

Dealership Departmental Operations Review Report



Sales & Marketing



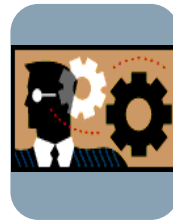
Profitability



Business Management



Asset Management



Human Resources



Housekeeping



Internal Procedures



Leadership

OCD

CONSULTING, LLC

Serving the Nation's Retail Automotive Industry

OCD Consulting, LLC Dealership Operational Review

Instructions

The purpose of this Dealership Operational Review Report is to provide dealers and their managers an effective and efficient means of communicating and measuring performance expectations.

Each department manager completes the section pertaining to his/her department. The reports can be completed by hand or in Microsoft Word, provided the individual is familiar with MS Word tables. The review process can be conducted as frequently as desired but two or three times annually should be sufficient.

Once completed, the General Manager or Dealer in absence of a General Manager should review the report with each department manager. It is suggested that this review be done privately without other department managers present.

When the departmental reviews are completed, the General Manager should then complete his/her own section. Once this is accomplished, then the Dealer and General Manager should review all of the reports together.

The Review considers several key areas of dealership management including sales, profitability, asset management, throughput management, human resource management, productivity, internal control practices, housekeeping, business management, and leadership. The goal of the Review process should be improved financial performance through better planning, communication, accountability, and execution.

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Michael McKean, President OCD Consulting, LLC

Dealership Operational Review

General Manager

To be completed by the General Manager

Name

Financial Results Reported Year-to-Date Through

The Numbers



Sales and Profit

The Dealership has achieved or exceeded these objectives

Yes/No

New units retail volume objective

New unit retail gross objective

New vehicle market penetration objective

New Vehicle Departmental Operating Profit objective

Used retail unit objective

Used retail gross objective

Used Vehicle Departmental Operating Profit objective

Service sales objective

Service gross objective

Service Departmental Operating Profit objective

Parts sales objective

Parts gross objective

Parts Department Operating Profit objective

Body Shop sales objectives

Body Shop gross objectives

Body Shop Departmental Operating Profit objective

Total Dealership Net Profit objective

Return on Assets objective

Return on Sales objective


Sales and Profit Actions Planned and Accomplished

Planned actions accomplished since last review:

Actions planned to improve sales and profits and scheduled completion date:

Dealership Operational Review

General Manager – Continued

Business Management	The following business management procedures are regularly completed in accordance with dealership policy.	Yes/No
	Annual and monthly forecasts and business plans are prepared on a regular basis.	
	Department managers and other employees are included in the forecasting and planning process.	
	The daily operating control is reviewed with department managers on a regular basis.	
	Upon its completion, the monthly dealership financial statement is analyzed and reviewed with the dealer and department mgrs.	
	Expense items are reviewed regularly and kept within budget.	
	New vehicle inventory levels and aging are maintained in accordance with dealership policy.	
	Used vehicle inventory levels and aging are maintained in accordance with dealership policy.	
	The parts and accessory inventories, aging, and obsolescence are maintained in accordance with dealership policy.	
	The issuance of customer credit is controlled and the receivable accounts are kept current.	
	Manufacturer warranty receivables are reviewed regularly and the account is kept current.	
	All other factory receivable accounts are kept current.	
	All other current assets are protected and accounted for.	

Business Management Actions Planned and Accomplished

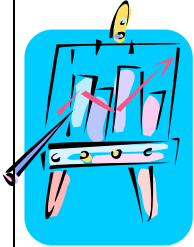
Planned actions accomplished since last review:

Actions planned to improve business management processes and scheduled completion dates:

Dealership Operational Review

General Manager – Continued

Sales
Marketing
and
Relationship
Management



The following sales and marketing responsibilities are regularly completed in accordance with dealership standards.	Yes/No
Advertising and promotions are planned in advance and well coordinated with the advertising agency/media.	
The dealership fully utilized co-op advertising funds	
The dealership is fully utilizing and getting maximum benefit from its CRM/DMS systems.	
The dealership regularly meets or exceeds manufacturers' sales objectives and qualifies for dealer incentives and bonuses.	
The dealership takes full advantage of promotions and marketing assistance offered by the manufacturer.	
The dealership meets or exceeds its expected levels of repeat and referral business.	
The dealership sales team consistently meets or exceeds its new customer prospecting objectives.	
My relationship with all factory representatives is amicable, proactive, and mutually respectful.	
My relationship with the dealership's vendors and suppliers is professional and serves the best interests of the company.	
My conduct with customers of the dealership is beyond reproach.	


Sales and Marketing Actions Planned and Accomplished

Planned actions accomplished since last review:

Sales and marketing actions planned and scheduled completion date:

Dealership Operational Review

General Manager – Continued

Human Resource Management	The following Human Resource practices are continuously implemented in accordance with dealership standards.	Yes/No
	The dealership accomplishes its new employee recruitment needs with well qualified and high potential individuals.	
	New hires are subjected to appropriate pre-screening, interviewing, and testing procedures.	
	The dealership's orientation program is regularly updated and participation is required for all new employees.	
	The dealership's drug testing and substance abuse policies are enforced in accordance with dealership policy.	
	The dealership's policies against all forms of harassment are uniformly enforces.	
	Employee records are maintained in accordance with state and federal requirements.	
	Employee training requirements are documented and fulfilled.	
	Employee performance evaluations are completed in accordance with dealership requirements.	
	The dealership is in compliance with all state and federal wage and hour laws.	
	Compensation plans are regularly reviewed and a signed copy is maintained in each employee's file.	
	The employee benefit programs are regularly reviewed for competitiveness and cost containment.	
	Employment policies and practices are consistently enforced in accordance with the Dealership's Employee Handbook.	
	The dealership is in compliance with OSHA requirements and all safety training requirements have been fulfilled.	


Human Resource Management Actions Planned and Accomplished

Planned actions accomplished since the last review:

Actions planned to improve human resource management and scheduled completion date:

Dealership Operational Review

General Manager – Continued

Management and Leadership 	Leadership Quality	S, P, I
	Rank yourself as follows: If the leadership quality is one of your strengths then mark the box (S), if you feel you are proficient in the area then mark the box (P), if you feel it is an area you would like to improve then mark the box (I).	
	1. With my guidance, the employees of the dealership work as a team with each member willing and able to help another to get the job done.	
	2. I put people work before paper work and the employees who work with me understand what is expected of them and are accountable to me for their performance.	
	3. I understand that communication is not speaking but rather getting thought. My employees feel they can talk to me because I listen to what they have to say.	
	4. The employees of the dealership are focused on fulfilling the needs of the customer and will extend themselves to provide the highest level of service to external and internal customers alike. Our CSI scores are continuously at or above the Manufacturers' Regional averages.	
	5. The employees of the dealership understand our goals for sales and profit and are constantly seeking ways to improve our financial results.	
	6. The employees of the dealership know and understand the importance of its mission and values.	
7. The dealership operates with a sense of urgency, and the employees are capable of executing our business plan in a competent and efficient manner.		

Leadership and Management Actions Planned and Accomplished

Planned actions accomplished since the last review

Actions planned for leadership and management training and scheduled completion date

Dealer Comments:

General Manager

Dealer

Date of Review

Dealership Operational Review

New Vehicle Management

To be completed by the New Vehicle Manager Name _____

Financial Results Reported Year-to-Date Through _____

The Numbers	New Veh. Unit Sales	Actual	Goal	% of Goal	Year Ago
 Sales and Gross	New Car Retail			%	
	New Truck Retail			%	
	Total Retail			%	
	Fleet			%	
	New Vehicle Gross	Actual	Goal	% of Goal	Year Ago
	New Car Retail	\$	\$	%	\$
	New Truck Retail	\$	\$	%	\$
	Total Retail	\$	\$	%	\$
	Fleet	\$	\$	%	\$
	Gross Per Vehicle	Actual	Goal	% of Goal	Year Ago
New Car Retail	\$	\$	%	\$	
New Truck Retail	\$	\$	%	\$	
Total Retail	\$	\$	%	\$	
Fleet	\$	\$	%	\$	
Finance and Ins.	Actual	Goal	% of Goal	Year Ago	
Finance Income	\$	\$	%	\$	
Per Vehicle Retail	\$	\$	%	\$	
Insurance Income	\$	\$	%	\$	
Per Vehicle Retail	\$	\$	%	\$	
Maintenance Agrmts	\$	\$	%	\$	
Per Vehicle Retail	\$	\$	%	\$	
Total F&I Income	\$	\$	%	\$	
Per Vehicle Retail	\$	\$	%	\$	
Total Vehicle Gross	\$	\$	%	\$	
Per Vehicle Retail	\$	\$	%	\$	


Sales and Gross Actions Planned and Accomplished

Planned actions accomplished since last review:

Actions planned to improve sales and gross and scheduled completion date:

Dealership Operational Review

New Vehicle Management – Continued

Asset Management	New Vehicle Inventory	Actual	Goal	Year Ago	
	Total Units				
	Units over 120 days old				
	+120 days % Total	%	%	%	
	Total Dollar Inventory	\$	\$	\$	
	Dollars over 120 days old	\$	\$	\$	
	+120 days \$\$ % Total \$\$	%	%	%	
	Throughput Management Objectives				Yes/No
	At month end, sales are cut off in accordance with dealership policy and deals are completed and promptly sent to accounting.				
	The schedule of contracts in transit is reviewed daily and timely corrective action is taken on uncollected items.				
	A "heat sheet", (deals sold but not delivered), is reviewed daily with appropriate sales people and management.				
New vehicles received from the factory are promptly stocked into inventory and PDI's are completed in a timely manner.					
Sales commission vouchers are promptly submitted to payroll.					
Traded-in vehicles are immediately classified as retail or wholesale and either scheduled for reconditioning or sold, respectively.					
Deliveries are promptly reported to the manufacturer.					
All sales leads, floor ups, phone ups, and internet leads are promptly entered into the database management system and followed up in an appropriate and timely manner.					


Asset and Throughput Management Actions Planned and Accomplished


Planned actions accomplished since the last review:

Actions planned to improve asset and throughput management and scheduled completion date:

Dealership Operational Review


New Vehicle Management – Continued

	Priority Internal Control Item	Yes/No
Internal Controls 	New vehicle storage lots are kept secured at all times.	
	A physical inventory of New vehicles is completed monthly.	
	Keys are kept in a controlled and secure environment.	
	All dealer plates are regularly accounted for and properly controlled.	
	Employee driving records are checked annually.	
	Demonstrator vehicles are accounted for and used in accordance with company policy.	
	IRS 8300 Cash Reporting Requirements are understood and carefully adhered to.	
	Gas Slips or PO's for gas purchases are controlled and properly issued.	
	Employee time sheets are properly maintained in accordance with policy.	
	Policy against hold checks, multiple contracts, or IOU's with spot deliveries is strictly enforced.	
	Dealership policies against all forms of harassment are understood and enforced.	
	All sales commissions are reviewed by management before going to payroll.	

	House Keeping Items	Yes/No
House Keeping 	Vehicles on the display lot are clean, PDI'd, and attractively displayed.	
	Sales and business offices are neat, comfortable, and free of clutter.	
	Exterior areas are clean and free of debris.	
	The new vehicle showroom is clean and attractive, vehicles are frequently changed, and promotional display materials are kept up to date.	
	Smoking in the building and in areas in view of customers is not permitted.	
	Employees' appearance and dress is professional, neat, and clean.	
	Employees are parking in assigned areas.	
	Customer information is protected as required by privacy act.	
	Employees are not allowed to consume food in other than designated areas.	

Dealership Operational Review

New Vehicle Management – Continued

Management and Leadership 	Leadership Quality	S, P, I
	Rank yourself as follows: If the leadership quality is one of your strengths then mark the box (S), if you feel you are proficient in the area then mark the box (P), if you feel it is an area you would like to improve then mark the box (I).	
	1. With my guidance, my department works as a team with each member willing and able to help another to get the job done.	
	2. I put people work before paper work and the employees who work with me understand what is expected of them and are accountable to me for their performance.	
	3. I understand that communication is not speaking but rather getting thought. My employees feel they can talk to me because I listen to what they have to say.	
	4. The people in my department are focused on fulfilling the needs of the customer and will extend themselves to provide the highest level of service to external and internal customers alike. Our CSI scores are continuously at or above the Manufacturers' Regional averages.	
	5. The people in my department understand our goals for sales and profit and are constantly seeking ways to improve our financial results.	
	6. I have communicated to the employees of my department and they understand the importance of the mission and values of the dealership.	
	7. My department operates with a sense of urgency, cooperates with the other departments in the dealership, and my employees are capable of executing our business plan in a competent and efficient manner.	

Leadership and Management Actions Planned and Accomplished

Planned actions accomplished since the last review

Actions planned for leadership and management training and scheduled completion date

Additional assistance and tools needed to improve departmental performance and scheduled completion date

Dealership Operational Review

New Vehicle Management – Continued

Human Resource Management



Staffing – Count only those people reporting directly to you

Position	Actual	Year Ago	Voluntary Term	Involun Term	New Hire
Supervision					
Sales Consultants					
Business Manager					
Internet Manager					
Customer Service					
Clerical/Title					
Lot Attendant					
Other					
Total					

Attendance and Administration – Department Totals

Total number of overtime hours worked to date			
Vacation days taken to date and remaining for year	Taken		Owed
Total sick and personal days taken to date	Sick		Per
Number of workmen comp claims filed to date			
Number of unemployment claims filed to date			
Number of employee legal actions filed to date			
Annual employee evaluations completed and due	Comp		Due

Productivity Standards

Measure	Actual	Goal	Year Ago
Avg Monthly Sales/Employee	\$	\$	\$
Avg Monthly Gross/Employee	\$	\$	\$
Avg Mon Health Ins/Employee	\$	\$	\$

Human Resource Actions Planned and Accomplished

Planned Actions Accomplished since last review

Training requirements planned and scheduled completion date (DMS, Technical, OSHA, Right to Know, Employee Harassment, other)

Supervisor's comments:

Manager	Supervisor	Date of Review
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Dealership Operational Review

Used Vehicle Management

To be completed by the Used Vehicle Manager

Name

Financial Results Reported Year-to-Date Through

The Numbers



Sales and Gross

Used Veh. Unit Sales	Actual	Goal	% of Goal	Year Ago
Used Car Retail			%	
Used Truck Retail			%	
Total Retail			%	
Wholesale			%	
Used Vehicle Gross	Actual	Goal	% of Goal	Year Ago
Used Car Retail	\$	\$	%	\$
Used Truck Retail	\$	\$	%	\$
Total Retail	\$	\$	%	\$
Wholesale	\$	\$	%	\$
Gross Per Vehicle	Actual	Goal	% of Goal	Year Ago
Used Car Retail	\$	\$	%	\$
Used Truck Retail	\$	\$	%	\$
Total Retail	\$	\$	%	\$
Wholesale	\$	\$	%	\$
Finance and Ins.	Actual	Goal	% of Goal	Year Ago
Finance Income	\$	\$	%	\$
Per Vehicle Retail	\$	\$	%	\$
Insurance Income	\$	\$	%	\$
Per Vehicle Retail	\$	\$	%	\$
Maintenance Agrmts	\$	\$	%	\$
Per Vehicle Retail	\$	\$	%	\$
Total F&I Income	\$	\$	%	\$
Per Vehicle Retail	\$	\$	%	\$
Total Vehicle Gross	\$	\$	%	\$
Per Vehicle Retail	\$	\$	%	\$

Sales and Gross Actions Planned and Accomplished

Planned actions accomplished since last review:

Actions planned to improve sales and gross and scheduled completion date:

Dealership Operational Review

Used Vehicle Management – Continued

	Key Expenses \$\$\$\$	Actual	Goal	% Goal	Year Ago	
The Numbers  Expense and Profits	Total Personnel	\$	\$	%	\$	
	Total Sales Comp	\$	\$	%	\$	
	F&I Comp	\$	\$	%	\$	
	Policy	\$	\$	%	\$	
	Delivery	\$	\$	%	\$	
	Advertising Net	\$	\$	%	\$	
	Floor Plan Interest	\$	\$	%	\$	
	Demo	\$	\$	%	\$	
	Key Expenses % Gross					
			Actual	Goal	% Goal	Year Ago
Dept Operating Profit is Total Gross Profit less selling, personnel, and semi-fixed expenses. Net Profit/(Loss) is Dept Oper Profit less Fixed Expenses	Total Personnel	%	%	%	%	
	Total Sales Comp	%	%	%	%	
	F&I Comp	%	%	%	%	
	Policy	%	%	%	%	
	Delivery	%	%	%	%	
	Advertising Net	%	%	%	%	
	Floor Plan Interest	%	%	%	%	
	Demo	%	%	%	%	
	Departmental Operating Profit					
		Actual	Year Ago	% Total Gross	Goal	
	\$	\$	%	\$		
Net Profit/(Loss)						
	Actual	Year Ago	% Total Gross	Goal		
	\$	\$	%	\$		


Expense Control and Management Actions Planned and Accomplished

Planned actions accomplished since last review:

Actions planned to reduce and better control expenses:

Dealership Operational Review


Used Vehicle Management – Continued

Asset Management	Used Vehicle Inventory	Actual	Goal	Year Ago	
	Total Units				
	Units over 60 days old				
	+60 days % Total		%	%	%
	Total Dollar Inventory		\$	\$	\$
	Dollars over 60 days old		\$	\$	\$
	+60 days \$\$ % Total \$\$		%	%	%
	Inventory Management Objectives			Actual	Year Ago
	Average age of unit in stock				
	Average cost per unit for reconditioning			\$	\$
	Dealership's inventory stocking and management policies have been consistently executed.				Yes/No

Asset Management Actions Planned and Accomplished

Planned actions accomplished since the last review:

Actions planned to improve asset management and scheduled completion date:

Internal Controls	Internal Control Item	Yes/No
	All used vehicle titles are secured and accounted for.	
	A physical inventory of used vehicles is completed monthly.	
	Reconditioning work is completed only with proper authorization.	
	All dealer plates are regularly accounted for and properly controlled.	
	Employee driving records are checked annually.	
	Policy work is completed only with proper authorization.	
	The policy against using used vehicles as demos or loaner cars is strictly enforced.	
	Gas Slips or PO's for gas purchases are controlled and properly issued.	
	All reconditioning work is processed through the dealership's service dept.	
	Policy against hold checks, multiple contracts, or IOU's with spot deliveries is strictly enforced.	
	FTC Buyer's Guides are properly attached to vehicles for sale.	
	All sales commissions are reviewed by management before going to payroll.	

Dealership Operational Review

Used Vehicle Management – Continued

Human Resource Management

Staffing – Count only those people reporting directly to you



Position	Actual	Year Ago	Voluntary Term	Involun Term	New Hire
Supervision					
Sales Consultants					
Business Manager					
Internet Manager					
Customer Service					
Clerical/Title					
Lot Attendant					
Other					
Total					

Attendance and Administration – Department Totals

Total number of overtime hours worked to date			
Vacation days taken to date and remaining for year	Taken		Owed
Total sick and personal days taken to date	Sick		Per
Number of workmen comp claims filed to date			
Number of unemployment claims filed to date			
Number of employee legal actions filed to date			
Annual employee evaluations completed and due	Comp		Due

Productivity Standards

Measure	Actual	Goal	Year Ago
Avg Monthly Sales/Employee	\$	\$	\$
Avg Monthly Gross/Employee	\$	\$	\$
Avg Mon Health Ins/Employee	\$	\$	\$

Human Resource Actions Planned and Accomplished



Planned Actions Accomplished since last review

Training requirements planned and scheduled completion date (DMS, Technical, OSHA, Right to Know, Employee Harassment, other)

Other staffing and employment actions planned and scheduled completion date

Dealership Operational Review

Used Vehicle Management – Continued

	House Keeping Items	Yes/No
<div style="text-align: center;"> <p>House Keeping</p>  </div>	Vehicles on the display lot are clean, reconditioned, inspected, and attractively displayed.	
	Sales and business offices are neat, comfortable, and free of clutter.	
	Exterior areas are clean and free of debris.	
	The reconditioning area is clean, organized, and meets OSHA safety regs.	
	Smoking in the building and in areas in view of customers is not permitted.	
	Employees' appearance and dress is professional, neat, and clean.	
	Employees are parking in assigned areas.	
	The showroom and customer areas are clean, attractive, and free of clutter.	
	Customer information is protected as required by privacy act.	
<div style="text-align: center;"> <p>Management and Leadership</p>  </div>	Leadership Quality	S, P, I
	Rank yourself as follows: If the leadership quality is one of your strengths then mark the box (S), if you feel you are proficient in the area then mark the box (P), if you feel it is an area you would like to improve then mark the box (I).	
	1. With my guidance, my department works as a team with each member willing and able to help another to get the job done.	
	2. I put people work before paper work and the employees who work with me understand what is expected of them and are accountable to me for their performance.	
	3. I understand that communication is not speaking but rather getting thought. My employees feel they can talk to me because I listen to what they have to say.	
	4. The people in my department are focused on fulfilling the needs of the customer and will extend themselves to provide the highest level of service to external and internal customers alike. Our CSI scores are continuously at or above the Manufacturers' Regional averages.	
	5. The people in my department understand our goals for sales and profit and are constantly seeking ways to improve our financial results.	
	6. I have communicated to the employees of my department and they understand the importance of the mission and values of the dealership.	
	7. My department operates with a sense of urgency, cooperates with the other departments in the dealership, and my employees are capable of executing our business plan in a competent and efficient manner.	
Leadership and Management Actions Planned and Accomplished		
Planned actions accomplished since the last review		
Actions planned for leadership and management training and scheduled completion date		
Supervisor's comments:		
Manager	Supervisor	Date of Review

Dealership Operational Review Service Management

To be completed by the Service Manager

Name

Financial Results Reported Year-to-Date Through:

The Numbers



Service Sales	Actual	Goal	% Goal	Year Ago
Customer Paid	\$	\$	%	\$
Warranty	\$	\$	%	\$
Internal	\$	\$	%	\$
Total Service	\$	\$	%	\$
Service Gross	Actual	Goal	% Goal	Year Ago
Customer Paid	\$	\$	%	\$
Warranty	\$	\$	%	\$
Internal	\$	\$	%	\$
Total Service	\$	\$	%	\$
Gross % Sale				
Customer Paid	%	%	%	%
Warranty	%	%	%	%
Internal	%	%	%	%
Total Service	%	%	%	%

Dept Operating Profit is Total Gross Profit less selling, personnel, and semi-fixed expenses.

Net Profit/(Loss) is Dept Oper Profit less Fixed Expenses

Key Expenses	Actual	Goal	% Goal	Year Ago
Total Personnel	\$	\$	%	\$
Policy	\$	\$	%	\$
Advertising	\$	\$	%	\$
Loaner Vehicle	\$	\$	%	\$
Company Vehicle				
Dept Operating Profit				
Actual	Goal	% Total Gross	Year ago	
\$	\$	%	\$	
Net Profit/(Loss)				
Actual	Goal	% Total Gross	Year ago	
\$	\$	%	\$	

Sales and Profit Actions Planned and Accomplished

Planned actions accomplished since last review:

Actions planned to improve sales and gross and scheduled completion date:

Actions planned to reduce or control expenses and scheduled completion date:

Dealership Operational Review


Service Management – Continued

Asset Management	Asset Account	Actual	Goal	Year Ago	
	Customer Acc'ts. Rec.	\$	\$	\$	
	Past due over 30 days	\$	\$	\$	
	Warranty Claims Rec.	\$	\$	\$	
	Past due over 30 days	\$	\$	\$	
	Work-in-Process	\$	\$	\$	
Productivity	Labor Rates	Actual	Goal	Year Ago	Date of Last Increase
	Posted Customer Paid	\$	\$	\$	
	Effective Customer Paid	\$	\$	\$	
	Warranty Rate	\$	\$	\$	
	Internal Rate	\$	\$	\$	
	Avg. Cost per Labor Hour	\$	\$	\$	
	Repair Order Analysis	Cust Pd	Warr	Internal	Other
	No. of RO's – Actual				
	No. of RO's – Year ago				
	Hours per RO – Actual				
	Hours per RO – Year ago				
	Labor \$ per RO – Actual	\$	\$	\$	\$
	Labor \$ per RO – Year ago	\$	\$	\$	\$
	Parts \$ per RO – Actual	\$	\$	\$	\$
	Parts \$ per RO – Year ago	\$	\$	\$	\$

Asset and Productivity Management Actions Planned and Accomplished

Planned actions accomplished since last review:

Actions planned to improve asset and productivity management:

Internal Controls	Internal Control Items	Yes/No
	The work in process account is reconciled monthly.	
	The open repair order report is reviewed weekly and all ro's open for more than 15 days are investigated and closed.	
	Hard copies of RO's are periodically reviewed to assure tech. time charged does not exceed time charged to customer.	
	Shop supplies are disbursed by the parts department and usage is monitored.	
	Special tools are regularly inventoried and kept in secure area.	
	All policy expense has prior approval of service manager.	
	Loaner cars are accounted for and used only by customers with signed agreements.	
	All warranty claims are processed and administered in accordance with the manufacturers' policy.	
	The repair order exceptions report is reviewed regularly to assure service advisors are pricing jobs correctly.	
	Technicians are not allowed to use the shop to work on own vehicles.	

Dealership Operational Review

Service Management – Continued

Human Resource Management

Staffing – Count only those people reporting to you



Position	Actual	Year Ago	Voluntary Term	Involun Term	New Hire
Supervision					
Service Advisors					
Dispatch/Bookers					
Foreman/QC					
Technicians					
Drivers					
Clerical					
Other					
Total					

Attendance and Administration – Department Totals

Total number of overtime hours worked to date			
Vacation days taken to date and remaining for year	Taken	Owed	
Total sick and personal days taken to date	Sick	Per	
Number of workmen comp claims filed to date			
Number of unemployment claims filed to date			
Number of employee legal actions filed to date			
Annual employee evaluations completed and due	Comp	Due	

Productivity Standards

Measure	Actual	Goal	Year Ago
Avg Monthly Sales/Employee	\$	\$	\$
Avg Monthly Gross/Employee	\$	\$	\$
Avg Mon. Health Ins/Employee	\$	\$	\$

Human Resource Actions Planned and Accomplished


Planned Actions Accomplished since last review


Training requirements planned and scheduled completion date (DMS, Technical, OSHA, Right to Know, Employee Harassment, other)

Other staffing and employment actions planned and scheduled completion date

Dealership Operational Review

Service Management – Continued

House Keeping	House Keeping Items	Yes/No
	The shop is cleaned regularly and kept clear of used parts and other debris.	
	The customer lounge is clean, attractive, and comfortable.	
	The employee dining area and locker rooms are kept clean and neat.	
	Loaner cars are kept clean, repaired, regularly maintained.	
	The service write-up area is kept clean and safe for customers.	
	The exterior areas are kept clean and free of debris.	
	Service office areas are organized kept neat and clean.	
	Employees are parking in assigned areas.	
	Employees' appearance and dress is professional, neat, and clean.	
	Customer service files are orderly and up to date.	

Management and Leadership	Leadership Quality	S, P, I
	Rank yourself as follows: If the leadership quality is one of your strengths then mark the box (S), if you feel you are proficient in the area then mark the box (P), if you feel it is an area you would like to improve then mark the box (I).	
	1. With my guidance, my department works as a team with each member willing and able to help another to get the job done.	
	2. I put people work before paper work and the employees who work with me understand what is expected of them and are accountable to me for their performance.	
	3. I understand that communication is not speaking but rather getting thought. My employees feel they can talk to me because I listen to what they have to say.	
	4. The people in my department are focused on fulfilling the needs of the customer and will extend themselves to provide the highest level of service to external and internal customers alike. Our CSI scores are continuously at or above the Manufacturers' Regional Averages.	
	5. The people in my department understand our goals for sales and profit and are constantly seeking ways to improve our financial results.	
	6. I have communicated to the employees of my department and they understand the importance of the mission and values of the dealership.	
	7. My department operates with a sense of urgency, cooperates with the other departments in the dealership, and my employees are capable of executing our business plan in a competent and efficient manner.	

Leadership and Management Actions Planned and Accomplished

Planned actions accomplished since the last review

Actions planned for leadership and management training and scheduled completion date

Supervisor's comments

Manager

Supervisor


Date of Review

Dealership Operational Review

Parts Management

To be completed by the Parts Manager Name

Financial Results Reported Year-to-Date Through:

The Numbers		Parts Sales	Actual	Goal	% Goal	Year Ago
	Customer Paid	\$	\$		%	\$
	Warranty	\$	\$		%	\$
	Wholesale	\$	\$		%	\$
	Total Parts	\$	\$		%	\$
		Parts Gross		Actual	Goal	% Goal
	Customer Paid	\$	\$		%	\$
	Warranty	\$	\$		%	\$
	Wholesale	\$	\$		%	\$
	Total Parts	\$	\$		%	\$
	Gross % Sale		Actual	Goal	% Goal	Year Ago
	Customer Paid		%	%	%	%
	Warranty		%	%	%	%
	Wholesale		%	%	%	%
	Total Parts		%	%	%	%
Dept Operating Profit is Total Gross Profit less selling, personnel, and semi-fixed expenses.	Key Expenses		Actual	Goal	% Goal	Year Ago
	Total Personnel	\$	\$		%	\$
	Policy	\$	\$		%	\$
	Advertising	\$	\$		%	\$
	Freight	\$	\$		%	\$
	Company Vehicle	\$	\$		%	\$
Net Profit/(Loss) is Dept Oper Profit less Fixed Expenses	Dept Operating Profit					
		Actual	Goal	% Total Gross		Year ago
	\$	\$		%	\$	
	Net Profit/(Loss)					
		Actual	Goal	% Total Gross		Year ago
	\$	\$		%	\$	

Sales and Profit Actions Planned and Accomplished


Planned actions accomplished since last review:

Actions planned to improve sales and gross and scheduled completion date:

Actions planned to reduce or control expenses and scheduled completion date:

Dealership Operational Review


Parts Management – Continued

Asset Management	Asset Account	Actual	Goal	Year Ago	
	Parts Inventory \$\$\$	\$	\$	\$	
	Days Supply at Cost	Days	Days	Days	
	Parts No Sale 9 mos.	\$	\$	\$	
	Parts No Sale 12 mos.	\$	\$	\$	
	Customer Acc'ts. Rec.	\$	\$	\$	
	Past due over 30 days	\$	\$	\$	
	Obsolescence Returns		Days Supply is calculated by subtracting ytd gross profit from ytd sales to get ytd cost of goods sold (cogs). Divide cogs by the number of ytd selling days to get a daily sales rate (dsr). Finally, divide the parts inventory amount by the dsr. This equals days supply.		
	Earned to Date	\$			
	Returned to Date	\$			
	Scheduled for Return	\$			
	Purchasing Efficiency				
	Total Parts Purchases to Date		\$		
	% Purchased on Stock Orders		%	Fill Rate	
	% Purchased from Outside Vendors		%	%	
	% Purchased Emergency/Unit Down		%	%	
Inventory Reconciliation					
Parts per Counter Pad		\$	Explanation of Difference		
Parts per Gen. Ledger		\$			
Difference		\$			

Asset Management Actions Planned and Accomplished


Planned actions accomplished since last review:

Actions planned to improve inventory and account receivable management:

Internal Controls	Internal Control Items	Yes/No
	Cycle checks or bin counts are being made on a regular basis.	
	The parts department is secured at all times.	
	All parts receipts are checked against packing slips.	
	Packing slips, invoices, and monthly statements are always reconciled.	
	A complete physical inventory has been completed in the last 12 mos.	
	Departing delivery trucks are periodically stopped and contents compared to sales slips.	
	Employee driving records are checked annually.	
	Warranty parts are being kept and returned as required by the manufacturer.	
	Locks have been changed since last termination of persons authorized to have keys.	

Dealership Operational Review

Parts Management – Continued

Human Resource Management 	Staffing – Count only those people reporting directly to you					
	Position	Actual	Year Ago	Voluntary Term	Involun Term	New Hire
	Supervision					
	Shop Counter Sales					
	Whls Counter Sales					
	Outside Sales					
	Delivery					
	Shipping & Receiving					
	Clerical					
	Other					
Total						

Attendance and Administration – Department Totals			
Total number of overtime hours worked to date			
Vacation days taken to date and remaining for year		Taken	Owed
Total sick and personal days taken to date		Sick	Per
Number of workmen comp claims filed to date			
Number of unemployment claims filed to date			
Number of employee legal actions filed to date			
Annual employee evaluations completed and due		Comp	Due
Productivity Standards			

	Actual	Goal	Year Ago
Avg Monthly Sales/Employee	\$	\$	\$
Avg Monthly Gross/Employee	\$	\$	\$
Avg Mon. Health Ins/Employee	\$	\$	\$

Human Resource Actions Planned and Accomplished


Planned Actions Accomplished since last review


Training requirements planned and scheduled completion date (DMS, Technical, OSHA, Right to Know, Employee Harassment, other)

Other staffing and employment actions planned and scheduled completion date

Dealership Operational Review

Parts Management – Continued

House Keeping 	House Keeping Items	Yes/No
	All overnight parts receipts are stocked by the end of the next day.	
	The retail parts area is neatly stocked and displays are attractive and clean.	
	Aisles are kept clear and parts are not stacked on the floor.	
	Parts are in correct bins and locations and kept clean.	
	The delivery vehicles are kept clean and regular maintenance is up to date.	
	Employees' appearance and dress is professional, neat and clean.	
	The area outside the parts department is clean and free of debris.	
	Counter and office areas are kept neat and free of clutter.	
	Employees are parking in assigned areas.	

Management and Leadership 	Leadership Quality	S, P, I
	Rank yourself as follows: If the leadership quality is one of your strengths then mark the box (S), if you feel you are proficient in the area then mark the box (P), if you feel it is an area you would like to improve then mark the box (I).	
	1. With my guidance, my department works as a team with each member willing and able to help another to get the job done.	
	2. I put people work before paper work and the employees who work with me understand what is expected of them and are accountable to me for their performance.	
	3. I understand that communication is not speaking but rather getting thought. My employees feel they can talk to me because I listen to what they have to say.	
	4. The people in my department are focused on fulfilling the needs of the customer and will extend themselves to provide the highest level of service to external and internal customers alike. Our CSI scores are continuously at or above the Manufacturers' Regional averages.	
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	6. I have communicated to the employees of my department and they understand the importance of the mission and values of the dealership.	
	7. My department operates with a sense of urgency, cooperates with the other departments in the dealership, and my employees are capable of executing our business plan in a competent and efficient manner.	

Leadership and Management Actions Planned and Accomplished

Planned actions accomplished since the last review

Actions planned for leadership and management training and scheduled completion date

Supervisor's comments:

Manager	Supervisor	Date of Review
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