TRANSFORMATION AUTOMOTIVE INDUSTRY

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Investor Days, 26-27 October 2017

WHEN YOU NEED TO BE SURE

SGS



CUSTOMERS NEEDS ARE CHANGING

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- **Because** the expectations of *their* customers are changing

CUSTOMERS



MOBILE MESSAGING

SIMPLE

CUSTOMIZED

CONVENIENT

SELF-SERVICE



Chat Support

QUICK

ON DEMAND

PERSONALIZATION

AN ALTERNATIVE WAY



CURRENT VEHICLE INSPECTION PROCESS

- Dated process
- Inconvenient for the consumer
- Effects on brand loyalty and service experience

DISRUPTING THE VEHICLE INSPECTION MARKET

- Bringing a fresh and innovative product and business model to the consumer
- Investing in Digital Migration to lead the industry into the next phase of inspection delivery
- Actionable data leading to better customer experience and increased retention

SIMPLE - CONVENIENT- TRANSPARENT

- Developing and releasing a mobile app is the first step in a long journey
- Success measurements
  - Performance : IT measurement on user experience
  - User and usage : Visibility into the user and their demographics
  - Engagement : User engaging with the app
  - Business : Business / transactions flowing through the app

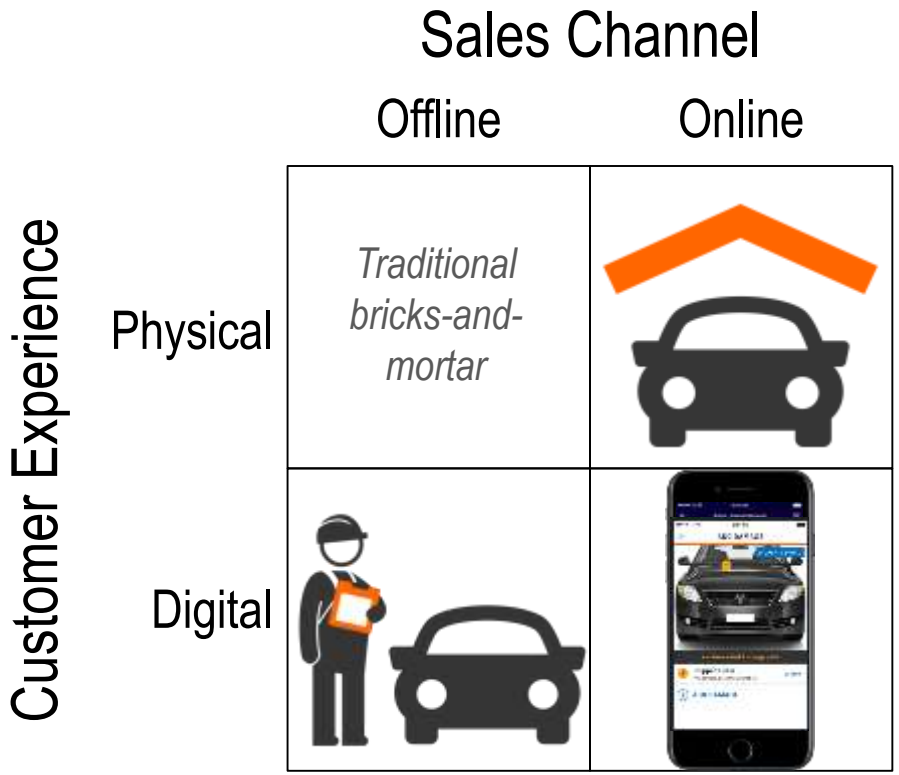






SELF-DISRUPTION NOT SELF-DESTRUCTION

- Complements our Field based inspection services
- Leverages technology for increased efficiency



VALUE TO *OUR* CUSTOMERS

- Leveraging smart phone technology for enhanced customer experience
- Decreasing costs while increasing number of inspections
- Capturing insights and **actionable data** regarding customers' decision making process and timeline
- Streamlining communication between all stakeholders
- Drives customer's loyalty



GROWTH MODEL IMPLICATIONS



- Transforming the industry will move the decision making power higher up the chain
- Dramatic change in Customer Experience
- Expansion in number of influencers and more information on the part of the customer
- More personalized and unique experiences BUT less company control of experience



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