

ABRN

AUTO BODY REPAIR NETWORK

30

COMMITMENT TO TRAINING
CLEARLY DEFINE SHOP
EXPECTATIONS SO YOUR
TEAM CAN SHINE



JANUARY 2017
VOL. 56, NO. 1 // **ABRN.COM**

**PRE- AND POST-REPAIR SCANS:
GET TWO PERSPECTIVES ON HOW
TO APPLY IT IN YOUR BUSINESS**

Mixed-Material Structure

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MANAGING MIXED MATERIALS

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New vehicle designs will require information access, new tools, equipment and skills

ADVANCED MATERIAL REPAIRS

If your shop hasn't begun getting ready, you are already far behind

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Perspectives from all segments of the collision industry on what lies ahead this year

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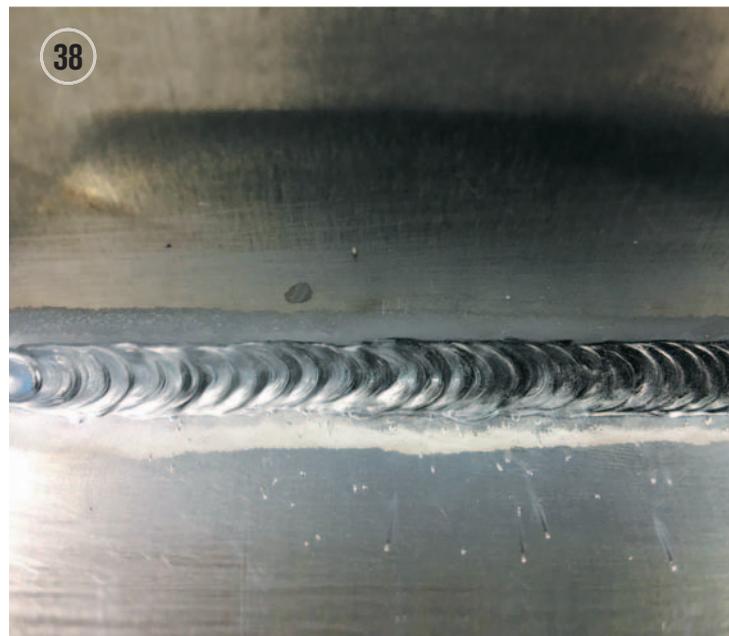
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CHICAGO

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If your shop hasn't begun this process, you are already behind

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ABRN.com/ToyotaFall16



WEB EXCLUSIVES // ABRN.COM

MAKE SURE YOU ARE GETTING THE MOST OUT OF YOUR PAINT BOOTH

Make sure that you are getting the most out of your paint booth operation by watching this webinar from the Commitment to Training and Global Finishing Solutions. Join Jason Garfoot, a trainer with GFS, for "Proper Paint Booth Operation," where he will show you how to properly prep a vehicle before painting, improve your booth's spray zone, achieve balanced booth pressure and maintain optimal booth performance.

ABRN.COM/BOOTHTIPS

EMPLOYING THE RIGHT TRAINING

Check out these tips to find the right training for your collision repair facility and learn better ways to care for matte or low-gloss finishes.

ABRN.COM/PPGWHITEPAPER

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ABRN (USPS 437970) (Print ISSN: 2166-0751, Digital ISSN: 2166-2533) is published monthly, 12 times per year by UBM 131 West 1st St., Duluth, MN 55802-2065. Periodicals Postage paid at Duluth, MN 55806 and at additional mailing offices. Subscription prices: U.S. one year, \$66; U.S. two year, \$99; one year Canada, \$74; two year Canada, \$148; one year international, \$104; two year international, \$208. For information, call (888) 527-7008 or (218) 723-9477. POSTMASTER: Send address changes to ABRN, P.O. Box 6018, Duluth, MN 55806-6018. Please address subscription mail to ABRN, P.O. Box 6018, Duluth, MN 55806-6018. Canadian G.S.T. number: R-124213133RT001. PUBLICATIONS MAIL AGREEMENT NO. 40612608. Return Undeliverable Canadian Addresses to: IMEX Global Solutions, P.O. Box 25542, London, ON N6G 6B2, CANADA. PRINTED IN U.S.A.

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PHOTO: TSCHANEN BRANDYBERRY

INDUSTRY TRAINING

JASON BARTANEN with I-CAR leads "Vehicle Technology and Trends" at the Commitment to Training event at Fox Valley Technical College in Appleton, Wis.

NACE AUTOMECHANIKA TRAINING EDUCATES HUNDREDS DURING ONE-DAY EVENTS

TSCHANEN BRANDYBERRY //
Special Projects Editor

The NACE Automechanika Commitment to Training completed its third one-day training event of 2016 in mid-November, with a record turnout that brought the total number of automotive professionals trained this year to more than 370. The Commitment to Training program is the educational component of NACE Automechanika, the largest U.S. trade show dedicated to high-end technical and man-

agement-related training for automotive service and collision repair shops.

Commitment to Training one-day events were conducted at Washtenaw Community College in Ann Arbor, Mich.; Fox Valley Technical College in Appleton, Wis.; and Joliet Junior College in Joliet, Ill. Each event featured industry-leading trainers presenting classes for mechanical and collision professionals on a variety of technical and management topics. Each

>> TRAINING CONTINUES ON PAGE 13

BREAKING NEWS

TRAINING AWARD

MONTANA TECH'S COMMITMENT TO TRAINING RECOGNIZED

CHELSEA FREY //
Senior Associate Editor

➔ With over 32 years of experience as a technician, Eric Taffs of Helena, Mont., is the 2016 recipient of the *Motor Age* Training/ASE Master Automobile + L1 Technician of the Year award. Taffs is currently employed at Placer Motors in Helena, where he has worked for 11 years.



PHOTO: JAMES HWANG

ERIC TAFFS (far right) receives the *Motor Age* Training/ASE Master Automobile + L1 Technician of the Year award.

Taffs' first foray into automotive repair began, like many, when he was young — he spent his summer breaks from

>> AWARD CONTINUES ON PAGE 12

TRENDING

2017 PPG MVP CONFERENCE SCHEDULED FOR APRIL

PPG's annual Business Solutions Conference will be held April 9-11 in Scottsdale, Ariz. It is open to owners and managers of collision centers using PPG Refinish products.

ABRN.COM/2017PPGMVP

SHERWIN-WILLIAMS ANNOUNCES 2017 Q1 TRAINING SCHEDULE

Sherwin-Williams Automotive Finishes training schedule for the first quarter of 2017 will run Jan. 23 through March 20 and be held at training centers across the country.

ABRN.COM/SWAFQ117

NABC ELECTS 2017 BOARD, OFFICERS

The National Auto Body Council announced officers and board members for 2017. Newly elected to the board is Doug Schlueter with I-CAR. Six other members were elected to serve another term.

ABRN.COM/NABC2017

BASF STUDY SHOWS MORE CONSERVATION WITH AN INTEGRATED PAINT PROCESS

The study was developed to identify how the eco-efficiency and resources conservation of the OEM coating process can be improved.

ABRN.COM/BASFSTUDY

CARSTAR OPENS 500TH LOCATION

CARSTAR celebrated the opening of its 500th store with the conversion of two Cincinnati, Ohio centers. The locations have been rebranded to CARSTAR West Chester and CARSTAR Center City.

ABRN.COM/CARSTAR500

2015 PROFILE OF EVOLVING COLLISION REPAIR MARKET AVAILABLE

VINCENT J. ROMANS //
Contributing Editor

The 10th anniversary annual research report, *A 2015 Profile of the Evolving North American Collision Repair Marketplace*, is now available from The Romans Group LLC.

The following is an executive overview highlighting our data and findings from the report.

It has been quite a ride to watch what has transpired during the past decade, not only within the collision repair industry, but throughout the entire auto physical damage ecosystem. The consolidation, convergence and the structural changes we are witnessing within businesses, industry segments and markets as we know them today are now significant market factors to consider as part of our future planning. The high velocity and breadth and depth of change, coupled with the seemingly relentless introduction of innovative and disruptive products, services and business models, has required us to maintain an intense vigilance, to stay constantly informed, and to learn and understand as we consider, adopt, avoid, or leverage these transformative or disintermediating forces in order to remain relevant and competitive.

U.S. collision repair industry

As the basis for our research, we track and analyze four U.S. segments:

1. Four top independent consolidators
2. ≥\$20 million multiple-location independent and dealer operators, MLOs
3. Franchise and banner groups
4. And since 2012, the \$10-\$19 million MLOs

Since 2006, the total revenue within these four segments has grown from \$3.8 billion to \$10.2 billion in market share, an 11.6 percent compounded

U.S. Top 10 MLO/MLN Repairers — 2015		
ALL REPAIRERS	INDEPENDENTS	DEALERS
Caliber	Caliber	Auto Nation
Service King	Service King	Hendricks
ABRA Corporate & Franchise	ABRA Corporate & Franchise	Berkshire-VT
Boyd/Gerber	Boyd/Gerber	Penske
Maaco	Maaco	Group 1
CARSTAR	CARSTAR	Asbury
Auto Nation	Fix Auto	Sonic
Hendricks	Cook's Collision	Carl Sewell
Berkshire-VT	Classic Collision	Faulkner
Fix Auto	Joe Hudson	Sterling McCall

annual growth rate.

The top ten ranking of all ≥\$20M segment repairers including independents, dealers and franchisors can be seen in the above chart. Under the “All Repairers” column, we see there are four independent consolidators, three independent franchise organizations and three dealer groups. Within this category, the four independent consolidators represent a significant 70 percent of the revenue processed in 2015.

The four consolidators by themselves represent 11.3 percent of the total industry size for 2015. We estimate that by 2020, they could almost double their market share and represent just over 20 percent of industry market size. When combined, the four segments we track and analyze could represent almost 45 percent of the collision repair industry by 2020.

Our annual research report, *A 2015 Profile of the Evolving North American*

Collision Repair Marketplace, is now available. The report is the result of our ongoing proprietary research, analysis and collaboration with specific market experts and leadership throughout various auto physical damage segments. It presents the complete results of our work for 2015 in over 40 charts and graphs in 47 pages and includes historical trends and a future view.

The report can be purchased by contacting The Romans Group LLC at 847.382.6208 or Mary Jane Kurowski at maryjane@romans-group.com. 



VINCENT 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. vincent@romans-group.com

FUTURETECH SUCCESS CAMPAIGN SEEKS TO FUEL THE PIPELINE OF TOMORROW'S TECHNICIANS

FutureTech Success has released a campaign video that aims to change the stigma of the automotive industry and rebrand it as an industry worth entering

and pursuing a career in.

FutureTech Success is a multi-faceted, industry-wide campaign to fuel the future pipeline of transportation techni-

cians by repositioning the image of the profession; giving middle- and high-school students, parents and influencers the tools to recognize and foster tactile intelligence; and providing scholarships and grants to help students complete their technical education.

There's a tech shortage in the transportation industry. It doesn't matter if you're talking automotive, trucking, diesel, aftermarket, motorcycle, marine, collision repair — you name it — all segments are struggling to find trained, professional technicians.

The grease-monkey stigma of the past needs to be abandoned, once and for all. Today's vehicles average 70-100 computers and more than 100 million lines of code. Being a professional tech requires an advanced skillset, one that paves the way for an amazing career. People starting as techs often wind their way through all sorts of interesting and successful jobs in the transportation industry. Do we talk about that? No. Should we? Yes.

The industry, and parents of young people looking to start a career, need to do more to show these young people who love taking things apart, putting them back together, and making things go — that there's a profession right in their hands.

The new FutureTech Success video aims to help the organization raise \$250,000 to underwrite the group's campaign to deliver an arsenal of videos and social media tools to reframe the conversation and change parents from naysayers to champions of their hands-on kids. It will bring back afterschool and summer activities where kids can tinker again, experience vehicle technology and how it relates to science, engineering, math and careers.

To watch the FutureTech Success video or to donate, visit ABRN.com/FutureTechcampaign. 



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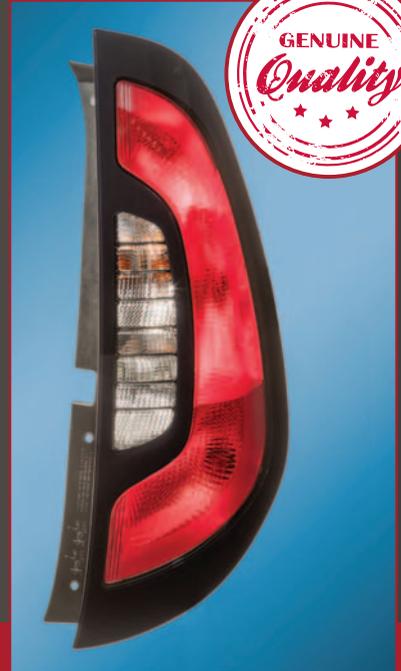


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>> **AWARD CONTINUED FROM PAGE 8**

school at the auto shop where his dad worked, which also had a salvage yard. Before long, the shop kept him occupied with projects. “The owner would bring me a couple of junk cars and turn me loose to make one run out of the parts from two,” Taffs recalls.

He later enrolled in his high school’s automotive program but soon discovered that continual training would be a necessity to ensure a successful career in the automotive repair industry. Taffs explains, “When my dad opened his own shop in the ’80s, cars were beginning to show up with more complex technology, and it became clear that on-the-job training by itself wasn’t enough to keep up. Faced with the frustration of not knowing enough, I chose to go to a manufacturer-specific school — GM Automotive Service Educational Program (ASEP) — and started working for their dealerships.”

Taffs’ dedication to training continued. In 2002 he was named the GM Medium/Heavy Truck ASE Technician of the Year and became GM World Class Certified in 2007. When GM discontinued Pontiac in 2009, Taffs began Subaru training and has recently achieved master technician status with Subaru. Taffs has also served as an Automotive Youth Educational Systems (AYES) mentor.

While Taffs acknowledges the importance of certification, he stresses the need for continuous training. He explains, “Certification is one of the most important prerequisites to being viewed as a professional, but training for me is not about the certificate on the wall. Being a technician requires constant learning through formal training, experience and independent research and teaches one to be proficient in many disciplines, such as the sciences, communication,

innovation and creativity. I remember when I took a scuba class, passed and then received a certificate, someone wise told me it didn’t make me a diver — it was just a license to go out and learn how to dive.”

Upon receiving the *Motor Age* Training/ASE Master Automobile + L1 Technician of the Year award, Taffs reflected on his career and the future of the industry. He expresses, “It is an honor to be chosen by *Motor Age* and ASE for this award. Meeting with ASE officials, company leaders and fellow technicians from around the country was an amazing experience. As I look at the auto repair industry, I see ever-increasing competition, consumer expectations and price pressures putting more demand on technicians. Receiving this award, along with the trip and first-class treatment, moved my thoughts from the daily grind back to the big picture where I can take pride in my career.” ■

OEMS EXAMINE MIXED-MATERIAL TECHNOLOGIES, JOINING, FORMING AT MANUFACTURING SUMMIT

The Global Automotive Lightweight Materials Series returns to Detroit Feb. 22-23 with the The 4th Lightweight Vehicle Manufacturing Summit 2017.

The event features an expert speaker panel including Honda, Volvo, FCA, GM, Ford, Deer & Company and more, who will discuss the latest innovations in adhesives, additive manufacturing, machine learning, multi-material joining methods, corrosion mitigation techniques and more.

In addition, driven by updated EPA regulations, the event launches an exclusive new discussion area, focused on specific lightweighting technologies and manufacturing techniques for medium and heavy-duty vehicles, alongside its long-established passen-

ger vehicles focus.

Here’s a preview of some of 2017’s features:

Latest aluminum developments—

The program will cover the spectrum of aluminum-related technology developments, including aluminium castings, sheets and extrusions, joining with aluminum, corrosion mitigation, recycling and more.

Manufacturing technologies for multi-material structures — Manufacturing experts will share their expertise and evaluate the pros and cons of each new technology to support practical application in manufacturing contexts.

Future focus — We will consider what opportunities lie ahead through advanced processes and technologies

for automotive lightweighting, including additive manufacturing, machine learning, plastic and composite technologies.

Corrosion mitigation challenges

— The program will focus on corrosion testing, prevention methods for mixed materials and management of corrosion and distortion issues.

Formability considerations —

Explore the formability of new material grades, forming techniques, formability modeling.

Deep dive into joining with adhesives — Sessions will evaluate their suitability, including failure mode analysis of adhesives in multi-material structures, use of adhesives with different material combinations and more. ■

>> TRAINING CONTINUED FROM PAGE 8

event was presented at no cost thanks to manufacturer support.

Instructors who trained at the Commitment to Training events and who will participate at NACE Automechanika Chicago include John Thornton, G. Jerry Truglia and Pete Meier. Other trainers at the Commitment to Training events this year were Mike Anderson, Charles Ayers, Jason Bartanen, Chris Chesney, Jerry Goodson, Greg Marchand, Brad Mewes, Larry Montanez and Mel Schampers.

"We are thrilled that more than 370 professionals from around the country were able to make it to our one-day events to improve their skillsets," said Pete Meier, technical editor and director of training for *Motor Age* and the UBM Americas Automotive Group. "Continued education is vitally important to the success of today's automotive industry, and these professionals showed their dedication by giving up a Saturday to learn and study with the best."

The Commitment to Training events are one way NACE Automechanika continues its focus on bringing quality, in-demand training from top educators to the automotive collision and service repair industries. Many attendees of the one-day events also attended Automechanika Chicago 2015 and plan to attend NACE Automechanika Chicago 2017. The upcoming training event and trade show will take place July 26-29, 2017, at McCormick Place West in Chicago.

"I went to Automechanika Chicago and then heard about the Commitment to Training events. I came (to the Washtenaw and Fox Valley events) because with all of the new technology on vehicles, you have to get all of the information you can," said Mike Felicioni, owner of Great Lakes Auto Body, Nunica, Mich. "And if it's free, even better."

"Seeing so many people take advantage of training and recognizing that they need to learn is encouraging for our industry. It ties in with our trainers at both the Commitment to Training events and NACE Automechanika, who recognize the importance of educating today's automotive professionals to ensure vehicle repairs are being made correctly and in a timely manner," said Jim Savas, VP and GM of the UBM Americas Automotive Group. "With the pace at which vehicle technology is advancing, these training opportunities are becoming increasingly important."

The Commitment to Training combines live training with webinars, whitepapers, how-to videos, networking and more in an effort to educate today's automotive professionals. It is made possible by support from manufacturers such as Carquest Technical Institute, Delphi, Abaris Training, Hella, Mitchell 1, PPG, Polyvance, Pico Technology, Schaeffler Automotive Aftermarket, Mitchell International, Motor Age Training, Axalta, Garmat USA and GFS.

Many of these sponsors will also be participating in the trade show. Because of the time and financial commitment often re-

quired to attend training events, NACE Automechanika has secured sponsorships from top companies to offset training costs for mechanical professionals.

Registration is open for NACE Automechanika Chicago, and training topics covered at NACE Automechanika 2017 range from analysis of fuel trim corrections for drivability to social media for shops. Courses offered reflect current trends as well as showcase new techniques and processes to make business more efficient. You can view a list of training sessions scheduled through today; more will be added in coming months.

"We are ecstatic about the Commitment to Training attendance and the positive feedback we have received thus far," stated NACE Automechanika Show Director, Bridget Ferris. "We look forward to complementing the high-level training with an outstanding show floor presence in July through the expansion of our product categories, adding more special features and more networking opportunities."

NACE Automechanika attendees will experience the latest technology, test equipment and discover advanced applications with live, interactive demonstrations. For the 2017 event, the show schedule has been adjusted to limit conflicts between exposition hours and training sessions.

For more information, visit: www.NACEAutomechanika.com. 

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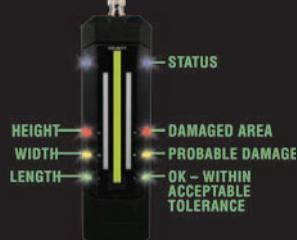
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SEVENTEEN PREDICTIONS FOR 2017

Perspectives from all segments of the collision industry on what lies ahead this year

JOHN YOSWICK // Contributing Editor

Perhaps more this year than in recent history, Americans seem intent on contemplating what change lies ahead in the coming year. *ABRN* asked industry participants from a variety of perspectives — collision repairers, insurers, vendors and consultants — to take a shot at what they foresee happening in our segment of the U.S. economy. Here are their 17 predictions for 2017 (some edited for length or clarity).

Aaron Lofrano, F. Lofrano and Son, Inc., a third-generation collision repair company with five loca-

tions in the San Francisco Bay Area:

One of the larger MSOs will agree to purchase one of the other large MSOs. More automakers will be added to the list of those with position statements on pre- and post-repair vehicle scanning of diagnostic trouble codes and severity, and the percentage of vehicles declared total losses will increase as a result. Here in California, the Bureau of Automotive Repair may talk about certifying technicians or estimators as they change or add additional guidelines as a result of vehicle scanning.

Jeff Peevy, president of the Automotive Management Institute:

In 2017 (and beyond), we will see the OEMs influencing the industry more and more as they perfect their network programs. Included in this will be a growing focus on learning — not just training as a series of required events, but a more comprehensive educational requirement. These requirements also will include proving knowledge and skills in areas where occupant safety and vehicle reliability are concerned.

Repairers also will begin to look for new ways to increase their competi-



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tive advantage over their well-trained competitors. In 2017, there will be an increased awareness of the need to train customer-facing employees, whose knowledge and skills development have been traditionally ignored or assumed.

Darrell Amberson, president of operations for Minnesota-based LaMettry's Collision: Accident frequency will continue to increase in 2017, thanks to cost-effective fuel, a younger fleet of vehicles, distracted driving, etc. Pre- and post-repair scans and new electronic technologies will continue to be the hot topic in the industry in 2017. And the auto manufacturers will continue to gain influence in our industry, often at the expense of insurers. But we will see more evidence of insurers and OEMs talking in 2017, perhaps leading to some formal agreements.

Roger Wright of Vector Squared, an industry consultant and a former chairman of the Collision Industry Conference: I am not sure what action will be taken, but insurers cannot absorb the increase in severity that will be necessary to repair the vehicles. I suspect huge rate increases (which usually take 6 to 10 months to get approved), plus increased pressure on shops to control rental costs and improve hours per day of touch time.

For the big MSOs, those items will likely be tied to their service level agreements with insurers. Economic disincentives will become the norm for those MSOs, and they will start to shift their allegiance.

I also foresee certification losing its luster because it's expensive and has not



Darrell Amberson



Roger Wright

proven to provide any increase in volume.

Mike Cranfill, vice president of global collision and new business development for Vehicle Service Group (parent company of Chief Automotive): Just as shop consolidation will continue at a steady pace, supplier consolidations will follow the national MSOs' demand to deal with one-source solution providers. Continued use of "exotic" vehicle materials, along with greater use of rivets and adhesives in repairs, will increase the reliance on using OEM repair procedures. There will be more requirements for "before and after" repair print-outs confirming OEM specifications have been restored after vehicles are repaired, and efforts to improve cycle time will lead more shops to perform their own alignments rather than subletting to a third party.

Charles Bryant, executive director of the Alliance of Automotive Service Providers (AASP) of New Jersey: I predict that more and more consolidators will be coming to the Northeastern part of the United States by the later part of 2017 buying existing fairly large auto body shops. OEM involvement will result in a steering situation to dealer or certified shops that will likely be as bad, if not worse, than the steering situation we currently see with insurers. I predict that we will see more and more litigation against the insurance industry for the abuse they have and continue to inflict on insureds and the collision industry.

Shop owner Tony Ferraiolo of A&R Body Specialty in Wallingford, Connecticut: Independent shops will finally realize they are the professional. The investments made in equipment, training and education, along with repairing vehicles according to OEM standards and requirements, are going to make shops change accordingly. The short-pays by the insurers will have to be passed on to the customers. This will show a pattern in the lower courts that the states' insurance regulators can no longer not address.

Fred Iantorno, executive director of CIECA, which develops standards

for electronic communications within the industry: Certifications at the shop level will be a single focal point of survival for independents. Consolidation will slow slightly, but will still be a trending topic. Consolidators will be the best positioned to deliver on certifications, and possibly [dominate] the majority of the collision business that requires specific repair processes and equipment due to new vehicle construction technology.

Second-generation shop owner Bob Juniper of Three-C Body Shops, Inc., based in Columbus, Ohio: Post-repair inspections will become a big opportunity. The quality of work in the industry is at an all-time low for several reasons, including that most shops simply do not know how to fix the higher-tech cars. Post-repair inspections are a great service to consumers and very profitable, and they will ultimately be the force that cleans up the collision repair industry and eventually gets shops paid closer to what we are worth.

John Walcher of Veritas Advisors, a consulting firm involved in mergers and acquisitions in the collision repair industry: Four will become three: Two of the "consolidators" will consolidate in 2017 (unless it happens in the last days of 2016). The consolidators will continue to grow through acquisitions in 2017, but overall



John Walcher

deal volume and multiples will decline. The consolidators (with longer-term views) will continue to add capacity by brownfielding. Regional MSOs will continue to grow (primarily via brownfielding) as they position themselves for either a sale to a consolidator or to be the primary competitor to a consolidator. Dealer MSOs will look to grow through acquisitions and brownfielding as the competitive advantage from telematics evolves. And smaller, single-location op-

erations will continue to shut down or sell at a record pace.

In other words, I don't expect a lot of change in 2017. However, my wild card is if we see consolidation within the insurance industry. If that occurs, the pace of collision-industry consolidation will quicken.

Jay Perry of Ally Business Coaching, a Canada-based consultant focused on the collision repair industry: Pricing will start to make the move upwards. Too much attention has been put on cost containment, and this has laid the groundwork for a depressed income for the collision repair industry. The liability that [creates] for the insurance industry is now starting to be recognized, leading to a realization that if profitability is not brought back into the collision repair industry, only substandard and potentially unsafe repairs will be available. This is not tenable for any reputable company with a concern for public safety and its own bottom line.

To further this issue, social media provides a fantastic education for consumers who in the past have been ignorant of the consequences associated with services based only upon pricing.

If companies want best-in-class service and a sustainable workforce, upward pressure on pricing must be present, as there is nothing more left to be wrung out of the costs.

Susanna Gotsch, industry analyst for CCC Information Services: Total loss frequency may continue to be elevated. In large part, much of the increase in total loss frequency is due to the remaining volume of older model year vehicles still on the road in the U.S. The percentage of total loss appraisals accounted for by vehicles 10 years or older was 50 percent in mid-2011; it reached 56 percent in mid-2016.

It's also because vehicle values are beginning to soften as the supply of used vehicles in the marketplace has grown. Part of what's led to that is leasing. Leases continue to grow, jumping to 31 percent of all new-vehicle transactions

in Q1 2016, according to Experian. This increase guarantees the number of vehicles returning for sale as used vehicles in two, three or six years (typical lease terms) will be significant. In fact, Tom Webb from Manheim estimates that as many as 3.6 million off-lease vehicles will return to the market in 2017 (up from 2.6

million in 2015), and nearly 4 million in 2018. With increased supply anticipated, most analysts are projecting used vehicle prices will finally begin to fall after several years of elevated prices.

Mike Anderson of Collision Advice, an industry consultant and trainer: I think two of the big MSOs will

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merge in 2017 (though it may be 2018). I predict another branded banner (like Fix Auto or CARSTAR) will enter the U.S. market, and that another of the large U.S.-based MSOs will enter the Canadian market. But I also see the mega-dealer groups (like AutoNation, Group One, Asbury, etc.) becoming the horses to bet on in collision repair.

I think vehicle scanning is going to become the norm. I believe that the information providers will step up and provide labor times for this work.

I also believe we will see the OEMs start to offer more roadside assistance programs through "OnStar" type technology that will allow OEM-certified shops to gain more work. More OEMs that do not have shop certification programs will add them, and those that have them will begin monitoring certified shops via a scorecard.

Rick Tuuri, who recently retired after more 35 years with an estimating system company:



Rick Tuuri

New-car sales will continue their current trend through most of 2017, with the OEMs aggressively introducing incentives to increase sales later in the year. Used car

prices will continue to rise a few points, but not enough to have a real impact on repairables/total losses.

At least one of the Big Four consolidators will merge with (or acquire) one of the others. And at least one of the other Big Four will go public.

Oklahoma shop owner Gary Wano of G.W. & Son Autobody, Inc.:



Gary Wano

As a consolidator acquires a facility now, all the trained staff and equipment is acquired as well. But what happens after the consolidator has cut labor

PREDICTION #17: WHEN WILL THE ENTIRE AUTO FLEET BE AUTONOMOUS?



Brian Sullivan is an insurance industry analyst and editor of Auto Insurance Report. His prediction, excerpted with his permission from a recent issue of his publication, extends beyond 2017, but given how the subject — when autonomous vehicles will make personal auto insurance obsolete — impacts the business models of collision repairers and insurers, it seemed worthy of inclusion:

How long will it be before we have a truly autonomous car that will go almost anywhere with a human driver serving only as a redundant emergency backup system? Given what we've seen in the market, we're projecting that car is five years away.

The next question is how long after that point does the federal government look at this technology as so valuable a safety feature that it must be included in all cars? That has to be another decade, right? It seems wildly improbable that just five years of experience with truly autonomous cars will bring the confidence and the reduction in cost

that will drive a mandate. Recall that mandatory installation of back-up cameras is coming 25 years from the first commercially available backup camera (in Japan) and 18 years after its commercial introduction in the United States.

So if it is five years before we have a working autonomous car, and 10 years after that for a mandate, that means we are 15 years away from all new cars being sold with autonomous driving features. That is the year 2031. Once that happens, how long before the fleet turns over and we have a predominantly autonomous fleet?

We have seen with other safety mandates that it takes 15 years or so for a mandated technology to filter into more than 90 percent of the fleet. And airbags, better bumpers and antilock brakes did not cost nearly as much, nor entail anywhere near the risk, of autonomous driving. Add that to the 15 years it will take to reach a mandate, and we feel pretty good about a 30-year run — 2046 — before we reach a largely autonomous fleet.

rates and accepted parts or bottom-line discounts and then finds they must invest tens or hundreds of thousands of dollars per facility to stay current? So my guess is consolidation will continue in 2017, but at some point vehicle technology is going to stop that growth.

Mike Quinn of Certified Collision Group, a network of independently-owned OEM-certified body shops:

The OEMs will continue to grow out their certified shop networks. Those programs certainly have increased the pool of qualified shops that have the right tools, training, equipment and facility modifications to properly repair their vehicles. Now the big question is: Are these shops' techni-

cians using OEM repair procedures to properly repair the vehicles?

Technicians soon will be required to provide proof of compliance to OEM procedures via a smart phone. (Several versions are under development.) Technicians will earn a score based on their compliance record. I think this will be good for all stakeholders as it will shine a light on those technicians and shops properly repairing vehicles. 



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DAVE LUEHR // Contributing Editor

Continuous improvement. Another buzz word? Worthless Lean terminology? I don't think so. Yes, the term has been used now for a couple decades by Lean gurus and companies like Toyota, but I want to ask you to think of "continuous improvement" from a real-world, practical perspective. Let's think of it as Business 101, the basics of proper busi-

ness management.

We have all heard the phrase "If you are not growing, you're dying" when relating to business. I am positive this is true. But what exactly is growing? I suppose it could mean building a bigger shop, or taking in more revenue compared to the prior year, but to me, growing means getting a little better at what we do every day. Companies that take this approach are miles

ahead of the competition even while only making small incremental improvements over long periods of time. These companies put continuous improvement at the top of their priority list, and they make it an integral part of their culture.

Culture

Culture is another popular word these days, and like continuous improvement,

culture is much more than a buzzword, in fact it is the "soul" of your business! Whether you have created the culture you want, or it has created itself, your company has a culture either good or bad. Culture could best be described as the accumulated beliefs, values and behaviors of your team. The culture can be influenced by how leadership interacts with the team, the personalities that are hired into the team and the level of understanding the team has as it relates to the purpose or mission of the company. Your job as a leader is to ensure you constantly feed the culture with the right stuff and to weed out the bad stuff.

A continuous improvement culture could best be described as a culture that makes getting a little better every day an integral part of what the team's mission is. What the team "stands for." A continuous improvement culture has strong leadership that encourages dialogue and actions every day that lead to its mission. A winning team such as this is always pursuing perfection while knowing that perfection will never be attained.

Enjoyment of the journey

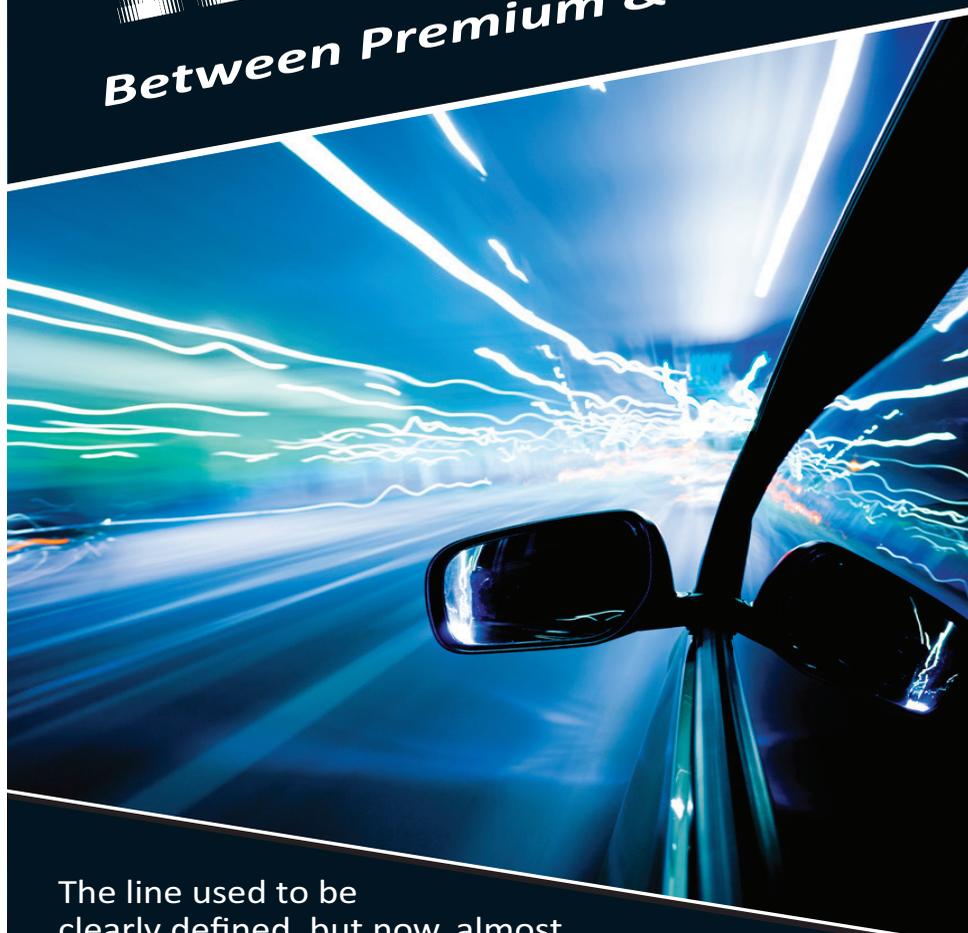
When you are engaged in a continuous improvement culture, change and improvement initiatives don't take on the same dreaded overwhelming feeling like they do in traditionally-run companies. At a traditionally-run company, change is something extra you have to do that is not viewed as part of the normal job. In shops with a continuous improvement culture, change is welcome because it is considered part of the job. Workplace enjoyment can be found because everyone feels as though they are contributing to something bigger than themselves, and the small incremental improvements are celebrated and enjoyed as part of their never-ending journey together.

Practical applications

How do you go about creating a culture like this? Even though the subject could

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take volumes to write about, here are three fundamentals to get you started.

1. Regular improvement meetings

A great way to get started on your journey is to hold regular meetings to discuss what to improve and how to improve it. Most shops have what I like to call “low-hanging fruit.” These are problems that repeatedly pop up and cause a lot of pain for everyone. For example, at most traditional collision repair shops, Friday afternoons are still a nightmare with missing parts, cars that won’t take an alignment and so on. The key here is to identify at a deeper level what is causing these problems to occur and to let the team help identify the problems in order to keep them engaged in being a fellow problem solver.

For a shop with a lot of problems, you could hold these meetings once or twice a week. For most shops once a month, plus regular follow-up visits, will suffice. Everybody gets to contribute to these meetings. At first you may have difficulty getting the team to engage in the conversation, and it is understandable if they have never been asked to participate in such a meeting before. They may be skeptical, but don’t let that deter you; most people will come around when they know you are serious about making positive changes.

Good leadership skills are essential and great listening skills are part of it. Hear everyone out and never tell someone that their idea is dumb! Equally important, as a leader you have a responsibility to hold everyone accountable to the agreed follow-up activities, especially your own. The team will never take you seriously if you promise changes that never come. One of the biggest things that can damage a culture is having poor integrity.

2. Make failure a positive learning tool

“So you screwed up — no big deal!” I bet not too many of you hear this phrase very often. I wish, however, that you would. I believe it was the famous author Ken Blanchard that said, “Failure is feedback, and feedback is the breakfast of champions.” People who reach the

highest levels of their professions crave feedback and even criticism. Sadly, most people are terrified of being caught making a mistake and will do plenty to cover it up. This is no way to build a culture! If you want to build a powerful continuous improvement culture, you have to bring mistakes and problems out into the open where they can be seen and dealt with. This can and has been done successfully at companies without all the finger pointing and without all the hurt feelings through a combination of excellent communication skills and by letting people know it is okay to make mistakes as long as the team can learn from the mistake.

A great example of how you can learn from mistakes is through the use of a journal or log book to document problems as they occur. For minor problems, discuss them in your continuous improvement meetings or address them immediately if you feel it would be better. For serious problems or mistakes, use them as a teachable moment, and address them right then and there, then follow up often to ensure the corrections are in place to avoid the same problems being repeated. I like my clients to use a “failure log” that is on a clip board hanging in the reassembly area of the shop. Assembly seems to be where a large percentage of failures are discovered, even though the root of the problem is usually caused well upstream in the process.

3. Measure progress and offer feedback

As with sports, in business we want our teams to be engaged. But in business we don’t always do a very good job of keeping our teams engaged by keeping score. People want to feel as though they are contributing to the team’s success, and the best way to do that is by providing them with the feedback and progress measurements they crave.

Along with sharing key performance indicators such as cycle time, customer satisfaction, etc. also provide measurements whenever possible on your specific improvement initiatives. For example, if the team is engaged in an event that will

reduce the number of supplements, then measure and offer feedback on supplement frequency. If the team is working on reducing the number of re-paints due to quality defects, keep track of that and share it. For the team to take leadership seriously, the score needs to be available to them consistently and accurately. Give them the numbers every day, if you can, during the morning meetings.

A mistake to avoid is setting the bar too low or too high. Shop leaders will quickly discover they are losing engagement from the team because the goals leadership is setting are either set too high and unrealistic, or the team feels they don’t have any control over the KPIs to which they are being held accountable. As mentioned earlier in the article, small incremental improvements are the key to winning.

Continuous education

Continuous improvement is only possible by also using continuous education. Far too often people will make many advancements in their business until they run into an obstacle caused by a lack of skill or knowledge, and they give up. The lack of knowledge is also a reason many people never even start. Don’t fall prey to paralysis by analysis — just start. All the information you need to succeed is out there somewhere; you can find it if you try.

Conclusion

Never in the history of the collision industry has there been so much needed change to deal with new technologies. It is up to you to view this as a good thing or a bad thing. Your future depends heavily on your attitude. It is a very exciting time to be in the collision repair business, and it will prove to be a very prosperous time for those with the right attitude and willingness to educate themselves. 



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CUSTOMER RETENTION STRATEGIES

Keeping your current customers helps build credibility, referrals and cost savings

CHRIS PRICE // Contributing Editor

Long gone are the days when automotive shop owners could simply expect customers to remain loyal for life. Consumers, fed up with paying too much for overly technical, poorly-explained car repairs, have grown distrustful of the industry. Shop owners are also experiencing the fallout from focusing less on customer

service and failing to respond to a new generation of customers who don't shop for repair services like their parents did.

The unfortunate result is that automotive repair centers are now losing 20 to 50 percent of their customers each year, according to some industry estimates. Think about it this way:

you're going to lose a certain percentage of active customers each year as people move away, buy new cars or pass away. But if you add to that count customers who don't feel they have a reason to return, then the line of customers exiting your shop is going to be a lot larger than the line of people coming in.

It may seem reasonable to think that you can simply replace your departing customers with new ones, but the truth is, it's better to stop the flow of customers out the door. Keeping your current customer base is cheaper than acquiring new customers and helps build credibility and new referrals.

Here are some strategies to help you turn the tide and inspire more allegiance from your current customers.

Employ a personal touch

These days, our interactions with customers are often conducted electronically. While that's convenient, it also doesn't provide much of an opportunity to engage customers or address concerns.

Let's say a customer doesn't have a completely positive experience at my shop, but fails to mention anything before leaving. Typically, the customer will receive an automated email from my shop thanking them for visiting, but there's no guarantee that the email will prompt them to contact me about an issue. So, why not follow up with a call to increase your chances of getting an honest response?

Personal outreach is something we've gotten away from in the industry but is still desperately needed. With that one call, I can get a more accurate gauge of how well the visit went and sort out any outstanding issues. This type of communication allows the customer to have a voice and also gives me the opportunity to explain anything that might not have been clear or correct any mistakes. Hopefully by the end of the call, I've overcome any issues and proven that my shop is willing to go the extra mile to keep the customer's business.

I know that the idea of follow-up calls is daunting, but there are software tools that can help simplify the process. Kukui, for example, just added a follow-up module to its software platform that generates

lists of customers that should be called for upcoming services. Full disclosure: I serve as a product architect for Kukui, but I can attest that using the product has helped my shop land new appointments. I am also strong believer that these types of personal interactions can make the difference between losing and keeping a customer.

Track your numbers

Many shop owners believe they can just guesstimate when it comes to customer counts. That's not a great way to figure out how well you're performing and how severe your retention problem may be. Even shops that are great at tracking and pay close attention to sales numbers and average repair orders can forget to monitor something like customer frequency. Examining the number of customers who have only visited your shop once, for example, can be a great way to gauge loyalty and measure the effectiveness of your marketing efforts.

If you notice a surge in single visits after running a Groupon or aggressive coupon, it may indicate that your offer is priced to only attract "one and done" type customers. However, it might also reveal that your shop isn't giving customers a reason to return. Either way, if you don't track these type of figures, you won't know what kind of action to take. To me, failing to count key numbers is akin to driving a car without a dashboard. Establishing a tracking program should be the first step in any customer retention effort.

Embrace technology

I know there are plenty of shop owners who will claim that they have done business for decades without bothering with social media or search engine advertising. But the fact is, they can't do business that way any longer. Younger consumers — who will eventually make up the bulk of your customer base — live their lives online. If you don't have a strong Internet presence, you don't have a chance of

keeping them as customers.

If you haven't done so already, make sure you have a search-optimized site that is mobile friendly and easy to navigate. Get active on social media and remember to both encourage and respond to reviews. Lastly, consider search engine advertising to increase your chances of landing customers looking for your services. These measures will help you build loyalty among Millennials and others who depend on technology to guide their buying decisions.

Adopt a holistic approach

Unfortunately, there isn't one magic bullet when it comes to customer retention. Performing outreach through a variety of marketing channels is your best bet for cultivating long-term support. So, while utilizing technology is absolutely essential, you can't ignore more traditional marketing methods such as direct mail campaigns.

Community sponsorships can also inspire loyalty. Whether you sponsor a local Little League team or provide a large donation to a special cause, remaining active in the community will help you stand out from the crowd and keep your customers from straying to the competition.

Last year, my shop gave a car away to a family in need and received great positive exposure from the effort. Staying engaged on as many fronts as possible will increase your brand exposure and improve your ability to retain customers.

Retention is one of the biggest challenges facing shop owners today. Employing the strategies discussed above has helped me maintain stronger ties with my customers, and I hope they can do the same for you. 📞



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'To scan or not to scan' is becoming less of a question

A complete repair requires looking for more than dented metal, broken parts

If you have attended any industry meetings this past year, you know one of the main topics of discussion has been pre- and post-repair scanning of vehicles. An increasing number of high-volume automakers (including GM, Nissan, Toyota, Fiat Chrysler and Honda) have issued very clear position statements on the need to scan vehicles that have been in a collision (you can find all the statements at www.oem1stop.com). That has the industry — shops, insurers, scan tool makers and third-party scanning service providers — all scrambling to figure out what this exactly means for all of our businesses.

I can tell you what we're doing. Unlike some of my friends in the industry, we are not to the point of scanning every single vehicle that comes into the shop. But we are scanning lots and lots of them.

In addition to (or in the absence of) OEM procedures, we base scanning decisions on the degree of damage and the type of equipment the vehicle has. If a vehicle comes in on a tow truck and has a lot of crash-avoidance technology on it, you bet that one is getting scanned. If it's relatively minor damage but it impacts parts of the vehicle — a bumper, for example — that has blind spot or other sensors, that one is getting scanned.

But we're also not in a high-end market where every vehicle is brand new and top of the line. So I'm not to the point of scanning every single car yet. But notice I said "yet." The day is not far off when we will need to scan every vehicle prior to repairs to know what's wrong with it and then again post-repair to make sure everything is back to how it needs to be.

We primarily use an asTech, one of the tools that enables you to hook the vehicle up and have the scan read remotely. But we also have a Snap-On scan tool, and occasionally we have to send a vehicle to a dealer for the scan.

Obviously, one of the sticky issues for the industry related to scanning is the cost. I certainly understand what this can mean for insurers. But we're not just trying to add



IF YOU AREN'T SET UP IN YOUR SHOP TO SCAN VEHICLES — EITHER IN-HOUSE OR USING A MOBILE OR REMOTE SERVICE — YOU ARE ALREADY BEHIND.

expense to the repair. And in our experience, if we can justify the need for a scan of a particular vehicle, rather than just scanning every vehicle, the insurers we work with are generally good about it. Some fight it a little harder than others. But as with almost any repair procedure, they just want to know why they owe for it on that particular vehicle.

One of the key issues I think the industry needs to figure out is what it is worth. Part of it is that the time required varies by vehicle. Some cars take 10 minutes to scan. Others take an hour to scan. And if it takes an hour, are we charging for an hour of labor or just charging for the remote scanning service? As an industry, we don't yet have an exact value on what it's worth as we do for, say, removing a broken headlight and reinstalling a new one.

I don't have all the answers to the issues we face related to vehicle scanning. One thing I do know is that if you're not set up to scan vehicles — either in-house or using a mobile or remote scanning service — you're already behind.

Thinking you will rely on subletting this to dealerships isn't realistic.

And if you think your customer doesn't expect you to have fully repaired their vehicle — including resetting fault codes and ensuring all the electronics are fully functioning — guess again. I'm not just talking about the owners of high-end European vehicle models. In case you missed it, Hyundai this past fall began offering a mobile phone app that allows drivers to remotely start their vehicle, schedule service at the dealership and even view vehicle diagnostics and trouble codes on their vehicle.

No way do I want a customer picking up a vehicle that we did not scan, only to have the app on their phone tell them they have a trouble code we didn't find. ❏

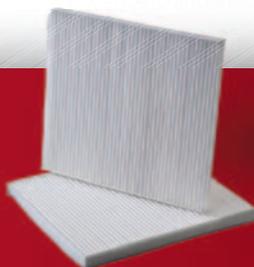
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Positioned for the future

Copeland family stays ahead of the curve by taking consolidation route

JAMES E. GUYETTE // Contributing Editor

➔ If they haven't arrived already, consolidators are eventually coming to your market. Tracey Copeland was on top of that trend back in 2005 when he joined CARSTAR while owning a single Hi-Tech Collision center in Spanaway, Wash.

"At that time he wanted to stay ahead of the curve. We were positioning ourselves for the future," says Shaun Copeland, Tracey's nephew who serves as overall general manager of the Hi-Tech chain, which now encompasses six shops and two satellite locations for writing estimates.

"We're moving ahead. If you're not moving ahead, you're moving backwards," says Shaun, crediting Tracey's sharp business acumen for driving the enterprise forward. "He's the one who buys everything. I'm like, 'Let's get this organized and get everything in place.'"

A few years after Tracey signed on with CARSTAR, Service King, Gerber and ABRA all moved into the Seattle-area marketplace. "Once they hit, they all got here. With all of the consolidation going on in the industry, we have been fortunate to be able to grow our footprint locally," Shaun reports.

"We have the advantage of working with an established MSO, but we're still like a family MSO. With each shop being managed locally we can still keep it a family business."

At CARSTAR's annual convention in July, Hi-Tech was awarded national Top Sales Growth and Top Footprint Growth honors.

Except for the Fred's Autobody location in Hoquaim, Wash., which is two hours away, all of the shops are within a half hour of each other, creating a significant presence in the region. "Nobody can get between us — we're aiming for market domination," Shaun quips, but he's only half joking. Tracey is consistently monitoring expansion opportunities, including the exploration of possible shop purchases in markets as far flung as Arizona and Nevada.

A main priority, though, is that the current network of key vendors is geographically positioned to serve any new outlet that is added to the roster. "We need to make sure that with consolidation we have coverage. We want everything in place with our jobbers and distributors so that all the same companies are providing the parts and services," says Shaun.

"With our growth we have focused on keeping all the shops on the same page. All of our shops use the same materials, paint line, management system and SOPs," he explains. "Our shops are



CARSTAR HI-TECH COLLISION

Spanaway, Wash. // carstar.com/store/hi-tech-carstar-spanaway-washington

Tracey Copeland
Owner

\$200,000
Average weekly volume

8
No. of shops (6 production;
2 satellite)

115
No. of customer vehicles
per week

28
Years in business

**BASF
Glasurit 90**
Paint supplier

54
No. of employees

Chief
Frame machines used

63,200
Total square footage of shops

CCC One
Estimating system used

146
No. of bays

\$10 million
Annual gross revenue

6 days
Average cycle time

all linked by one main server and VOIP phone system. Anyone can be reached by their extension or cell phone from any shop, and we can also print to any shop. I can do an estimate in Spanaway and print it out in Olympia, and this allows estimators to help shop-to-shop. With the estimators linked, all of the estima-



tors can help each other out.”

Shaun is the main point of contact for all the vendors, which are the same for every location. “We have a master order list with first and second calls for all of our parts ordering. And we buy our materials exclusively from Total Sales and WESCO. There is a master order list at all the shops, and I meet with our reps monthly to go over products. We have a quarterly meeting with our technicians to make sure they are happy with everything we are using.”

Shops of varying shapes and sizes are continually looked at for possible purchase, but no deal is made until several facets are reviewed. Census data is analyzed for a neighborhood’s population density and demographic considerations, such as income levels. The nearness of competing shops is taken into account, along with the viability of establishing direct repair program affiliations.

Hi-Tech’s 14 DRPs and the customer referrals they can provide are an important element of the company’s sales volume and operational details. “They can expect a business model from you and how you run things, and they expect you to replicate that at your other stores.”

Looking askance at shops with few or no DRPs, such limits can cause a collision center to shut its doors should a major disagreement arise with an insurance carrier. “Our eggs aren’t in one basket,” Shaun points out, noting that the aligned procedures at the shops aid in maintaining positive relationships with insurers.

“I rotate around the stores and engage with the adjusters and supervisors during routine spot checks and also during any inspections and audits. I serve as the main contact for all of our stores, making sure our insurance providers have just one call to make, and then I push that out to all of our locations.”

Can-do capability

As with the multiple DRPs, there are few limitations regarding the types of repairs that Hi-Tech actively pursues through an extensive marketing strategy that includes a heavy rotation of radio advertisements on the region’s No. 1 network of stations airing several formats to beam to the broadest reach of potential customers.

The can-do list for the clientele includes commercial fleet vehicles of all sizes, municipal transit buses, auto dealerships, rental car companies, motorcycles, motor homes, trailers and boats. A towing service is also part of the portfolio.

Plus they do landscaping. Tracey additionally owns a landscaping and construction business, “so if a car has run off the road and into a fence or something, we can also get the job of repairing the fence and reseeded the lawn,” says Shaun, highlighting Hi-Tech’s commitment to serving the public.

“Customer service is our top priority. We strive to make every customer feel like they are our only customer. Repeat customers and word of mouth have helped us grow our customer base for the last 28 years.”

Maintaining high visibility within the assorted market communities, this year’s edition of Hi-Tech’s annual summer golf tournament raised more than \$40,000 for a local children’s hospital. A yearly program donates a new car to a deserving military veteran. And for 14 years an annual car show with more than 500 vehicles on display has been raising funds for the region’s parks and recreation programs. In addition, the company participates in a December toy drive for underprivileged kids.

All of the shops are I-CAR Gold, and “we invest in training every technician so they are all I-CAR platinum and welding certified. All of our estimators are I-CAR platinum and ASE B-6 certified, and our main store is aluminum certified along with several OEM endorsements.”

Added educational and marketing expertise is obtained by belonging to a CARSTAR Puget Sound 20 Group made up of 22 shops within the organization. 



JAMES E. GUYETTE is a long-time contributing editor to *ABRN*, *Aftermarket Business World* and *Motor Age* magazines.

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Define your shop expectations so your team can shine

CLEARLY SET STANDARDS WITH DETAILED DOCUMENTATION, COMMUNICATION

CHRIS CHESNEY // Contributing Editor

Last year, through the Commitment to Training series we discussed the importance of ensuring your team is prepared to provide the best level of customer service. We've focused on a few topics, including establishing a learning manager who is responsible for your organization's ongoing learning efforts. We've talked about commitment from a technician's perspective and the return on investment you can experience once your entire team commits to training. The common thread in each touch point is standards. Standards of performance, standards of customer service, standards of your business. So how do you start? What's the best process for setting standards?

At automotive service facilities, the definition of service standards is defining the expectations for your team. You start the exercise of creating standards of service by recognizing the difference between customer-defined standards and company-defined standards. Standards should be based on the expectations of your customers and reflect the customer's view of these expectations.

Draw from observations what your customer expects and gather direct input from your customers about their expectations for the repair experience and your team. Define the customer experience you seek to provide and create a blueprint for the processes that can deliver that experience. Then, measure results. How to do that? Categorize your service standards in the context of customer expectations as either a Hard Standard or a Soft Standard — Hard Standards can be counted, measured or timed. These can include the amount of time it takes to complete an inspection or the time required to provide a customer with an answer. Soft Standards are more subjective or opinion-focused and can't be quantifiably measured. These soft standards can be gathered by speaking to customers via a variety of tools including reviews, callbacks or surveys.

The process of service standards based on your customers' expectations becomes well documented. For a step-by-step guide, here is an example based on a process used by McGraw-Hill:

1. Determine who you want to be to your customers; then determine what those customers want from you.

a. An example could be "I want to be a low-cost service provider for my local community." Now, determine what your chosen customer group wants from you

2. Convert customer expectations into behaviors and actions.

a. You might begin with "I will communicate with my customer, keeping them well informed of our progress."

b. Now, drill down to a greater level of detail: "I will notify my customer of every step in our service process."

c. Continue to drill down until you identify all the actions and behaviors you want to use to meet the customers' expectations. E.g., "I will notify my customer via text when we complete our inspection, when I have their service offer ready, when we have parts on order, when their vehicle is being serviced, when their vehicle is ready for pickup and when their vehicle has been delivered."

3. Create the standards for each action.

a. This is a clearly defined set of steps used by your team to ensure you meet the expectation of the customer.

4. Develop measurements for each standard.

a. This could entail creating reports

>> CONTINUES ON PAGE 32

SUPPORTERS





“With the new technology on vehicles, you have to get all the information you can. And if it is free, even better.”

— MIKE FELICIONI, GREAT LAKES AUTO BODY, COOPERSVILLE, MICH.; NACE AUTOMECHANIKA COMMITMENT TO TRAINING — LIVE! ATTENDEE

WATCH + LEARN



How to polish out clearcoat defects

ABRN.COM/PolishClear



Plastic identification: performing a weld test

ABRN.COM/PlasticID



All-women collegiate panel discuss training experience

ABRN.COM/Collegiate



Troubleshooting welds with visual inspection

ABRN.COM/InspectWeld

SOCIAL INSIGHTS



REPAIRING BLOW-MOLDED PLASTIC BUMPERS

Blow-molded parts are not new to the industry; however, using this blow-mold process to make a plastic bumper is new. It might seem challenging to repair and remove a dent from a bumper like this, since you can't push a dent from the backside. Luckily these bumpers are hollow, and depending on the damage severity, it's not that difficult if you have the right tools.

ABRN.com/plasticbumper

RIGHT-SIZE YOUR PAINT DEPARTMENT SUPPLIES WITH EXPERT TIPS

Shops must carefully consider how much inventory to maintain. Stock too little paint and prep supplies, and repairers risk running out of critical products, which has a negative cascading effect on cycle times through a shop. When they stock too much, shops tie up funds that could be gaining substantial interest in a bank or financial fund. Excess inventory is also an invitation to employees to work inefficiently and waste supplies.

ABRN.com/rightsize

FIGHT CORROSION, WIN THE REVENUE

Incorporating corrosion protection measures into your shop's standard operating

procedures and repair plans is a simple way to defend your customers' vehicles from the elements and the onset of rust. Surprisingly, this step often is overlooked. Download the whitepaper for more.

ABRN.com/3Mcorrosion

BRIDLE THE IDLE

A certain level of harmonic vibration at idle rpm on 2013MY Sorentos' 2.4L GDI engines is a normal characteristic; however, some of these vehicles produced from February 15, 2012 to September 13, 2012 may need improvement of their idle rpm stability (750 to 680) at a stop. The remedy to stabilize the idle is an ECM upgrade and alternator pulley replacement.

ABRN.com/idle

HOW EFFICIENCY DRIVES SALES, PROFITS FOR THREE-BAY SHOP

Eric Svedberg started as an Amoco dealer at the age of 22. Now at 45, he has much to share as a man with 23 years of experience. Eric runs a well-oiled business, and he shares his expertise and insights into his growth and success. He shares stories of personal achievement and many of the best practices that have contributed to his success. Listen to learn just one new thing!

ABRN.com/svedberg

TRAINING EVENTS

JANUARY 24

Documentation and Digital Photography; I-CAR

Fred Martin Collision Center; Norton, Ohio

JANUARY 25-27

Color Adjustment and Blending; Sherwin-Williams Automotive Finishes

Atlanta, Georgia

JANUARY 26

Pro//BASE Refinish System Painter Certification;

Martin Senour

Dallas, Texas

JANUARY 27

Blueprinting Process and Damage Discover; I-CAR

Hertz; Santa Cruz, California

FEBRUARY 22-23

4th Lightweight Vehicle Manufacturing Summit 2017;

Detroit Marriott at the Renaissance Center

Detroit, Michigan

APRIL 19-20

Collision Industry Conference; Sheraton Station Square

Pittsburgh, Pennsylvania

JULY 26-29

NACE Automechanika Chicago; McCormick Place West

Chicago, Illinois

OCTOBER 31-NOVEMBER 3

SEMA; Las Vegas Convention Center

Las Vegas, Nevada

>> CONTINUES FROM PAGE 30

from your shop management system or creating an audit sheet to review the team's execution of standards

5. Establish target metrics for each standard.

a. For example, if you set a standard to answer the phone before the third ring, then the target is two or fewer rings.

6. Track the results and compare results to your standard targets.

7. Share the results with your team

and constantly train on how to improve.

a. Take the opportunity to learn from your team and apply their input and best practices while making sure to give credit and praise for their efforts.

8. Regularly update the targets and measurements based on the feedback of your team and the results observed.

Another thought: the best way to create and implement these standards in a way that ensures their success is to include your team in the step-by-step creation and modification of standards in steps 2-5. Depending on the size of your business, recruit a leader from each department — technician, service advisor, manager, parts supplier, mentors — to take time to create these standards. Practice also drives the process forward: I suggest you tackle one or two standards first to test your processes. And always start with something nonintrusive and easily measured. Two excellent examples of this type of standard come from quick-service food chains. When you walk into a Moe's Southwest Grill, what do you always hear? "Welcome to Moe's!" Similarly, at Chick-fil-A the standards on how their team responds to customers is evident — you'll hear "It would be my pleasure" multiple times during your visit. These standards become the expectation from customers and are measured by each business. Implementing your own version at your shop is something that can get your entire team more engaged.

Finally, when considering what to do first, start with small, easy-to-implement standards and then seek assistance when tackling larger areas. One example of a tool or assistance that can help is a course from CTI called Logical Trouble Shooting Process. This program guides you when creating standards that allows you to meet your customers' expectations regarding a very complex discipline. 📖

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MANAGING MIXED MATERIALS

NOTICE THE EXTENSIVE USE of aluminum castings, stampings and extrusions, as well as ultra-high-strength steel (UHSS) in the side aperture of the Cadillac CT6.

NEW VEHICLE DESIGNS WILL REQUIRE INFORMATION ACCESS, NEW TOOLS, EQUIPMENT AND SKILLS

JASON BARTANEN // Contributing Editor

We've seen more change in vehicle structure technologies over the past 10 years than we have ever seen before. The growth of Advanced High Strength Steel (AHSS), the number of aluminum-intensive vehicles and the expanded use of carbon fiber and other composites are significant factors in how we repair today's vehicles. Historically, we've been focusing on either a "steel vehicle" or an "aluminum-intensive vehicle" — that is going to change significantly over the next several years. The landscape of collision repair will continue to change rapidly,

and we must keep pace to ensure complete, safe, quality repairs. Soon we'll be working on mixed-material vehicles that will require access to information, new tools, equipment, techniques, proper training and a new skill set.

There are at least a couple of factors that have gone into the extensive changes we're seeing in today's vehicles — most significantly, weight reduction and safety. The vehicle makers are in a daily struggle against two opposing forces: How do they add all of the safety and 'creature comfort' items that customers demand while meeting stringent (and getting more stringent) Corporate Average Fuel Economy (CAFÉ) requirements? The array of options on today's vehicles is vast — heated and cooled seats,

rear-seat infotainment systems, center console coolers, and even vacuums are just a few of the options available on an increasing number of vehicles. Add to that the significant number of Advanced Driver Assist Systems (ADAS), such as adaptive cruise control, lane keep assist, blind spot monitoring, active park assist and many others, and the vehicle makers have a weight problem. All of these options — the computers electronics to run many of them and the wiring that powers them — add a significant amount of weight to the vehicle.

At the same time, the vehicle makers also have to design stronger vehicles to protect vehicle occupants. The new

Insurance Institute for Highway Safety (IIHS) 25 percent small overlap crash test has posed a significant challenge to the vehicle makers. When the test was first released, many vehicles yielded dismal results. The vehicle makers quickly scrambled and re-engineered their model lineup to be more successful in the new crash test. Design changes, including additional reinforcements, again added some weight to the vehicle.

All of the weight that is added to the vehicle adversely affects the fuel economy standards, imposed by government regulation, that the vehicle makers must meet. Vehicle makers have a few options for reducing that weight:

- Build smaller vehicles. While we've seen a significant increase in the number of small cars on the market, trucks, SUVs, and crossovers continue to be some of the most popular vehicles on the roads of the United States. The vehicle makers must produce a significant number of these smaller vehicles to offset the sales of larger vehicles to meet their CAFÉ requirements.

- Decrease engine size. Smaller engines are more fuel-efficient, but many customers also want horsepower and towing capabilities, especially in the truck-, SUV- and crossover-hungry U.S. market. This is one reason we're seeing a lot more turbo-charged engines on many of today's vehicles. Prior to its release, Ford estimated that 56 percent of 2015 F-150 sales would include one of their turbocharged, EcoBoost engines, while their 5.0 liter engine would only account for roughly 28 percent of sales.

- Reduce the weight of the vehicle structure. This is a key area and the reason why we see a lot more high- and ultra-high strength steel, aluminum, magnesium and composites on today's vehicles.

Reducing the weight of the structure is an area that today's vehicle design engineers focus on daily. Historically, those engineers have looked to leverage a variety of either high- and ultra-high-strength steels or aluminum for the vehicle structure. The cars and trucks that we repair on a daily basis are, more often than not, either a "steel vehicle" or an "aluminum-intensive vehicle." That is beginning to change and will continue to change at a much more rapid pace over the next several years.

Tomorrow's (and some of today's) design engineers are going to choose the material they believe is best suited for a particular application and won't likely focus on one type of material. Tomorrow's vehicle will be a mixed-material vehicle, and we're going to need to adapt our approach to repairing those vehicle.



FACTORY-INSTALLED SPRs will often be replaced with blind rivets during repair.



TO AVOID COSTLY DAMAGE to SPR dies, always make sure the dies match the rivet application.

Today's mixed-material vehicle

There are a few vehicles that are already employing, or had previously employed, this approach to vehicle design and construction. Several years ago, BMW introduced their GRAV structure on the 5- and 6-series vehicles, and Audi leveraged a similar approach on the TT. Today, we're seeing BMW leverage steel, aluminum and carbon fiber on the new, carbon-core, 7-series. Additionally, Cadillac used both steel and aluminum throughout the structure of their flagship, the CT6. For future mixed-material vehicle applications, you may want to keep an eye on these vehicle makers.

Material identification

One of the first steps in the development of any repair plan should be to identify the material(s) used by the vehicle maker. This will provide the foundation for a solid repair plan. Fortunately, the



THE CADILLAC CT6 used a significant amount of aluminum and steel in the vehicle structure.

number of vehicles that provide detailed information on material types continues to increase. Unfortunately, the information isn't always located in the same area of the body repair manual and may be a bit challenging to find. However, with time and experience, you'll quickly become familiar with how different vehicle makers lay out their repair information,

making it easier to find in subsequent visits to their repair websites.

Damage analysis

Once you've identified the type(s) of materials that are going to be involved in the repair, the next step is to determine what is repairable and what will require replacement. Again, the best first step is to refer



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to the vehicle's body repair manual. An increasing number of vehicle makers offer a wealth of repairability guidelines for their vehicles. The number of vehicle makers that allow for straightening of high- and ultra-high strength steel and aluminum is decreasing, so part replacement will become quite common. The amount of straightening allowed for mixed-material vehicles will likely be even less. More often than not, if the structure of a mixed-material vehicle is damaged, part replacement is going to be required.

If no repair guidelines exist, you'll have to rely on your expertise and previous training to make an effective repair decision. If the vehicle has damage to mild steel or aluminum stampings, some straightening may be an option. If there is damage to aluminum extrusions, aluminum castings, high- or ultra-high-strength steel or carbon fiber, replacement will likely be the only option.

The I-CAR kink vs. bend rule was designed for steel, not aluminum, so it likely wouldn't apply on a mixed-material vehicle; but, if the part in question is steel, the rule may be applicable. The kink vs. bend rule has also changed over the years based on the types of steels found on today's vehicles. The number of damaged parts that would qualify as bent has

dramatically decreased, while the number of damaged parts that would now be considered a kink has increased. Why has the number increased? The kink vs. bend rule is no longer as simple as it sounds. Part of the original definition of a kink is that a part is considered kinked if, after straightening, there is a permanent area of deformation, which will not return to its original state and shape without the use of excessive heat. Kinked parts may also have visible cracks or tears in the metal.

A part may not look like it is kinked, but it may not be able to be straightened without cracking. The stronger the steel, the less repairable it becomes. For example, a slight bend in a UHSS part may crack when straightened, if it is able to be straightened at all. As a best practice, do not straighten parts that are above 600 MPa unless specific documentation exists from the vehicle maker. This is due to possible cracking and tearing of the part and possible damage to adjacent panels. If straightening is allowed by the OEM, a dye penetrant should be used to ensure no micro-cracking has occurred in the steel. Some vehicle makers do not recommend straightening UHSS parts that are above 600 MPa due to cracking and tearing of the part and damage to adjacent panels.

If the part is bent but the thickness or

strength of the metal will not allow for straightening without leaving an area of permanent deformation, then replacement — either partial or complete — would be appropriate.

Tools, equipment and parts replacement

While many of the tools and equipment you work with today will be useful for mixed-material vehicles, you will need to invest in some new equipment if you're not already working on aluminum-intensive vehicles today or doing MIG brazing.

While vehicle makers may be able to join dissimilar metals together using spot welding, friction-stir welding, or other 'fusion' methods, that type of equipment will not be available for repairs — at least not for the foreseeable future. When attaching dissimilar materials to one another, most repair procedures are going to include mechanical fasteners in conjunction with adhesives. Blind rivets and, in some cases, self-piercing rivets (SPR) and adhesives are going to be common place in replacement attachment methods. Not only is rivet bonding an effective attachment method, but it also provides a barrier between dissimilar materials, especially aluminum and steel. While the likelihood of galvanic corrosion is mini-



VEHICLE MAKER INFORMATION is required to select the correct rivet size.

mal, rivet bonding provides additional protection. It also helps with noise, vibration and harshness (NVH) and general corrosion protection.

Repairs may not always require joining dissimilar materials, and there will be many cases where a dissimilar material is sandwiched between two similar materials — for example, an aluminum or carbon fiber reinforcement between two pieces of steel. In those cases, squeeze-type resistance spot welding (STRSW) will likely be the preferred attachment methods. However, not all areas will be accessible for spot welding arms. In those cases, conventional GMA plug welding may be allowed or MIG brazing may be required. Honda is one vehicle maker that requires MIG brazing when attaching 1,500 MPa steel where spot welding arms won't reach.

Again, to ensure you're using the proper tools, equipment and attachment methods, it is imperative that you refer to

the vehicle maker procedures. Not doing so will create an inferior and, quite possibly, a failed repair.

Training

All of the tools and equipment needed for repairing tomorrow's vehicles won't be as effective without proper training. Fortunately, I-CAR has a couple of new courses available to help. I-CAR now offers an in-shop, hands-on Rivet Bonding (RVT01) course and an in-shop, hands-on MIG Brazing Hands-On Skill Development (BRZ02) course. Both of these courses use your equipment to train you and your team on how to properly use these advanced joining techniques.

I-CAR is also in the process of developing a new suite of courses on new vehicles and new technology to share important information on which vehicle makers are leveraging which materials and repair methods. Many of these new

courses will be offered online and will be accessible 24/7.

Conclusion

Working on vehicles with mixed materials can be complicated, but with the proper information, training, tools, equipment and techniques you can ensure complete, safe, quality repairs for our customers. Always research the vehicle maker information before beginning repairs to ensure you're following the vehicle maker's procedures for repair and replacement. 📧



JASON BARTANEN

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education, knowledge and solutions for the collision repair industry.

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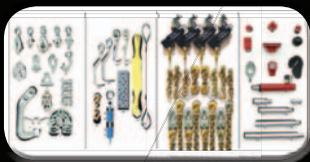
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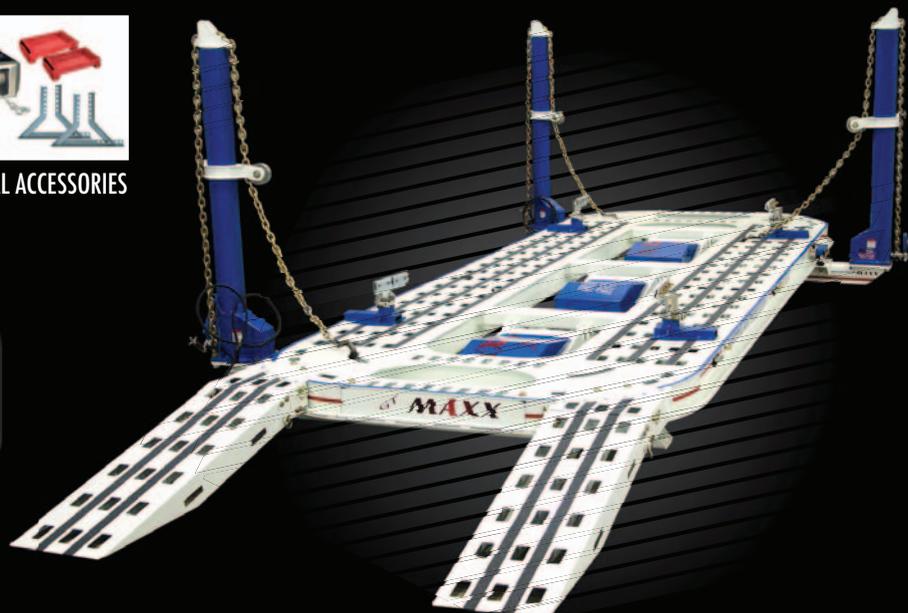
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IF YOUR SHOP HASN'T BEGUN THIS PROCESS, YOU ARE ALREADY FAR BEHIND

LARRY MONTANEZ // Technical Advisor

OEMs are hard pressed to produce vehicles that are not only stylish, functional and cool-looking, but that are extremely fuel efficient and safe as well. Gasoline engines are only about 30 percent efficient, so that means 70 percent of that energy is wasted. So how can the OEMs get more miles and improve efficiency? Hybrids and electric vehicles have helped, but we still have gasoline and diesel engines. If lighter materials are used, the challenge is keeping build costs down, and in turn selling prices, while also maintaining safety.

Over the past 20 years, we have seen more and more Advanced High Strength Steels (AHSS) trickle down from the high-end luxury vehicles to the mass-produced vehicles. We saw the same with aluminum components on panels for mass-produced vehicles, and now we are seeing aluminum-intensive vehicles in the less than \$50k price range. Over the past few years, we have seen high-end vehicles produced with Carbon Fiber Reinforced Polymer (CFRP). How far off do you think it is before CFRP is found in affordable mass-produced vehicles? Think about it this way: many OEs utilize plas-

tic or plastic composite for radiator core supports. How long will it be before they use CFRP to lighten the vehicle weight? In the near future this material will start to show up as structural components on affordable cars. Repair facilities need to be prepared to be able to repair these advanced-material vehicles.

Understanding the industry

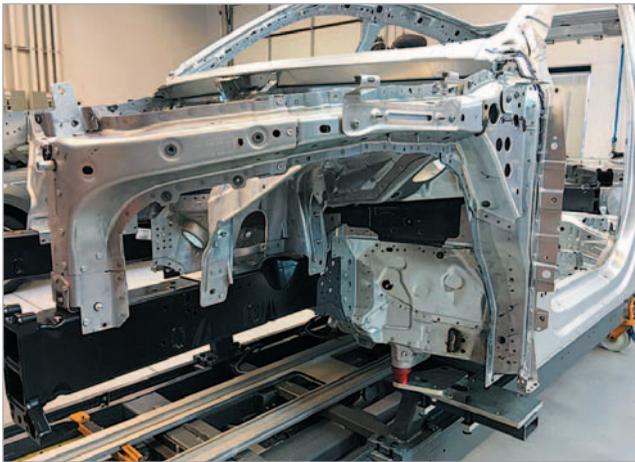
Some of you may be reading this and thinking that what I'm telling you is

nothing new. However, there are many shops across the country that are out of touch and are repairing vehicles in the same ways they were repaired in the '60s and '70s. If you are on any of the industry Facebook pages such as (but not limited to) Collision Repair Technicians United, Auto Body Repair, National Auto Collision Instructor Association or any of the other auto body groups, you will see posts asking for opinions on equipment choices for upgrades, ques-



MERCEDES-BENZ type aluminium T-weld

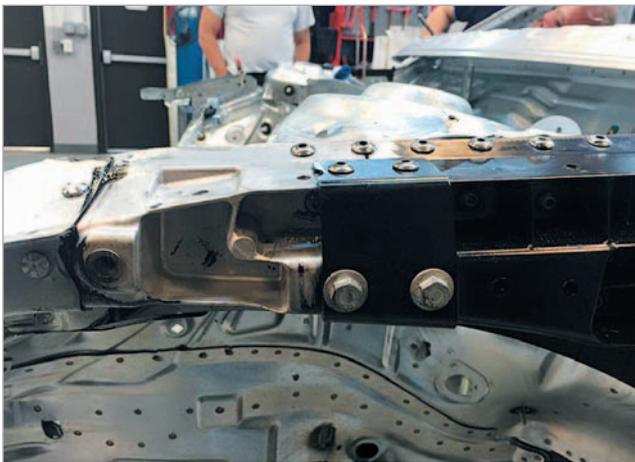
PHOTOS: LARRY MONTANEZ



AUDI Q7 frontal components — aluminum and steel



AUDI Q7 lower front aluminum rail sectioning bolt bonding



AUDI TT A-pillar sectioning rivet bonding, FDS bonding and bolt bonding



AUDI TT A-pillar sectioning rivet bonding, FDS bonding and bolt bonding

tions about repair procedures that seem to not make sense, material types and even how to handle a particular issue or problem pertaining to a claim. However, more often than many would prefer, you will see posts on clipping, rolling clip or full-body sectioning and how the posting technician feels they did a great job. Then all hell breaks loose. Comments roll in on why these procedures shouldn't be performed, and then egos kick in, and it gets ugly.

You will also see posts with panels that should be replaced, and there is body filler top to bottom, left to right, side to side, and once again an educational conversation turns into an ego measuring contest. Surprisingly, after all the mudslinging and name calling, most of the technicians who at first tried to de-

pend an incorrect repair come away actually understanding what they should have done.

A diagnosis from Dr. Montanez

The main issue is that many people in our industry suffer from one or more of several ailments. These ailments include:

1. A shop owner who will not invest in equipment and/or training
2. Technicians who are not properly trained
3. Technicians focused on completing repairs quickly as it impacts their pay, rather than on proper repairs
4. Shop management and/or estimators who cater to an insurer's preferences either on a direct repair or in an independent shop
5. Lack of knowledge on OEM repair

procedures, materials and/or state laws and rules

6. Lack of training on modern equipment
7. Techs and owners who don't read industry magazines or keep up with industry trends and technology.

Do you suffer from one or more of these? Dr. Montanez is going to help you overcome these ailments with the following prescriptions.

OEM certified repair programs

The European OEMs have set a high bar of standards for their Certified Collision Repair Facility (CCRF) programs. These OEMs have established requirements for CCRFs of ASE certification, I-CAR training, I-CAR welding certification and specific tool and equipment purchases to start on the program, followed up

with specific OEM training and welding certifications under strict ISO welding testing. Additionally, these OEMs monitor OEM parts and materials purchases and OEM repair information access and perform surprise in-shop inspections. Annual training must be met; welding certifications expire and require retesting to stay on the program. An added bonus is the restriction of certain components that are only sold to CCRFs. Generally, the component restrictions are for aluminum- or carbon-intensive vehicles. This is for two main reasons: first, the OEM ensures the vehicle is being repaired properly and second, the restriction of these components protects the investment the CCRFs have put in to the program.

A shop interested in these type programs must not only meet facility size and tooling, training, uniforms, office appearance, insurance coverage and distance to the sponsoring dealer, but must be sponsored by a dealer and have a relationship with that dealer. Investment costs in a European or Tesla CCRF program generally requires \$175,000-\$300,000 initial investment and an additional \$15,000-\$175,000 for each additional program.

So why invest? Easy — it is a great program if you are in the right demographic area. Many other OEMs have followed suit with similar programs but are not as strict. Most require all the facility insurance coverages, location to dealer(s), I-CAR train-

ing or even Gold Class Recognition or Platinum Individual Recognition*, ASE certifications (B2-B5 and B6), access to the OEM repair procedures (through the OEM or a third-party provider) and periodic in-shop inspections from VeriFacts or Assured Performance. (*Note: I-CAR does not certify technicians or repair facilities; they train. I-CAR does certify technicians for their welding tests.)

Almost all of these programs have a wide range of required equipment choices for structural, welding and tools. There are no parts restrictions (except Cadillac for the CT6). All OEM programs have collision repair websites for vehicle owners to find the closest CCRF, with a search by zip code and OEM CCRF signage and plaques identifying the facility as being on the program, generally requiring a yearly re-certification.

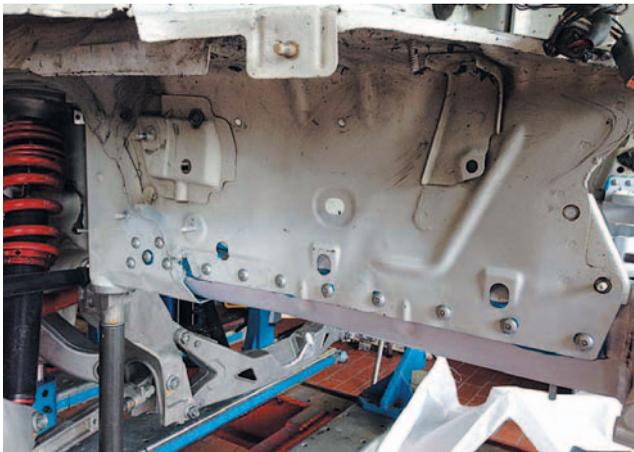
Why?

So why are the OEMs developing and supporting these programs? They want to ensure brand recognition, customer satisfaction for service and quality and



LAMBORGHINI carbon fiber and aluminum floor.

proper repairs; to keep the OEM warranties in force; and to have eligible trade-ins and lease returns meet requirements for Certified Pre-Owned (CPO) Programs. Additionally, many of the programs require the CCRF to only use new OEM replacement components, so they sell more parts. OEMs look at numbers and trends, and if a vehicle is deemed a total loss, or there are issues about a repair (come back or bring back), the consumer statistically blames the vehicle maker. In approximately 60 percent of these cases, the consumer will purchase or lease a different vehicle from another OEM. The goal for OEMs is to prevent this from happening by making the traumatic experience of having a consumer's second most expensive purchase less stressful when they are



PORSCHE 911 (996) lower rear rail FDS bonded



PORSCHE 911 (996) rear structure repair on a Celette.

involved in a collision event and have to deal with the insurance company and the repair facility. OEMs cannot manage or control insurance companies, but through CCRF programs they can control, audit, manage and keep checks and balances over participating facilities.

Advanced material and system repair

Steel — Vehicles are being produced with a wide range of multiple strength steels, aluminum, composites and computer-controlled electronic systems. Many repair facilities are not trained or equipped to repair these vehicles and diagnose and reset or relearn these systems. The CCRF programs help to alleviate these issues. Because of Advanced High-Strength Steels (ADHSS) such as Boron alloyed, Martensite, Dual-Phase, TRIP, TWIP and others, resistance welding is now the main requirement for

welding replacement panels back onto the vehicle structure. Silicon Bronze/MIG brazing has been adopted by a few OEMs for outer panel sectioning and/or panel attachment in specific areas. **Please note:** MIG brazing IS NOT an alternative to steel MAG welding and is only used on steel components. MIG brazing is only approved by a few OEMs for specific repairs in specific areas. Honda, VW and Jaguar/Land Rover utilize MIG brazing more than any other OEM. These OEMs have procedures for MIG brazing at not only sectioning joints, but in specific areas, such as panel attachment to structural AHSS components like the B-Pillar outer to reinforcement. Generally, this is performed through slotted holes with MIG brazing, using specific type electrode wire. Honda, Toyota and Mercedes-Benz utilize MIG brazing in specific sectioning areas on outer panels. No OEM has any procedures to uni-rail (frame) sectioning



MIG BRAZING-SILICON bronze weld training.

or uni-rail replacement using MIG brazing. Remember MIG brazing is not a fusion weld. Only use MIG brazing when and where the OEM specifically says to in their repair procedures.

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Conversely, some OEMs have some very different procedures for their steel vehicles. For example, BMW uses rivet bonding to affix replacement panels to the vehicle on mating flanges, some MAG plug welding on specific areas and an OEM insert/sleeve in sectioning areas on outer panels that is bonded only with a specific BMW adhesive and heating lamp required. Additionally, BMW requires two to four EMC (Electro Mechanical

Compatibility) screws to be installed on the replaced panel to ensure there is an electrical connection. And in the bonded sectioning areas, a special metal putty is required to smooth out the area. Ford and Chrysler/Dodge/Jeep require weld bonding for replacement of their outer panels and some inner reinforcements. On outer panels, Ford requires sectioning locations to be MAG seam welded, while Chrysler requires a bonded sleeve in the sectioning locations. These are just a few examples of why you must read the OEM procedures.

Aluminum — As most have learned by the Ford F-150 program, and some have known for years by being involved in the European, Tesla and Cadillac CT6 CCRF programs, aluminum repairs require rivet bonding for outer panel attachment to the structure of the vehicle. Some aluminum outer panel replacement procedures will require MIG welding (seam sectioning and plug welds). Some aluminum structural repair sectioning procedures will require bolts and adhesives. There are approximately 15 different rivets and 8 different adhesives used for replacement of aluminum components. You must follow the OEM repair procedures and protocols for the type of rivet and adhesive to use. Never mix or match materials between OEMs. Additionally, some of the adhesives require special applicator guns, and rivets have specific tensile strength and



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require specific guns, gun heads and even adapters to install the different rivets. Unfortunately, there is no one tool that can do it all.

For aluminum welding, you must first take a welding training class, such as I-CAR. Once you pass that training and testing you will need to practice 3 to 5 hours a week to become proficient at aluminum welding and to maintain your technique. With some newer vehicles, the OEM is mixing aluminum and steel together, like the Cadillac CT6 and Audi Q7. These hybrid construction-type vehicles will generally require bolt or rivet bonding on aluminum-to-steel mating flanges and STRSW on steel-to-steel mating flanges.

Composite and plastics — Plastic Composites, Fiber Reinforced Plastics (FRP), Sheet Molding Compounds (SMC), Reinforced Reaction Injection Molding (RRIM) and Reaction Injection Molding (RIM) — although still utilized for components on vehicles — will soon be replaced with Nano-Plastics, CFRP and Nano-Carbon Fiber. Repairs to these newer plastics are very similar to the repairs for plastic that we have been utilizing for the past 15 years, but with only a few changes, such as adhesive and heat curing. Conversely, if the damage extends to the edge of the component, then in many cases it will require replacement. BMW was the first company to introduce a multiple

or mixed-material construction vehicle, with the all-new 7 Series (G12) in MY2016. The G12 body is an AHSS, aluminum and CFRP mixed construction, and BMW claims the new 5 Series, X5 and X6 models will all be built similarly. Once again, it is imperative that the repair facility employees (estimator, manager, technician and even painter) review and understand the OEM repair procedures and protocols and adhere to them. Many OEMs will require their branded

adhesive material while others will allow choices from multiple adhesive brands.

The future

Expect more:

- Advanced steels that are thinner, lighter and stronger than what is available now.
- Aluminum outer panel components, both bolt-on and affixed
- Carbon fiber components and mixed material constructed vehicles.

Repair facilities will need to invest in equipment and training, and we predict more OEMs will restrict replacement components to those shops who are certified by the OEM.

One other procedure to mention is the pre- and post-repair scanning of collision-damaged vehicles. Review the OEM policies, which have been around for the past 20 years. After almost every collision event, the vehicle will require a pre-scan.

Our recommendation is that you keep up this technology by reading *ABRN* and taking training classes. Remember, no one knows what they don't know. 📧



LARRY MONTANEZ

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He is also a certified technician for multiple OEM collision repair programs.

info@pnlestimology.com

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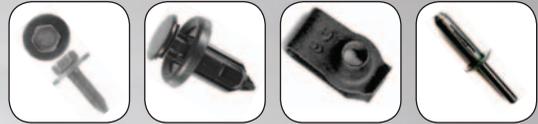


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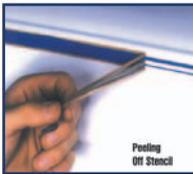
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Balancing common sense and repair standards

The cost of pre- and post- repair scan requirements demand a better approach

The hottest topic in the industry appears to be the ambivalence to conduct a pre- or post-repair scan and the current position by the OEs. Certainly a case can be made that scans are a necessary procedure on specific vehicles for specific damage. The position that every vehicle requires a pre- and post-scan seems to breach the parameters of common sense. A key-scratched vehicle, PDR hail damage, overspray damage or minor parking lot dents would appear to stretch the concept that “every vehicle needs to be scanned.”

Have vehicles been incorrectly repaired for the last 20 years? The industry’s position 5 years ago and earlier was that once the car was ready for delivery, all systems were checked for functionality and if any warning lights were on, a scan would be done with the aftermarket shop scan tool. The problem would be found and fixed prior to delivering the vehicle to the customer. If the shop did not have the appropriate scan tool, the vehicle would be sent to the dealer for repair.

If other fault codes were identified, they would only be addressed if they related to the current accident. So the only time scanning was addressed was as a post-repair scan if there was an indication that some functionality on the vehicle was not operating properly and was accident-related. It is likely that some critical functionality was missed. And with these sophisticated systems on the vehicle today, we cannot risk missing a fault code that could render a dystonic cruise system inoperable. So a complete scan on every vehicle operating system seems necessary — at least for late-model vehicles.

With more than 250 million registered private passenger motor vehicles on the road today and an average age of the vehicle at 11.6 years, only 10 percent of the vehicles on the road today have these sophisticated systems. Yet, OEs want every vehicle scanned. Can a common-sense approach to scanning be done similar to what was done in the early 1980s when the unibody hit the collision repair market?

In the 1980s, we were told that every vehicle needed to be



IF 50 PERCENT OF SCANS SHOW NO ACCIDENT-RELATED CODES, WHO PROVIDES COMPENSATION FOR THE TIME SPENT PERFORMING THE SCANS?

mounted and measured to assure the unibody structure was not damaged. The industry has worked through that scenario using common sense and determined three deciding factors that define the need to mount and measure: Location — high, medium or low; Direction — front to rear, side, front or rear; and Severity — light, medium or severe.

Why not apply the same common-sense approach to pre- and post-repair scans? Add make, model and options to the equation. (Problem solved if all information providers used build data for VIN decoding.) With location, direction and severity, decide the need to disassemble, disconnect the battery, remove sensors, identify damaged components, etc. If required, then scanning should be added as part of the repair order.

Let’s take a look at the cost of scanning and the impact on repairers, insurers and the vehicle owner. Scans cost between \$75 and \$300, depending on who completes the scan, what type of tool is used and if a third party is involved.

Shops delivering 150 cars a month with pre- and post-scanning on every vehicle would be completing

13.6 scans every day. With each scan taking 20 minutes, overall daily labor times to complete the scans would be 4.5 hours. If 50 percent of the scans show no accident-related codes, who provides compensation for the time spent performing the scans? The insurance policy only pays for accident-related damage.

The insurers’ impact on overall severity will be significant with an average pre- and post-scan of about \$187.50. Larger insurers with 10,000 vehicle claims a day would result in a daily severity impact of \$1,875,000 or \$495 million dollars annually. This impact would require insurers to obtain rate increases, which would be passed along to the vehicle owner.

So ultimately the cost is just added to the premiums for buying auto insurance. ☞

ROGER WRIGHT is founder and managing director of Vector Squared, LLC, a consult company for the automotive and insurance industries. He is a past chairman of I-CAR’s International Board of Directors, and a past CIC chairman. roger@vectorsquared.com

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