



# Mobility sales: A future-proof sales model

Cross-industry research suggests that mobility has much to learn from other sectors

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# The direct sales dilemma

It's no secret that 24/7 digital connectivity and the revolution in customer expectations it has unleashed are driving mobility businesses toward direct sales.

Many carmakers have launched online stores and taken steps to personalize their offerings. Some are even piloting innovative digital sales formats. A few are already selling directly online to the end consumer. Volkswagen, for example, is rolling out a new IT infrastructure that would facilitate online sales at scale. While carmakers including Ford, Mitsubishi Motors, and Hyundai in Europe, have partnered with sales-as-a-service providers and select dealer groups, to open small, digitally enabled showrooms in popular shopping areas that are seamlessly integrated with online stores and vice versa.<sup>1</sup>

Yet the mobility industry overall is still challenged to make direct sales work. The transformation entails significant financial and market risk: hefty upfront investment and high annual operating costs. That's a tall order for many players, despite widespread recognition of the urgent need for a truly consumer-centric sales model, robust enough for the digital age.

The experiences of similarly disrupted industries offer some valuable lessons. Recent research across five industry sectors—mobility, consumer goods, heavy machinery, telecommunications, and insurance—has identified five best practices that can help mobility players overcome the direct sales dilemma and successfully future-proof their sales models.

## Five best practices to future-proof mobility sales models

- 1. A seamless, omnichannel buying experience is now a baseline customer expectation**
- 2. B2C and B2B expectations are converging**
- 3. Digital marketplaces are increasingly popular with customers and require a strategic response**
- 4. Pricing should be clear, systematic, and consistent**
- 5. Direct sales not only align most closely with customer expectations— they also give companies more control**

# About the research

We surveyed over 1,000 B2C and B2B customers as well as more than 750 salespeople from the UK, Germany, and France. We also talked to top executives of established manufacturers and service providers to augment our findings.

## Our research combined the perspectives of:

### B2C customers

**1,000+ customers** who recently purchased a product or service for personal use from one of the selected industries. The sample provides a well-spread distribution across age, gender, income, and other metrics to account for potential differences in needs and preferences.

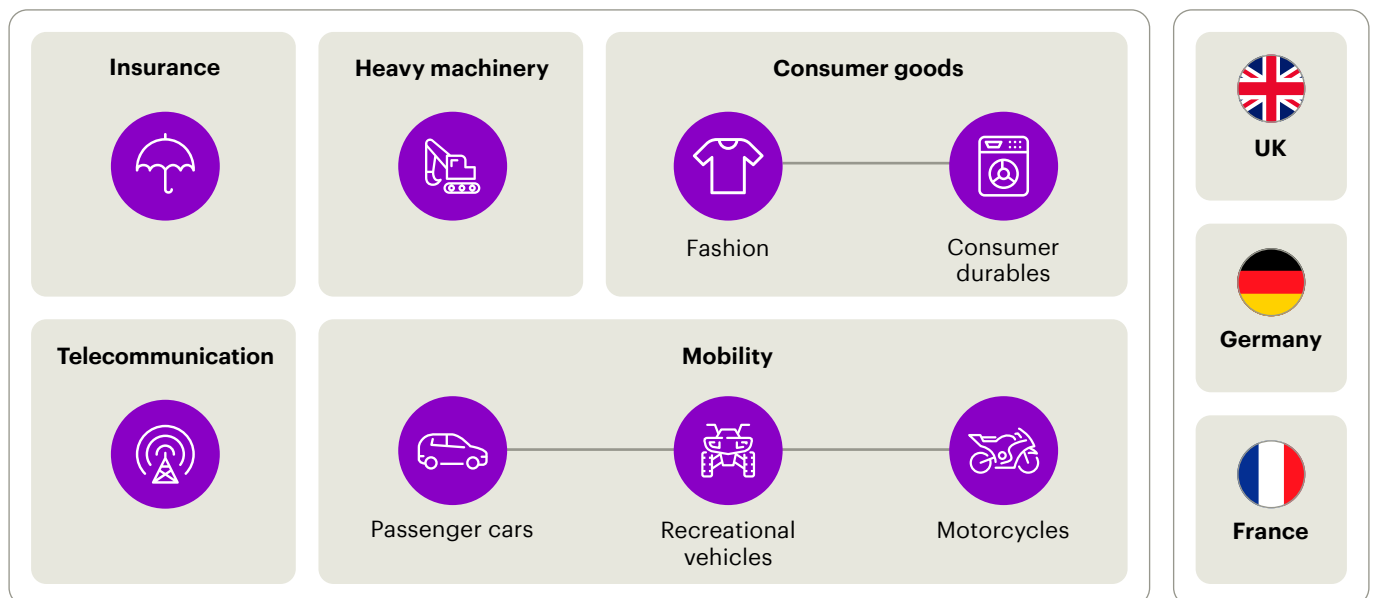
### Salespeople

**750+ salespeople** were asked about their understanding of customer needs, how they respond to them, and how well they think their current sales approach is preparing them for the future. Our sample provides a representative split across the different industries in scope.

### B2B customers

**300+ customers** who recently bought a product or service for business purposes, covering business customers as well as purchasing managers.

Figure 1: Overview of consumer, business customer and salespeople survey sample



Consumers and business customers				Salespeople			
Customer type		Residence		Customer group		Sales model	
B2C customers	<b>77%</b>	Urban	<b>52%</b>	Mainly in B2C sector	<b>37%</b>	Currently in indirect sales model	<b>70%</b>
B2B customers	<b>23%</b>	Suburban	<b>24%</b>	Both B2B and B2C	<b>33%</b>	Currently in direct sales model	<b>30%</b>
		Rural	<b>24%</b>	Mainly in B2B sector	<b>30%</b>		



## Executives and experts

Senior executives of established manufacturers and providers augment our findings.

Figure 2: Industry executives and experts interviewed for this study



**Dr. Marc Güntermann**  
Senior Director  
Sales & After Sales Strategy  
Audi AG



**Timo Resch**  
VP Customer Brand Sales  
BMW M



**Marcel Keller**  
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# The industries

In addition to mobility, we examined four other industries—consumer goods, heavy machinery, telecommunications, and insurance—picked because their sales strategies are also disrupted by rapidly changing consumer and market demands and/or because they, too, have made moves toward direct sales.





## Mobility

We focused on three industry segments at different points in the transformation from pure vehicle manufacturing to the provision of broader service “bundles”: passenger carmakers, motorcycle manufacturers, and recreational vehicle makers (quad bikes, water scooters, etc.). While all three segments have a clear B2C focus, only passenger carmakers have a significant B2B component.

Across the companies surveyed, indirect models dominate sales strategies. Less than 20% of sales are currently made through direct channels.

Mobility customers are moving online, but 36% are dissatisfied with current online buying options—more than in other industries. As many as one in three customers was dissatisfied with the experience of their latest purchase of a recreational vehicle. For passenger cars and motorcycles, one in four. Mobility customers also want better personalized offers and more reliable delivery.

**36% of mobility customers are dissatisfied with current online buying options.**



**Sandy Scullion**  
President  
Powersports Group at BRP



Fueled by customer expectations and the dynamics of digitalization, we see an opportunity to evolve our sales model focus and support our network of dealers and distributors to shift toward consultative selling and servicing. Deepening our post-sales service offering will provide BRP and our retail network with a competitive advantage and propel us further.







## Consumer goods

Consumer goods customers in both the apparel and consumer durables sub-sectors appreciate the range of goods they can find online—considerably more than the industry average. When searching for product information, one in every two customers goes straight to a website. Just one in four visit a store. In both sub-sectors, around 75% of sales are via indirect models and 25% via direct models. Of those companies already using direct sales, two-thirds say their current sales approach works well in meeting customer expectations. Salespeople also recognize the advantages that direct sales bring in tailoring product assortments and protecting profitability in a low-margin business.

**Two out of three salespeople that use a direct sales model say their current sales approach works well in meeting customer expectations.**



**Tobias Seemann**  
SVP Commercial Europe  
Adidas AG



Data is the new currency for success. Yet few truly focus on using it to solve key consumer use cases and most miss out on the personalization opportunity. It's all about collecting and leveraging data to create value for the consumer. Direct-to-consumer is pivotal to leveraging data for growth. Building a bridge to include wholesale partners as an integral part of an ecosystem to win with consumers is truly mastering it.







## Heavy machinery

This industry consists primarily of large players that sell almost entirely in a B2B context. Its customers are moving towards online channels, but sales via online channels are relatively rare.

Even for initial product research, the use of digital is below the cross-industry average. Less than half of B2B customers surveyed use digital channels to collect detailed product information.

The complex nature of heavy machinery, coupled with the need for detailed in-person explanations and guidance at the offline point of sale, help explain why the sector lags. However, salespeople cite a lack of customer data insights as the principal disadvantage of an indirect sales approach.

**45% of heavy machinery B2B customers use online channels to collect detailed product information.**



## Telecommunications

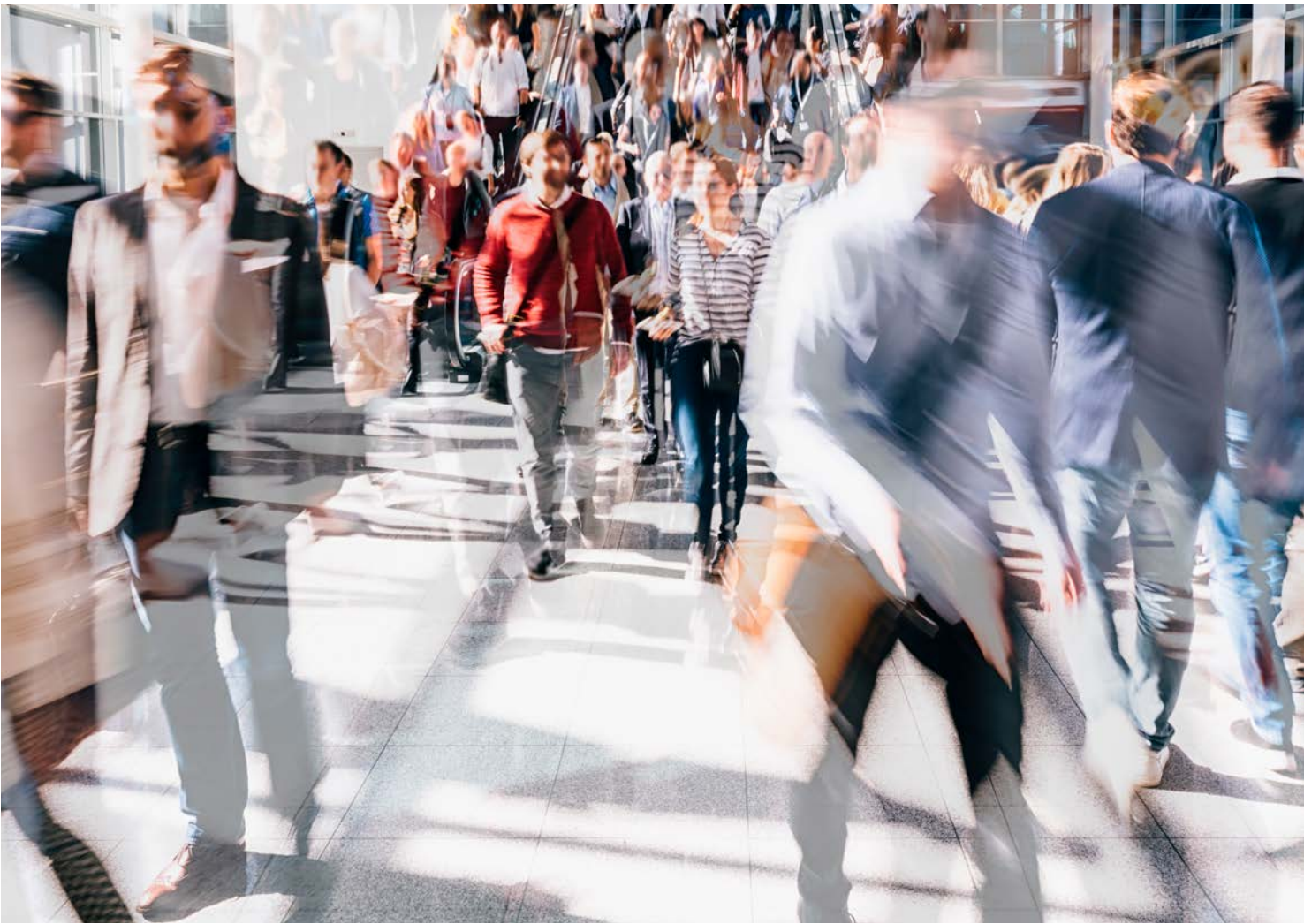
Half of all telecommunications customers surveyed were satisfied with their last purchase process. They are also typically more comfortable shopping online than customers in other industries. Two in every three consumer sales are now closed online (although this drops to less than one in three for B2B sales).

Most companies use the direct sales approach, either as a pure direct-to-consumer model or by incentivizing brokers and marketplaces to pass over prospects for closing a sale.

Sales teams are also much more likely to say online channels are their primary revenue drivers (46% versus 16% for offline). A substantial majority (71%) said sales processes should be further digitalized and 61% said more sales would shift online.

**46% of salespeople say online channels are their primary revenue drivers. Still, 71% see substantial room to further digitalize sales processes.**





## Insurance

While 39% of B2C insurance customers in our survey were highly satisfied with their last purchase, this drops to 22% for B2B buyers.

The B2C customer journey in retail insurance markets, especially regarding mass-market products like motor vehicle insurance, are typically more advanced online. For example, three-quarters of customers use online price comparison platforms. The RoPo (research online, purchase offline) approach is still widespread in many markets, depending on factors like online sales process maturity and customer preferences.

However, online sales make up a low share of B2B sales in most markets and lines of business, as customers primarily close deals offline.

More human touch during the sales process is needed for higher-cost products with longer-term commitments and financial impact, such as buying and insuring fleet vehicles for a business.

Lower-cost products and services, such as renting and insuring a car for a personal trip, are more easily distributed in digital channels. In consumer segments, 29% of revenues are generated in a purely online context.

**29% of insurance revenues are generated in a purely online context.**





# Rising customer expectations

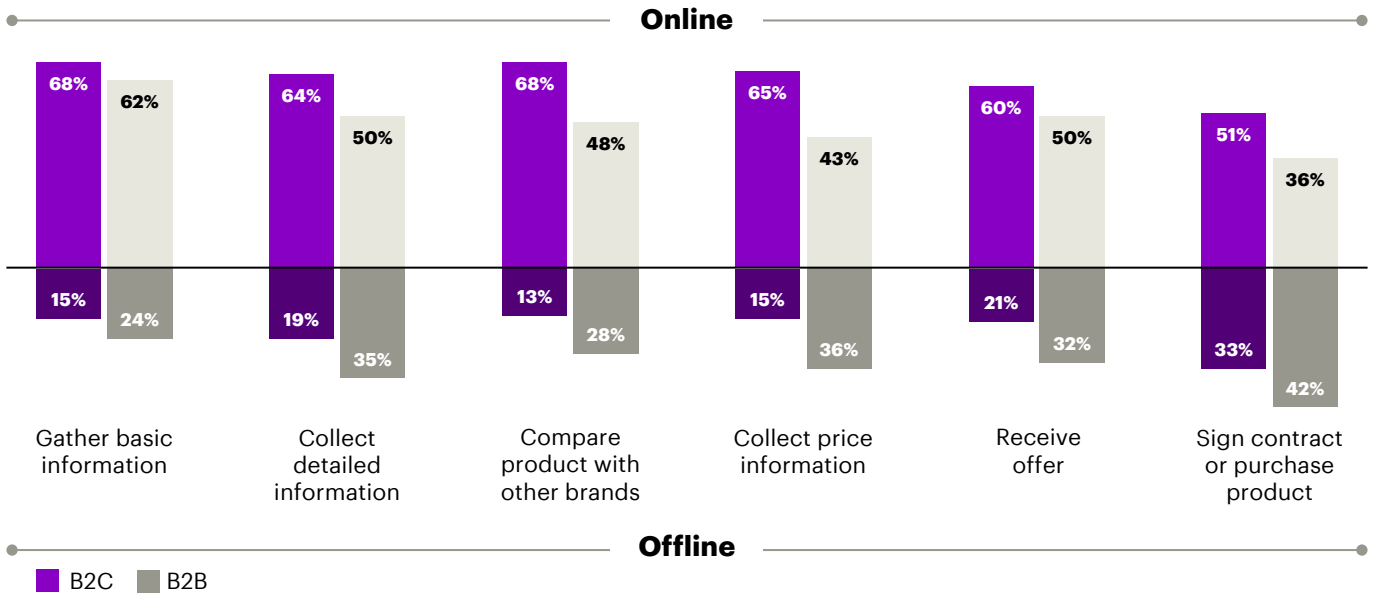
The transformative effects of pervasive digital connectivity are still playing out worldwide. But it's already clear that the trend is driving more and more customers online—and significantly raising their expectations.

Across all five industries we investigated, nearly half (49%) of customers now shop primarily online, versus fewer than a third (30%) who still shop primarily offline.

Our survey also confirms some of the key reasons why consumers are flocking to digital channels. Principally, they cite the time savings, around-the-clock availability, and lower prices that are typically offered online.

**Figure 3: Online vs. offline along the customer journey**

For each of the following steps of your purchase journey, did the step take place primarily online or offline?



They also mention the ease with which they can conduct their own product research by, for example, quickly comparing different products side by side.

Even so, across all five industries, only 39% of buyers were satisfied with their last purchase process.

**49% of consumers now primarily shop online—just 30% shop primarily offline.**



**Timo Resch**  
VP Customer Brand Sales  
BMW M



Today’s classical sales approach is not future-proof to meet the requirements for a long-term beneficial relationship between the customer, product, and brand. A digitalized sales platform and the direct interaction with the customer becomes increasingly important. This will be essential for a successful sales strategy of the future.



**Figure 4: Customer satisfaction with specific aspects of the purchase process**



# Finding a way forward for mobility players

**Our cross-industry research reveals five best practices that mobility players can leverage to tackle the twin challenges of accelerating digitalization and rising customer expectations.**

## 1. A seamless, omnichannel customer experience is now a baseline requirement

While some customers have pivoted entirely to online channels, a significant number still prefer offline shopping. The largest number, however, see the benefits of both.

Most customers clearly want seamless continuity across all phases of the sales journey, including aftersales. They expect shopping experiences offline to be just as engaging as they are online. And they require the ability to switch channels easily, without the hassles and headaches that still hinder the shopping journey in many industries.

The implication is clear. Businesses that can facilitate a truly engaging omnichannel experience can drive sustained growth.

”

**Antonio Nigro**  
**SVP – Head of Commercial & Regional Lead EMEA**  
**Fossil Group Europe GmbH**



With increased digital penetration, we have to re-invent our physical store presence to create unique omnichannel experiences that ‘wow’ our consumers.

“



By harvesting data across all customer touchpoints, they can generate deeper insights and thus more personalized content—a growing requirement in all industries—as customer concerns about data sharing diminish. 84% of those interviewed for our cross-industry study had no issue with data sharing in principle, though they do typically expect either a monetary benefit or some other kind of reward in return.

Mobility businesses recognize that their customers want better options for buying online. In fact, they see better online offers as one of the highest-potential improvements they could make, alongside providing more personalized offers. But launching online stores or moving existing sales operations online, which many mobility players have already done, are only first steps.

Right now, carmakers are the front-runners in responding to new customer needs, with many working on and some (especially greenfield players) already providing significantly better online experiences.

Consider, for example, how easy it is to navigate Tesla’s online store. A small range of customization options helps simplify choices and check-out is completed in just two clicks. Polestar’s website, similarly, seamlessly integrates online purchasing, while also providing a live specialist chat function and an engaging introductory video stressing the sustainability message that defines the brand.



**Barbara-Maria Loth**  
**Global Head of Commercial**  
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**Knauf Digital GmbH**

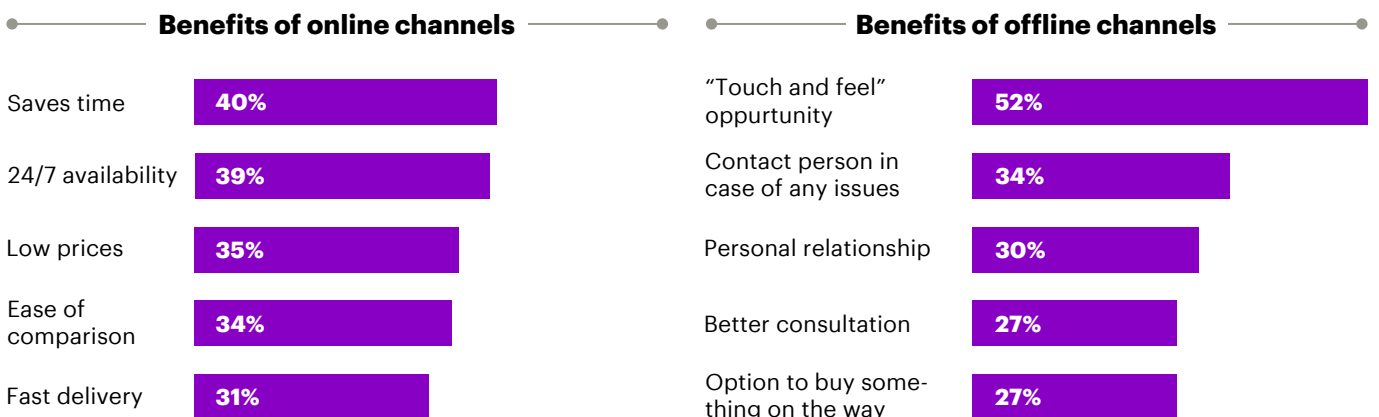


Digitalization per se does not generate new revenues for us. Only new products and services can do that. But taking advantage of the means of digitalization like automating services or applying advanced analytics will enable us to better serve our customers on existing and new touchpoints and ultimately more efficiently sell existing products.



Motorcycle manufacturers are also starting to provide better experiences online, such as product configurators that can be forwarded to the nearest dealer. The recreational vehicle segment, however, is lagging. Here, most manufacturers still provide little more than product information online, despite customers actively searching for more.

**Benefits of online and offline channels as seen by customers across industries**



## 2. B2C and B2B expectations are converging

Although cross-industry research reveals the persistence of differences between B2B and B2C buying experiences, especially when it comes to the customer journey on digital channels (see “A lack of options?”, page 17), it also clearly shows that B2B customers increasingly expect the same personalized, frictionless sales interactions common in consumer settings.

We found that the fundamental drivers of a purchase are largely the same, regardless of whether the customer is buying for their personal use or for their business. In all cases, price, quality, and performance are ranked highest (although B2C customers are typically more price sensitive than business buyers).

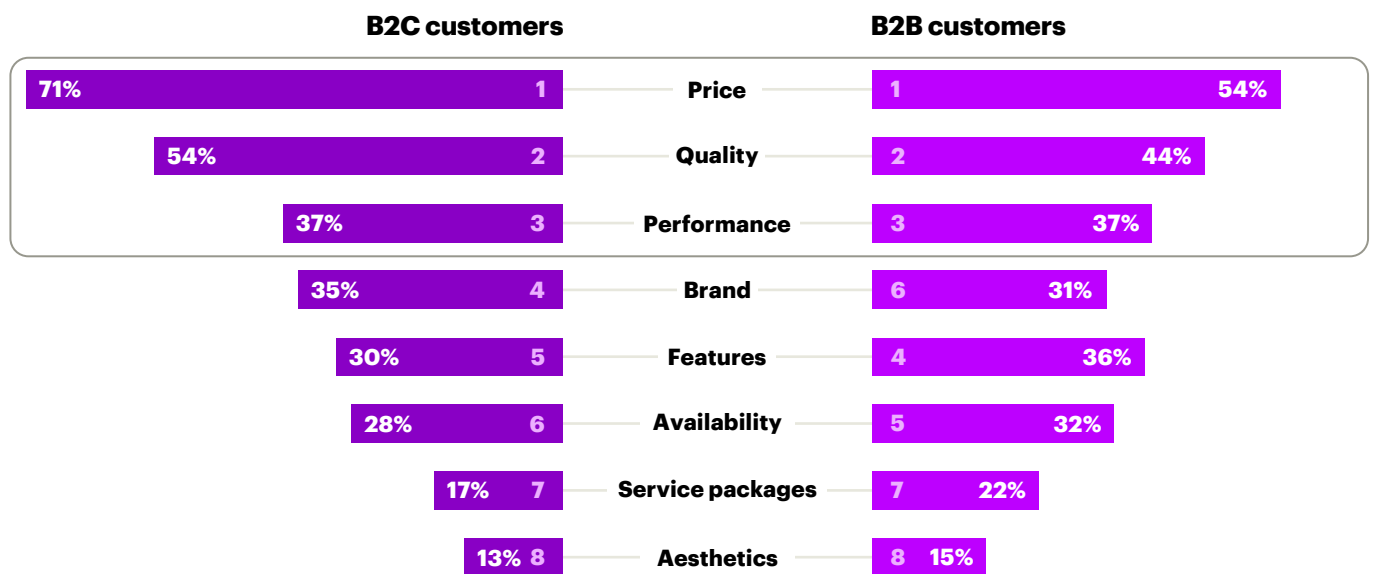
Mobility businesses, including established players like Mercedes, BMW, Volvo, and Stellantis, and EV-only OEMs like Tesla and Polestar, have launched online initiatives targeting both B2C and B2B customers. None, however, yet offers a fully-fledged online sales solution that addresses both.

Some of the best practices in that regard have been developed in sectors like consumer goods, half of whose customers already visit a website for product information.

As demand for online buying grows, a clear shift to cost-efficient digital channels should be on every mobility company’s agenda. It’s important to remember, though, that online sales strategies should not be driven solely by price—especially when it comes to boosting sales through new customer offers.

This was a common strategy in telecommunications but is now being revised. For instance, AldiTalk, the telecommunications subsidiary of German retail giant Aldi, frequently offers existing customers the same financial benefits as new customers.<sup>2</sup>

**Figure 6: Main drivers of B2C and B2B customers’ purchase decisions**



Samsung, for example, offers its B2B customers the same kind of online journey as its consumers, including a one-stop online shop solution. In just one click, business customers can browse through a similar online offering with the possibility to view the prices with or without the value-added tax. Additional requirements (for bulk orders, for example) can leverage a customer service capability. B2B customers can also set up their own accounts through which employees can access personalized product offerings, including tailored product portfolios, prices, and campaigns. It's a full digital solution—even framework agreements for price conditions are signed digitally.



**Dr. Christine Knackfuss-Nikolic**  
**SVP Digital Business & Transformation**  
**Deutsche Telekom AG**



A simple and easy to understand product portfolio is one of the essential prerequisites for a smooth digital (eSales & eService) customer journey.



Furthermore, when it comes to product discovery, two-thirds of B2C customers say they don't primarily look for specific brands, but rather for products and services that best meet their needs.

This preference is true for B2B customers as well, although in practice many business buyers are still restricted by their employers' procurement policies to a predetermined set of partners or brands.

## **A lack of options?**

In both B2C and B2B contexts, the purchase journey typically starts online with the customer gathering basic product information and then tends to shift towards offline channels as the sale approaches. In B2B, however, this shift is more pronounced.

Our research shows that online sales would comprise up to 30% of total B2B cross-industry sales through to 2025. Typically, however, B2B buyers are less likely to use online channels across the board, with many preferring them for researching products rather than closing deals. In insurance, for example, where B2B customers' needs can be complex, especially when it comes to claims, there's a strong preference for closing deals offline.

Even so, this apparent preference may simply be the result of a lack of digital options in many B2B areas. In some industries digital sales channels are still relatively rare or unavailable (even for B2C customers in cases like motorcycle sales). In others, online offers and promotions are geared towards B2C, meaning B2B customers should resort to offline channels to benefit. Even where digital B2B channels do exist, their immaturity and lack of functionality means many buyers are avoiding them.



### 3. Digital marketplaces are increasingly popular and require a strategic response

Digital marketplaces—especially industry-specific players like Carwow and price comparison platforms like Check24—pose a growing challenge for mobility companies’ sales strategies.

For buyers, and especially younger buyers, these platforms offer convenient, transparent, user-friendly, and streamlined shopping experiences—hence our finding that 35% of customers across all industries studied now purchase via marketplaces.

Sellers can benefit too, of course. Marketplaces, after all, offer a chance to boost brand exposure, audience reach, and sales volumes. But they also heighten customer price sensitivity. And because they take a commission on every supported transaction, they lower margins. Not surprisingly, the impact of third-party platforms (intra-brand competition) is one of the top three threats to current sales models that mobility businesses identify.

When should a business engage with a marketplace, looking to exert influence by actively managing the relationship, and when should it choose to remain independent?

The latter option would inevitably restrict access to certain customers; the almost 1.5 billion Europeans who visit Amazon every month, for instance, are hard to overlook.



**Marcel Keller**  
Member of the Executive Board  
Vorwerk International & Co. KMG

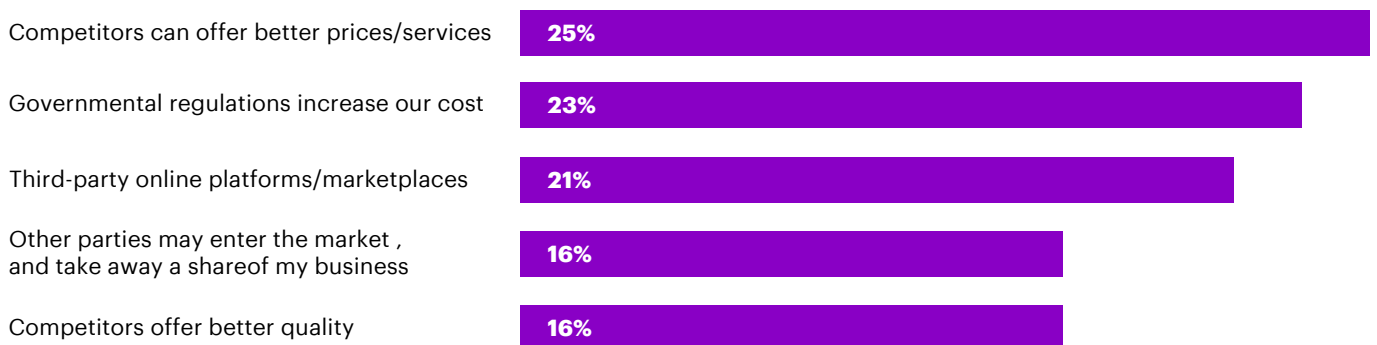


For us, there was never a discussion about going for growth via intermediaries or third-party providers, such as marketplaces or independent stores. If we were to dilute our unique direct selling model, we would lose customer intimacy, the ability to shape pricing and much more. Therefore, changing our distribution model would mean eliminating a major competitive advantage we built and honed over decades.



And for some industries, the benefits that marketplaces offer outweigh the disadvantages. Most insurers, for example, are not worried about third-party platforms because they view them as an additional sales channel; just 14% of salespeople see them as a threat.

**Figure 7: Biggest threats that salespeople within the mobility sector see affecting their sales model in the future**



However, if the customers are not within a company's target segment, or alternative options exist for reaching them, playing against the platforms, and remaining independent is an option worthy of consideration.

Everything depends on the unique context and objectives of each business. What is abundantly clear is that marketplaces cannot be ignored. Their presence puts additional competitive pressure on the entire value chain—manufacturers, service providers, wholesalers, agents, and retailers alike. In telecommunications, every second salesperson surveyed cited third-party platforms as a threat. That makes a clear and conscious strategic response to marketplaces a matter of company survival for many. And a few players have sought and found a middle ground.

HUK-Coburg, the largest traditional car insurance provider in Germany, established a direct online sales channel with its HUK24 subsidiary. HUK24 offers entry-level insurance packages that customers can tailor to their requirements in a fully digital setting. Costs and prices are kept lower by not offering personal consultation services: a direct approach that offers a viable alternative to playing the marketplace game. The German market leader in price comparison sites, Check24, attracts 10 times as many visitors. But HUK24, which has clearly positioned itself against a partnership, retains its target audience with competitive offerings at comparably lower premiums.



# 4. Pricing should be clear, systematic, and consistent

The shift to online shopping has huge implications for pricing in all the industries we investigated—largely because price comparison becomes so much easier for customers.

More than 95% of telecommunications customers say they compare offers at least occasionally, and 80% say they do so primarily online. Even in heavy machinery, where levels of online affinity are lower than in telecommunications, salespeople are accustomed to customers touting competitive offers from other manufacturers; more than 90% say this is a regular occurrence.

In the mobility industry, where one in three salespeople believe they cannot charge more for products without losing sales, price negotiations are still common—but they are not universally popular with customers. In fact, 44% of those who negotiated a sale price told us they would have preferred a fixed price (while just 13% of those who paid a fixed price would have preferred to negotiate).



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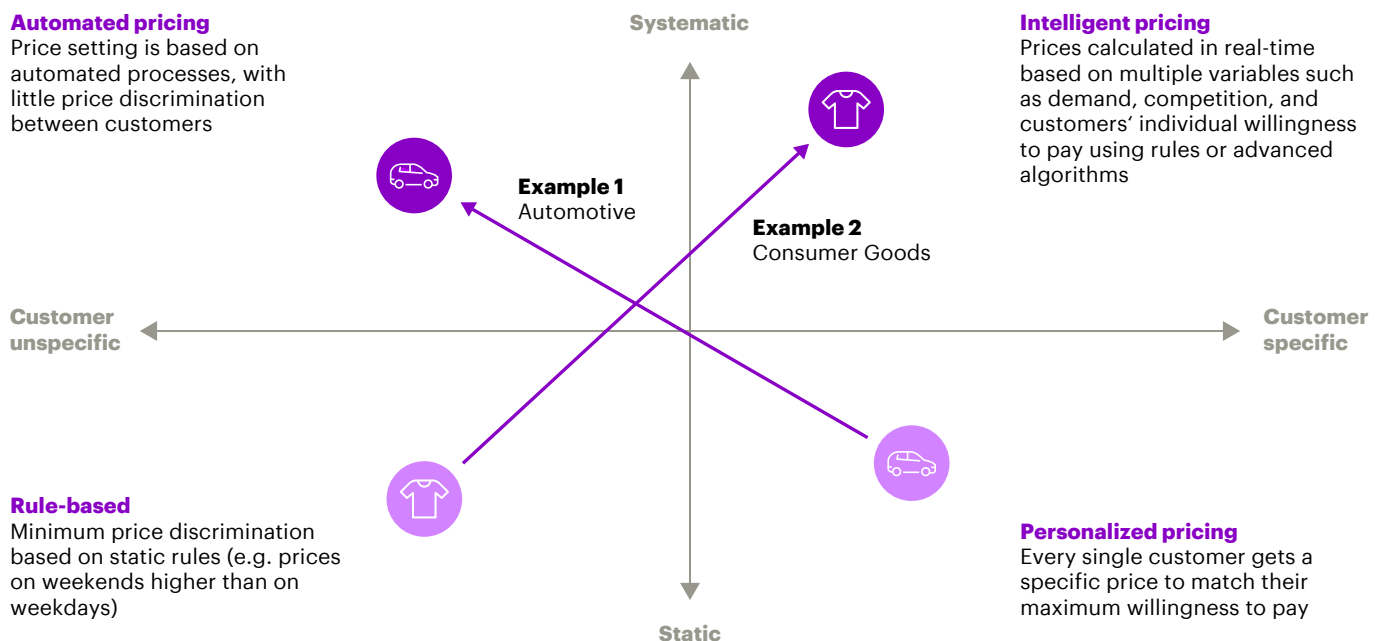


The interaction of the channels depends on the existing quality and usage of data in a company. Data must help to better understand the customer’s situation and needs to enable the business to deliver the right content to the right customer at the right time in the right channel.



Increasingly, customers across all industries appear to prefer the speed, ease of mind, and lack of sales pressure that fixed prices offer. Just 30% of telecommunications customers negotiate deals, for instance (marginally more for B2B). Our research found that overall, only a third of customers (both B2C and B2B) say they like to negotiate a price—though 20% of business customers and purchase managers also say that their employer requires it.

**Figure 8: Businesses across industries move from static to systematic price setting**





Price, in any event, remains one of the key purchase drivers across all industries (four in five apparel customers cite it as their top criterion, for example), underscoring the critical importance of a clear pricing approach based on two overarching dimensions:

1. Level of price differentiation—general versus individual
2. Frequency of price changes—static versus systematic

Using these two dimensions, four distinct strategy archetypes can be distinguished. These are rule-based pricing, personalized pricing, automated pricing, and intelligent pricing.

Pricing strategies are, of course, strongly influenced by sales models. The more centralized a sales model, the stronger a business' ability to set prices based on internal and external data, using advanced pricing software. In a decentralized sales model, on the other hand, intermediaries hinder the level of control a business exercises over the end price.

We have detected a trend toward more systematic and agile price-setting across industries, but the level of price differentiation acceptable to customers varies.

Consider the following examples:

- Mobility consumers have shown a strong preference for fixed prices instead of individually negotiated prices at dealerships. Passenger carmakers are reacting to this by limiting dealers' discount authority and by adapting prices based on automated processes.
- While rule-based pricing (such as cost plus) has traditionally been the norm in the consumer goods industry, we now observe a clear trend towards intelligent pricing. Using advanced algorithms, businesses set prices systematically and automatically to reflect individual customers' willingness to pay.

Because online channels are usually non-assisted, options for price negotiation are rare. And that means companies need to place even more emphasis on setting and communicating the right price across all sales channels and across the entire sales journey—a strategy that requires a solid pricing strategy for each brand.



## 5. Direct sales align most closely with customer expectations—and give companies more control

In their quest to find future-proof sales models, growing numbers of mobility businesses are re-evaluating their sales strategies. And the shift to direct sales, which typically align more closely with customer needs and expectations as well as strengthening the manufacturers' own position, is gathering pace. In fact, direct sales are rapidly emerging as the leading sales model for the mobility industry.

Tesla has had direct sales in place for a decade for all models in the EU. More than 15 other auto brands, including big established players such as Mercedes-Benz, are expected to have direct sales in place for all model ranges in Europe by 2030.

Other industries have recognized the advantages of direct sales models for much longer. Insurers in many markets offer products direct to customers while others leverage the agency model, integrating an existing retail network within a multi-channel sales model, thus preserving the personal touch many insurance customers value. Other industries, including consumer goods players, are opting for the direct-to-consumer model, which involves no intermediaries but requires substantial up-front investment.

Adidas, for instance, wants to sell up to 50% of its volume direct-to-consumer by 2025. The sports retailer's plan, dubbed Own the Game, recognizes apparel shoppers' growing preference for dealing directly with brands, and aims to boost net sales by 8-10% annually and net income by 16-18%. It will focus on strategic partnerships and be fueled by major investments in both marketing and digital, including data analytics and better in-store digital capabilities.<sup>3,4</sup>



**Dr. Marc Güntermann**  
Senior Director  
Sales & After Sales Strategy  
Audi AG



The switch from indirect to direct sales is not only prevalent in specific industries. Diverse companies must decide if their current sales approach is future-proof or not. Traditional manufacturers with historically grown sales networks are especially challenged to provide a consistent customer journey, merging online and offline. For those companies, the direct sales model is an opportunity worth considering.



In short, direct-sales models, in both their agency and direct-to-consumer forms, not only meet customer needs better. They also offer manufacturers, providers, retailers and other players full control over consumer data and interactions, as well as the ability to set and control prices centrally across all sales channels and keep distribution costs to a minimum (see "Going direct", page 23).

# Going direct

The direct sales models that are becoming predominant across industries take two basic forms:

## 1. The agency model

Agents, who may be employees or independent contractors and are typically paid a percentage of each sale, are the face of the brand—facilitating product discovery, offering detailed product knowledge and experience, handling negotiations, closing sales, and offering aftersales support.

### Advantages

The agency model can preserve the geographic reach of an existing retail network for physical product consultation as part of an omnichannel strategy. It also allows manufacturers and service providers to protect profitability through better control over pricing and fixed commissions for agents. In a genuine agency model, the brand has full control over the transaction price, although variants allow agents to give their own discounts and control some aspects of the offline customer journey. Crucially, manufacturers and providers can acquire a direct relationship with the end customer by integrating their and their agents' systems.

### Drawbacks

The principal disadvantage is the initial capital investment required in setting up integrated IT and logistics systems, although some costs (such as storage and equipment) may remain with agents. Some customers may also feel constrained by the fact that agents are authorized to sell products and services only from one manufacturer or provider.

## 2. The direct-to-consumer model

A manufacturer or service provider sells directly to an end customer, through digital and/or physical channels, with no intermediaries involved. All retail activities, risks, and responsibilities, across all channels, are in the hands of the manufacturer or service provider.

### Advantages

Manufacturers and service providers have a direct relationship with the end customer, giving them first-hand data on who those customers are, and what they want, expect, and need. They can control and influence that relationship end-to-end, protecting the brand image, building trust, and ensuring seamlessly integrated customer journeys across all sales channels. They have full control over discounting and pricing strategies, enabling them to protect profitability while providing much more transparency and certainty.

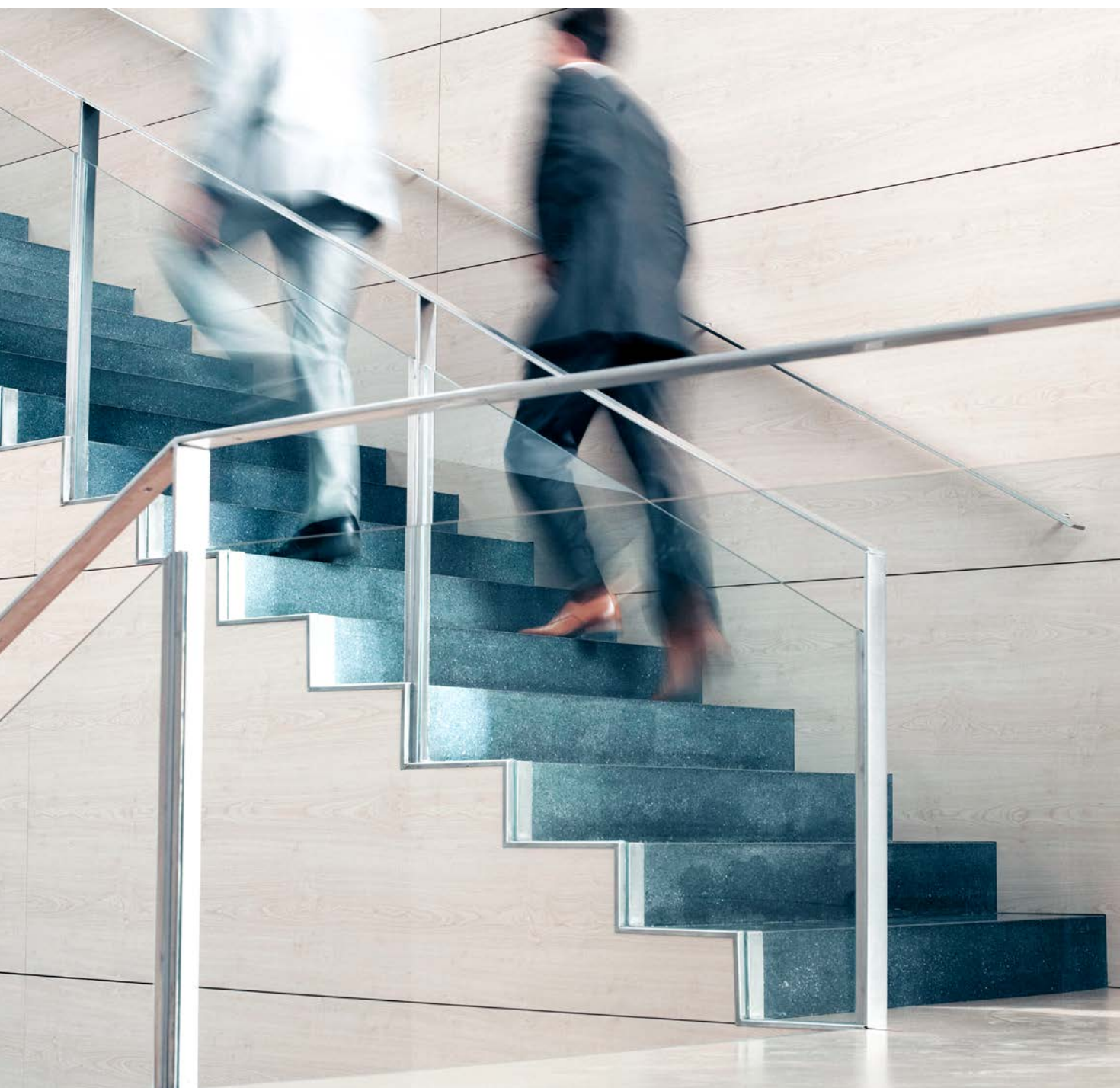
### Drawbacks

Because the manufacturer or service provider takes responsibility for the entire sales journey, it should make significant investments in its own retail network, including IT systems, logistics, property, and equipment. Customer-centricity becomes a key differentiator, requiring the business to understand and respond to rapidly changing customer needs and expectations, and delivering market-leading retail experiences.



# How mobility players can get started

Mobility businesses that follow these best practices can elevate their chances of developing a future-proof sales strategy—but how should they get started? In each case, three initial considerations are key.





### **To lay the groundwork for a seamless, omni-channel customer experience:**

1. Ensure continuity for a better customer experience, with similar interfaces at point of sale and online stores.
2. Enhance customer reach with faster decision-making by offering fewer, simpler, more enjoyable vehicle configuration options.
3. Boost customer loyalty using robust data collection and management across all touchpoints.

### **To make the most of converging B2C and B2B expectations:**

1. Enrich historical sales data with predictive customer data insights to get the 360-degree view you need to understand customer needs and tailor interactions.
2. Make digital engagement truly end-to-end, with personalized content and marketing campaigns, online configurators (when suitable) and continuous tracking of customer satisfaction.
3. Operate proactively, with tailor-made offerings to increase cross-selling and upselling, recommendation engines and personalized online shopping.

### **There's no one-size-fits-all solution to the strategic challenge of digital marketplaces, but consider the following:**

1. Are target customers active on such marketplaces and if so, how many customers and what are they looking for?
2. Is there a positive business case for engaging with marketplaces versus not doing so? What would it cost to engage versus going it alone?
3. What would be the impact on your competitiveness? Would partnering with a marketplace cannibalize other sales channels?

### **To achieve clear, systematic, and consistent pricing:**

1. Meet the customer preference for fixed pricing by limiting dealers' pricing authority/negotiating power.
2. Set the technical foundation for automated pricing by minimizing price discrimination between individual customers.
3. Establish an intelligent, data-driven, and comprehensive price solution that captures how much customers are willing to pay.

### **To strengthen direct sales initiatives:**

1. Bring all key stakeholders onboard.
2. Start with a small, targeted, pilot project and limited product portfolio, with a view to subsequent scaling.
3. Actively support agents in terms of both process and IT tool use, well into the launch of the new sales model.

# In conclusion

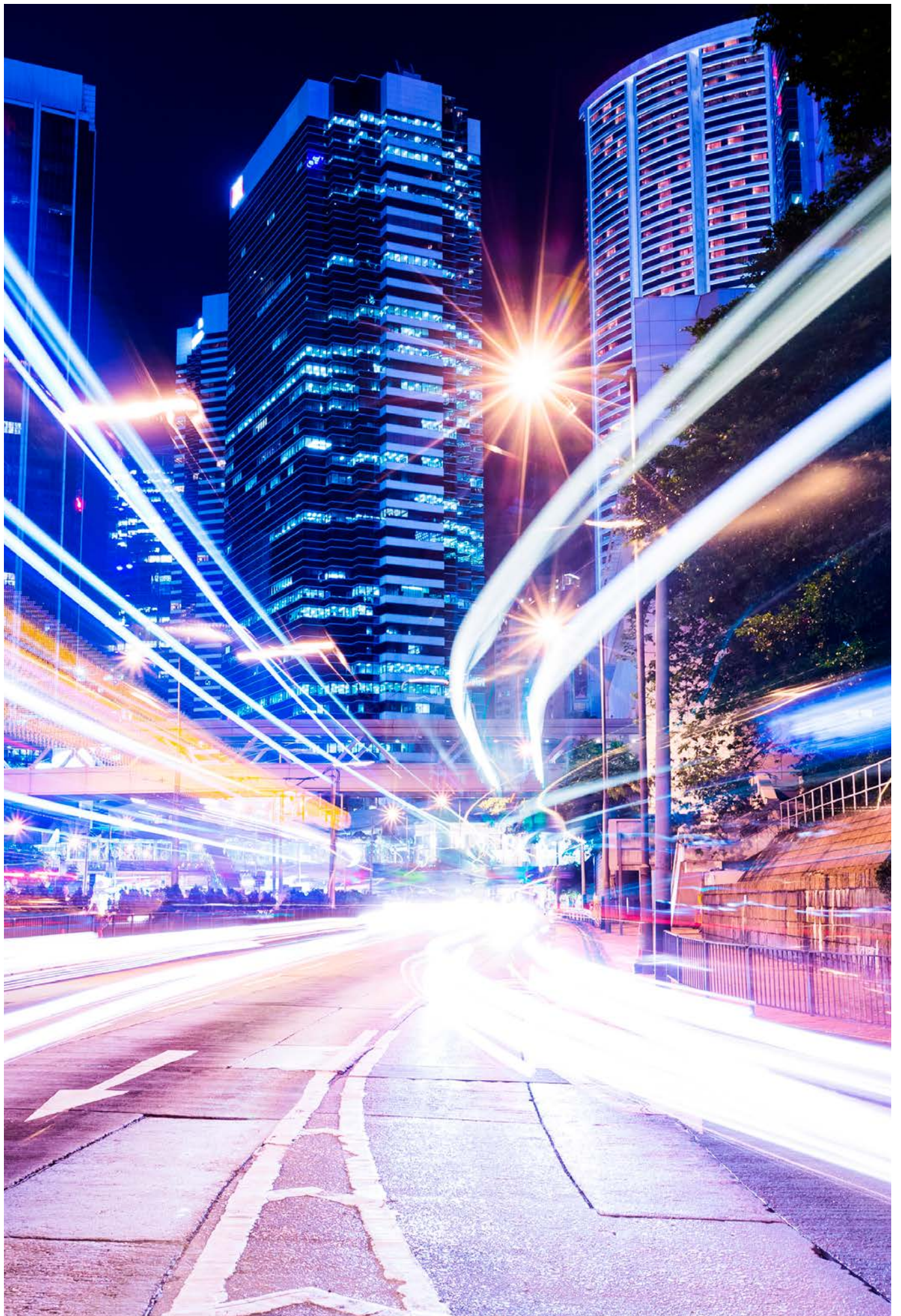
The ongoing digital revolution is reinforcing the mobility industry's transition to a direct sales model. The transformation involves significant cost and risk and can be a daunting prospect for many. But the experiences of other, similarly disrupted industries offer both encouragement and a way forward.

Research across five industry sectors—mobility, consumer goods, heavy machinery, telecommunications, and insurance—and encompassing the views of customers, salespeople, industry executives, and experts suggest that five best practices are key to success:

- 1. A seamless, omnichannel buying experience is now a baseline customer expectation**
- 2. B2C and B2B expectations are converging**
- 3. Digital marketplaces are increasingly popular with customers and require a strategic response**
- 4. Pricing should be clear, systematic, and consistent**
- 5. Direct sales not only align most closely with customer expectations—they also give companies more control**

**Mobility players that leverage these lessons will be in pole position to build a future-proof sales strategy—and power ahead.**







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### **The authors wish to thank:**

Patrick Vollmer, Markus Zimmerman, Dr. Boris Maurer, Keith McInerney, Lydia Aldejohann, Alexander Huber, David Habib, Simon Roewer, Dr. Maximilian Holtgrave, Dr. Marcus Demmelmair, Sven Petersen, Florian Keppler.

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