

## INDUSTRY INSIGHTS REPORT



**WARDS**AUTO™

**2019 DCG MARKET REPORT**

## **TABLE OF CONTENTS**

<b>INTRODUCTION &amp; METHODOLOGY</b>	<b>4</b>
<b>KEY FINDINGS</b>	<b>5</b>
<b>ROLE IN DEALERSHIP AND MANAGEMENT OF THE DEALERSHIP</b>	<b>6</b>
<b>NUMBER OF DEALERSHIPS OWNED AND LENGTH OF OWNERSHIP</b>	<b>7</b>
<b>CURRENT BRANDS REPRESENTED</b>	<b>8</b>
<b>OWN OR LEASE DEALERSHIP REAL ESTATE</b>	<b>9</b>
<b>ANNUAL UNIT SALES</b>	<b>10</b>
<b>GROSS REVENUE CHANGES</b>	<b>11</b>
<b>STRATEGIES TO MAXIMIZE REVENUE</b>	<b>12</b>
<b>AREAS TO IMPROVE BUSINESS</b>	<b>14</b>
<b>IMPROVING EARNINGS GROWTH</b>	<b>15</b>
<b>PROFESSIONAL VALUATION</b>	<b>17</b>
<b>MAIN INITIATIVES TO IMPROVE DEALERSHIP</b>	<b>18</b>





## **TABLE OF CONTENTS**

<b>EXPENSE REDUCTION</b>	<b>19</b>
<b>DEALERSHIP OR AUTOGROUP EXPANSION</b>	<b>21</b>
<b>AREAS NEEDING HELP TO INCREASE VALUATION</b>	<b>24</b>
<b>BUSINESS LEGACY/SUCCESSION</b>	<b>25</b>
<b>INTEREST IN PROFESSIONAL ASSISTANCE</b>	<b>28</b>
<b>ABOUT DCG ACQUISITIONS</b>	<b>29</b>
<b>ABOUT INFORMA ENGAGE</b>	<b>37</b>



## INTRODUCTION & METHODOLOGY

### OVERVIEW:

Nearly 60% of the qualified respondents are dealership owners or principals. The majority of the respondents (81%) are active in the day-to-day management of their dealerships. Of the 41% of respondents who are not owners or principals, over half (52%) are in a management position at the dealership.

### METHODOLOGY:

On December 27, 2018, WardsAuto emailed invitations to participate in an online survey to subscribers. By February 8, 2019, Informa Engage had received 262 completed surveys. Of those, 165 were submitted by respondents who are owners, principals or hold an active role with an automotive dealership.

### RESPONSIVE MOTIVATION:

To encourage prompt response and increase the response rate overall, a live link to the survey was included in the email invitation to route respondents directly to the online survey. The invitations and survey were branded with the WardsAuto name and logo, in an effort to capitalize on user affinity for this valued brand. Each respondent was afforded the opportunity to enter a drawing for one of four \$50 Visa gift cards. Follow-up emails were sent to non-respondents.







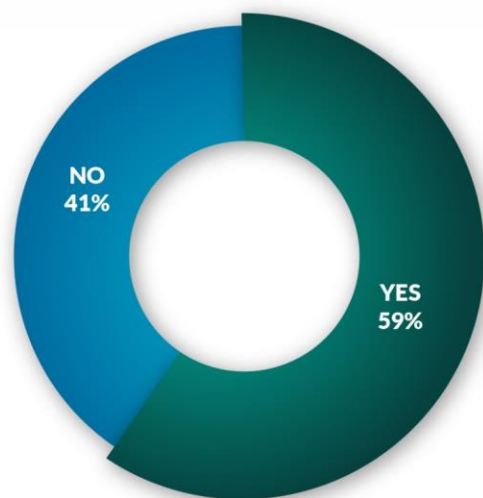
# *KEY FINDINGS*

## ROLE IN DEALERSHIP AND MANAGEMENT OF THE DEALERSHIP

Nearly 60% of the qualified respondents are dealership owners or principals.

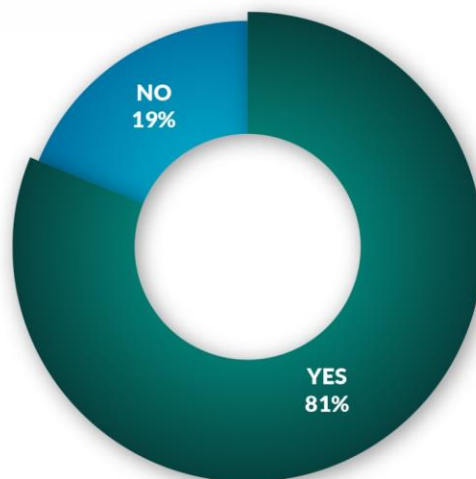
The majority of the respondents (81%) are active in the day-to-day management of their dealerships. Of the 41% of respondents who are not owners or principals, over half (52%) are in a management position at the dealership.

### Are you an automotive dealership owner or principal?



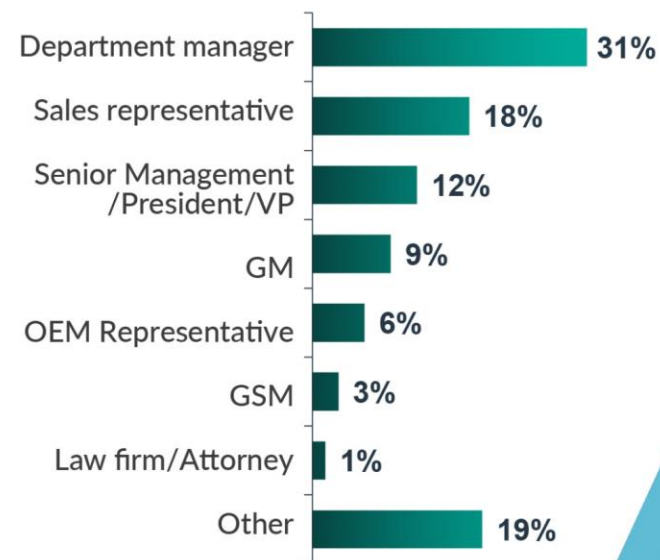
Question: Are you an automotive dealership owner or principal?  
Base: All respondents (n=165).

### Are you active in the day-to-day management of the dealership?



Question: Are you active in the day-to-day management of the dealership?  
Base: All respondents (n=165).

### What is your role within an automotive dealership?



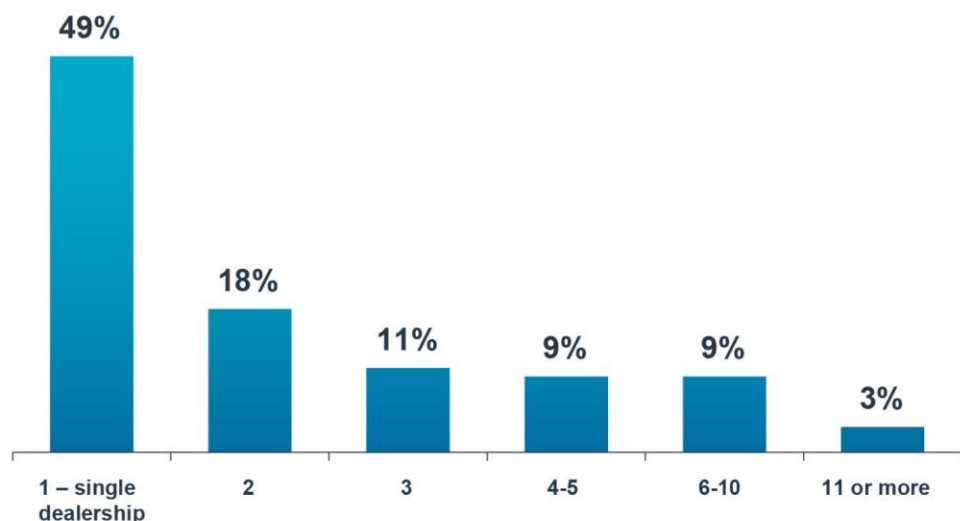
Question: What is your role within an automotive dealership?  
Base: Respondents are not an automotive dealership owner or principal (n=67)



## NUMBER OF DEALERSHIPS OWNED AND LENGTH OF OWNERSHIP

Over half (51%) of the dealership owners and principals currently own two or more dealerships. 72% of the owners and principals have been in their current role for more than 10 years

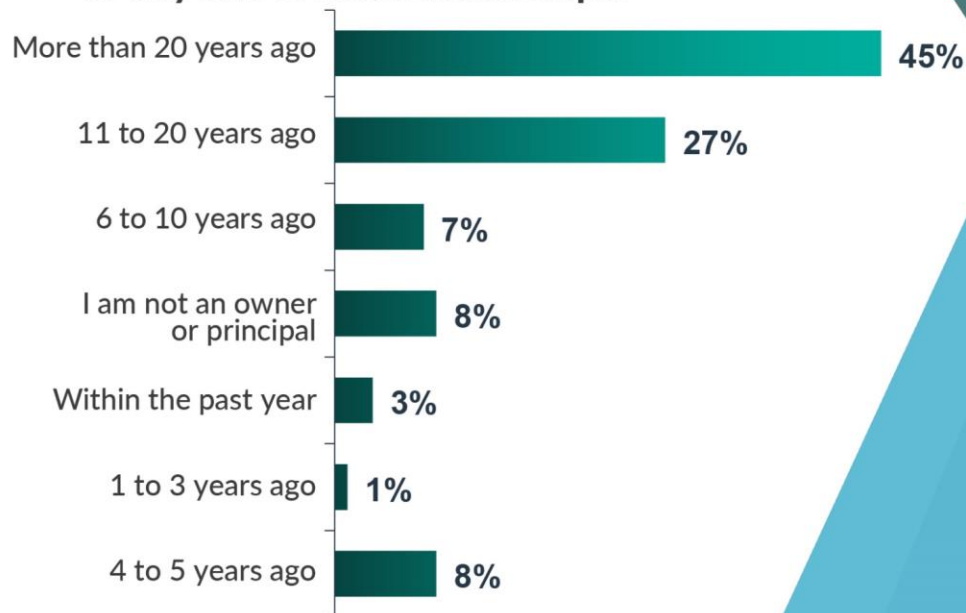
How many dealerships do you currently own?



Question: How many dealerships do you currently own?

Base: Respondent is an automotive dealership owner or principal (n=95).

When did you become an owner, Principal, or buy one of these dealerships?



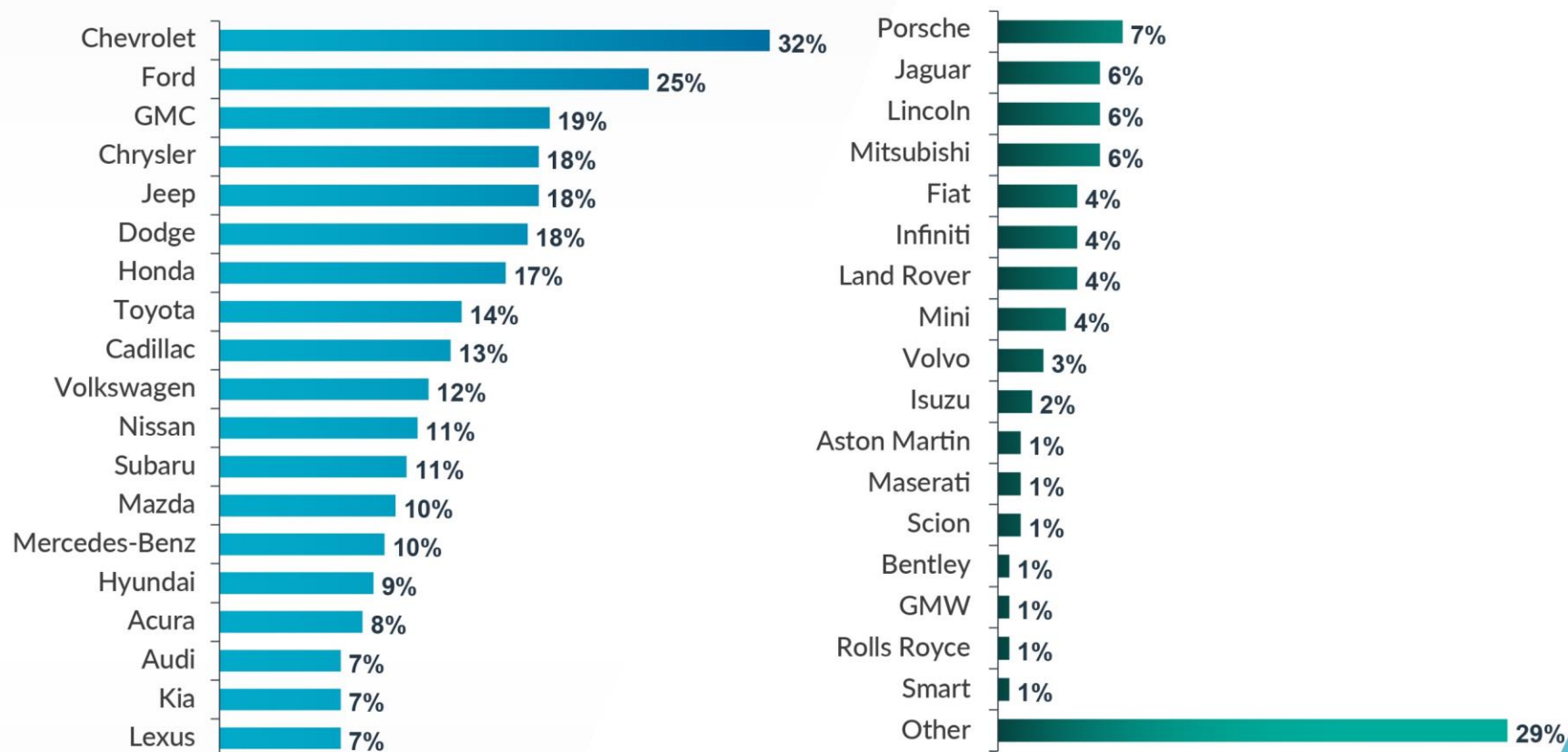
Question: When did you become an owner, Principal, or buy one of these dealerships?

Base: Respondent is an automotive dealership owner or principal (n=96).

## CURRENT BRANDS REPRESENTED

The most common brands represented by the respondents are from the U.S. Big Three manufacturers.

### How many dealerships do you currently own?



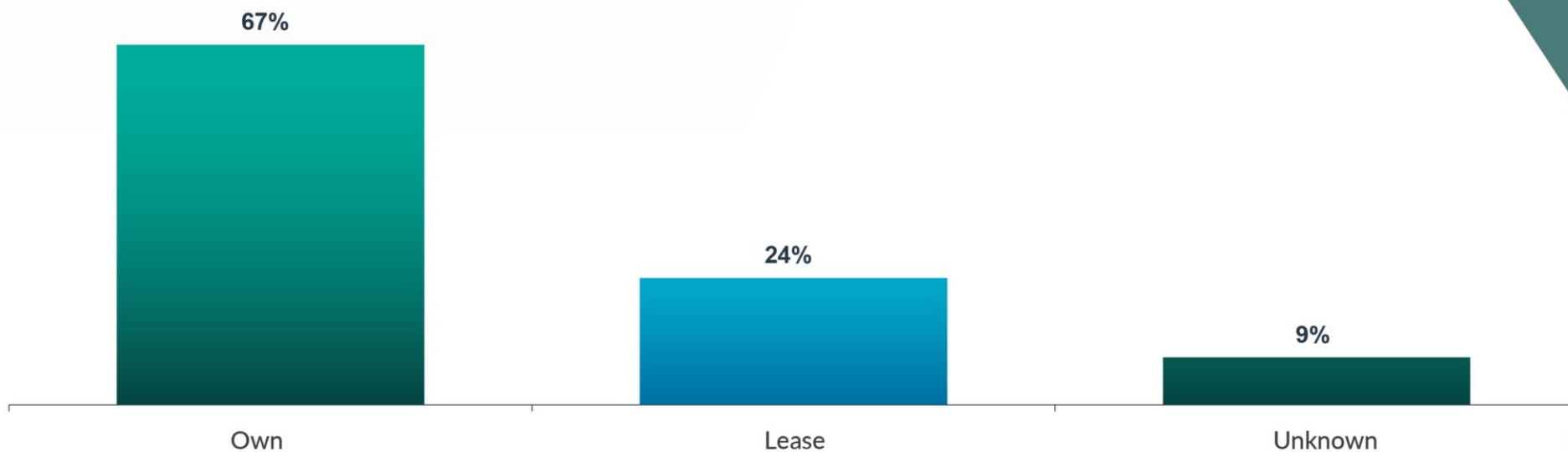
Question: What brands do you currently represent?

Base: All respondents (n=157); multiple responses permitted.



## OWN OR LEASE DEALERSHIP REAL ESTATE

Two-thirds of the respondent's dealerships have real assets in addition to the value of the business by owning the real estate the dealership is located on.

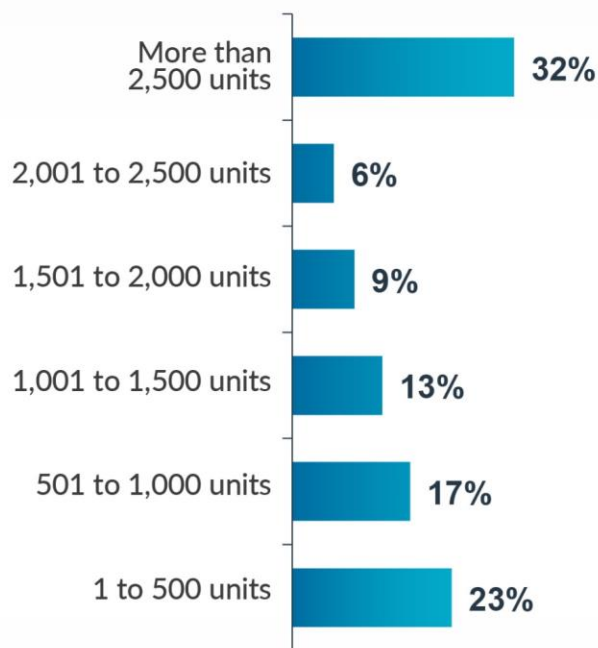


Question: Does the dealership own or lease the real estate it is located on?  
Base: All respondents (n=101).

## ANNUAL UNIT SALES

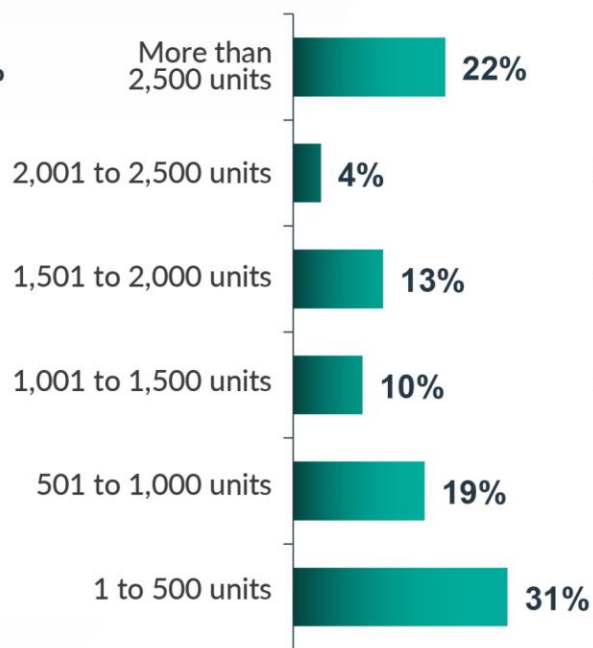
60% of the respondents have overall sales of more than 1,000 units annually. Less than half (49%) of the respondents have new retail sales of over 1,000 units and 40% have sales of over 1,000 used units.

### Overall Unit Total



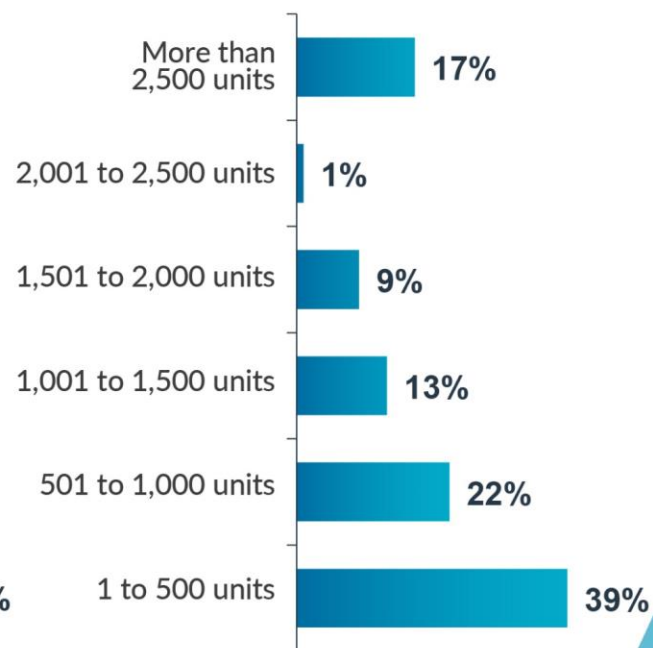
Question: What are your annual unit sales?  
Base: All respondents (n=145).

### New Retail Units



Question: What are your annual unit sales?  
Base: All respondents (n=125).

### Used Units

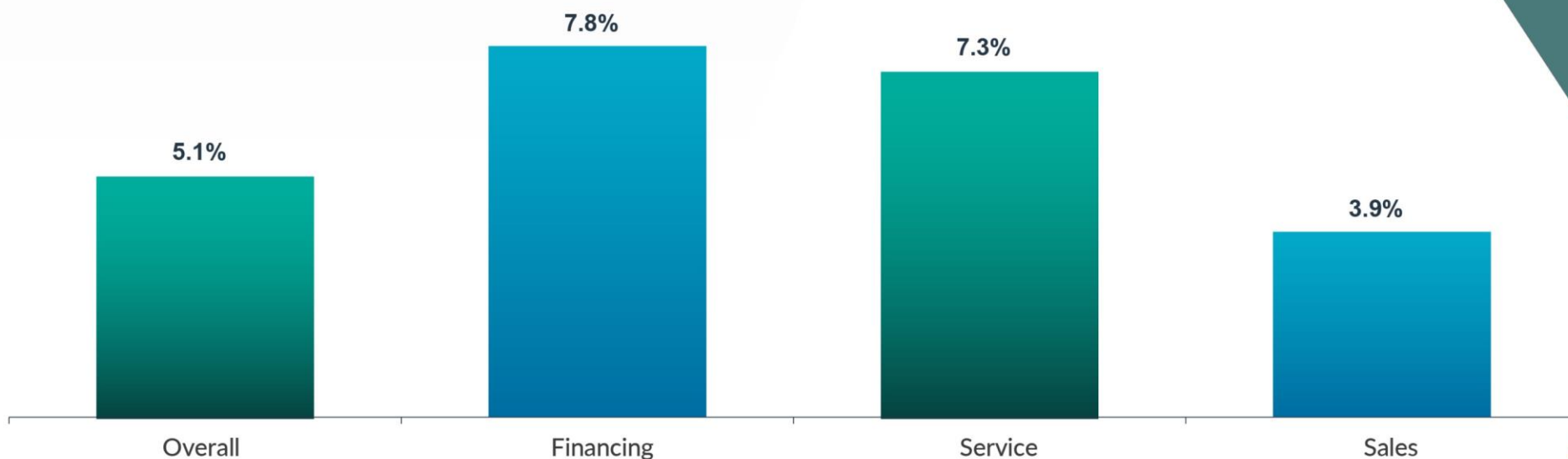


Question: What are your annual unit sales?  
Base: All respondents (n=125).



## GROSS REVENUE CHANGES OVER LAST 3 YEARS

Overall gross revenue has increased on average 5.1% over the last 3 years. All sectors of the dealerships showed revenue growth over this period, financing grew at twice the rate of sales (7.8% and 3.9% respectively).



Question: How has your gross revenue changed in the last 3 years ago for the following?  
(Values in graph have been converted from ranges used in the questionnaire.)

Base: All respondents (n=126-145).

## STRATEGIES TO MAXIMIZE REVENUE

While overall gross revenue of the dealerships surveyed has grown 5.1 percent in the last three years, drilling down into the data reveals that most revenue growth has been due to financing (7.8 percent) and service (7.3 percent) rather than sales, which grew only 3.9 percent. For this reason, respondents have indicated that they plan to focus on these higher growth activities in the future.

Growth requires the creation, execution and management of a strategic plan. There are challenges that many dealerships will need to overcome in expanding their financing and services activities, most notably:

### A SHORTAGE OF SERVICE TECHNICIANS.

There are approximately 750,000 auto technician and mechanics in the country, according to the U.S. Bureau of Labor Statistics. To meet anticipated demand, which includes responding to attrition, the industry will need about 46,000 more technicians by 2026. In reality, technicians retiring and abandoning the career are likely to create a deficit rather than add to the ranks. Many dealerships are having to train their own technicians, or partner with local community colleges to address the shortfall.





## STRATEGIES TO MAXIMIZE REVENUE

### INSUFFICIENT HIRING EFFORTS FOR SERVICE DEPARTMENTS.

According to Hireology CEO Adam Robinson, too few dealerships are playing up the advantages of working in the industry. The difference between dealerships that thrive and the ones that do not is likely to be rooted in their ability to recruit, hire and retain the right people who fit well into today's digital landscape rather than rely on hiring wisdom that is years or decades old.

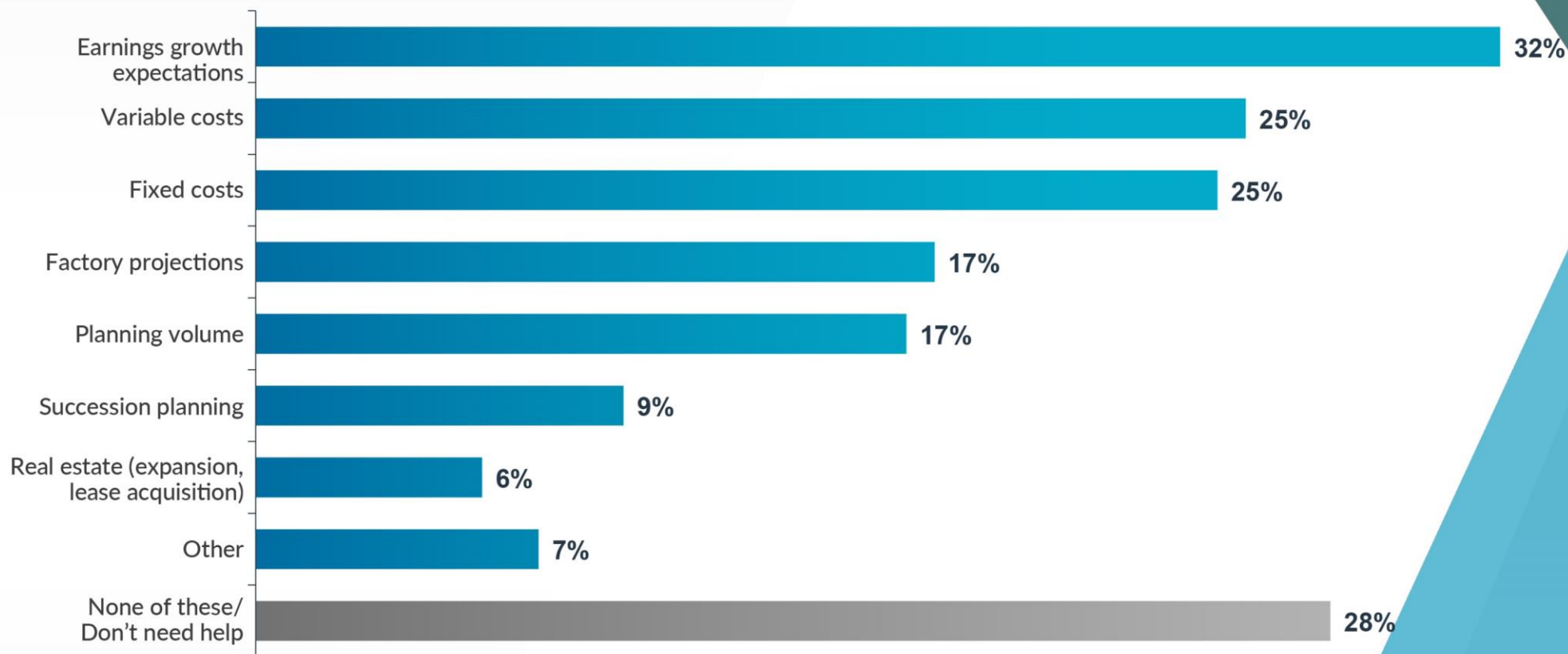
### COMPETITION FOR MARKET SHARE IN FINANCING.

In 2018, banks continued to pull back their vehicle financing efforts while interest rates are on the rise. At the same time, manufacturers have had to step up providing deep incentives to make new vehicles affordable. There are opportunities here for savvy dealers to improve their revenue with skillful partnership with technology-based auto finance companies that can provide attractive, multi-tiered loan packages for buyers with a minimum of paperwork. In the digital era, customers are looking for "fast and flexible" when it comes to financing.



## AREAS TO IMPROVE BUSINESS

The three areas to improve the business are earnings growth expectations (32%), variable cost (25%) and fixed costs (25%). Over one-fourth (28%) of respondents indicated that they don't need help or none of the options applied to them



Question: What area of your business do you need the most help to improve your business?

Base: All respondents; multiple answers permitted (n=138).

## IMPROVING EARNINGS GROWTH EXPECTATIONS A TOP CHALLENGE

When it comes to areas in which dealers are trying to improve business, nearly one third (32 percent) of dealers surveyed identified improving earnings growth expectations as a top challenge and an area in which they are likely to seek help in the form of professional services. These dealers are attempting to manage the future earnings and growth of their business while overcoming the headwind from multiple factors, including:

### RISING INTEREST RATES.

With interest rates on the rise, new vehicles are becoming more costly and out of reach of many buyers. At the same time, dealers are facing higher interest rates on loans, lines of credit and real estate, which is pushing the cost of doing business higher. Financing costs to acquire and operate dealerships are rising, and investors are demanding greater returns.

### COMPRESSED MARGINS ON NEW AND USED VEHICLES.

Rising costs and interest rates have squeezed dealer profit margins. Many analysts have stated that margin compression is the single biggest risk to a dealer's profitability today.





## **IMPROVING EARNINGS GROWTH EXPECTATIONS A TOP CHALLENGE**

### **PRESSURE FROM MANUFACTURERS.**

Vehicle manufacturers have a great deal of power over dealer sales and facilities, and they're not afraid to wield it. Rising costs to meet OEM rules are putting pressure on earnings expectations.

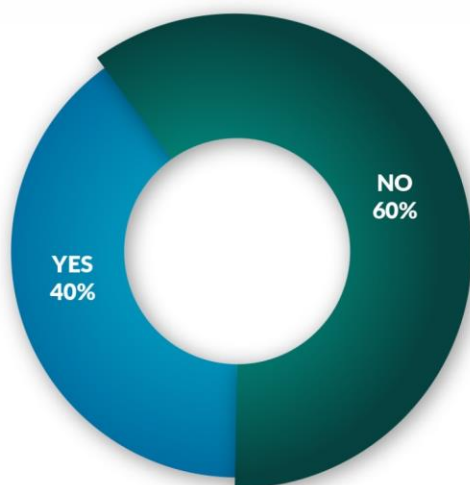
There are some strategies for improving long-term growth prospects and profitability even with all these challenges. By focusing on service and parts to maximize revenue, dealers are better able to cover the total expenses of the dealership. Many are now choosing to increase the emphasis on used vehicles, which have higher profit margins than new vehicles. Finally, they're turning to scale and expense structuring to enable expenses to be spread across multiple stores for the purpose of centralized accounting, dealer management systems CRM solutions and more, which drives down the cost structure of the business over that of the competition.



## PROFESSIONAL VALUATION

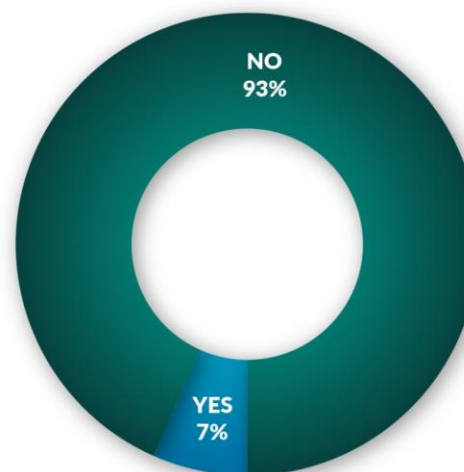
40% of respondents have had a professional valuation performed on their dealership in the past five years but only 7% of respondents would like professional assistance in valuing their dealerships.

**Has a professional valuation been conducted by a third party in the last five years?**



Question: Has a professional valuation been conducted by a third party in the last five years?  
Base: All respondents (n=137).

**Would you like professional assistance in properly valuing your dealership(s)?**



Question: Would you like professional assistance in properly valuing your dealership(s)?  
Base: All respondents (n=136).

## MAIN INITIATIVES TO IMPROVE DEALERSHIP

The most common initiatives the dealerships are using to improve revenue are fixed operation (53%) and expense review (50%). When addressing profit the same two initiative are the most commonly selected where expense review is an initiative for 62% and fixed operation for 53% of respondents. These is no initiative for improving valuation where the majority of respondents have undertaken.



Question: What are the main initiatives your dealership is undertaking to help improve the following:  
Base: All respondents; multiple answers permitted, Revenue (n=105), Profit (n=103), Valuation (n=77).



## DEALERS ARE LOOKING TO REDUCE EXPENSES

Sixty-two percent of respondents revealed that one of their primary goals in improving their dealership profits is to review expenses. Reducing expenses without considering the impact on quality can help boost profitability in the short-term, of course, but it can damage the business in the long term. One of the best ways to reduce expenses while keeping quality the same – or even improving it – lies in better efficiency.

### IMPROVING EFFICIENCY MIGHT MEAN:

#### *AUTOMATING SOME TASKS*

Are there repetitive, time-consuming tasks in your service or sales departments that could be improved with automation? Perhaps instead of making calls manually, you could implement a service that texts customers appointment information. This way, you can free up human workers to handle the more complex customer queries.

#### *USING SCHEDULING SOFTWARE*

Double-booking, missed appointments, and overbooking can cost a dealership money in the long run. A good scheduling solution can ensure that the right number of workers with the right skills are available the right time to meet the daily needs of the service department. .



## DEALERS ARE LOOKING TO REDUCE EXPENSES

### GETTING DIGITAL

Can customers book, change and cancel appointments via your Web site, or are you still relying on humans to do this work? According to the new J.D. Power 2019 Customer Service Index (CSI) Study, customer satisfaction scores tend to increase when car dealership service departments use customers' preferred methods of communication, and increasingly, this means digital channels.

### IMPROVE FFV METRICS

"Fixed first visit," is an increasingly important mantra in service businesses. Industry analysts recommend that dealers take an in-depth look at their FFV rates and determine ways to improve this metric as a way of cutting costs while simultaneously improving quality.

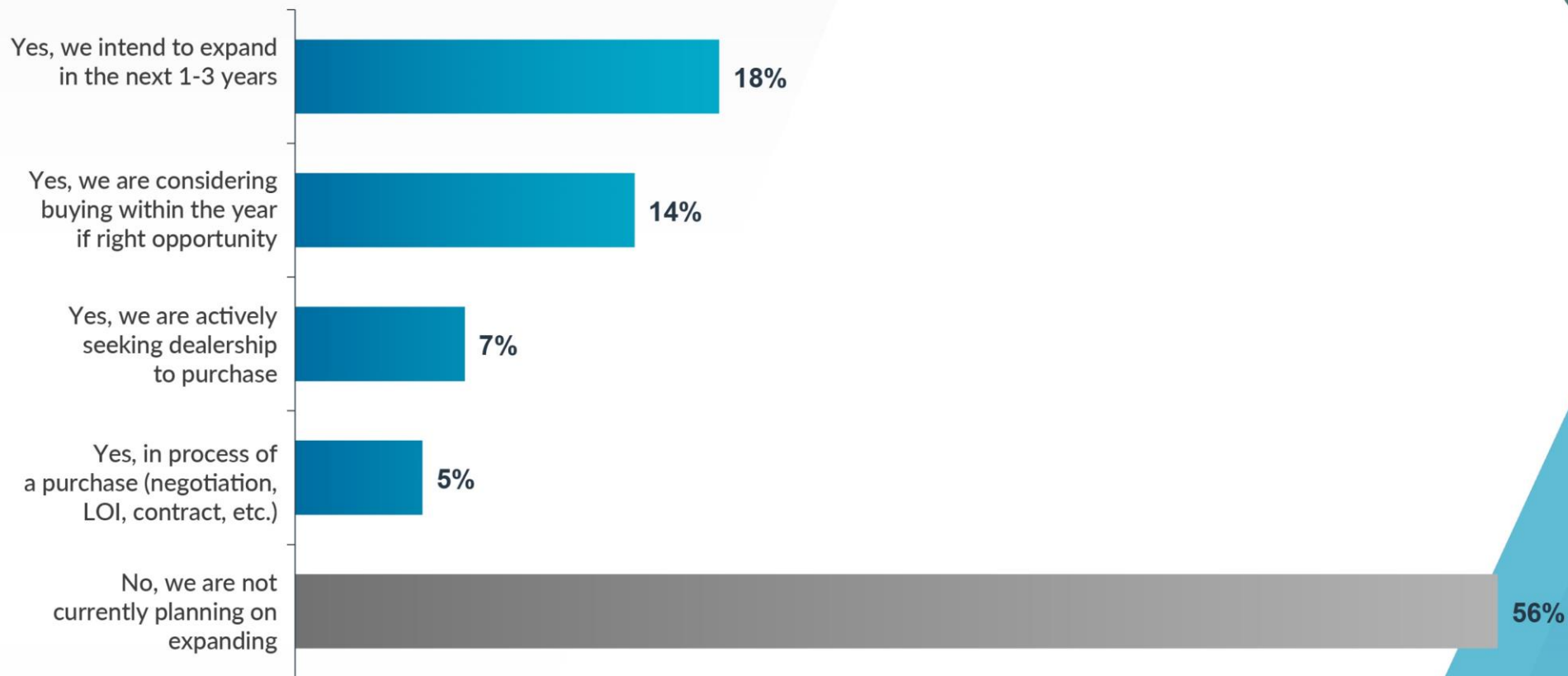
### UPDATE YOUR DIGITAL MARKETING

Data collected by NADA in 2017 found that the average dealership spends 55.4 percent of its budget across digital marketing channels. Despite this, the figures for marketing cost per vehicle sold has remained nearly the same: \$762 for luxury vehicles and \$630 for mass-market vehicles. It's not enough to have a digital marketing program, dealerships need to ensure their current digital marketing is effective and relevant to local customer searches for vehicles. Another way to evaluate the effectiveness of your efforts is to examine the dealership's call-tracking software to measure phone call conversions from paid search, digital, and offline marketing channels.



## DEALERSHIP OR AUTOGROUP EXPANSION

44% of respondents are currently looking to expand within the next three years.



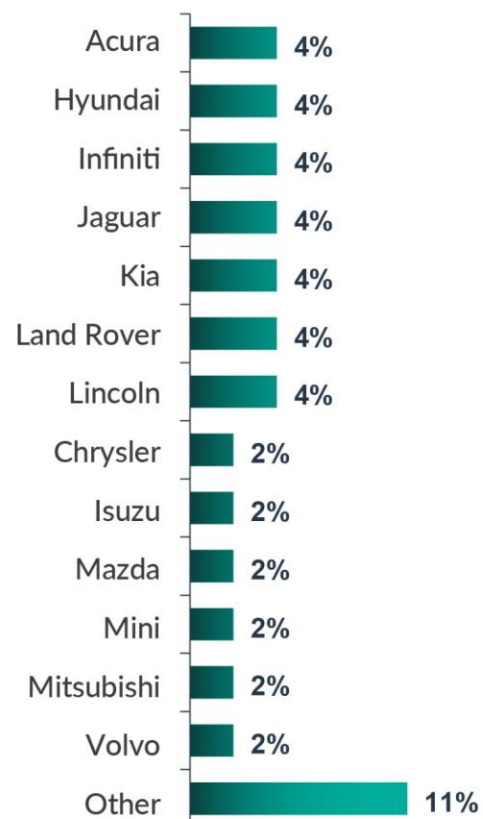
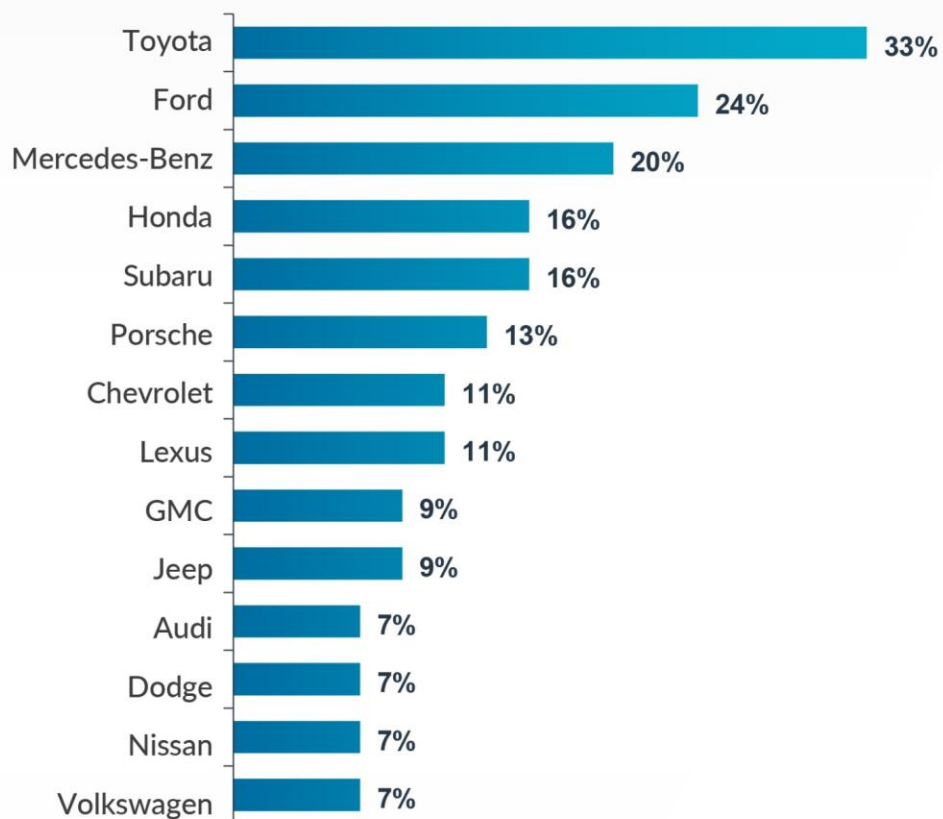
Question: Are you considering expanding your dealership or autogroup?

Base: All respondents; multiple answers permitted (n=111).



## TOP 3 BRANDS FOR EXPANSION

Toyota is the most popular brand (33%) for dealership expansion.

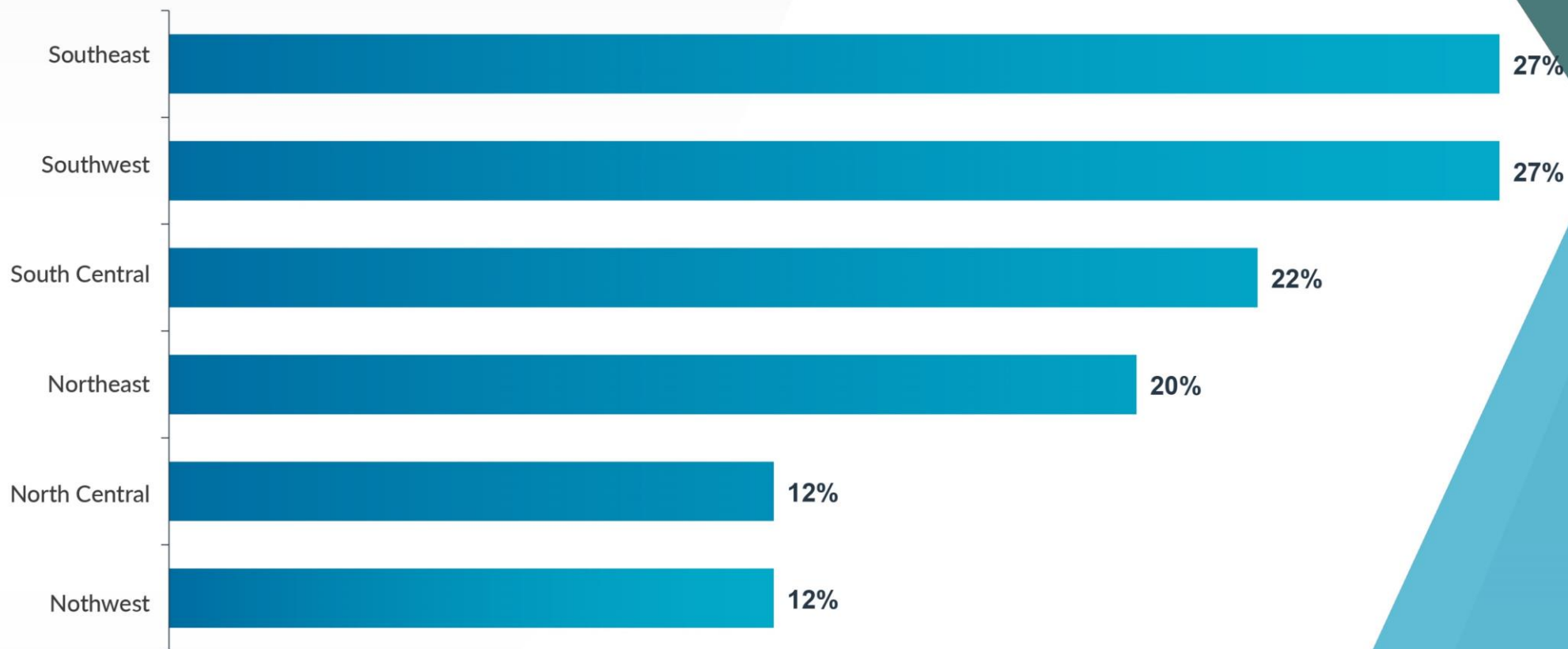


Question: What are the top 3 brands you are interested in expanding your dealership or autogroup?

Base: Respondents looking to expand (n=45); top three responses permitted.

## EXPANSION REGIONS

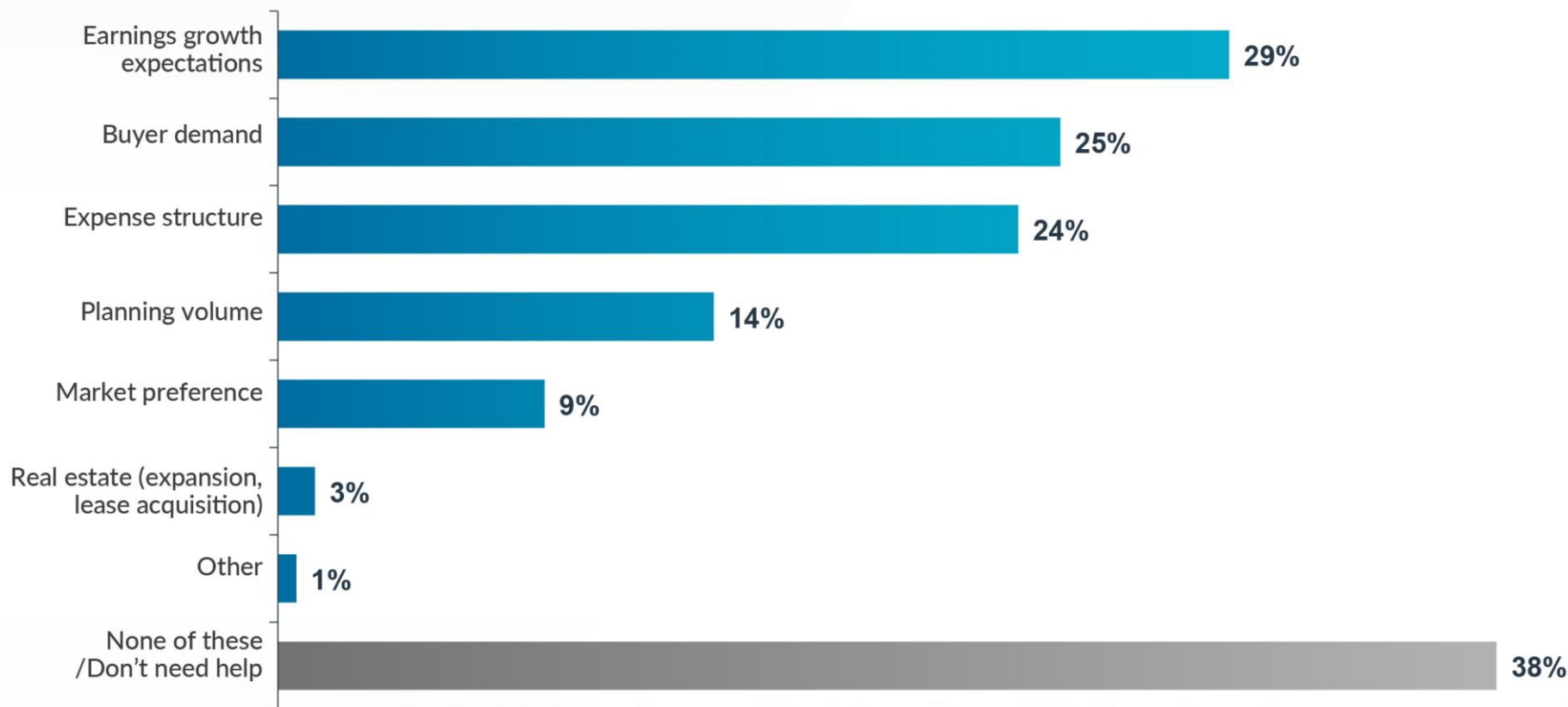
The most popular regions where expansion is planned is the Southeast and Southwest.



Question: Into which regions are you interested expanding your dealership or autogroup?  
Respondents looking to expand; multiple answers permitted (n=41).

## AREAS NEEDING HELP TO INCREASE VALUATION

To increase the valuation of their dealership, nearly 40% of respondents (38%) indicate that they don't need help or none of the choice options apply to them. 29% of respondents need the most help with earnings growth expectations to help increase their valuation.

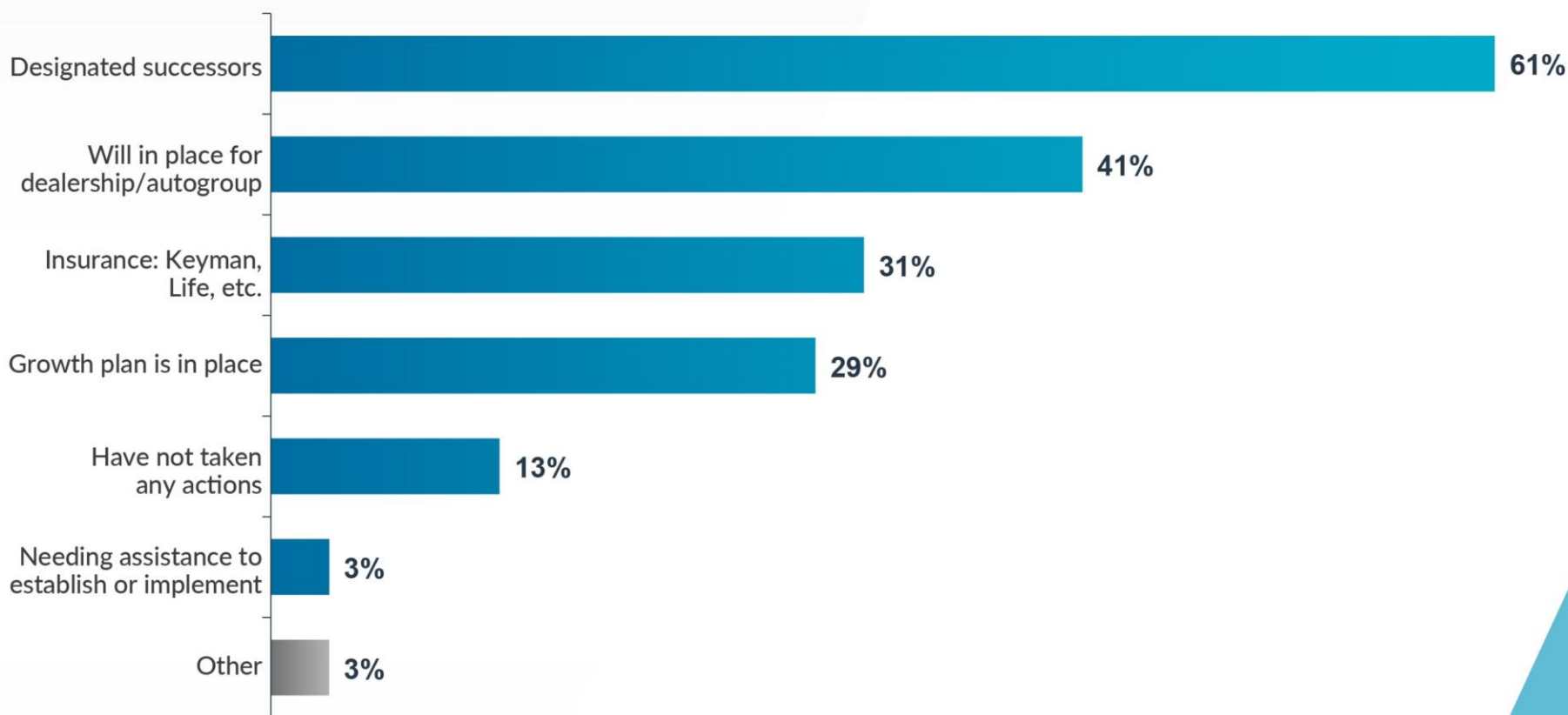


Question: Into which regions are you interested expanding your dealership or autogroup?  
Respondents looking to expand; multiple answers permitted (n=41).



## BUSINESS LEGACY

While 61% of respondents have a designated successor and additional 13% have not taken any actions on protecting their business legacy.



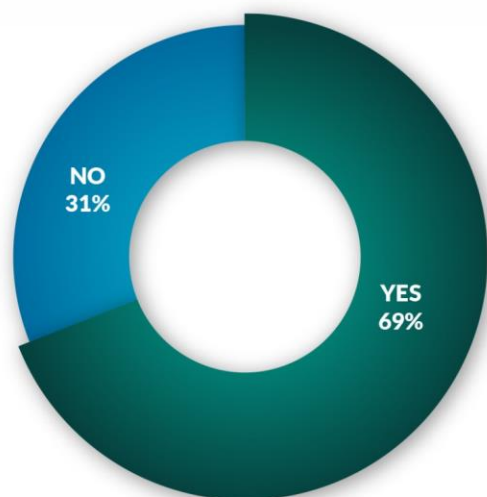
Question: What actions have you taken to protect your business legacy?

Base: All respondents; multiple answers permitted (n=94).

## SUCCESSION PLAN

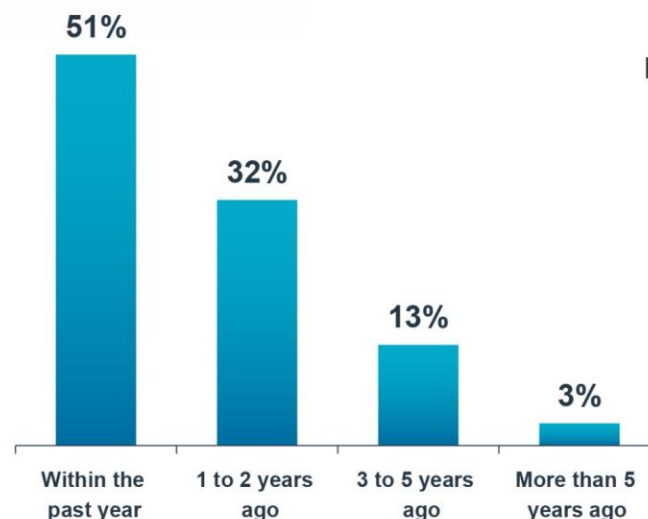
Nearly 7 out of 10 respondents (69%) have a formal succession plan in place. Of those who do have a formal plan in place, the majority have last updated the plan within the last two years (83%) and 75% have designated family members as their successors.

### Do you have a formal (written plan) succession plan in place?



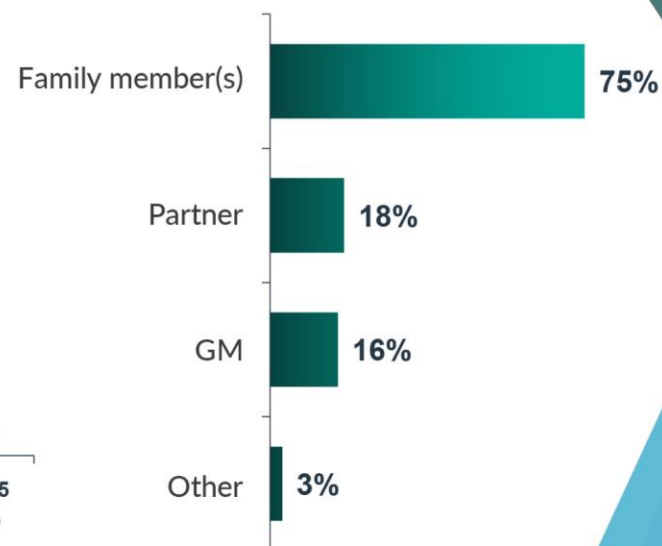
Question: Do you have a formal (written plan) succession plan in place?  
Base: All respondents (n=100).

### When was the succession plan last updated?



Question: When was the succession plan last updated?  
Base: Respondents have a formal succession plan in place (n=68).

### Who is your designated successor or successors?



Question: Who is your designated successor or successors?  
Base: Respondents have a formal succession plan in place (n=68).

## SUCCESSION PLAN

While the survey found that a majority of dealership owners have a succession plan in place, nearly one-third of all dealers – thirty-one percent – do not. Those without plans are taking significant risks. Most principals at auto dealerships oversee day-to-day operations, so if something were to happen to them, it would remove one of the key parts (perhaps the key part) of the business.

Many dealers who do have a plan in place need to go further and ensure that it's updated, and that it addresses the often-overlooked elements that create value and build the foundation for sustainable success in the future.

Strategic planning is critical and often overlooked by dealers as a part of the succession planning process. This planning involves the participation of key leaders and family members who will ultimately manage the business, and develops and refines the company's mission, core values, and a three- to five-year vision with corresponding action steps to achieve identified objectives.

Based upon the perspectives of those involved in the planning process, the strategic outcomes may focus on recruiting top talent, building bench strength, growing the business, identifying alternative revenue sources or simply finding better ways to sell more cars, service customers and drive profit. If there is family involved – particularly multiple family members who may have divergent views about the future of the business – now is the time to address how the shift will occur.

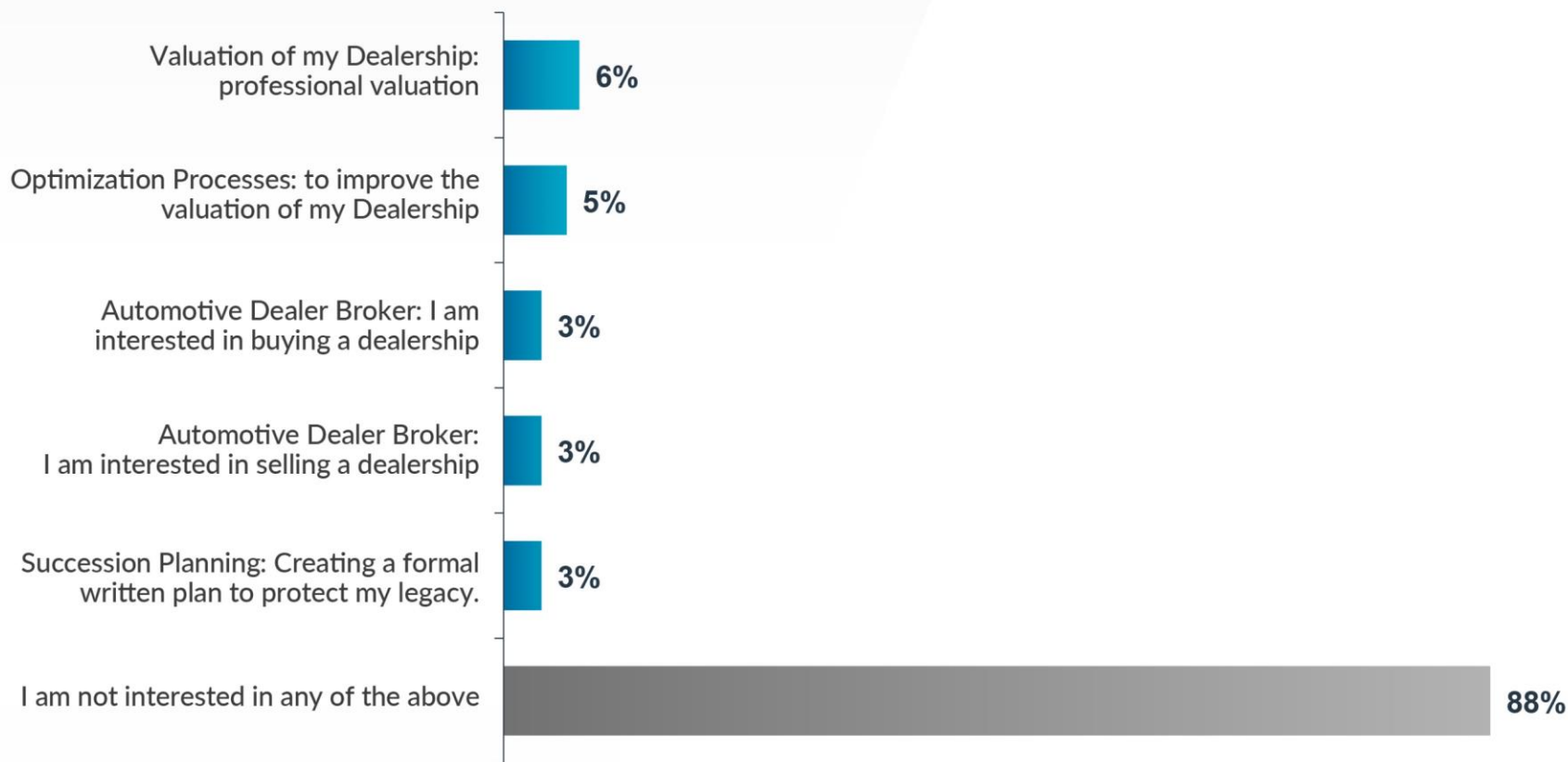
When multiple family members are present, it can often become a question of determining who will be the successor while keeping positive family relationships. Once the strategic plan is complete, it should include performance metrics and compensation plans tied to the achievement of the business' strategic goals. This way, the plan will come alive rather than sit on the shelf, and it will become clear if any part of it needs to be reworked.





## INTEREST IN PROFESSIONAL ASSISTANCE

There is a strong lack of interest in professional assistance for the dealerships. 88% indicated they are not interested in any of the areas of assistance that were listed.



Question: Are you interested in professional assistance in any of the areas below?

Base: All respondents; multiple answers permitted (n=95).

# ***ABOUT DCG ACQUISITIONS***



## ABOUT US

### DCG Acquisitions is a full-service automotive M&A firm.

We successfully manage and execute the sale and purchase of dealerships.

The DCG Acquisitions team has the depth of critical experience, expertise, relationships, and resources to deliver success whether a succession plan, simple acquisition, or complex multi-dealership sale. More importantly, the team has a track record of success.

#### Depth of Experience:

Each member of the DCG Acquisitions team has 10 to 30+ years of incomparable automotive industry experience and in-depth expertise across all critical areas.

#### Key Relationships and Resources:

DCG Acquisitions has extensive relationships with OEM's, automotive attorneys, accountants, and financial institutions including traditional banks, private equity firms and investment funds.

#### Successful Track Record

The DCG Acquisitions team has collectively participated in and/or has directly closed **OVER \$10.5 BILLION** in successful dealer acquisitions over their careers.

#### Successful Track Record

Dave Cantin has personally closed **OVER \$2 BILLION** of transactions in collaboration with both strategic and private equity investors

DCG Acquisitions offers a free consultation on succession planning.  
Contact us to discuss your needs. 1-800-722-8621





## **DAVE CANTIN**

### **CEO & FOUNDER DAVE CANTIN GROUP**

Dave's career in the automotive industry spans over 20 years. His passion and dedication to exploring innovative sales opportunities led him in taking a small local car dealership to become the largest single point car dealership in the world.

Since selling the dealership in 2015, Dave regularly consults on dealership acquisitions for large public and private automobile groups. He has extensive knowledge in analyzing evaluations for dealerships worth and helping negotiate a complete buy/sell transaction. Dave's specialty is representing platform acquisitions, overseeing multiple dealerships within an individual deal.

In 2017, Dave closed the second largest auto buy/sell in U.S. history; Prime Motor Group, consisting of over 30 dealerships. The largest deal of its kind ever done by a broker, it is the second largest automotive acquisition behind Warren Buffett's 2015 acquisition of the Van Tuyl Group which eventually became Berkshire Hathaway Automotive.

NJ BIZ featured him in their 2014 edition of "40 under 40" recognizing him for his commitment to business growth, professional excellence and his dedication to the community. Also in 2014, founding member of KISS and Rock & Roll Hall of Fame inductee, Peter Criss presented Dave with the Man of Courage Award for Philanthropy sponsored by the Beauty Foundation. He was recognized because of his courage to stand tall in the face of insurmountable adversity.

Beyond his business achievements, Dave also beat the odds to champion over his diagnosis of Leukemia in 2011. After 5 years of chemotherapy, Dave Cantin is now cancer free.

Motivated by inspiring others and giving back. Dave has pledged extensive time and effort in the pursuit of finding a cure for childhood cancer. Through programs with his former dealership and external fundraising events he is unwavering in his commitment to funding pediatric cancer research. Dave has been a board member for several foundations including Hope & Heroes Columbia University Medical Center, Project Ladybug, and Hyundai Hope on Wheels, where he served as the Vice Chairman. He has been instrumental in raising over 100 million dollars towards curing pediatric cancer.

Cantin maintains homes in California and New York.



[dave@davecantingroup.com](mailto:dave@davecantingroup.com)



## DCG ACQUISITIONS EXECUTIVE TEAM

# BRIAN BROWN

### CHIEF OPERATING OFFICER DCG OPERATIONS

Brian has 30 years automotive experience focusing on every aspect of the automotive business and dealership operations. He has spent a majority of his career working at General Motors at a corporate, regional and field level. He has a proven automotive understanding from a wholesale and retail perspective as it relates to product advertising/marketing, OEM processes, dealership operational processes, variable/fixed strategies, and employee engagement.

He was instrumental in not only developing and executing upon a private equity automotive strategy that established a top-10 privately held automotive company in the United States with over \$3.2 billion in annualized revenues, he also led the efforts to seamlessly transition all the dealerships while driving employee engagement and operational/staffing improvements.

Brian's success is driven by his unique ability to view/understand the business not "as it is" today but "as it needs to be" for success tomorrow. He has an established network of OEM, private equity and dealership contacts to develop and drive future business strategies.



[brian@davecantingroup.com](mailto:brian@davecantingroup.com)

## DCG ACQUISITIONS EXECUTIVE TEAM

# STEPHEN JONES

### DIRECTOR OF ACQUISITIONS

Stephen Jones is an experienced acquisition advisor with a demonstrated history of success in the automotive industry. Stephen specializes in helping buyers and sellers streamline automotive retail buy/sell transactions.

Prior to joining DCG, Stephen was on the investment team at a large private equity firm where he played a key role in the successful acquisition of over 50 dealerships, including two major dealership platforms: Kenny Ross Automotive Group and Prime Motor Group, the second largest automotive buy/sell transaction in U.S. history.

Stephen started his automotive career in Sonic Automotive's Corporate Development department where he provided key analysis to executive management resulting in the completion of 18 dealership buy/sells. In addition, he supported the real estate acquisitions for Sonic's EchoPark stores, leading to the opening of 6 fully operational locations in Colorado.

Stephen began his career in public accounting at Grant Thornton where he specialized in financial statement audits and Transaction Advisory Services. He is a licensed CPA in the state of North Carolina.



[stephen@davecantingroup.com](mailto:stephen@davecantingroup.com)



## DCG ACQUISITIONS EXECUTIVE TEAM

# BRIAN TRAUGOTT

### DIRECTOR OF ACQUISITIONS

Brian Traugott has a wealth of experience in sales operations, marketing, and sales backed by his blend of analytical and people skills that have delivered results in everything he has done. Having worked in multiple industries prior, his start in automotive was with General Motors where he excelled through their sales development program, before managing major metro markets on both coasts of the U.S., and field operations in the Northeast region.

At General Motors, Brian worked with the dealer network to drive sales and process improvement through his analytical expertise and data analysis, as well as strong understanding of dealer financials. He excelled through their sales development program before managing major metro markets on both coasts of the country, as well as spending time on the corporate side in the office. Here he was instrumental in streamlining the processes and successfully closing up and activating NER buy/sell transactions, as well as administering the dealer performance program focused on driving up underperforming stores in areas of retail sales index, customer satisfaction, and capital requirements. Working as a partner to dealers, Brian was also one of GM's dealer financial report experts that held consultations on financial performance and KPI metrics to drive profitability. He most recently was the lead for GM in the Northeast in transitioning activation and termination of buy sells smoothly.

Brian has a unique perspective on automotive buy/sell transactions having led GM's Northeast region's activation and termination process from whined down to start up of the stores.

He is a graduate of Niagara University where he completed his M.B.A. in Strategic Management and two undergraduate degrees in Mathematics and Marketing. While there he led the Purple Eagle's NCAA Division 1 Cross Country, and NCLL Lacrosse teams as their captain. His love for sports still drives him to compete today, as well as to mentor and coach young athletes and students to their future athletic and personal success.

Brian is an achiever who is an intense and fast learner you can challenge with any role you need him on your team; and will find a way to succeed. With his analytical nature and industry knowledge and connections he is ready to support all your automotive M&A needs.



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## DCG ACQUISITIONS EXECUTIVE TEAM

# STEPHANIE LICATA

### DIRECTOR OF OPERATIONS

With nearly two decades of combined management and leadership development experience, Stephanie is a multi-faceted strategist and organizational development professional, with sub specialties in marketing and marketing operations.

She deeply understand organizations from every angle: from managing mission, vision and messaging to streamlining operations, delivering training, and helping individuals and teams succeed.

Stephanie has worked in a variety of industries creating business and team growth including marketing, technology, media training and development, human resources, education, public relations, non-profit and beyond.

Stephanie has a Masters in Organizational Psychology from Columbia University and a Professional Coaching Certificate from New York University.



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## **MICHELLE AMODIO**

### **COMMUNICATIONS MANAGER**

Michelle spent over 15 years in the tech sector writing about IP communications, call center/CRM services, IoT/M2M, alternative power, and automotive technology. After working in the B2B tech market, she started focusing on helping other businesses with their communications projects and strategies. Her experience runs the gamut, from drafting and editing materials and communications copy, to collecting data and maintaining databases all while supporting business teams and helping them to succeed with their goals. Michelle's passion has always been about helping businesses implement the right communications strategies, as well as providing administrative support to programs and internal teams all across the country.



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# ***ABOUT INFORMA ENGAGE***

## INFORMA ENGAGE

Informa Engage is the marketing services powerhouse behind Informa's trusted brands. We provide B2 Bmarketers with unrivaled specialist audiences, deep knowledge of vertical markets, sophisticated data and content marketing expertise.

Through our deep understanding of our customer's behaviors and changing needs, Informa Engage connects marketers to customers as they move from discovering a problem to identifying features and functionality of a solution to selecting a provider and making a purchase. dealership.

**250+**

DATA, INSIGHT &  
INTELLIGENCE  
PRODUCTS

INTELLIGENCE

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ACADEMIC BOOKS  
& JOURNALS

KNOWLEDGE

**1,800K**

EVENTS &  
EXHIBITIONS

EVENTS

**180+**

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WORLDWIDE  
FUELING A RICH  
DATABASE

GLOBAL REACH

With reach to 30+ million business decision makers.

## MEET OUR RESEARCH LEADERSHIP TEAM

The Informa Engage Market Research team adheres to the highest standards in market research, conducting over 300 custom research studies each year for B2B clients in a wide variety of industries. Each member of the Research Leadership Team has over 20 years of research experience.



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***THANK YOU***



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