATOR RECALLS

Air bag manufacturer Takata has acknowledged a defect in its air bag inflators and agreed to a recall of nearly 34 million vehicles.

»» ABRN.COM/34MILLION

GM TO DO MARKET TESTING OF MYPRICELINK

GM will perform market tests on MyPriceLink, its collision parts up-front pricing initiative.

»» ABRN.COM/GMUPDATE

PPG AWARDS STUDENT SCHOLARSHIPS

In partnership with the Collision Repair Education Foundation, the PPG Industries Foundation awarded \$5,000 scholarships to four students.

»» ABRN.COM/PPGSCHOLAR

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Mike Jones spoke to 2015 PBES Conference attendees.

CONFERENCE
PBE distributor event dials in on leadership, shop support efforts

SAN ANTONIO – Mike Jones, president of Discover Leadership Training, of Houston, Texas, kicked off the PBES 2015 Spring Conference with a passionate look at human behavior and a plea for audience members to alter their lives, both personally and professionally, to exit their comfort zones in order to grow.

"Everything you have learned from other human beings is part of your BS, your Belief System. You act according to it," Jones told the 140 attendees. "All the things you learned from another human being created your own personal map." It's essential for effective leaders to take steps to focus on positive outcomes/goals rather than avoiding negative results.

Organized under the theme of "Keeping Pace With Change," the conference took place May 13-15 at the Hyatt Regency San Antonio Riverwalk and featured speakers from throughout the collision repair and paint, body & equipment industry.

In his presentation, Jones used audience members to express behavioral concepts, specifically calling attention to the way humans vary in their points of view. Because it's easy for people to interpret things differently, it's vital for effective leaders to communicate exactly what they want any future outcome to be. When given the choice

>> CONTINUES ON PAGE 10

BREAKING NEWS
ACQUISITION
VALSPAR BUYS QUEST'S AUTOMOTIVE COATINGS DIVISIONS

Valspar Corporation completed the purchase of the performance coatings businesses of Quest Specialty Chemicals, which include automotive refinish and industrial coatings segments totaling approximately \$190 million in 2014 sales. Financial terms are not being disclosed.

Quest Automotive Products formulates, manufactures, and distributes a complete line of advanced technology paints, coatings systems, and accessories to professional refinishers under the brands Matrix®, Prospray®, and USC®, primarily in North America and Europe. Quest Industrial Products serves both the professional and consumer markets with aerosol spray products and highly-specified coatings for industrial applications under the Patriot®, Raabe® and Precision Color® brands, primarily in North America.

"Over the past several years we have successfully built strong teams and grown these businesses into leadership positions in their markets. I'm very pleased that in Valspar we have a buyer who can continue to build the business, brands and customer

>> CONTINUES ON PAGE 12

Photos: Michael Willins

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>> CONTINUED FROM PAGE 8

PBE DISTRIBUTOR EVENT DIALS IN ON LEADERSHIP, SHOP SUPPORT EFFORTS

between taking a positive view and negative view, Jones asked, why would anyone opt for negativity?

While Jones dialed the audience into being better leaders, collision industry consultant and ABRN contributor Mike Anderson of CollisionAdvice.com urged the distributor audience to lock into sup-

porting their shop customers to help them thrive in a fast-paced, evolving marketplace.

“Your job as a jobber or distributor is that whenever you walk through that door, that customer wants to see you and will make time for you,” Anderson said. During his presentation he outlined areas

where jobbers and WDs can make a difference for shops. Specifically he spoke about a three-legged stool model of support where Sales & Marketing is one leg, followed by Production and Finance & Human Resources.

When discussing Sales & Marketing, Anderson identified a trend toward “virtual steering” among the OEMs thanks to the growth in telematics technology. He referenced how OEMs are becoming the first point of contact with customers following an accident, because of their in-vehicle technology that connects them with drivers in real time. This puts them ahead of insurers, and gives them the ability to advise drivers on repair location options, among other things.



Mike Anderson

“You better make sure your customers are getting aligned with the OEs. This is not some flavor of the month, it’s a serious deal,” he said. Car companies are moving in this direction for customer service. “It’s not something that’s coming. It’s here. They just have to build their networks.”

[NOTE: To hear Anderson’s discuss the trend toward Virtual Steering, go to abrn.com/VirtualSteering.]

Why are OEMs so interested in body shops? Because 60 percent of all consumers who have to return their vehicle to a body shop for a problem will sell or trade their vehicle within one year. And 63 percent of those people will change vehicle brands when they sell or trade-in their vehicle. The carmakers definitely have a vested interest in the repair process and happy customers, he said.

To that end, Anderson discussed CSI and the value of having distributor partners that help shops stay focused on strong CSI scores. “Being kept informed is the single most important thing to a consumer today,” he said, noting that 63 percent of consumers prefer txt message updates, and distributors should advise their shop customers to do that on a regular basis.



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Mercedes-Benz

>> CONTINUED FROM PAGE 8

VALSPAR BUYS QUEST'S AUTO COATINGS DIVISIONS

relationships," said Doug Mattscheck, president and CEO of Quest Specialty Chemicals.

"The acquisition strengthens Valspar's value proposition in automotive refinishing," said Gary Hendrickson, Valspar Chairman and CEO. "Our customers will benefit from expanded distribution of a portfolio of preferred brands they know and trust, a broader range of high-performance products and a stronger service network. We are pleased to welcome the Quest team to the Valspar family."

Quest previously announced that it was actively seeking new ownership with the blessings of its equity partners, Audax Private Equity and Moelis Capital Partners. Quest retains ownership of the Quest Construction Products business, which makes and sells roofing systems, reflective coatings for buildings and pavement coatings.

NON-INCLUDED WORK**NABR STUDIES PAYMENTS FOR NON-INCLUDED WORK**

National AutoBody Research (NABR) published its initial results from its recent nationwide launch of the VRS Procedures & Practices Survey.

Read the full report entitled, "Get Paid For The Work You Do" online at ABRN.com/NABRstudy. Introduced in April, the research measures how often shops got paid for several non-included procedures and how well insurers paid for those. "For some time, we've heard stories from shops about performing work but not getting paid," said Sam Valenzuela, president of NABR. "This research helps put real data and documentation around those stories, which we find to be largely true."

"Soon, with this data and documentation built into the Variable Rate System, the VRS will help pull back the curtain on what is really happen-

ing in the industry — how shops bill for procedures and which insurers pay for what. It will help level the playing field for all shops across the country, enabling them to get paid for the work they do."

Among other findings, the research revealed several opportunities for improvement for both shops and insurers. For shops, opportunities for improvement include fundamentally changing their belief system from, "I can't get paid for that," to "Yes, I can and will get paid for the work I do"; writing more of the work they perform on the estimate; utilizing more documentation to get paid; and the biggest opportunity of improved profits.

Insurers do in fact pay some shops for non-included procedures, yet they do so inconsistently, paying one shop for a procedure but not paying another shop for the same work, even if both shops are in the same market. The insurers' major opportunity for improvement is in paying shops for work that is truly performed and paying shops more consistently.

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COLLISION REPAIR INDUSTRY Stats & Trends

6,000 – the number of attendees at Automechanika Chicago from April 24-26 at McCormick Place West.



Know your strategy

The collision repair market of today demands that you develop a business strategy to determine the path of your shop

BY BRAD MEWES | ABRN BLOGGER

There has never been a greater need to develop a business strategy to determine the best path forward in the collision repair industry. The entrance of Wall Street money in the industry is causing rapid structural change. No longer is the collision industry just about fixing cars and minding your KPIs. The industry is maturing. As a result, business models are changing, too.

Think back a few years and a popular operational model in the collision industry was to build a big box, a huge box, a 100,000-sq.-ft. box and fill it up with the newest and shiniest equipment you could find. If you build it they will come was the thought behind such models.

That model is no longer in vogue. Now the predominant operational model is to go lean. Reduce overhead. Drive efficiencies. Reduce cycle times.

Smaller is better, less waste, constant production. Triage is critical to convert large jobs to small jobs.



The reason I bring this up is to illustrate that operational models shift over time. And if you are not careful, it is easy to get swept in the latest fad and find you and your management team bouncing from good idea to good idea.

That is why I always prefer to take a more global data-driven approach. There is no one right strategy. Understanding where you want to take your business depends on a myriad of factors that are unique to every business and every business owner. But understanding the big trends and overarching options available to you allows a business owner to take advantage of trends

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Get the most out of your MIG welder with the right set up

BY RICHARD PERRY

MIG welders are versatile and easy to use. With a little bit of practice, they can also be easy to set up. Your MIG welder's user manual may contain recommendations for power settings and wire feed speed, but there are also a few universal setup guidelines to follow to ensure you end up with clean, strong welds.

The Basics

Before you set up a MIG welder, it is important that you have a basic understanding about how one works. Metal Inert Gas (MIG) welding, also known as Gas Metal Arc Welding (GMAW), uses an electric arc and an inert gas to melt the metal being worked on. This molten metal combines with

metal fed from the welding gun to form a weld "bead." As the bead cools, it solidifies, forming a new section of fused metal.

Setting Up a MIG Welder

On a traditional MIG welder, there are three primary settings that you will have to adjust for each welding session: voltage, wire feed speed and gas flow rate. Even if you have a user manual or chart to guide you, it can help to take some time working with a scrap piece of metal to precisely dial in these settings.

Voltage is the primary setting that determines how much heat is applied to the metal. Insufficient voltage will produce a weak weld, but too much voltage can burn completely through the metal being worked on.

The wire feed speed setting controls how fast the wire is fed into the weld joint. This determines not only the amount of fill material left in the joint, but also amperage, since increasing the feed speed means more electrical current can be transferred into the metal being welded.

A gas flow rate of 15 cubic feet per minute should be sufficient for most shops, but you may have to increase this setting if you are working in a drafty area. The gas shields the weld, enabling it to form in a clean, consistent manner.

Common Bead Issues

As you try different settings using your scrap piece of metal, pay close attention to the quality of the bead you are producing. A good weld will fully penetrate the

base material without burning through it, have a flat bead profile, and adequately cover the joint. If you experience any of the following issues, adjust your MIG welder settings accordingly:

Metal splatter

Solution: increase voltage and/or gas flow rate

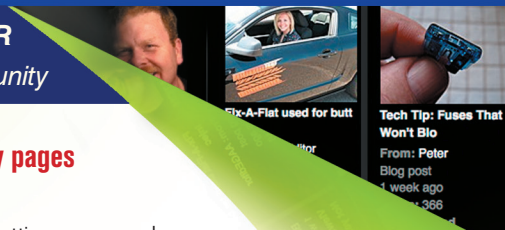
Burn-through

Solution: decrease wire feed speed and/or voltage

Excessively wide bead

Solution: decrease wire feed speed or accelerate gun travel time along the weld

Continue at ABRN.com/Welder



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Watch the video at www.ABRN.com/Consolidator



PAGE 16



THE SHOP OWNER

MIKE LEVASSEUR

In-house training success

PAGE 44



FINANCIAL INSIGHT

BRAD MEWES

The changing face of the jobber

PAGE 70



MIKE ANDERSON

You are not the only one

rather than be controlled by trends.

Understanding the larger context, whether you want to stand pat, grow or sell, allows you as a business owner to better position yourself to determine your own destiny. Understanding your own core competencies allows a business owner the ability to choose how to best exploit a specific strategy.

There is a lot of change currently tak-

ing place in the industry. I'm excited to announce that through a partnership with ABRN I will be hosting short video blogs designed to dive deeper into the topics we talk about here. These video blogs are designed to be short and easy to digest, but to also provide a bit more color to my weekly messages. Continue reading at ABRN.com/Strategy

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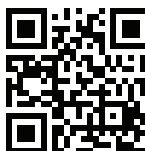
• The value of a motorsports sponsorship for the shop

Adam Chafe, vice president of marketing for Sherwin-Williams Automotive Finishes, talks about the power that a motorsports sponsorship can have in helping to grow and promote your shop brand, leading to more money for you at the end of the day. [ABRN.COM/MOTORSPORTS]

• Reducing paint costs in the MSO environment

Presenter Darrell Amberson, VP of Operations for LaMettry's Collision, discusses profitability with regard to paint and materials in collision shops. We'll help MSOs examine process changes and other waste-reduction ideas that can boost the bottom line. [ABRN.COM/REDUCING]

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Noteworthy

READER FEEDBACK TO ONLINE ARTICLES

Chris Smith, Manager and Estimator, Maaco Collision Repair wrote: With aluminum repairs becoming more and more a reality and everyone now gearing up to do the work, can anyone out there tell me about what equipment they are using to repair? I have been looking around at many different options and manufacturers of tools for the job and it's a matter of choice out there. What can you recommend? Some people are using glue bond pulling methods and others are using weld pullers. The miracle tool looks great but it's expensive. Please share with me what you are using and how you find it works. Any information will help me make the right purchasing decision.

Paul Jenkins, motor vehicle body repairer, Steele Auto Group: As someone mixed up in this aluminum body repair business, my recommendation would be to research which manufacturer(s) your shop needs/wants approval from. Most are very specific as to what equipment they require and some don't jive with one another. IE: Ford requires a different MIG welder and wire than Land Rover/

Jaguar with the same parent company. Also, just buying the right equipment is one thing, proper training on said equipment is also very important. Aluminum repair isn't necessarily right for every shop; it's a pick your battle type thing as far as I'm concerned. Balancing the cost of setup and training vs. potential profit are key things to investigate before delving into this new realm.

Craig Totten, director of training and technical support, Global Jig North America: For aluminum dent repair, make sure that the equipment you buy is equipped with what you need to truly fix damaged aluminum panels. A lot of what is out there has stuff in the kit that is unnecessary or mismatched for the tasks while leaving out some very necessary things. If you want to repair more than just very small dents make sure that the system you get has long leveling bars with feet and tooling that will allow you to put and hold even pressure over large areas while you stress relieve. And if it has a heat gun, it must be high temp, high quality not some of the small worthless ones I see in some kits.



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As an owner, you need to find your employee's motivation and utilize that knowledge to get them to produce more for both you and them. [MotorAge.com/Employees]

• Auto Care Association and ASE select 2015 World Class Technicians

Of the 840,000 automotive technicians in the United States, 17 outstanding individuals have qualified for the 2015 World Class Technician. [MotorAge.com/World]

• iATN celebrates 20 years

Twenty years ago, the first emails were exchanged among a small group of automotive technicians through iATN. Today thousands use its forums and databases. [MotorAge.com/iATN]

• Takata reaches agreement with NHTSA to expand recalls

Takata has agreed to a national recall of certain types of driver and passenger side air bag inflators. [AftermarketBusiness.com/Takata]

• EV charging stations poised to offer added revenue options

The aftermarket starts plugging into the prospect of repairing electric vehicles. [AftermarketBusiness.com/EV]

• MEMA China Center opens in Shanghai

MEMA announced that its China Center is officially open in Shanghai, China. [AftermarketBusiness.com/MEMA]

JULY 21-22

• Collision Industry Conference Detroit, Mich.

JULY 23-25

• NACE | CARS Detroit, Mich.

SEPTEMBER 9-11

• Auto Care Association 2015 Fall Leadership Days Austin, Texas

SEPTEMBER 20-23

• Fix Auto Annual National Conference Ojai, Calif.



In-house training success

Second intern to graduate confirms that the industry can 'grow' its own talent

A year ago, I wrote about our initial progress with what we call the Collision Repair Opportunity Program (CROP), a response to the industry's shortage of collision repair technicians (*Growing our own talent*, August 2014). We've had some continued success with it this year, so I'll offer an update.

CROP grew out of a strategic planning session we had in 2012, when cultivating talent was among the issues we discussed. Once we created a basic framework for CROP, Max Sorensen, who manages one of our locations, took the lead and laid the groundwork for the project, working with our marketing director Craig Comacho to get the word out to the schools in our area.

"It all starts at the local high schools," Sorensen says. "We present CROP to the students enrolled in the collision repair programs, as an alternative to tuition-based secondary education centers."

Graduating high school seniors apply for the internships through our website. We then select interns through a basic aptitude test and a three-interview screening process. Our employee who will be serving as that student's mentor participates in the third interview to help us ensure the two will be a good fit.

The chosen students begin a nine-month internship working with the mentor in either our body or paint department. We provide them with a starter set of tools as well as a workbook that spells out the curriculum.

"EVERY STUDENT WHO MAKES IT THROUGH THE PROGRAM IS ONE FEWER TECHNICIAN THAT WE HAVE TO FIND AND RECRUIT THROUGH OTHER MEANS."

At the end of the first three-month "term," the intern must complete both a written and a hands-on test. Upon successful completion, they can move on to the remaining two three-month terms of the internship.

Oscar Cantone Corona completed the program in 2014 as a paint tech. Oscar is now working in our paint department, has zero student debt, and kept the tools (valued at about \$1,500) that we provided at the start of the program.


This past spring we graduated a body technician through the program. Sergio Cerrato works with our A-level technician John Scully as his mentor. It was really satisfying to have Sergio's proud parents here when we presented him his plaque for successfully completing the program. And we have another student in the pipeline who is on track to graduate this year.

I can't say there haven't been some hiccups along the way. We had one student who five weeks into the program decided body work was not the career for him. Although not an ideal outcome, we felt good that he gained some work experience and was able to move on to another profession before he invested years and thousands of dollars pursuing collision repair training.

We keep learning as we go, and know that every student who makes it through the program is one fewer technician that we have to find and recruit through other means.

One of the critical aspects of the program's success is having very qualified, motivated mentors. They need to be not only quality technicians, but also able to continually convey to the intern what they are doing and why. They need to understand the program isn't just about "free help," but overall it won't unduly hinder their productivity. The time the mentor spends helping the intern learn is generally offset over time by the boost to the mentor's production provided by the intern.

There are other benefits, the mentors say, in the form of satisfaction of helping another person learn the profession, and of building a legacy, passing along the skills they've developed.

We've all complained about the challenges of finding new employees in this industry. It's time all of us do more than talk and actually develop programs to grow more of the talent we need. CROP is serving that purpose for us. 

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ABRN.COM/LEVASSEUR

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Mike LeVasseur is president and COO of Keenan Auto Body, which has 12 shops. It was recently acquired by ABRA Auto Body.



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- 46** The Profit Motive

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MINDING YOUR BUSINESS

DISRUPTION IN THE AUTOMOTIVE ECOSYSTEM



WHAT TO EXPECT AND HOW TO SURVIVE AND WIN

BY **STEPHEN APPLEBAUM AND VINCENT ROMANS** | CONTRIBUTING EDITORS

THE entire automotive ecosystem — manufacturers, drivers, repairers, aftermarket suppliers, insurers and policyholders, the claims supply chain and technology and information providers — is in the midst of significant disruption, and the pace of change will only accelerate. This disruption is the result of the convergence of upstream upheaval including:

- “new consumer” behavior and expectations
- technology evolution
- the digital data gold rush and the adoption of advanced analytics
- globalization integration, collaboration and supply chain consolidation

▪ collision repair industry consolidation
Over the last 30 years, the repair and aftermarket segments were part of a steady evolution. During this progression, the physical damage industry adapted to a myriad of business innovations. Some resisted, while others embraced them as opportunities.

The 2007/2008 U.S. recession impacted our entire economy and became the foundation for today’s auto physical damage industry transformation. It trig-

gered unprecedented change within the U.S. and Canadian repair and aftermarket segments. This changing landscape became part of four distinct, yet connected, marketplace phases: contraction, consolidation, convergence and constructive transformation.

These phases are impacted by forces, which have both disruptive and transformational influences on today’s stakeholders. Some of the more influential factors include:

- private equity investment
- accident avoidance technology
- predictive analytics
- telematics-integrated claims process models

Get the full “Disruption in the Automotive Ecosystem” white paper at
[ABRN.com/Disruption](#)



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In this dynamic environment, we believe that the ultimate leaders and winners in 2015 and beyond will be those companies that most successfully develop compelling personal mobility solutions; leverage data and analytics; plan and execute globally; and collaborate as effectively as possible.

The new consumer, mobility and the internet of things

Today's consumer has created new challenges and opportunities for the automotive ecosystem, in particular for insurers. This new consumer, epitomized by Millennials, has embraced mobile technologies and social media, changing how insurance is branded, marketed and sold. Moving forward, this same mobility will enable insurers to design new types of insurance products and manage risks much more effectively.

The most disruptive group of mobility technologies is the rapidly emerging "Internet of Things," mostly controlled by industry outsiders, and its potential impact on insurance, as well as on the rest of the auto ecosystem.

A related concern is the potential for these "outsiders" to leverage this information to enter the business and become competitors. Recent acquisitions include Monsanto's acquisition of crop insurance and data company Climate Corp. (which was started by former Google executives), and Google's acquisitions of the connected home devices and security company Nest. Verizon acquired Hughes Telematics in 2012. The data generated by all of these businesses can be combined with advanced analytics to manage individual and property risks. The ability to successfully acquire, control and effectively translate and utilize all of this data as actionable information will determine the insurance industry's winners and losers of the future.

Impact of OEM globalization

Automotive industry globalization is one of the more significant factors im-

pacting the auto physical damage landscape. General Motors is planning to reduce in 10 years its current 26 global production plants to just 4 by 2025. This globalization of cars and its many OEM implications will continue to drive significant change throughout the entire insurance supply chain.

One of the key drivers of this manufacturing transformation is the National Highway Traffic Safety Administration's CAFE standards, which require fuel consumption to drastically improve from today's 30.2 miles per gallon to 54.5 miles per gallon by 2025.

As the OEMs drive to innovate globally, there will be intended and unintended outcomes involving the use of many new materials, engine downsizing, alternative powertrains, advanced integrated electronics, telematics and new repair technologies and processes, and producing light weight vehicles. These innovations will be seen as a disruption by some, while embraced by others.

Other ecosystem and supply chain industry consolidation

Another global perspective to consider is increasing international trade and investment by private equity and strategic buyers.

The following is a partial list of some of the more relevant recent M&A activi-

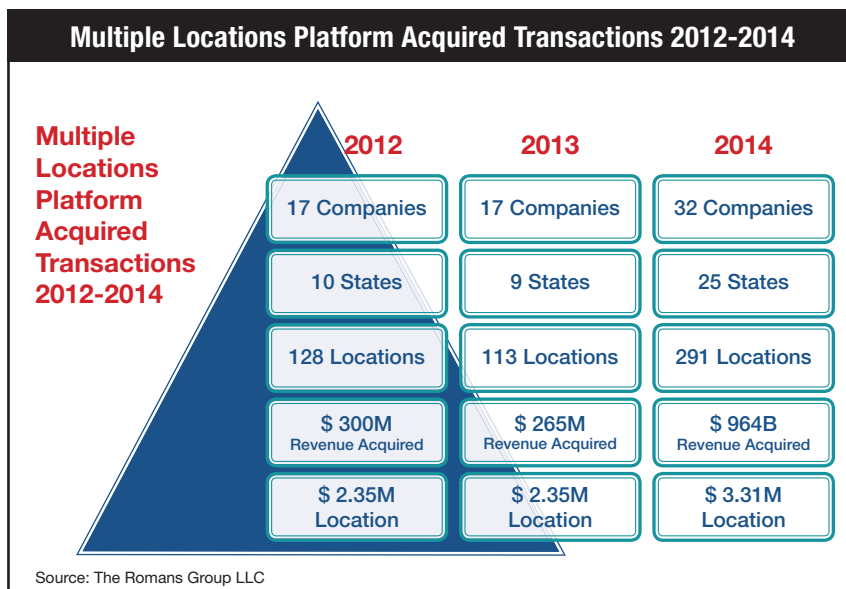
MSO Consolidator	Year	Private Equity
ABRA	2006 2011 2014	Prudential Palladium Hellman & Friedman
Caliber	2008 2013	ONCAP OMERS
Service King	2012 2014	Carlyle Blackstone
Kadels	2006	KCB Management
Joe Hudson	2014	Carousel

Source: The Romans Group LLC

ty by U.S. and international companies:

- QBE Insurance, Australia, acquires Balboa Insurance, US
- Travelers Insurance, US, acquires Dominion Insurance, Canada
- Desjardins Insurance, Canada, acquires State Farm Canada, US
- Boyd Group, Canada, acquirers Gerber Collision and Glass, US
- OMERS, Canada, acquires Caliber Collision Centers, US
- UniSelect, Canada, acquires Finish-Master, US
- Solera, US, acquires CAP Automotive, UK
- Belron, South Africa, acquires Safelite Glass, US
- LKQ, US, acquires Euro Parts, UK
- UBM Plc, UK, acquires Advanstar-Motor Age and ABRN, US
- The Carlyle Group (owners of Axalta and investors in Service King) acquire Nationwide Accident Repair Services of the United Kingdom

These acquisitions reflect the growing trend of an increasingly integrated global insurance and automotive economy resulting in an



extension of business and market international strategies, introduction of new, innovative and disruptive technologies and processes, and brand expansion while also managing resource and risk diversification.

The digital data gold rush

We have entered a “digital Gold Rush.” This has huge implications for the insurance industry. Digitization is already

forcing supplier consolidation and compressing customer service response times to near real time. This will impact claims technology, as well as information and services provider segments, which have historically been highly fragmented and privately owned and operated. National consolidation, volume aggregation and sizable technology investments led by professional management teams offer significant me-

dium-term rewards to the participants.

The most potentially disruptive group of digital technologies is the “Internet of Things” or “M2M” (machine-to-machine) technology. Of related concern is the potential for non-traditional competitors to leverage M2M data and enter their business. An example is Google’s acquisition of the connected home devices and security company Nest Labs. The data acquired in all of these businesses will be combined with advanced analytics to accurately establish and manage individual and property risks.

These forces are driving M&A activity to unprecedented levels in the claims technology ecosystem, attracting private equity and strategic investors, and providing exit opportunities and alternatives for participants, all while creating new capabilities for insurers, agents, brokers and consumers.

Private equity and collision repair industry consolidation

The first two phases of the current collision repair industry structural transformation — contraction and consolidation — are part of a four-phase model that also includes convergence and constructive transformation. The first two phases began after the start of the recession in December 2007. Simultaneously, private equity groups turned their attention to the collision repair industry.

Private equity firms were on the hunt for alternative investments that could yield comparative or better returns than those currently available. The current private equity investor groups competing in the consolidation of the auto repair industry are identified in the chart, Private Equity Investors in U.S. MSOs (page 24).

There are a number of factors impacting the continued attractiveness of investing in the collision repair industry.

- the collision repair industry’s structural transformation is still early to mid-stage
- aggressive MSO consolidator and private equity competition
- debt financing is inexpensive and available
- collision repair management teams realize the benefit of partnering with investors in order to more quickly grow and develop market share
- \$32 billion addressable collision repair industry size
- performance-based insurance DRP contract requirements

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- brand recognition
- demonstrated economies of scale
- replicable acquisition and integration models
- insurance industry strategy aligned with MSO consolidator strategy

As consolidation continues, four MSO consolidators, ABRA, Boyd/Gerber, Caliber and Service King, stand out as the primary buyers vying for regional presence. More nascent strategies focus on market density and coverage through acquisition of individual shops, constructing greenfields and brownfields, and utilizing franchise models in smaller tier markets.

The chart, Multiple Locations Platform Transactions 2012-2014 (page 21) reflects these four consolidator's multiple-location platform transactions.

The growth of MSO consolidators associated with these transactions have had private equity backing. How long private equity continues its aggressive funding of MSO consolidators is uncertain.

The chart on the top of page 21 reflects selected private equity and pension fund ownership periods for the top four MSO consolidators.

Supply chain consolidation in the auto insurance ecosystem

Forces are also driving M&A activity in the North American property and casualty insurance claims and technology "ecosystem" to historically high levels, including claims

supply chain consolidation; rising use of big data and analytics solutions; an influx of private equity capital; and expectations of a steadily improving economy with low interest rates.

We expect these forces to amplify competition among strategic players and private equity participants. The implications for smaller, less capitalized, regional or technology-challenged competitors are meaningful.

Claims supply chain consolidation

The area in which we expect the greatest potential for increased activity in 2015 and beyond is within the claims supply chain. The property and casualty insurance claims ecosystem is comprised of thousands of small local and independent firms as well as larger regional, national and global vendors and business partners who provide critical products and services to the claims operations of the property and casualty insurance industry.

One of the subsectors most impacted is the highly-fragmented

Private Equity Investors in U.S. MSOs	
MSO	Equity Source
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Caliber	Omers
CARSTAR	Champlain Capital
Kadels	KCB Management
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and inefficient collision repair and parts business. Many of these are local, privately-owned businesses with limited technology capabilities and management talent. National consolidation can lead to expense rationalization, upgraded information technology systems, improved management and the ability to better respond to customer pressure and improved pricing.

One of the other important trends is the development of an electronic parts procurement and e-commerce solution for the large \$15 billion and still highly fragmented and inefficient parts supply chain.

For smaller providers in the claims supply chain, now may be the time to consider combining with larger, better-capitalized players. Going it alone will be increasingly risky as larger, national players will garner more market share by offering better pricing, technology solutions and geographic coverage.

Information provider expansion, consolidation

North American insurance industry auto and property claims operations, including their auto collision repair and property partners, primarily utilize the products and services of three claims information providers — CCC Information Services, Mitchel International and Solera.

Over the next 12 months, we expect these information providers to expand in several directions through internal product development supplemented by strategic acquisitions. This expansion will likely include deeper integration with claims management systems; introduction of new tools and services utilizing advanced analytics; deeper integration with third-party companies; and further development of workers' compensation management services and solutions.

Predictions for 2015 and beyond

- Contraction, consolidation and convergence, combined with the intensity of change throughout simultaneous events will continue to drive the ongoing constructive transformation within the entire automotive ecosystem.

- Property and casualty insurance carriers will develop new forms of highly-customized and contextual insurance coverage tied to policyholders' real-time needs

- Insurance carrier supply chain partners will increasingly assume claims servicing responsibilities and associated risks in exchange for guaranteed transaction volume

- Direct repair assignments through customer choice among the top 10 insurers continues to grow and many now have an assignment conversion rate over 50 percent to their DRP providers

- Analytics will change every aspect of insurance including marketing, distribution, underwriting, pricing, claims and billing

- Supply chain consolidation in the insurance ecosystem will accelerate in 2015 as existing players move to protect and grow their market shares. New, well-capitalized and more consumer-savvy players will enter the market with an array of powerful digital assets. Investors will continue to gravitate to the space.

- MSO consolidators will continue their platform acquisition growth and development strategies in existing major and smaller markets.

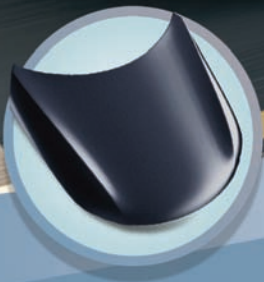
- The traditional insurer-repairer business model, which

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is focused on an estimate exchange process, is likely to be transformed within three years and supplanted by a process driven by mobile technologies and predictive analytics. This will eventually eliminate the need for repairer-carrier estimate exchanges for an increasingly higher percentage of claims.

Conclusions

The ultimate leaders and winners in 2015 and beyond will be those that most successfully execute on the new realities identified in this report. They will also leverage a strategic alliance ecosystem as part of a collaborative brain trust where all are committed to co-create and change their organizations and their uncertain environments to their mutual benefit. Companies must also focus on the development of personal mobility solutions for the new consumer.

The auto parts supply chain, until now characterized by numerous competing parts search and procurement platforms, will finally begin to consolidate to just a few well capitalized, highly experienced and strategically-positioned

information and software providers.

The ability to acquire and leverage these new streams of data into actionable information and insights will determine the insurance industry's digital gold rush winners and losers of the future.

The area in which we expect the greatest potential for increased disruption in 2015 and beyond is within the claims supply chain. For smaller providers in the supply chain, now may be the time to consider combining with a larger, better-capitalized player, especially given the trend towards vendor management by insurance companies.

Many of the trends associated with the beginning of a slow, long-term, downward slope of future accident frequency, such as the proliferation of accident avoidance technology, urbanization, car sharing, Uber, connected vehicles and telematics, are already cooked into the expanding equation and future insurance and repair model reflecting reduced accidents and fewer repairable vehicles with new and hybrid insurance coverage offered by fewer surviving insurers.



VINCENT ROMANS
CONTRIBUTING EDITOR

Romans is the founding principal and managing partner of The Romans Group LLC, which provides business, market, financial and strategic development and mergers and acquisitions advisory services to the collision repair, property and casualty auto insurance, and the auto physical damage aftermarket supply chain.

E-mail Vincent at vincent@romans-group.com.



STEPHEN APPLEBAUM
CONTRIBUTING EDITOR

Applebaum is managing partner, Insurance Solutions Group, and senior advisor, StoneRidge Advisors LLC. He is a subject-matter expert and thought leader for those in the North American property and casualty insurance ecosystem.

E-mail Stephen at stephen.applebaum@gmail.com.

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REAP THE BENEFITS OF GIVING BACK IN THE COLLISION INDUSTRY

BY **KIM KIMBRIEL** | CONTRIBUTING EDITOR

WE HAVE all heard the following buzzword phrases: cause marketing, corporate social responsibility and good corporate citizenship. Definitions are blurry, and the terminology is used interchangeably. Many MBA programs offer specific courses on these topics and marketing experts dissect the differences as they offer specific strategies for each.

Whichever terminology you choose, at the core is one simple, basic principle: giving back makes good business sense.

This is backed by compelling research statistics. A recent Nielsen study showed that:

- 81 percent of consumers are likely to switch brands to one with a good cause, given comparable price and quality

- 55 percent are willing to pay more for products and services from companies that are committed to positive social impact.

- 62 percent prefer to work for companies that give back to the community.

Most businesses today already know they need to give back. But what does that really mean? Many will want to measure the benefits in terms of return on investment. Did my business grow? Did I get more leads?

Giving back is not always about making money. Nor is it about how much money your company is able to give. Small independent collision repair businesses do not have thousands of dollars in their budgets to donate, and larger MSOs cannot support all the charities that are constantly knocking at their doors.

The most important outcome from giving back – whether it is time, talent or financial — is the goodwill that comes when you connect with your employees, your community and with your peers in the industry. And it is this goodwill that organically builds your brand, enhances customer loyalty and differentiates you from your competitors.

Connect with your employees

“The act of giving back evokes emotion and fosters an authentic connection,” wrote a blogger for *Entrepreneur* magazine.

Anyone who has participated in any of the National Auto Body Council’s (NABC) Recycled Rides™ giftings immediately understands this. You can see it on the misty-eyed faces of



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normally stoic technicians as they watch an overjoyed, grateful single mother in the driver's seat of the car they restored on their own time. It's in the pride as employees watch the local evening news with their family and see their company highlighted on television or read about it in their hometown newspaper.

"It's a special opportunity for us to give back in our community. It reiterates what kind of company we work for, what they are really about and what we stand for," said Ryan Elliott, technician at Faulkner BMW in Lancaster, Penn., after a recent Recycled Rides presentation.

Strengthening teamwork through community service helps instill company loyalty and respect for owners and the leadership team. There are limitless opportunities to choose from locally, nationally or even globally.

The leadership at ACD, a technology and claims services company, fosters a culture of service by encouraging and supporting individual employee causes as often and generously as possible. An internal communication platform allows employees to share and participate in each other's causes, which enhances camaraderie and shared successes. These causes include going into Mexico, Honduras, Uganda and China to help build orphanages, medical centers and affordable housing, as well as local organizations such as Ronald McDonald House Charities, Big Brothers and Sisters, Meals on Wheels, World Vision and Boy Scouts of America.

The result, according to Barry Barbee, ACD Director of Client Relations, is "our employees are highly energetic and very proud to be involved in all our corporate charitable endeavors."

Similarly, at Caliber Collision, employees at each of the company's 283 locations challenge each other to a friendly competition to see which center can bring in the most donations for their annual nationwide food drive. Caliber then matches their efforts with a corporate donation to each local food bank based on the team's results in that region. Pride and enthusiasm from last year's food drive, which collected more than 1 million meals, has resulted in Caliber employees shooting to double their contributions in 2015.

"Servant leadership is a Caliber

core value and our annual food drive is just one example of how we address the needs of communities we live and work in," said Greg Clark, Caliber's senior vice president of marketing.

Volunteering also provides leadership opportunities for employees, which leads to increased staff performance and fulfillment and, ultimately, increased productivity. Whether it is collecting canned goods or donations for a charity, or walking together as a team to raise funds for a cause, the effort and rewards behind organizing and executing a successful event builds synergy that translates into higher work ethic and pride.

Connect with your community

Existing and potential customers appreciate companies that are involved and care about their local communities. No matter how great or small the contribution, a consistent program to give back goes a long way. The key is establishing a connection and a strong reputation and image as a good corporate citizen.

This is especially important in this industry where consumers don't always have names of auto body repairers top of mind – until they unexpectedly need one. And at that point, when presented with several choices, the consumer will most likely gravitate towards a repairer they associate with a trustworthy, positive local community presence.

This could be as simple as supporting local high school sport booster clubs, sponsoring the snack bar, ads in the yearbook, or sponsoring jerseys for youth sports teams. Volunteering and being visible at community events – i.e., serving food at Salvation Army holiday dinners or staffing fundraising walks, auctions, etc., also fosters networking opportunities. These activities create strong team-building experiences for all involved. An added benefit of a strong community reputation is the ability to recruit the best local talent as your business grows.

There are so many opportunities to give in local communities that the downside is having to sort through, evaluate and turn down many requests. The key is to find ways to maintain a consistent presence and identify causes that match your company culture, values and available resources.

For example, team members at GEICO's western regional headquarters in Tucson, Ariz., match their skill sets to provide valuable community service. With their training and experience speaking with customers over the phone, GEICO team members volunteer their time to make calls on behalf of the local Cystic Fibrosis Foundation's annual fundraising drive.

Keenan Auto Body, whose 12 locations throughout the Delaware and Philadelphia areas were recently purchased by ABRA Auto Body & Glass, has hosted an annual golf tournament for the past 17 years. The tournament enabled the Keenan team to strengthen relationships with its business and community partners while raising to date over \$500,000 for a myriad of children's causes such as Big Brothers Big Sisters, Camp Make A Dream Foundation, Delaware County Children and Youth Services, the Make-A-Wish Foundation, Philadelphia Ronald McDonald House and Philadelphia Little Smiles.

CARSTAR locations in Omaha and Lincoln, Neb., maintains its community ties by partnering with several local organizations. For the sixth year, these shops are working with the Omaha Women's Fund to launch a community-wide search for a deserving woman who would benefit from a vehicle through the NABC's Recycled Rides program. Another program encourages auto body careers through a Career Exploration day, partnering with Avenue Scholars Foundation which works with teens who are at risk of not graduating high school.

The Nebraska CARSTAR locations also enhance community resources by providing local first responders with opportunities to practice life-saving extrication skills through another NABC program – First Responder Emergency Extrication (FREE™). Since 2010, they have hosted over 20 FREE events with over 800 participating firefighters.

Connect with your industry and peers

This is one of the most rewarding ways to give back. Serving on committees, councils and boards can be a great way to help promote the collision industry and elevate the professionalism within.

Petra Schroeder of Axalta Coating Systems is actively involved in many



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of the industry associations. Currently she serves on the boards of NABC, the Collision Industry Foundation and Women's Industry Network.

"What I continue to learn is how much talent there is in this industry," said Schroeder, explaining why she is grateful that Axalta supports volunteering her time. "The general public underestimates the collision industry and doesn't have full understanding of the technician's skills sets. I would love for people to understand the artistry of these professionals."

Schroeder says her volunteer efforts of course provide valuable business opportunities, but she also feels rewarded through the many lifetime relationships with friends and colleagues that are a result of working together for the good of the industry.

She strongly encourages others to volunteer and contribute in whatever ways they can.

"We all have an obligation to talk more about our involvement in the industry. It's up to all of us to share our

positive experiences and encourage people to serve. Join committees, visit open board meetings, get a feel for what these industry associations do. You don't have to commit to being a board member — just volunteer where you feel you can contribute and enjoy."

"Regardless of whether it's through NABC programs or any other service project, our members represent a community of collision industry professionals who through actions and practices, pledge a commitment to promote the professionalism and integrity of our industry," said Nick Notte of International Paintless Dent Repair and Chair of the NABC.

Some of the industry associations where you might want to volunteer your time, talent and resources include:

- Collision Industry Foundation; www.collisionindustryfoundation.org/
- Collision Industry Conference; www.ciclink.com/
- Collision Repair Education Foundation; collisioneducationfoundation.org/
- National Auto Body Council; www.NationalAutoBodyCouncil.org

- Society for Collision Repair Specialists; <http://scrs.com/>
- Women's Industry Network; thewomensindustrynetwork.com/

Winning hearts and minds

While giving back through community service is not about driving a company's bottom line profits, it provides numerous opportunities to build brand name. No matter what size donation or level of resource commitment, any effort to touch the hearts and minds of all stakeholders — your staff, customers, local community and colleagues — will undoubtedly pay dividends. ☑



KIM KIMBRIEL
CONTRIBUTING
EDITOR

Kimbriel, PR/marketing director for the National Auto Body Council, also owns Kimbriel Marketing Communications and manages public relations and communications for a number of collision industry companies.

 E-mail Kim at Kim@KimbrielMarketing.com.

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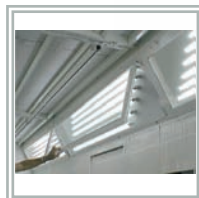


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BY JOHN YOSWICK | CONTRIBUTING EDITOR

ASK ROGER Fowler how his shop, J&W CARSTAR in McMinnville, Ore., gets its work and he can quickly recite the sources.

In addition to some insurer direct repair programs, the company is a referral shop for about a half dozen local dealers. Fowler said he is always surprised by the amount of customer-pay work the shop also does; it accounts for more than 25 percent of sales. In addition to the shop's longevity in the community – Fowler bought the business in 1990 and became a CARSTAR

franchise in 1992 – it builds name-recognition through advertising in the local newspaper, on a local AM radio station and on cable television.

“I always joke that we get 80 percent of our work off 20 percent of our advertising,” Fowler said with a smile. “We just don’t know which 20 percent it is, so we do all of it.”

Fowler is hardly alone among shop owners who can’t always pinpoint the exact mix of marketing and advertising that is propelling their businesses forward. But Fowler and other seasoned shop owners say there’s also no

one right marketing recipe for every shop; it’s a matter of trying things to see what works for your business and your market.

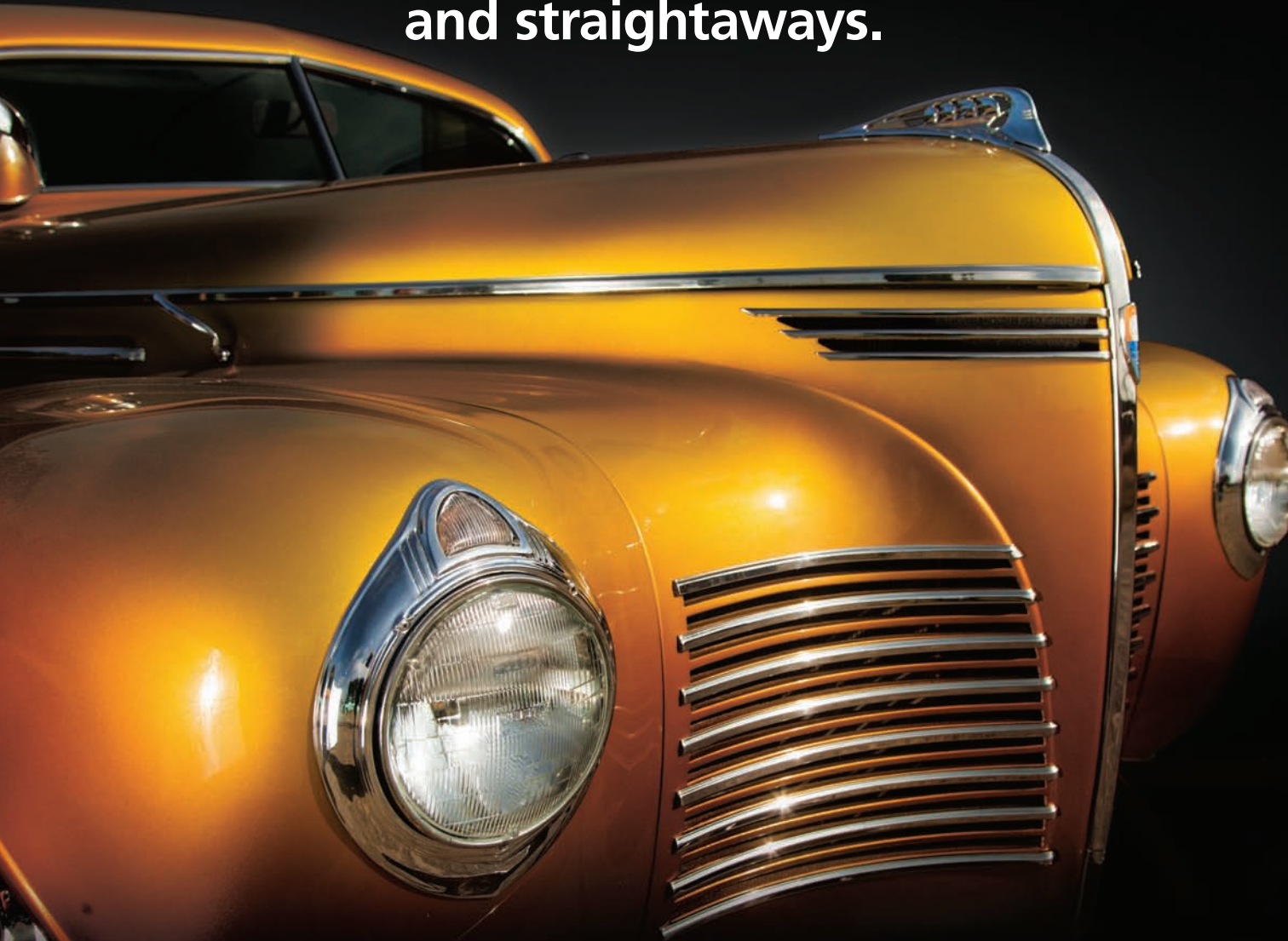
Here’s a look at several of the marketing ideas that have worked for some shops around the country, ideas that might fit successfully in your shop’s marketing mix.

Have more to offer customers

Joe Wheeler said having more than one thing to market has helped Wheeler’s Collision & Paint in Kelso, Wash., stay busy. In addition to standard passenger



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vehicle collision repair work, Wheeler's 10 employees offer complete mechanical work as well as repair of RVs and heavy-duty trucks.

Mechanical work, in particular, Wheeler said, allows the shop to offer customers more services – and at labor rates not controlled by insurance companies.

Its affiliation as a NAPA AutoCare Center for both mechanical and collision since 2005 is also part of the shop's marketing.

"It gives people an additional assurance through the warranty," Wheeler said. "We offer a great warranty ourselves, but that's also backed by the nationwide NAPA warranty."

The shop participates in no insurance direct repair programs, but relies heavily on its long-standing reputation in the community, a good website, and referrals from fleet managers, RV dealers, and mechanical shops that don't do collision work. Wheeler does some radio advertising, but also has good success with ads on shopping carts in several local grocery stores.

"Those are excellent for advertisements," he said. "It's like a billboard every time they shop."

Go whole hog

Wicklund's CARSTAR in Liberty, Mo., has an annual "Go Whole Hog for CARSTAR" event every year, putting on an evening hog roast. An "after-hours" session for the Liberty Area Chamber of Commerce, the event attracts hundreds of people to the shop each year for BBQ, live music

and prize give-aways.

While it's good marketing for the shop, "We also just want to say thank you to Liberty for supporting us for over 40 years," shop owner Bill Wicklund said of the event.

Overcome less-than-ideal location

Owner Steven Jensen said he too is active in his local chamber of commerce as part of his marketing for his shop, Better Body & Paint in Eugene, Ore. He's hosted as many as 200 people at the shop for chamber events that includes an opportunity for attendees to watch through the paint booth's windows as a vehicle is being sprayed.

Jensen said his son Keegan's management of day-to-day operations at the shop allows him to focus on marketing. He has custom boxes printed to deliver locally-made muffins to insurance agents and other referral sources. Nearly 70 agents participate in the annual golf tournament the shop hosts. And the shop actively assists a number of local charities, including offering to make a donation to the customer's choice of charity after a repair job or referral.

"Any business person who has any amount of success owes it to the community to give back," Jensen said. "The charities get the money they need to do good things, and we get some advertising. Any time you can win-win like that, I think it's really a cool deal."

The shop also overcomes its less-than-ideal location a little north of the city by offering free mobile estimating and free pick up and delivery.

Switch to fleet, government work

Vicky Haye-Roberts said that as the second-generation owner of Southland Auto Body near San Diego, she decided to shift the company focus away from insurance work and toward fleet and government accounts.

"That's the best thing I did," she said. "We had been a direct repair shop for one insurer, and they had us doing so much of their paperwork that I didn't have time to get out and market my own business. I felt like I was an employee of the insurance company."

The shop still has a loyal following among individual customers as evidenced by its online reviews.

"There are people who will tell their insurance company, when they try to steer them somewhere else, 'No, we're taking it to Southland,'" she said.

But many of the vehicles in the shop on any given day are owned by a major national rental car firm, or are city, county, federal or military vehicles. Haye-Roberts said there's really no downside to that type of work.

"You may be asked to reduce your labor rates, but these days who doesn't ask you to give them a deal or lower your rate," she said. "You make it up in volume. You're working with fewer people, you don't have the insurance industry telling you that you have to do this or you have to do that."

Attract the right mix of work

Southland isn't the only San Diego shop to shift its marketing to attract a different mix of work. Throughout his 40-year career in the body shop industry, Rocky Frost said he's overseen a variety of businesses, from a start-up shop to a large established business with lots of employees and

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insurance direct repair work, to one focusing as much on custom and restoration work as collision repair.

All of those businesses have been Custom Auto Body, the shop he and his wife Carolyn have owned and operated in San Diego, California, since the 1970s.

“My thing had always been custom painting and restoration, but we kind of lost sight of that because of insurance work,” Frost said. “We did that (insur-

ance work) for 30-some years, and had as many as 19 employees. It was great.”

But the economic slowdown several years ago led Frost to change his business.

“We cut way back here,” he said. “In fact, we got all the way down to just six employees. We were still hanging in there, but I also wasn’t real happy about the direction of the direct repair programs. So I made a pretty risky decision and got rid of them all. We started

going back to our roots in custom painting and restorations. People kept telling me, ‘You’re crazy.’ First, they said, you can’t do that kind of work along with collision repair. And they felt it wasn’t the time to make that change.”

Frost is happy to say the nay-sayers were wrong. The business has sustained itself, added to its employee count and now boasts a workload split about equally between late-modern collision repair work and custom or restoration work.

“On any given day, we can have cars from the early 1920s along with a brand new 2014 (Ford Mustang) Shelby GT 500 in here,” Frost said. “So we don’t really specialize in anything except doing quality work.”

One form of marketing Frost has used is posting to the shop’s Facebook page two or three times a week. He said Facebook offers a great opportunity for frequent updates and lots of photos.

“That’s a way I can show off the particular projects that we’re working on,” he said.



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Prompt online reviews

Nearly every collision shop has a handful of online reviews from customers, but Canyon Road Auto Body in Portland, Ore., has more than 140 on just one of the review websites alone. It's something the shop made a priority for several years, making sure every customer who left received a flier with directions on how to go to the site and give a review, good or bad. The vast majority of the reviews are good, and that's bringing more work to the shop.

Another marketing effort the shop has used is a mammoth billboard on top of its building that reads simply, "Fender bender, meet fender mender," followed by the shop's name and arrows pointing downward to the building.

Certification as a marketing tool

Meeting the requirements for OEM shop certifications isn't an inexpensive venture. Between required equipment, training and fees, the costs for even just one such certification can push well into the 5- if not 6-figure range.

But many shops that have done it say it's proven to be a good marketing tool. Kye Yeung of European Motor Car Works in Santa Ana, Calif., said he discovered he was overly cautious when he projected a 5-year return on investment in his shop's first certification.

"What I didn't realize was that being associated with that particular certification brought other business in," he said.

Paul Sgro, owner of Lee's Garage in West Long Branch, N.J., which has multiple automaker certifications, agreed.

"When you have a customer that has an exotic automobile you're repairing, and the rest of his family is driving something else, you're also taking care of their cars," he said.

"We're not Tesla-certified but we've fixed over a dozen Teslas because of our other brand certifications," Eric McKenzie, director of body shop operations for the Park Place Dealerships in Texas, agreed. "Their friends and family who are our customers told those Tesla owners, 'You don't want that car to go anywhere else.'"

Market without spending

But not every marketing effort requires a large financial investment. Mark O'Dell of O'Dell Auto Body & Paint in Hillsboro, Ore., said for a smaller shop such as his with a limited marketing budget, time itself can sometimes be the best marketing tool. O'Dell said that earlier in his career as a shop owner, he'd rush to get a potential customer an estimate and on their way because of how valuable he presumed their time was. More recently, he said, he's realized spending more time up front with them is valuable.

"I read in a trade publication that the longer they are here, the more you can get to know them and find out about what they're looking for," O'Dell said.

"You also have to sell yourself, make that personal connection. I'm more likely to get the job if they like me. That can be the best marketing investment you make." ❏



JOHN YOSWICK
CONTRIBUTING
EDITOR

John Yoswick is a freelance writer based in Portland, Ore., who has been writing about the automotive industry since 1988.

E-mail John at jjoswick@spiritone.com



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The changing face of the jobber

Competitive pressure and a customer focus are driving customer demands

The paint jobber industry is undergoing significant change. Increasing customer concentration in the collision industry is putting pricing pressure on the entire refinish materials supply chain.

A second round of jobber consolidation is underway, enhancing competitive pressure in the industry. Adding to this, paint manufacturers are placing ever more start-up, technical and back-office requirements on jobbers in an attempt to drive efficiency and lower costs. The result is a jobber industry that is and will continue to undergo significant change.

Consolidation in the collision repair industry is hot news. Backed by billions of dollars of private equity investments, the industry is witnessing what may be a once-in-a-lifetime transformation. The pace of consolidation is projected to increase exponentially.

As the collision market becomes more concentrated, the impact on companies that sell into the industry becomes more apparent. The jobber industry in particular has seen a shift. As larger collision repair companies take more market share, they have become more demanding on both price and operational integration, creating a fear in the industry that paint distribution is becoming a commoditized business.

Selling to an MSO is different than selling to a traditional single- or dual-location business. Large MSOs are focused on price first and value-added services second. Many of the largest MSOs are able to buy direct and negotiate steep discounts. In conjunction with price, there are also increasing demands that the jobber deeply integrate their business operations with the MSO. There is a particular focus on KPIs and ensuring the jobber is performing as agreed. In return, jobbers servicing the largest collision repair operators in the industry earn gross margin on delivered product in the 5 percent to 8 percent range.

Selling high volumes at low margins alters the way business has traditionally been conducted in the market. For large distribution companies with already existing investments in inventory, sales and distribution staff, equipment and facilities, selling to a large regional account can prove to be a lucrative opportunity. In exchange for selling at low margins, many MSOs demand less in costly value added services that smaller customers require.

Large MSOs tend to have their own technical experts on staff and need less support. Jobbers serving this market engage in traditional distribution, essentially becoming drop shippers that add value by closely integrating operations with large MSOs as opposed to providing technical and operational support.

While consolidation continues, the majority of the market is still traditional single- or dual-location small businesses. There are substantial differences between the needs

of a nationwide MSO and a smaller organization. Smaller organizations do not have the financial resources to staff technical experts or negotiate long-term purchase agreements at significant discounts. As a result, these customers are less price sensitive.

"We choose not to sell on price," says Mitch Penny of UYL in Houston. "We focus on selling value add services. We sell ourselves first and paint second."

Josh Bergeron of Pro Color AutoPaint in New Orleans agrees. "In this industry you have to do things differently than in the past. All the paint lines work, otherwise they wouldn't be in business. For us, it's really about what additional support we can provide to our client."

Both Penny and Bergeron do not sell to large MSOs by design. Penny says, "I'm not sure I would want to. The margins are just too thin. We provide a lot of services to our clients, and I don't think it would necessarily be a good match for our business model."

Ongoing concentration of the collision repair market is driving structural change in the jobber market. As MSOs grow, increasing pressure to build scale and growth is exerted on jobbers serving these clients. Large distributors like NCS, FinishMaster, LKQ, and Single Source will continue to expand geographically with their clients in order to better serve them. This presents a unique opportunity for medium-sized regional jobbers that have established a strong geographical market niche.

NCS, FinishMaster, Single Source and LKQ have all grown substantially in the past few years directly as a result of acquisitions. As the collision customer base becomes more concentrated, so too will the jobber industry as only the largest, best-capitalized and best-organized distributors will be able to meet large consolidator needs.

There are also financial shifts impacting the jobber industry. Primarily through low-cost access to capital, NCS, LKQ, FinishMaster and Single Source all are able to continue to grow via acquisition to develop a truly nationwide footprint.

For smaller regional jobbers this is both an opportunity and a risk. Smaller jobbers can join forces with larger nationwide distributors by merging with other jobbers or selling their company to such groups. They can also continue to specialize in a geographic area by providing a level of service and expertise difficult for larger nationwide organizations to overcome. One thing is certain – consolidation in the collision industry will drive continued buying and selling activity in the jobber industry.

As the industry continues to evolve, changes on the supplier side are adding increasing pressures. Many paint manufacturers are aware that paint is becoming much more commoditized and price is playing an increasingly significant role in negotiating nationwide purchase agreements. In an attempt to compete on price, many manufacturers are cutting back on value-added services they traditionally provided, such as new client acquisition support, accounting functions and ongoing technical support. Only a few years ago many jobbers and shops leaned on manufacturers to provide such support, now the responsibility rests on the jobber.

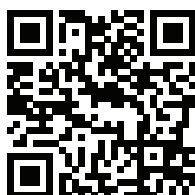
The jobber industry is changing. Consolidation is creating a need for a truly national paint distribution and jobber segment. Low-cost access to capital will spur continued buying and selling in the industry. Increasing competition on price is forcing manufacturers to offload capital-intensive support features to paint jobbers. However, these changes also present an opportunity to build a deep niche of loyal customers that value service over price. While the changes may be a threat to some, others are capitalizing on them to create true opportunity within the industry. 

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PROFIT MOTIVE: YOUR COMPASS TO FINANCIAL SUCCESS

Hit a motivation bullseye

Find what drives your employees to produce

BY CHRIS "CHUBBY" FREDERICK | CONTRIBUTING EDITOR

If you have employees who are not producing the way you want, you need to determine why. Steve Privette, an ATI coach, explains how he helps shop owners with different motivational challenges. Steve says typically there are three causes: they lack ability, training or motivation.

Let's talk about a lack of motivation. As an owner, you need to find your employee's motivation and utilize that knowledge to get them to produce more for both you and them. People are motivated by many things. The areas I have found to be the most successful in moving staff to higher levels are money; time; material items; or family. Now you have to find out which category each employee falls under.

Money

Many employees are motivated by money. Every employee should be — in one form or another — paid depending on their production. Many of you may use a flat-rate system for techs and salary/commission system for writers and managers. Then there are weekly or monthly bonuses in addition that you can create to motivate.

If you believe your employee is motivated by money and they are on a similar plan as above yet still not producing, then they are either too comfortable financially or are really not motivated by money, but by something else.

Time

For many, their time is more valuable to them than the money. The last shop I ran

was a Monday to Friday dealership. I had a tech who was solid all around. Fixed it right the first time, could beat flat rate on most jobs, had a good attitude and was always on time. Here's the problem: he worked 40 hours per week, but rarely produced 30 billable hours. I told him, "I need you to produce more hours. Plus, you would make more money!" He said he did not care about making more money and would prefer to work at his stress-free pace. I asked him "What is important to you?" He answered, "My free time!"

I found his motivation. I said, "Give me 40 billable hours by end of day Thursday and you can have Friday off." He rarely ever worked another Friday again!

Material items

I have a client with a tech who really wasn't motivated by money or time. He wasn't money motivated because no matter how much he made, the money was going to his ex-wife and kids, through a wage garnishment. So I told the owner to find his motivation. It turns out this tech was NASCAR crazy!

So the owner and I determined monthly billable hour goals he needed to produce and how much more money reaching those

goals would put in the owner's pocket, to make sure we could afford the appropriate incentive. We determined two monthly levels of billable hours for the tech to hit.

If he hit the lower level, the owner would buy him a NASCAR die-cast scale car of his choice. If he hit the higher level, the owner would buy him NASCAR tickets to the next upcoming race. This worked very well, and the tech has reached one of those levels many times. Not always, but often.

Family

Another shop owner of mine had a service writer whom he really liked, but he wasn't motivated. Customers loved him; he had great phone skills, good organizational skills, was good with the techs. Money wasn't motivating him to produce more.

The owner determined that the most important thing to this service writer was his nine-year-old daughter. He was a single dad, and his world revolved around her. He knew that earning more money would allow him to provide more for her, but he wasn't good with his money.

The owner opened a savings account in his daughter's name, and every month the service writer hit a gross profit dollar goal, the owner would deposit money into her account. This service writer just took off producing, month in and month out.

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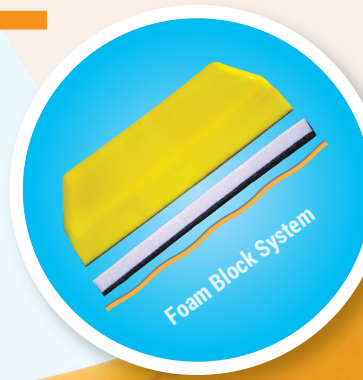
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GET THE GREATEST PAINT TRANSFER EFFICIENCY POSSIBLE WITH THESE STEPS

Spray guns must be fitted with a regulator, but air pressure must be set on the regulator at the wall for maximum efficiency.

BY **TIM SRAMCIK** | CONTRIBUTING EDITOR

As with any service business in the last two decades, the collision repair industry has undergone dramatic changes in the way it generates revenue. Looking back just 15 years, most shops were focused on boosting profits solely by bringing in more repairs, which typically meant pursuing as much work and as many direct repair agreements as possible. Stagnating labor rates and increasing costs in maintaining multiple DRPs made this course untenable for many repairers. Shops, quite frankly, were working harder for decreasing returns.

The focus then turned to lean operations, cutting waste to glean as much profit as possible from each job. Running lean quickly proved itself a money maker as shops began pocketing funds

they once flushed away in the form of wasted materials and effort. In many cases, investments in lean operations were minimal. Shops didn't have to take special steps. They needed only to use their tools and products as manufacturers intended.

Of course, this remains the case today. Yet even with years of lean experience, the repair industry still struggles with implementing efficient operations in some areas. Nowhere is this truer than in the paint department, specifically with paint transfer efficiency. Spray gun and paint manufacturers regularly churn out new products designed to work together to provide better finishes using less product.

Through misuse, failure to invest in upgrades and other missteps shops

frequently deprive themselves of optimal transfer benefits. Don't let this be the case at your business.

Refer to the following list of the steps to ensure the best transfer efficiency, partnered with best finishes possible.

Get the right gun for the job

Is it time for your shop to update its spray guns? With some models carrying price tags approaching \$1,000, shop owners can be reluctant to invest in newer technology, especially when proper maintenance has kept their current stock in great working condition. Painters may balk at switching to an unfamiliar gun while stepping away from a tool they're comfortable with.

Complicating this common scenario is the history some shops have with



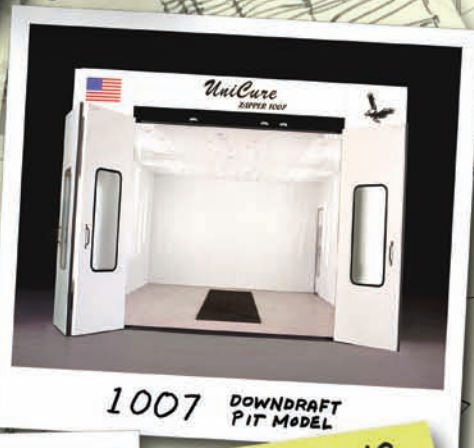
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new spray guns. John Moore, Axalta Global Application Technology Guardian, notes that problems with early HVLP models produced doubts in the technology. "They under-atomized spray, which made color match and clearcoat leveling difficult," he explains. "There continues to be some reluctance to take advantage of the guns that are available today, even though they have an improved balance between atomization energy and paint flow."

Paint vendors encourage repairers to set aside any hesitation in purchasing new models or risk losing significant savings. Paul Evans, Zone Manager of Refinish Business Development Centers for PPG, says shops owe it to themselves to use the best tools available since they are designed to work with the latest finishes to provide the greatest transfer efficiency.

Brian Stebbins, Regional Training manager for Sherwin-Williams Automotive Finishes, notes that newer gun models provide other significant benefits to a repairer's bottom line. They offer improved finish quality that requires less buffing and other post-paint work.

Pete Mahoney, National Technical Manager/Trainer for ChemSpec, recommends shop demo a new gun for at least a week to allow painters to determine if the benefits justify the investment. Mahoney notes that some of the most recent gun designs have demonstrated significant increases in efficiency. He points to the Anest-Iwata Supernova, a low-volume low-pressure (LVLP) gun he says raises efficiency by as much as 20 percent. (Mahoney plans to test the SATA 5000 model, which also promises a significant boost in transfer.)

Even if repairers are willing to wait for newer guns, paint vendors say they can benefit from stocking multiple spray guns designated for each type of application. Doing so helps ensure the application type is applied correctly with optimal efficiency.

"Separate color and clear guns should be priority," says Prospray Technical Training Manager William Warner. "Dedicated quality spray guns should also be used for priming and sealing."

Set up the gun correctly

Regardless of which guns a shop selects, transfer efficiency will be tied directly to proper gun setup, especially



Correct spraying distance is 4-6 inches from the vehicle.

Photo: PPG

with the selection of the correct fluid tip based on the product and job.

Evans notes, for example, that waterborne products typically require a smaller tip, in the 1.2-1.3 mm range, compared to solvent-based applications. When the wrong tip is used, painters end up applying too much product. This mistake costs shops twice since they lose efficiency and create texture problems and other finish deficiencies that must be fixed later.

Proper set up also includes utilizing the parts specifically designed for each spray gun brand. Shops should never use parts from one manufacturer's guns in another's. Evans says painters sometimes make the mistake of swapping regulators and gauges across manufacturer lines. While they may fit another brand, these critical gauges won't function accurately, thereby robbing the gun of its efficiency potential.

Properly control air flow

Since optimal air flow is necessary for optimal transfer efficiency, painters need to avoid making five common mistakes that affect air volume and pressure.

Mistake one is using pressure in excess of manufacturer recommendations. Hans Kempf, North American Training Manager for BASF, says some painters still apply outdated notions of necessary air pressure requirements. "Painters tend to be creatures of habit, with some using excessive air pressure that's no longer needed in today's guns," he says. "Excess pressure causes product to bounce off a vehicle body, and it also creates increased overspray."

This mistake can be avoided by simply sticking to paint and gun manufacturers' recommendations. In fact, following these recommendations eliminates mistake number two, guessing air pressure settings. Evans says some painters adjust air pressure based on the sound of the air flowing from the



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air cap, a highly inaccurate practice that almost always wastes product.

Mistake three involves using weak or faltering air volume produced by underpowered compressor systems. "In some shops there isn't enough compressed air to go around for everyone using it," Evans explains. "The paint department always seems to be the last in line to receive air, and painters have to deal with sudden drops in pressure."

Without the necessary air volume and pressure, products don't atomize properly and produce "lumpy" or malformed textures. Some painters compensate by "going wetter" — spraying additional product in an attempt to create the desired finish.

Others raise air pressure in an attempt to increase atomization. "What they don't

seem to realize is this not only wastes paint, it creates more potential overspray," says Warner. "It also contributes to bad looking blends, color flop, halos and lightness/darkness issues, along with color opacity that could be managed better with proper air pressure."

Evans says shops can head off all these problems by setting up a dedicated compressor for their paint departments or, at the very least, maintaining a dedicated compressor for the paint booth.

Going a step further, Stebbins recommends shops make the most of their available air by investing in high flow fittings and air lines. He also recommends regular maintenance of compressors to ensure optimal air flow at all times and to prevent oil and other contaminants from entering air systems.

From there, painters can avoid mistake number four by setting gun pressure at the regulator on the wall versus the air micrometer (or choke) on the gun. Kempf explains that when painters use the micrometer excessively to adjust pressure, they reduce the amount of air volume in the gun, cutting efficiency, while reducing gun pattern and atomization.

Finally, shops can avoid mistake five by setting proper spray booth air velocity. Moore notes that most new booths are designed to operate within the OSHA spec of 125-175 feet per minute flowing from the inlet filters toward the exhaust filters to efficiently remove overspray. The OSHA range also coincides with the recommended velocity for the maximum booth filter capture efficiency. Higher velocity, says Moore, causes excessive turbulence, which results in less product successfully making its way from the gun to the vehicle.

Maintain your tools

Spray gun cleaning and care similarly should be performed according to recommendations. Proper maintenance not only extends the working lives of spray guns, it's a critical part of transfer efficiency. Stebbins explains that without regular cleaning, finish products can dry and gradually clog the gun's passages. As the passageways become smaller, painters typically compensate by increasing the amount of product they're spraying.

Effective cleaning should involve, at the least, a quick flush between every

job, along with a thorough breakdown and cleaning at least once a day. That thorough cleaning must include removing the cap, fluid tip and needle and methodically scrubbing all the passages.

Always be training


Training gives painters the opportunity to review cleaning schedules, along with gun set up, air flow and spray technique recommendations mentioned here. Just as important, it introduces repairers to constantly changing gun and product technology.

Warner notes that painters sometimes mistakenly regard their guns like modern fuel injection systems — needing little adjustment or attention — when their technology more closely resembles a carburetor, which requires regular fine turning that training addresses.

The same holds true for updated finishes, which painters similarly must adjust to in order to optimize finish transfer. Stebbins says training is vital for shops adopting new products or moving onto a different brand. The same rules that apply to mixing and applying one product can vary significantly between new generations and manufacturers.

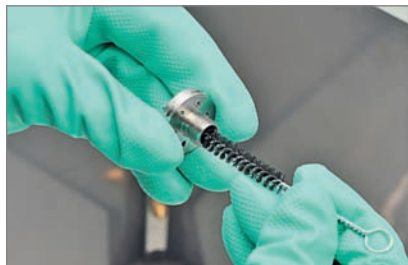
Techniques change as well. Currently, recommended spraying distances run 4-6 in. from the vehicle body. Vendors note that too many painters adhere to the outdated recommendations of 8-10 in., which wastes product.

Warner says painters also can increase transfer efficiency by adopting other techniques, such as creating tighter overlaps and limiting "wrist rolls" on blends to avoid building up dry spray on blend edges.

Together, all these recommendations can save substantial amounts of product. The key, as usual, is making sure they're put to work in your shop. 



Repairers need to make sure a spray gun is fitted with the correct tip for the product being applied.




At least once a day, spray guns should be thoroughly cleaned, which means scrubbing out all the passages where product can dry and create clogs.



During a thorough cleaning, the gun needs completely disassembled, with the cap pulled.



Tim Sramcik has written for *ABRN*, *Motor Age* and *After-market Business World* for more than a decade. He has produced numerous news, technical and feature articles covering every aspect of the collision repair market. In 2004, he was recognized for his work by the American Society of Business Publication Editors.

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SHOPS CAN DO PLENTY TO PREPARE FOR THIS MATERIAL BEFORE THEY SEE A 2015 FORD F-150 AT THEIR DOOR

It might be some time before most shops have an opportunity to put their aluminum training to work on a 2015 Ford F-150, but preparation in the meantime will pay off.

BY **TIM SRAMCIK** | CONTRIBUTING EDITOR

Just about anyone who spends time serving in the military eventually learns the meaning of the old expression "hurry up and wait." Service members spend long hours training to meet specific deadlines at precise locations, often to be left waiting once they've completed their tasks. This isn't accidental. It's the military's way of stressing the importance of continuous preparation and timeliness even when the need isn't always immediate.

Collision repair businesses are going through their own version of "hurry up and wait" as they prepare to work

on aluminum, specifically on the 2015 version of the top-selling Ford F-150 pickup truck. *ABRN* recently spoke with several successful MSOs who had taken aluminum training and invested in new tools and equipment. Not one had worked on the vehicle yet, nor did they expect to use their new training and tools any time soon. That's to be expected. The aluminum-intensive truck is brand new, and until significant numbers hit roadways, very few will be rolling into shops needing repairs.

Still, the investment should pay off handsomely.

According to a 2015 North American Light Vehicle Aluminum Content Study by industry analysts Ducker Worldwide, over the next 10 years "seven out of 10 new pickup trucks produced in North America will be aluminum-bodied" and "every leading automaker will have several aluminum body and closure panel programs."

In the meantime, repairers can continue honing their skills and preparing for aluminum work by keeping up to date on the latest repair information and equipment. Here's a look at what your shop will need to know about prepping

to paint and weld aluminum, along with the basics of adhesive rivet bonding and some tools to add to your inventory.

Clean finishes

For the most part, finishing aluminum parts will differ very little from those made of steel. The major departure comes in the prep work.

With its light weight, aluminum offers the additional benefit of being highly corrosion resistant. That's because aluminum resists rust by spontaneously forming a thin but effective oxide layer when it contacts moisture. This layer prevents further oxidation. Unfortunately, it also can contaminate any finishes applied to the aluminum, so it must be removed during the paint prep stage.

Notable here is the fact that some of the cleaning done during prepping to remove shop contaminants picked up during body work will produce this oxide layer. Repairers will remove this layer mainly by sanding.

I-CAR offers the following directions for preparing bare aluminum parts for refinishing.

- Begin by cleaning bare metal surfaces with soap and water to remove any water-soluble contaminants. Next, apply a wax and grease remover. These steps will ensure a clean, contaminant-free part.

- If required, apply a metal cleaner and conversion coating made specifically for aluminum.

- Remove the oxide layer by sanding or abrading the surface. Never use grits coarser than P80 since aluminum scratches easily.

Bonding principles

Aluminum's light weight also makes it an ideal candidate for rivet bonding, which provides a remarkably strong bond that further reduces vehicle weight. Some shops are already performing rivet bonding since it also can be performed on steel, as it is on some BMWs.

Rivet bonding utilizes structural adhesives and a variety of different rivets, either specially coated HSS steel, specially coated boron alloyed steel or aluminum rivets in different designs, such as but not limited to SPRs, domed, flat, counter-sunk blind rivets and solid rivets.



Aluminum spontaneously forms a protective anti-corrosive oxide layer when it contacts moisture that will need to be removed before refinishing and welding.

Photo: 3M

Refer to the following rivet instructions supplied by 3M for standard aluminum panel replacement on domestic vehicles. (Note that OEM information will include additional steps for specific models, such as information on de-burring drilled holes and using clecos to hold panels in place.)

Step 1. Prepare the host panel. Use a grade 80 abrasive belt to remove any remaining rivet material from this panel. Prep the remaining mating flanges with a coarse durable flex belt.

Step 2. Prepare the mating flange panel. Remove the e-coat from replacement panel mating flange areas using a clean strip sanding disk.

Step 3. Dry fit the replacement panel and complete any necessary metal straightening at the flange areas.

Step 4. Clean the host panel and replacement panel mating flange areas with a VOC compliant surface cleaner.

Step 5. Identify the replacement rivet sites and prepare the surface for the rivet type recommended by the manufacturer. (For solid or blind rivets, drill all necessary holes.) Once complete, remove the panel.

Step 6. Pre-assemble the NVH replacement. If the vehicle construction requires this step, apply an NVH dampening material or flexible foam at the original locations.

Step 7. Apply adhesive to mating flange areas on host panel and replacement panel covering all bare metal areas. Apply additional bead of adhesive at the mating flange area to ensure proper bond line thickness.

Step 8. Install the replacement panel to host panel, making sure to avoid scraping off any of the adhesive. Clamp the panel in place.



Fillers and other aluminum products need to be stocked in dry storage places to prevent the buildup of condensation.

Photo: 3M



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Step 9. Install the replacement rivets to all areas per manufacturer recommendations. Note: Rivets must be installed while the adhesive remains uncured. Weld or insert bond the cosmetic joints/splices as recommended by the manufacturer.

Step 10. Clean up the adhesives. Remove the clamps and "tool" the excess adhesive squeeze out from the repair area before curing to seal the repair. Use an acid brush to remove adhesive from between clamps. Warning: Grinding to remove excess cured adhesive can expose bare metal, causing corrosion.

Step 11. Post-assembly foam replacement. Apply foams at the original locations as required.

Worry-free welding

Welding aluminum — namely aluminum joints — requires the same level of preparation as refinishing. Repairers again need to address removing the oxide layer since it has a greater melting point than the base metal. Shops also must clean any moisture, dirt, grease or oil that might contaminate the welding area.



Aluminum dent pulling equipment, shown on this mobile workstation, allows every shop to get into aluminum repairs, regardless of their equipment budgets.

Photo: ProSpot

Miller Electric Manufacturing Company recommends the following directions for preparing aluminum welds using their tools.

- Oftentimes aluminum arrives from the factory with grease and oil on it. To clean the joint, begin by degreasing the surfaces with a solvent. Next, use a cheesecloth or lint-free cloth to clean and dry the welding joint (their materials tend to be porous and will absorb more oils/moisture). Do not use shop rags to clean welding joints because they can transfer oil and dirt to the welding surface.

- Always wipe the opposite side of the joint clean since impurities can be pulled through the aluminum and into the weld puddle.

- Use residue-free solvents. Avoid chlorinated solvents in the welding area since they can form toxic gases in the presence of a welding arc.

- Never blow off the joint using compressed air. Compressed air contains moisture and oil contaminants.

- Clean the joint with a stainless wire brush but only after solvent cleaning. Wire brushing prior to cleaning will embed hydrocarbons and other contaminants in the metal surface. It also transfers these undesirable elements back to the brush, making it unsuitable for cleaning.

- The by-product residuals from etching must be removed prior to welding. Use a stainless steel wire brush to clean all metal that has been etched.

- Clean all wire brushes frequently to prevent the transfer of contaminants to the weld joint. Dedicate specific brushes solely for aluminum work to reduce the chance of cross contamination with steel and other materials.

Miller also recommends the following rules for storing aluminum parts and filler materials to prevent contamination:

- Store all base metals and welding filler in a dry location with minimum temperature fluctuation (to minimize condensation). Welding filler metals should be stored in a heated and dry cabinet or room.

- Store aluminum pieces vertically to reduce condensation and the absorption of water contamination between layers.

- Whenever possible, bring all filler and base metals into the welding area 24 hours prior to welding so they may

reach room temperature. Again, this minimizes condensation.


- Keep filler metals covered at all times prior to welding. This includes a spool cover for MIG wire.

New tools

Along with the tools absolutely necessary for aluminum work — a MIG welder, clean room apparatus and a rivet gun — shops also would be well served to invest in an aluminum dent pulling kit or system. These systems typically include an anodized aluminum pulling bar kit (with suction cups, tie-rods and multi-hook gripping heads), an assortment of hammers, a heat gun and an infrared laser thermometer.

The thermometer is necessary to help technicians identify when a part has been adequately heated. Aluminum, unlike steel, does not change color when heated to its melting point. Heat shield gel usually is included in a system because it creates a barrier to protect undamaged portions of the aluminum panel.

Manufacturers now offer these systems as part of mobile aluminum workstations that feature additional tools such as stud welders and die grinders, allowing repairers to stretch their tool budgets a bit farther. These systems and workstations can be good investments for shops that are still putting together the funds to fully convert their shops for F-150 work.

A number of vehicles already sport aluminum hoods that need dent work. And affording dent pulling systems allows any shop to get into the aluminum game as it prepares for the inevitable day when vehicles like the new F-150 will no longer be the exception, but the norm. Although, most of the repair work for cosmetic aluminum panels, if repairable, can be accomplished with a map-pro gas. Then you may need to apply one or two pins to finish the repair. 



TIM SRAMCIK
CONTRIBUTING
EDITOR

Tim Sramcik has written for *ABRN*, *Motor Age* and *Aftermarket Business World* for more than a decade. He has produced numerous news, technical and feature articles covering every aspect of the collision repair market. In 2004, he was recognized for his work by the American Society of Business Publication Editors.

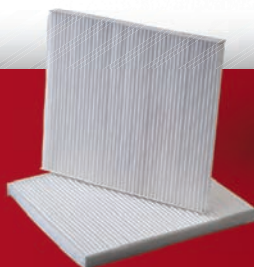
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CARBON FIBER: REPAIR VERSUS REPLACE

KNOW WHEN AND HOW TO REPAIR CARBON FIBER TO MAKE THE
BEST RECOMMENDATIONS TO YOUR CUSTOMERS AND ADD TO YOUR PROFITABILITY

BY ED STAQUET | CONTRIBUTING EDITOR

“Repair vs. Replace” is not a new issue in the collision repair industry. However, as new substrate materials are pioneered by car manufacturers, the decision of “repair vs. replace” becomes even more significant to your business. Knowing when and how to repair these newer materials, such as carbon fiber, and whether the repairs are structural or cosmetic, will allow you to make the best recommendations to your customer and can add to your profitability.

What is carbon fiber?

Carbon fiber has been used in automobile production for about 20 years, and more frequently over the past

five years, typically for high-end vehicles such as BMWs and Corvettes. Carbon fiber is composed of thin carbon filaments that are bound together with a plastic polymer resin to form a composite material. The fibers are woven into a complex weave that is both strong and lightweight. Carbon fiber does not contain any metal elements.

It is carbon fiber’s strong, lightweight properties, along with its woven look that make it so appealing to car designers, especially for visible cosmetic panels on high-end vehicles. Although carbon fiber is more costly than traditional composites and more costly than metals such as steel or

aluminum, new production techniques are reducing the cost factor. An equivalent panel of carbon fiber is also much thinner and lighter than a fiberglass weave.

While carbon fiber was once cutting edge and used mostly for aerospace applications, automated production methods are making it easier to shape and form the material. It is also available in a pre-preg form – carbon fiber cloth that is pre-impregnated with resin allowing the manufacturer to form and cure the material into desired shapes.

Carbon fiber is mostly used for decorative purposes – glamour panels for exterior components such as

door panels, fenders, hoods and roofs. It is less commonly used for monocoque or unibody construction on vehicles, except for specialty designs such as Formula 1 race cars. Carbon fiber is even less commonly used for parts such as brake rotors, drive shafts or wheels. As new production and molding techniques for carbon fiber become less expensive, its affordability might make it more attractive for use in the average automobile.

Since carbon fiber is still a relatively expensive material, it is more generally found on high-end vehicles, such as Corvettes, where the open-weave is visible on decorative (glamour) panels. The carbon-fiber component can be left in its "natural" color or painted in the car's body color.

Repair vs. replace

To solve the mystery of whether a repair is structural or cosmetic, it is important to understand that the standard collision shop will be making structural repairs to cosmetic carbon fiber panels. You can take a cosmetic panel that has a hole in the carbon fiber material and repair the hole – this is structural repair.

A standard collision repair shop will be fixing the outer skin of a vehicle – a ready-to-repair type of damage — such as a scratch on the surface of a hood or a small hole in a door panel.

As an example, if a Corvette has a visible carbon roof that is scratched, a repair can be made if the roof will be painted. With a light cosmetic scratch, the panel can be clear-coated to hide the scratch. But if the carbon fibers are torn, a repair patch would be visible and not acceptable to the customer. For replacement procedures, a mechanically fastened or bonded carbon fiber component can be replaced in the shop.

The decision to repair or replace a carbon fiber component is the same as with any metal or composite component – analyze the damage and estimate the time it will take for repair vs. the cost of a part replacement. For instance, if there is damage to a carbon fiber hood on a Shelby Mustang, a technician can spend several days recreating the hood, painting it and getting it ready for the customer. If it makes good business sense to repair the hood, rather than spend \$15,000 on a new hood, then that would be the best decision. If you can do the repair, that is the key, and the answer to repair vs. replace.

Visibility of a repair is another factor that enters into the decision-making process for repair vs. replace. If the carbon fiber component is painted on the outside surface and the backside of the repair will not be visible, the repair can be made and should be acceptable to the customer. A visible repair would probably not be considered satisfactory.

For example, a repair made to a carbon fiber hood on a Corvette might look good from the outside after it is painted, but if you can see the patch on the underside of the hood when you open the hood, this might not be acceptable to the customer.

Corvette owners — and most vehicle owners, for that matter — want their vehicles to look good both outside and inside, so in this instance, a replacement would be preferable.

It's not difficult

There are no special tools, equipment, product, or training required for repairing or replacing of a carbon fiber component. Any of the products that are currently used to repair fiber-reinforced plastics and fiberglass can be used for cosmetic repair of body panels, hoods, decks, and doors.

Some of these products include heat-set plastic panel repair adhesives, flexible and rigid foams, plastic bonding adhesives, and plastic-to-metal bonding adhesives. Consult your repair product supplier for information on which products are suitable for repairing carbon fiber parts. Your supplier will also have instruction sheets with preparation, application and finishing techniques for carbon fiber repairs.

As carbon fiber becomes a more prevalent material in car design, collision repair shops will be called upon to make repairs or replacements to these vehicles. Making structural repairs or replacing carbon fiber cosmetic panels can be a lucrative addition to your car-repair menu with the end result of satisfied customers.



ED STAQUET
CONTRIBUTING EDITOR

Ed Staquet has more than 40 years of experience in the auto body repair business. For the past 20 years, he has worked for Fusor Repair Systems and LORD Corporation and is now the senior staff technical support manager. He has been an instructor at I-CAR for 30 years; and he served two terms on the I-CAR Board of Directors.

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Not just a fuse box

The home of vehicle power management has undergone significant changes in the push for increased fuel economy.

BY **DAVE MACHOLZ** |
CONTRIBUTING EDITOR

PETE RUDLOFF CONTRIBUTED TO THIS ARTICLE

IT OFTEN is nearly impossible to perform collision work on modern cars and not deal with the occasional damaged wire harness or fuse box. For many collision shops this is foreign territory. With a little training, these new fuse boxes and wire harnesses are not as intimidating as they appear.

Vehicle manufacturers are constantly exploring ways to improve on-board technology to meet consumer demand and government regulation. The “fuse box” has undergone significant changes as a result of these efforts. We’ll take a look at what’s new in the fuse box and some diagnostic approaches for problems related to power distribution.

Fuse box on a diet

Every single piece on the car contributes to the vehicle’s overall weight. By reducing components and/or the weight of existing components, we can drop the overall vehicle weight and reduce fuel consumption. So how do we put a fuse box on a diet? There are several ways OEMs are making these changes.

Three-prong fuses

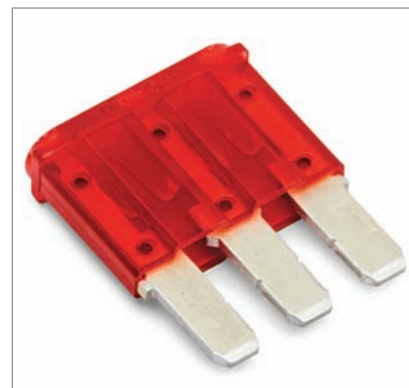
You can expect to be seeing these in great numbers before too long. These fuses, known as ATL or Micro 3 fuses, occupy slightly more space than one traditional micro fuse while providing

power to two circuits. The center of the three prongs is the common power supply for each side of the fuse. This gives OEMs a better way to utilize space while providing a lighter solution for power distribution systems. Testing these should be done in the same manner as the two prong fuse. When a fuse fails, the center prong should have power when testing with a Digital Multi-Meter. The two outer test points should show source voltage if the fuse is in good working order. If your initial voltage checks show a voltage other than expected, do some further testing to determine the root cause of the problem.

Integration relays

Similar to a four-pin relay, an integration relay takes the place of multiple traditional four-pin relays reducing overall vehicle weight. Often identified as a traditional plug-in relay in wiring schematics, the integrated relay is a soldered-in unit that is not designed to be serviced separately. Integrated relays also cannot be tested in the same manner as a four-pin relay. A relay that appears in an area of the diagram that is shaded grey is part of the integration relay. A relay that has numbers for terminals will be a traditional relay.

One additional benefit to using a solid state relay, as opposed to a traditional relay, is that the solid state relay takes far less current to operate. By eliminating 22 relays and replacing them with a solid-state IC device, there is far less electrical load for the alternator to power. This is a simple way of



Three-prong fuses are a space and weight saving solution for the fuse box. The Micro 3 and ATL are available through companies such as Kimball West.

IMAGE: KIMBALL WEST

achieving a power and weight reduction, but many manufacturers have taken this a step further.

Solid state power distribution and management

Modern automobiles rely on heavy electrical integration to handle customer convenience items and vehicle safety systems. As electrical load increases more drag is placed on the serpentine belt by the increased magnetic strength of the field winding inside the alternator. This parasitic drag leads to increased fuel consumption.

To curb electrical consumption, many OEMs have taken steps to control power management through the use of solid state electronic devices with built-in logic. The underhood fuse



box itself becomes integrated with a module that may need to be programmed/reprogrammed when it is repaired or replaced. Let's take a look at a few of the integrated module/distribution systems and a few that may cause some problems in your bays while performing a collision repair.

Ford: Smart Power Distribution Junction Box (SPDJBs)

Ford's Smart Junction Box (SPDJB) was designed in partnership with its supplier, Lear. According to Lear's website, Smart Junction Box (SJB) technology is the main hub in a vehicle's electrical system, providing power to electrical features such as power windows and door locks, lighting, instrumentation and the audio system. Current SJB technology combines fuses, relays, a microcontroller and multiple (circuit board and fret) layers of interconnection into a single integrated assembly. Its job is to provide protection against excessive current loads, typical of a short circuit, by shutting down circuit function.

The SJB module is software driven, and there have been some issues. Some problems can be addressed with reprogramming, which typically requires use of a Ford IDS scan tool.

Problems that can't be fixed with software updates or programming will be resolved by replacing the entire smart unit, which can be a costly proposition.

Nissan Intelligent Power Distribution Module (IPDM)

Nissan's IPDM works on the same basic principles as the Ford unit. But note that the only serviceable parts of the unit are its fuses.

There is an exception to this with certain Technical Service Bulletins (TSBs) that require you to use a special relay puller to remove the ECM relay on certain years and models. If you are not working with a TSB, do not attempt to remove any relays from the IPDM device. Problems with the IPDM that can't be fixed with software will typically require the replacement of the entire IPDM.



Voltage drop testing across a fuse is Macholz's preferred method for finding parasitic draw concerns.

IMAGE: MACHOLZ

Chrysler: Totally Integrated Power Module (TIPM)

Chrysler's TIPM is a module and has serviceable fuses and solid state switching. The TIPM has been the subject of recent recalls for no start, failure to keep running once started, fuel pumps that won't shut off and stalling. Check service campaigns and TSBs when working on late model-year Chrysler vehicles that exhibit these problems.

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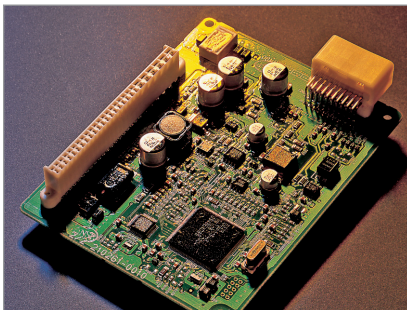
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Diagnostic strategies

Though integrated power modules are a relatively new technology, there should not be much of a learning curve. Normal network diagnostic strategies and fundamental laws of electricity are all in play. Many of the faults within the power distribution system will require the use of a scan tool, preferably of the factory variety. A fundamental ability to diagnose electrical faults combined with the use of a multimeter and/or lab scope, are essential to efficiently diagnose integrated power module faults.

Power and ground distribution schematics

When repairing a wire harness post collision, power and ground distribution schematics are invaluable in diagnosing electrical faults. Understanding what the power source is, what circuits share the power and ultimately where the circuit is grounded can help you determine whether the problem you are dealing with is isolated to one particular circuit or if seemingly unrelated



Denso and Toyota partnered to create this power management ECU that allows Toyota to simplify their Power management systems.

IMAGE: DENSO



Integration relays are solid state devices that take the place of traditional 4 and 5 pin relays in order to reduce weight and lower power consumption.

IMAGE: MACHOLZ

electrical problems could be related to a power distribution device such as an IPDM, SJB or integration relay.

Modern Parasitic Draw Testing

All body shops deal with the occasional ignition off draw complaint post repair. Most of us know by now that disconnecting the battery when performing parasitic draw testing is a bad idea, especially with advanced power distribution technologies.

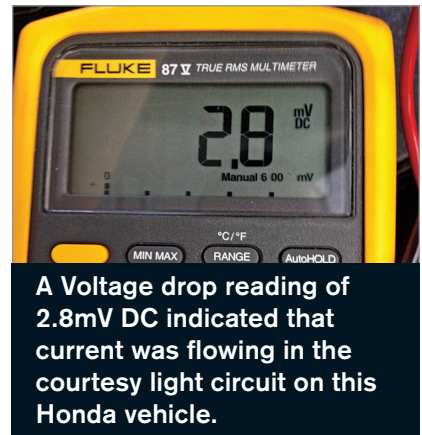
Ignition off raw testing always starts by prepping the vehicle and removing sources of interference with onboard modules:

- Close doors and lock them with the key fob.
- If the hood is open, be sure to close the latch with a screwdriver. Be sure underhood lamps are out.
- Move keys at least 10 feet away from the car.
- Make sure any Bluetooth device such as a smart phone or Bluetooth headset is removed from the vehicle.
- Wait for a few minutes for the remaining modules to go to sleep. Take your time and go make money fixing something else for now and come back to this when you are done.

If the vehicle uses a smart entry system, having the key in close proximity to the car will wake up the modules associated with the entry system and in many cases will turn on the lighting in the vehicle. In addition to keys, smart phones and other Bluetooth devices can be a problem. Removing smart phones and Bluetooth devices will eliminate the possibility of these devices keeping a module awake.

Once initial preparations are made, proceed with isolating the circuit that is causing the draw. My method of choice is using a multi-meter, set on DC Volts, and voltage drop testing across the top of each fuse until I find one that is flowing current. The only time current is flowing in a circuit is when the circuit is on. Using a meter set on DC volts and performing a voltage drop test provides me with an indication if current is flowing or not. Once I locate the circuit I will print a power distribution schematic for that circuit. Once I see what the fuse is powering I can start pinpoint testing individual load devices on that circuit.

I used this technique recently with an Acura product that had been in a




A Voltage drop reading of 2.8mV DC indicated that current was flowing in the courtesy light circuit on this Honda vehicle.

IMAGE: MACHOLZ

collision. When the car was returned to the customer by the collision shop, the battery would die overnight. I used the voltage drop method to isolate the draw to the courtesy light circuit in less than five minutes.

After isolating the circuit, I found that the body shop had the hatch striker installed upside down, which was not allowing the hatch to completely close and causing the courtesy lamp to stay illuminated. Once I installed the striker correctly, I had it fixed.

Don't forget that you can achieve similar results with an inductive amp clamp and your oscilloscope. Using a lab scope will allow you to see a picture of the current draw over time. Having a picture of the draw over time can be extremely helpful in locating faulty components.

Constant changes in technology make our job as technicians challenging. Embracing new technology and accepting the challenge will help you make money instead of losing it when it comes to diagnosis. Remember, even though this technology is newer, it still utilizes basic electricity. So long as you have a firm grasp on how electricity works, diagnosing high-tech fuse box problems will be a walk in the park! 



DAVE MACHOLZ
CONTRIBUTING
EDITOR

Dave Macholz is an instructor for the Toyota T-TEN, Honda PACT and general automotive programs at Suffolk County Community College in Selden, N.Y. He is an ASE CMAT and L1 technician and holds a NY State teaching certification in vehicle repair.

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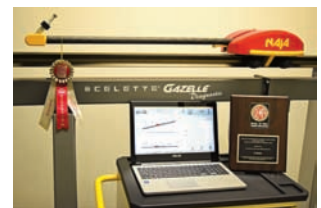


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THE LAST T D E T A I L [✓]

Think about the last time you had a car in the shop in which you had to mask the engine compartment as part of welding in a core support or apron. Did you bill for this procedure, and were you paid?

A survey of nearly 1,000 body shops earlier this year found that more than one third (35.7 percent) have never asked to be paid for masking the engine compartment, yet another one third of the shops (34.4 percent) who seek to be paid for it said they are indeed paid "always" or "most of the time."

The survey found a little more than 12 percent of shops acknowledge they have never charged or asked to be paid for "feather, prime and block." Yet another 12.4 percent of shops said they are "always" paid for the procedure, and another 9.9 percent of shops said they are paid for the operation "most of the time."

This confirms something I see as I work with shops around the country. Here's a procedure that 12 percent of shops aren't even listing on their estimates, yet more than 20 percent of shops are getting paid for it most, if not all, of the time.

If you find this kind of information valuable, I'd like to encourage you to participate in these new quarterly surveys that I've organized. Each survey lists about two dozen procedures or estimate line items and asks you to indicate how often each of the eight largest auto insurers pays your shop for each item (when it is a necessary part of the repair).

The surveys aren't quick. You can expect to spend 10 to 30 minutes on each. But I think you'll find that investment of time valuable for a couple of reasons. First, the survey questions will likely serve as a good reminder of many of the non-included items you may want to itemize on your estimates if they are part of a particular repair job in your shop.

"My estimators, production manager and I did the survey together during our production meeting," one Texas shop owner told me about our first survey earlier this year. "It definitely stirred up our thought process about some of the items that we have not been asking for."

The second way you may find the survey results useful is when you're being told, "We don't pay for that." The results can be another tool – along with documentation from the automakers or estimating

“The results can be another tool – along with documentation from automakers or estimating system providers – that you can use to negotiate to show that you are not the only one asking for or getting paid for it.”

YOU ARE OFTEN NOT THE ONLY ONE

Surveys give shops an opportunity to better understand billing, payment policies

system providers – that you can use to negotiate and show that you're not "the only one" asking for or getting paid for it.

Our second quarterly survey, which focuses on body labor operations will be available online during the month of July. Visit my company's website (CollisionAdvice.com) for a link to where you can get more information about taking the survey or seeing results from previous surveys.

Here are some other things you should know about the surveys. First, your shop's individual responses will be held in the strictest confidence. Only cumulative data will be released. You need only provide a zip code and state to participate. You have the option to provide additional contact information if you'd like to receive an executive summary of the survey findings.

Second, the survey should be completed by the shop owner, manager or estimator who is most familiar with your shop's billing practices and the payment practices of the largest national insurers.

With 985 shops completing the first survey (only one response per shop location is allowed), I'm confident it's already among the strongest surveys conducted in our industry. I want to increase the number of participating shops so we can provide statistically valid results even by state. To make that happen, please take the time to complete the survey, and forward the link to other shop owners you know. Make sure any association you belong to sends the link to your fellow members.

You'll read more about the surveys right here. I'll use the results as the basis for some of my future columns, to explain how you can justify charging for these procedures when they are necessary.

So visit my website (www.CollisionAdvice.com) to get more information or take the survey. 📱

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Mike Anderson, a former shop owner, currently operates COLLISIONADVICE.COM, a training and consulting firm.

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