

GLENN MERCER

Cleveland, Ohio, USA
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INDEPENDENT AUTOMOTIVE CONSULTANT, GM Automotive LLC **2006-present**

- Private equity advisory work in the automotive arena (car and truck OEMs, suppliers, distributors, dealers, aftermarket, etc.) with Greenbriar Equity Group and others; member of Board, automotive supplier Tinnerman (formerly), truck supplier Grakon (currently)
- Advisor to John Casesa at Guggenheim Partners (www.guggenheimpartners.com); former Advisor, Casesa & Company
- Advisor, AllianceBernstein (specifically Max Warburton, EU automotive equities), on special projects (e.g. on scale economies in OEM M&A)
- Expert witness work in the automotive arena (for Chrysler, Chery, et al.)
- Advisor to Ricardo PLC's Strategy Consultancy (branch of UK automotive engineering firm)
- Occasional columnist, *Supplier Business*, *Edmunds Auto Observer*
- Senior Director, International Motor Vehicle Program (based at Wharton, MIT, U of Tokyo)
- Member, automotive research consortium GERPISA (based in France; as such author of chapter on Ford in *The Second Automobile Revolution*, Palgrave Macmillan, 2009)
- Special automotive projects for governments (e.g. US Dept. of Energy, Industry Canada)
- Lecturer on economics of auto industry, Case Western Reserve University, Wharton School
- Past advisor to the Automotive X Prize
- Advisor to the Rocky Mountain Institute in automotive topics

MCKINSEY & COMPANY, Cleveland, London, Copenhagen, Milan, etc. **1985-2006**

Partner / Senior Practice Expert (Automotive) **1992-2006**

Within the automotive sector, provided clients focused expertise and knowledge in all functional areas (e.g. product development, sourcing, purchasing, manufacturing, logistics, distribution, retailing (dealerships), marketing, etc.) on diverse topics such as globalization, labor issues, modularization of cars, platforming, warranty and quality management, technology management, channel management, etc.. Contributed comprehensive insights into P&L economics (revenues, costs, capital) throughout, as well as forecasts of key trends over time. Global coverage (experience in NA, Latin America, Asia, Europe). Highly detail-oriented: granular analysis as well as "big picture." Fast response time with good focus on key points. Supplemented own knowledge with extensive network of industry contacts in multiple countries.

¶ Staffed directly on client assignments including negotiating and launching projects, managing projects, and providing information and insight. Also supported McKinsey teams around the world either in person or via email, telephone calls, videoconferences, etc. Roughly 250 client situations "touched" each year. Main client involvements included:

- Top management of most American, European, and Asian car makers over a period of 20 years, on topics including distribution strategy, product development processes, technology introductions, marketing spend effectiveness, incentive design, dealership relations, supplier management, purchasing strategy and tactics, etc. – c. 50 projects over the last decade.

- Top 10 suppliers in Europe, North America, and Asia; major dealer groups; top 10 aftermarket firms; automotive insurers; used car entities; truck firms; car rental firms; automotive finance companies and more. Worked with these firms on a wide range of topics, from sales and marketing to technology portfolio to global sourcing to factory operations, etc. – c. 100 projects over the last decade.
- Over 25 investment firms (hedge funds, private equity groups, bond traders, principal investors, etc.) advised on 50+ potential acquisitions and due diligence projects, ranging in size from \$10 million to \$1+ billion, including OEM suppliers, dealerships, service firms (e.g. extended warranty providers), aftermarket distributors, etc. Provided insights on industry dynamics, technology trends, competitive positioning, operational effectiveness, strategy, profitability, etc.

- ¶ Contributed to new business development efforts with above-mentioned clients, including letters of proposal, negotiation meetings, study kick-offs, “dog and pony” shows, etc.
- ¶ Led or participated in c. 25 McKinsey Automotive Practice research projects in the last decade, including Global Sourcing, Future Powertrains, Supplier OEM Interface, Car Retailing Incentives Optimization, Supplier Restructuring Outlook, and more.
- ¶ Authored over 100 articles, speeches, and presentations, including speeches at industry association meetings (including OESA, RMA, IBIS, Bel-Air Partners, APEX, AFI, GAAS, etc.), investor conferences, university programs, and research groups (see below).

Senior Engagement Manager, Engagement Manager, Associate **1985-1992**
 Led teams and worked with senior executives at client companies to resolve key strategic and operational issues in industrial, automotive, and service corporations.

BP / STANDARD OIL OF OHIO, Cleveland, OH **1981-1985**
 Retail planning group, corporate planning, licensed petroleum futures trader, etc.

CENTRAL INTELLIGENCE AGENCY, Langley, VA **1977-1979**

EDUCATION

Tuck School of Business, Dartmouth College, MBA, with honors, 1981
Yale University, MA, Soviet and East European Area Studies, 1979
Dartmouth College, AB, Russian Studies *magna cum laude*, 1977

PROFESSIONAL/COMMUNITY/PERSONAL

- Member: Society of Automotive Engineers, Society of Automotive Analysts (past President), Automotive Fellowship International, International Motor Press Association
- Charitable boards: WCPN (Cleveland NPR affiliate; past membership), Cleveland Cello Society, Ohio Chamber Orchestra (past membership).
- Have resided, in addition to the USA, in Italy, the UK, Denmark, Sweden, etc.
- Married 28 years; wife a performing cellist; 4 children from ages 14 to 20. Three cats, two dogs, one Prius, one smart, sold the Zanardi NSX!