DUCKER CARLISLE

GLOBAL CONSULTING, STRATEGY AND M&A SERVICES

SEE WHAT THE INDUSTRY SEES.

THEN SEE WHAT ONLY YOU CAN.

The Ducker Carlisle Insights Subscription.
Real market intelligence for the decisions shaping your business.

DUCKERCARLISLE.COM

BENGALURU | BOSTON | DETROIT | LISBON | MUNICH | NEW DELHI | PARIS | SHANGHAI

THE MOMENT

The industry is moving faster than your data can keep up.

WHY IT MATTERS

Aftersales is where margin is defended, loyalty is earned, and reputation is built. Dealer and network capacity, technician turnover, tariffs, supplier disruptions, and evolving equipment technology are all moving at once.

The OEMs winning this are the ones making decisions with real market intelligence, in real time. Not just their own numbers. The full industry picture, refreshed as it changes.

That is what Ducker Carlisle delivers.

THE COST OF WAITING

$23.5M

Estimated annual cost to an average OEM for every 1% of UIO not fixed right the first time. Decisions made with stale data are decisions made too late.

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WHAT WE SOLVE FOR

Better decisions. Made with better intelligence. From every angle.

Ducker Carlisle gives you four lenses on the industry, in one place.

SEE THE INDUSTRY

The full peer picture

How the industry is performing across parts and service, benchmarked and continuously updated. Learn from peers before you have to learn on your own.

HEAR THE DEALERS

The dealer voice

What your parts managers, technicians, service advisors, and managers are actually experiencing, benchmarked across brands.

READ THE MARKET

The customer signal

Consumer sentiment, aftermarket demand, and market sizing that show where the industry is heading, not just where it has been.

ASK YOUR QUESTIONS

Answers to what you need

Custom studies and deep dives on the specific questions your business is facing right now, delivered by analysts who know the channel.

30+	175+	14,000+	30,000+	30+
OEMs	warehouses	dealers	annual dealer voices	years of history

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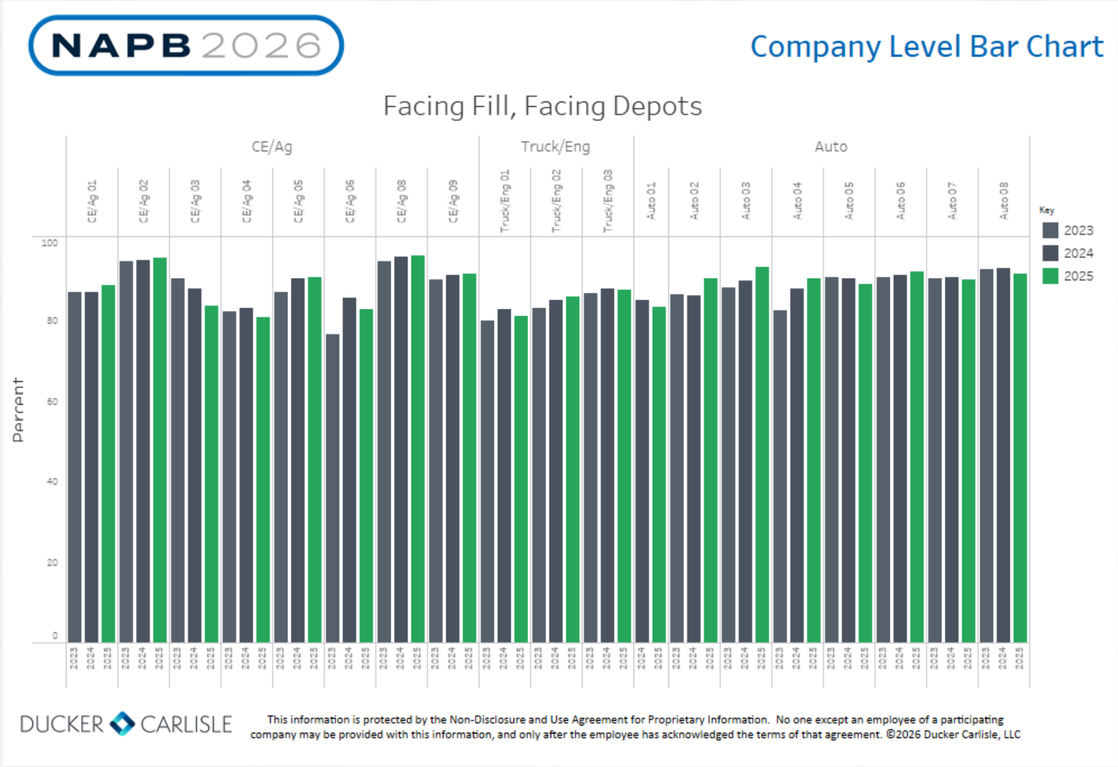
The dashboard that stays open. The data that keeps moving.

The Aftersales Intelligence Dashboard gives you continuous access to your most critical KPIs, refreshed on the cadence they move at. Your definitive annual benchmark, plus the month-to-month view of what is changing in between.

Always on, always accessible
Log in from any device, any time.
The dashboard doesn't close.

Refreshed as the market moves*
The KPIs that shift most, updated monthly.
The benchmark, published annually.

Compare at any level
Peer averages, segment cuts, regional views, historical data. Filter to your question.



* Critical KPIs refreshed monthly. Full benchmarks published annually. Dashboard access is continuous.

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THE INSIGHTS TOOLKIT

The tools inside every package.

A short guide to what each element gives you, before you choose a package.

BENCHMARKS & DATA

Aftersales Intelligence Dashboard
DC's continuously accessible benchmarking dashboard. Log in from any device to see how your parts and service operations compare to the industry, with critical KPIs refreshed monthly.

NAPB
North American Parts Benchmark. Since 1993. Contribute your parts operations data; receive a full annual benchmark showing how you compare against peer OEMs across 175+ metrics.

NASB
North American Service Benchmark. Since 2006. Service retention, technician turnover, customer-pay sales per repair order, and 87 other service KPIs, published annually.

EVAB
Electric Vehicle Aftersales Benchmark. Covers EV-specific parts and service operations, including dealer readiness, technical training, and EV battery logistics. The full aftersales side of the EV transition.

Focus Day
Full-day working sessions on a single high-priority topic, with peer OEMs and DC analysts in the room. A deep, practical view of one topic that matters now.

Conference Passes
Each pass admits one team member to the annual NAPB or NASB conference — peer sessions, analyst briefings, and network conversations.

DIRECT VOICE & CUSTOM

Dealer Surveys (Auto)
Annual surveys of dealership staff — parts managers (APMS), service managers (ASMS), Accessory Sales Teams (AAS), service advisors/technicians (ASAS/ATS). 53,000+ voices a year.

Dealer Surveys (Heavy Equipment)
Heavy Equipment Parts Survey (HEPS) captures the voice of dealer parts managers; Heavy Equipment Service Survey (HESS) rotates annually across service managers, service advisors, and technicians. Both benchmarked across HE brands.

Custom Studies
Light (~5 questions) or full (~20 questions, results webinar) research on a question specific to your business. Answers in weeks, not months.

Market Monitor
Two components in one product: a one-time Market Size and Share deep-dive assessment of your parts market share versus OEM benchmark peers, plus a monthly-updated dashboard tracking service transaction volume and value across the automotive service market by segment (OEM dealers, chains, tire, quick lube, IRFs).

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WHY SUBSCRIBE

Market intelligence. The relationship built to deliver it.

The Ducker Carlisle Insights Subscription gives you continuous access to the intelligence, on terms that let your organization plan around it.

01
Price certainty
Lock in a known annual cost for two to three years, with a capped CPI escalation. No unexpected increases at renewal.

02
Meaningful Savings
Subscription rates offer real savings versus single-year pricing. Discussed at the contracting stage.

03
Stronger partnership
More analytical and advisory resource from DC.

04
Cross-subscriber intelligence
As more OEMs subscribe across more products, benchmark comparisons get deeper and more comparable.

05
Priority access to what's next
First access to new benchmarks, product extensions, AI-enhanced alerting layers, and pilot opportunities.

06
Simplified procurement
One Master Subscription Agreement. One contract, one invoice, one renewal conversation.

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HEAVY EQUIPMENT PACKAGES

Five levels of market intelligence, built for how heavy equipment operates.

Parts and Service sit alongside each other. Full combines both and delivers the complete intelligence view.

01
ACCESS
See the industry

02
FOCUSED
One benchmark

03
PARTS
The parts view

04
SERVICE
The service view

05
FULL
The complete view

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HEAVY EQUIPMENT · ACCESS

See the industry, before you're in it.

THE INTELLIGENCE YOU GET

An intelligence on-ramp for organizations building their view of the industry. For new heavy equipment OEMs interested in learning more, before committing to full participation.

ON-RAMP

2yr

Structured transition into full participation when you're ready.

Access is the on-ramp. Parts or Service is the next step.

WHAT'S INCLUDED

- **NAPB anonymized industry data**
  Aggregated benchmark and survey results with no OEM identified. See where the HE industry is without contributing your data yet.
- **3 conference passes**
  Three team members at the annual NAPB conference.
- **Defined upgrade path**
  A structured transition into Parts, Service, or Full after the first year.

TOOLKIT REFERENCE

NAPB Conference = annual parts benchmark event · **Full participation** = contribute data, receive full benchmark

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HEAVY EQUIPMENT · FOCUSED

One benchmark. One focused view.

THE INTELLIGENCE YOU GET

For HE OEMs whose intelligence needs center on a single benchmark. Focused is offered on an exception basis, typically for smaller OEMs whose engagement is limited to parts operations.

EXCEPTION BASIS

1 Benchmark, for OEMs with focused parts operations engagement.

Focused is the exception fit. Most HE OEMs benefit from Parts, Service, or Full.

WHAT'S INCLUDED

- **NAPB participation**
  Full parts benchmark. Your data in, full peer comparison out.
- **3 conference passes**
  Three team members at the annual NAPB conference.
- **1 Focus Day**
  One full-day working session on any Focus Day topic offered in the year.
- **Dashboard access**
  Continuous access to the Aftersales Intelligence Dashboard for NAPB, with critical KPIs updated monthly.

TOOLKIT REFERENCE

NAPB = parts benchmark · **Focus Day** = peer working session · **Dashboard** = Aftersales Intelligence Dashboard

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HEAVY EQUIPMENT · PARTS

See what your parts operation looks like next to the industry.

THE INTELLIGENCE YOU GET

For heavy equipment OEMs where the parts operation is the strategic focus. Parts combines the industry benchmark, the dealer parts voice, and continuous dashboard access into one intelligence view of your parts network.

SAVINGS OPPORTUNITY

$650K+

Estimated annual savings for an average HE OEM reaching best-in-class parts performance.

Parts is the natural fit for HE OEMs where the parts operation is the strategic focus.

WHAT'S INCLUDED

- **NAPB participation**
  Full participation in the industry parts benchmark. Your data compared against all peer OEMs across both automotive and heavy equipment.
- **4 conference passes**
  Four team members at NAPB.
- **1 Focus Day**
  One full-day working session on any Focus Day topic offered in the year.
- **Dashboard access for NAPB**
  Continuous access to the Aftersales Intelligence Dashboard for NAPB, with critical KPIs updated monthly
- **HEPS**
  Heavy Equipment Parts Survey. The direct voice of dealer parts managers, benchmarked across the HE industry.

TOOLKIT REFERENCE

NAPB = parts benchmark · **HEPS** = HE parts manager survey · **Dashboard** = Aftersales Intelligence Dashboard

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See where your service network stands, and where it is quietly losing ground.

THE INTELLIGENCE YOU GET

For heavy equipment OEMs where the service network is the strategic focus. Service combines the industry benchmark with the direct dealer service voice, so you see both how you perform and what your dealers are actually experiencing.

INTELLIGENCE

12

Service topic deep-dives at the NASB conference, including 3 dedicated to heavy equipment challenges.

Service is the natural fit for HE OEMs where the service network is the strategic focus.

WHAT'S INCLUDED

- **NASB participation**
  Full participation in the industry service benchmark. Your data compared against all peer OEMs across both automotive and heavy equipment.
- **4 conference passes**
  Four team members at NASB.
- **HESS**
  Heavy Equipment Service Survey. Rotates across service managers, service advisors, and technicians in the HE channel. Plus, how you compare to your peers.
- **Peer network access**
  The peer forum where HE OEMs share what is working on the service topics defining the industry now.

TOOLKIT REFERENCE

NASB = service benchmark · **HESS** = HE service survey (rotating roles)

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HEAVY EQUIPMENT · FULL

The complete intelligence picture. On one agreement.

THE INTELLIGENCE YOU GET

For heavy equipment OEMs where parts and service are both strategic. Full combines the complete Ducker Carlisle intelligence portfolio into a single commercial relationship.

PEER NETWORK

30+

OEMs contribute to and learn from the same benchmark data, protected under strict NDA.

Full is the right long-term fit for most heavy equipment OEMs.

WHAT'S INCLUDED

- **Full benchmark and survey suite**
  NAPB, NASB, HEPS, HESS. Parts and service benchmarks plus both direct-voice surveys.
- **8 conference passes total**
  Four passes each at NAPB and NASB.
- **Focus Days included**
  Access to all Focus Day sessions offered in the year (typically 3-4).
- **Dashboard access**
  Continuous access to the Aftersales Intelligence Dashboard for both NAPB and NASB. Monthly KPI updates for NAPB.
- **Custom executive workshop**
  A strategic session led by DC experts, reviewing your performance across all products and highlighting where to prioritize improvement efforts.
- **1 light custom study + cross-benchmark access**
  One 5-question custom study per year, plus ad-hoc access to other DC benchmarks including EVAB.
- **15% ad-hoc discount**
  Preferred rate across all ad-hoc additions.

TOOLKIT REFERENCE

NAPB/NASB = parts & service benchmarks · **HEPS/HESS** = HE parts & service surveys · **EVAB** = EV aftersales benchmark (ad-hoc)

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HOW TO ENGAGE

A conversation.

Three steps to the intelligence.

01

Discovery call

A 30-minute conversation to understand your current view of the industry and where you want to strengthen it.

02

Package recommendation

We propose the package that matches your organizational scale and strategic priorities, with pricing tailored to your scope.

03

Contracting

A single Master Subscription Agreement covering the full relationship. Two-year term standard; three-year available.

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YOUR DUCKER CARLISLE TEAM

The people behind the intelligence.

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The standards behind the intelligence.

01 | How current is the data?

The Aftersales Intelligence Dashboard is continuously accessible, with critical KPIs refreshed monthly. Full benchmarks are published annually.

02 | Who owns the data?

Ducker Carlisle owns all benchmark data, survey instruments, indices, and derived metrics. Subscriptions convey a license to access and use insights.

03 | How is confidentiality protected?

You see peer benchmark data under a strict NDA. Survey responses are anonymized before publication.

04 | How does pricing get set?

Pricing is set based on organizational scale, participation history, and package scope. Final pricing is confirmed during the contracting phase.

05 | What is the contract term?

Two-year subscription is standard. Three-year terms are offered. Auto-renewing with 90-day notice to cancel.

06 | How is dealer engagement managed?

Strict frequency-cap governance. No individual dealer respondent is contacted more than twice per calendar year across all DC programs.

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THE INSIGHTS PORTFOLIO

AFTERSALES INTELLIGENCE DASHBOARD · NAPB · NASB · EVAB · DEALER SURVEYS

BETTER DECISIONS, IN THE MOMENT YOU NEED THEM.

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