

Variable 2: Pre Class Assignment

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1. Latest Financial Statement

2. Other income and deductions.

a. Investigate the new vehicle sources and deductions to this account

- i. DOC Fees $-\$175$ DOC NYS Reg fees
- ii. Factory incentives and programs Bank fee
- iii. Distributor payments

b. Total all additions to income attributable to new vehicle sales 26,525

3. What is your dealership's ideal months' supply of new vehicles? Prepare to defend this number.

ideal - 3500 units yr. X 1.5 (45 day supply) =
5250 ÷ 12 = 438 CARS

✓ 4. New Vehicle Inventory sorted by age (Bring Copy to Class)

Run right before class... does not need to match with the statement)

a. -Subtotal in following age buckets (calculate units and dollars for each bucket)

- 0-30 days - 80
- 31-45 days - 28
- 46-60 days - 15
- 61-90 days - 26
- 91-120 days - 20
- Over 120 days - 25

194 CARS

5. Investigate your dealership's floorplan financing interest rate: 3.73 % (1.65 + Libor)

a. Does the dealership earn incentives based on retail contract penetration?

1.65 + 2.08 Libor

Briefly describe your New Vehicle floorplan assistance program:

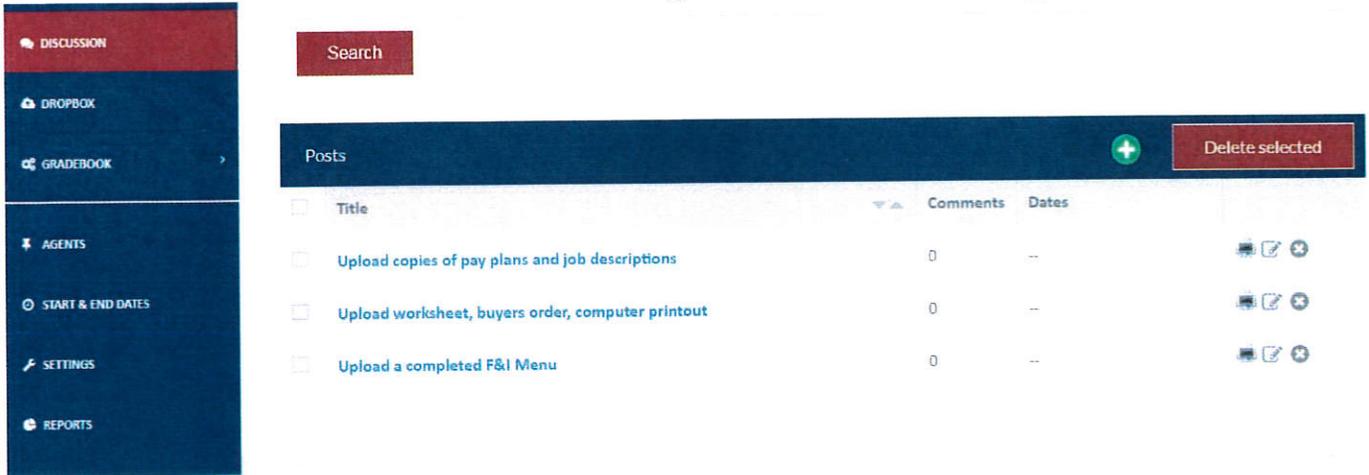
We receive 1% of the MSRP in floor plan
assistance

✓ 6. Print and bring your New Car Area of Responsibility Map (available from your manufacturer).

✓ 7. Bring sales effectiveness report card from your manufacturer, including pump in and pump out information, owner loyalty/customer retention and units in operation (5, 7, 10 year)

8. What is the size of your active unique owner base? 29,507 (number of active customers you still do business with from all departments)

- 9. Bring a copy of a 'worksheet' / 'buyers order' / 'computer printout' utilized in the sales department when working a deal with a customer. Prepare to share the process and overcoming customer objections with the class ✓
- 10. Copies of Pay Plans and job descriptions sales person, f&l and service advisor.
- ? 11. On class site **Discussions then doc sharing to upload required files.**



- 12. What is the total number of employees that left dealership employment during the previous 12 months? 56 How many left **voluntarily**? 41
 - 13. What is the total percentage of 'mini's' or 'flats' paid to the sales force on new car sales for the last 12 months 270
 - 14. Bring current phone call guide used by Sales Consultant when **taking incoming sales calls and for placing outbound internet and phone communications** ✓
 - 15. How much time does it take to purchase a vehicle at your store? 15 minutes to 3 hours
 - 16. Bring a completed F & I Menu (if you are using one and I hope you are!) If you are using DocuPad please take a screen shot and bring with you. ✓
 - 17. Have your F & I Manager complete attached F & I performance data form. ✓
 - 18. Does every retail customer go through the F & I office at time of sale? ✓ No If not, what percentage do? 40%
 - 19. What are the goals of the F & I office in your dealership, financial and otherwise? ✓
100% of the customers being in contact
With F&I if not in person on the phone 100x
100
100
 - 20. Review and observe the following during your next sales, service and management meetings at your dealership: content, effectiveness and level of participant satisfaction. ✓
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-
-

#4

STOCK	DAYS	MODEL	VIN	COLOR			
18-68097	315	GLE43W4	4JGDA6EB1JB006077	BLACK	0	76,023.61	-75,952.00
18-68286	294	GLE43W4	4JGDA6EB7JB017052	WHITE	0	79,518.00	-79,448.00
18-68320	280	C63C	WDDWJ8GB3JF627003	WHITE	68,640.00	0	-68,570.00
18-68472	273	GLE350W4	4JGDA5HB3JB028149	WHITE	0	0	-65,869.00
18-68620	258	CLA45C4	WDDSJ5CB0JN584877	BLACK	55,685.00	0	-55,615.00
18-68669	258	CLS550C4	WDDLJ9BB8JA204897	BLACK	81,494.00	0	-81,424.00
18-68648	258	CLS550C4	WDDLJ9BB3JA204046	GRAY	80,762.80	0	-80,624.00
18-69094	218	E300W4	WDDZF4KB6JA361200	BLACK	65,062.00	0	-64,992.00
18-69213	206	E300W4	WDDZF4KB7JA358760	WHITE	60,258.00	0	-60,188.00
18-69433	184	E300W4	WDDZF4KB3JA376821	BLACK	57,384.00	0	-57,384.00
18-69499	181	G63W4	WDCYC7DH8JX286833	BLACK	0	144,980.00	-144,910.00
18-69564	177	E300W4	WDDZF4KB3JA382702	BLACK	62,060.00	0	-66,593.00
18-69586	176	E300W4	WDDZF4KB2JA386241	BLACK	65,081.00	0	-65,011.00
18-69691	166	C63A	WDDWK8GB2JF644453	WHITE	73,554.00	0	-73,554.00
18-69671	166	G63W4	WDCYC7DH5JX287986	WHITE	0	150,002.00	-149,932.00
18-69685	166	E300W4	WDDZF4KB3JA393506	BLACK	61,918.00	0	-61,848.00
18-69656	166	C43C4	WDDWJ6EB2JF682601	WHITE	66,585.08	0	-66,494.00
18-69736	157	E300W4	WDDZF4KB3JA385566	BLACK	59,916.00	0	-59,846.00
18-69838	155	C300W4	55SWF4KB6JU260113	BLACK	50,501.00	0	-50,431.00
18-69821	144	G550W4	WDCYC3KH9JX290577	GRAY	0	117,455.50	-117,301.00
18-70000	130	GLE350W4	4JGDA5HB8JB099976	BLACK	0	62,119.00	-62,119.00
18-70005	128	GLE350W4	4JGDA5HB9JB100780	RED	0	59,286.00	-59,286.00
18-69944	127	G63W4	WDCYC7DH1JX291016	BLACK	0	141,004.00	-141,004.00
18-69953	125	G63W4	WDCYC7DH6JX291268	GRAY	0	146,380.00	-146,380.00
18-69980	121	C43C4	WDDWJ6EB0JF705891	WHITE	54,657.64	0	-54,516.00
18-70030	118	GLC300W4	WDC0G4KB3JV070656	GRAY	0	47,414.56	-51,020.00
18-70006	118	G63W4	WDCYC7DH0JX291508	BLACK	0	141,892.00	-141,892.00
18-70023	118	E400W4	WDDZF6GB4JA414769	WHITE	61,326.93	0	-61,236.00
18-70035	115	E43W4	WDDZF6EB9JA350389	RED	73,165.00	0	-73,095.00
18-70038	115	E300W4	WDDZF4KB7JA392066	WHITE	65,559.00	0	-65,489.00
18-70045	114	E300W4	WDDZF4KB8JA388138	WHITE	65,068.00	0	-65,068.00
18-70079	112	E300W4	WDDZF4KB1JA387364	BLACK	57,859.00	0	-57,789.00
18-70072	112	E300W4	WDDZF4KB1JA391320	WHITE	59,693.83	0	-59,599.00
18-70126	106	E300W4	WDDZF4KBXJA381451	GRAY	63,171.00	0	-63,171.00
18-70133	106	E300W4	WDDZF4KB0JA393320	WHITE	65,489.00	0	-65,489.00
18-70134	106	E300W4	WDDZF4KB5JA390509	WHITE	62,171.00	0	-62,171.00
18-70205	106	GLS550W4	4JGDF7DE7JB110205	WHITE	0	94,638.00	-94,638.00
18-70204	106	GLE350W4	4JGDA5HB7JB112006	BLUE	0	60,393.00	-60,323.00
18-70221	106	GLE350W4	4JGDA5HB9JB113089	GRAY	0	66,982.00	-66,912.00
18-70174	106	GLE350W4	4JGDA5HB8JB111432	GRAY	0	59,829.33	-59,715.00
18-70155	101	C300C4	WDDWJ4KB8JF659073	BLACK	48,560.00	0	-48,490.00
18-70360	95	GLS550W4	4JGDF7DE7JB120541	BLACK	0	98,476.00	-98,406.00
18-70215	93	GLA45W4	WDDTG5CB6JJ497592	BLACK	0	55,713.00	-55,713.00
18-70229	92	C300A4	WDDWK4KB1JF669585	BLACK	54,824.00	0	-54,754.00
18-70383	91	GLE350W4	4JGDA5HB8JB123824	BROWN	0	59,388.00	-59,388.00
18-70255	89	G63W4	WDCYC7DH6JX293070	BLACK	0	146,567.00	-146,567.00
18-70263	89	S560A	WDDXK8DB0JA032922	BLACK	143,085.00	0	-143,015.00
18-70280	88	S560C4	WDDXJ8GB6JA033426	BLACK	134,755.00	0	-134,685.00
18-70420	86	GLE350W4	4JGDA5HB8JB126674	RED	0	55,255.00	-59,585.00
18-70309	83	S560C4	WDDXJ8GB9JA033484	BLACK	0	0	-125,381.00
18-70316	83	CLA250C4	WDDSJ4GB7JN643153	BLACK	43,209.00	0	-43,209.00
18-70313	83	E400S4	WDDZH6GB7JA430118	WHITE	69,720.00	0	-69,650.00
18-70331	83	S560C4	WDDXJ8GB7JA033242	BLACK	135,924.00	0	-135,854.00
18-70335	83	CLA250C4	WDDSJ4GB0JN653605	BLUE	39,760.83	0	-39,674.00

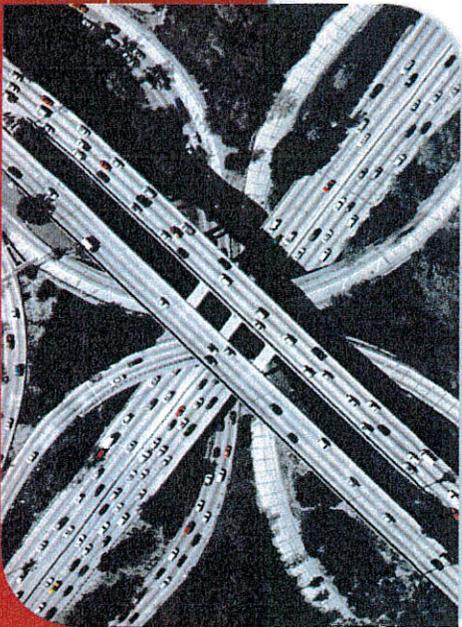
18-70323	83	CLA250C4	WDDSJ4GB2JN651757	WHITE	41,574.53	0	-41,437.00
18-70340	81	S560C4	WDDXJ8GB6JA033717	WHITE	133,931.00	0	-133,931.00
18-70342	81	GLC300W4	WDC0G4KB3JV084220	GRAY	0	45,493.00	-45,493.00
18-70348	81	S560C4	WDDXJ8GB6JA033698	WHITE	133,511.00	0	-133,511.00
18-70351	81	GLC300W4	WDC0G4KB2JV083334	BLACK	0	48,299.00	-48,299.00
18-70426	80	GLE350W4	4JGDA5HB4JB127403	RED	0	59,912.00	-59,912.00
18-70430	80	GLE63C4S	4JGED7FB1JA115466	WHITE	0	113,332.00	-113,262.00
18-70363	79	S560C4	WDDXJ8GB8JA033833	BLACK	132,300.00	0	-132,300.00
18-70367	79	CLA250C4	WDDSJ4GB8JN653500	BLACK	38,783.83	0	-38,697.00
18-70394	78	GLC300W4	WDC0G4KB4JV086509	RED	0	44,193.00	-44,193.00
18-70387	78	S65A	WDDXK7KB1JA033087	BLACK	249,252.95	0	-247,212.00
18-70443	68	E300W4	WDDZF4KB5JA441670	GRAY	67,121.00	0	-67,051.00
18-70470	67	GTA	WDDYK7HA2JA020349	GRAY	129,990.00	0	-129,920.00
18-70490	64	G63W4	WDCYC7DHXJX294867	GRAY	0	140,770.00	-140,770.00
18-70537	64	GLE350W4	4JGDA5HB3JB135699	BLUE	0	58,042.00	-58,042.00
18-70493	64	E300W4	WDDZF4KB2JA446468	RED	60,110.61	0	-60,109.00
18-70533	62	GLC300W4	WDC0G4KB9JV091785	WHITE	0	45,965.00	-45,895.00
18-70592	59	GLE43W4	4JGDA6EBXJB138996	WHITE	0	79,935.00	-79,865.00
18-70616	57	GLE350W4	4JGDA5HB4JB138921	BLUE	0	62,039.08	-61,856.00
18-70544	56	G63W4	WDCYC7DH1JX295535	WHITE	0	141,705.00	-141,705.00
18-70554	56	G63W4	WDCYC7DH1JX295292	BLACK	0	143,155.00	-143,155.00
18-70555	56	GLC300W4	WDC0G4KB1JV091893	RED	0	50,987.00	-50,917.00
18-70558	56	E300W4	WDDZF4KB4JA452319	GRAY	66,467.00	0	-66,397.00
18-70578	53	GLC300W4	WDC0G4KB9JV087879	WHITE	0	45,417.00	-48,954.00
18-70583	53	G63W4	WDCYC7DH7JX295605	BLACK	0	145,679.00	-145,679.00
18-70585	53	GLA250W4	WDCTG4GB5JJ513161	BLUE	0	41,777.00	-41,777.00
18-70588	53	GLC300W4	WDC0G4KBXJV095179	GRAY	0	50,673.00	-50,673.00
18-70586	53	GLC63W4	WDC0G8JB5JF435468	GRAY	0	81,586.00	-81,516.00
18-70599	52	GTR	WDDYJ7KA4JA020882	GREEN	177,985.58	0	0
18-70602	51	E400C4	WDD1J6GB6JF058825	WHITE	63,048.00	0	-62,978.00
18-70631	46	C300W4	WDDWF4KB3JR396555	GRAY	49,508.03	0	-49,421.00
29710	46	S550C4	WDDXJ8FB8FA006804	BLUE	0	0	0
18-70736	44	GLE350W4	4JGDA5HB5JB150494	BLACK	0	70,600.00	-70,600.00
18-70745	44	GLS450W4	4JGDF6EE2JB149194	BLACK	0	74,394.00	-74,394.00
18-70735	44	GLE350W4	4JGDA5HB1JB148905	BLUE	0	59,663.42	0
18-70669	43	E400W4	WDDZF6GBXJA453866	BLACK	61,469.00	0	-61,469.00
18-70749	42	C300W4	55SWF4KB5JU271197	BLACK	48,163.00	0	-48,163.00
18-70777	42	C300W4	55SWF4KB0JU270782	BLACK	48,233.00	0	-48,163.00
18-70675	41	GLC300W4	WDC0G4KB7JV095267	BLUE	0	46,043.00	-49,627.00
18-70685	41	G63W4	WDCYC7DH1JX294417	RED	0	144,229.00	-144,229.00
18-70691	41	GLA250W4	WDCTG4GB6JJ518157	RED	0	39,093.00	-39,093.00
18-70687	41	SLC300R	WDDPK3JA2JF155462	WHITE	50,448.00	0	-50,378.00
18-70700	39	GLA250W4	WDCTG4GB7JJ519026	BROWN	0	41,590.00	-41,590.00
18-70695	39	E400W4	WDDZF6GB7JA463870	BLACK	62,647.00	0	-62,577.00
18-70784	39	C300W4	55SWF4KB9JU272045	GRAY	47,971.00	0	-47,901.00
18-70843	39	GLE350W4	4JGDA5HBXJB150104	BLACK	0	59,624.58	0
18-70778	39	GLE350W4	4JGDA5HB0JB149205	GRAY	0	59,802.42	0
18-70716	38	GLA250W4	WDCTG4GB6JJ518997	WHITE	0	38,069.17	-40,917.00
18-70714	38	GLA250W4	WDCTG4GB9JJ519240	GRAY	0	40,870.00	-40,870.00
18-70715	38	GLC300W4	WDC0G4KB6JV101012	WHITE	0	48,795.00	-48,795.00
18-70781	38	GLE350W4	4JGDA5HB5JB150673	BLUE	0	59,248.00	-59,248.00
18-70783	38	C300W4	55SWF4KB0JU271883	RED	49,724.13	0	-49,571.00
18-70841	38	GLE350W4	4JGDA5HB3JB146590	BLACK	0	60,899.08	-60,591.00
18-70727	36	GLC300W4	WDC0G4KB1JV100981	BLUE	0	42,606.00	-45,839.00
18-70792	36	GLE350W4	4JGDA5HB6JB151346	BLACK	0	62,259.00	-62,259.00

18-70793	36	GLS450W4	4JGDF6EE3JB152783	BLACK	0	76,021.00	-76,021.00
18-70755	35	GLC300W4	WDC0G4KB7JV100970	BLACK	0	46,550.00	-46,550.00
18-70754	32	GLC300W4	WDC0G4KB6JV102502	BLACK	0	46,343.00	-49,954.00
18-70857	32	GLE350W4	4JGDA5HB7JB150352	WHITE-S	0	63,816.00	-63,816.00
18-70752	32	GLA250W4	WDCTG4GB2JJ518687	WHITE	0	40,377.08	-40,286.00
18-70774	30	C300W4	WDDWF4KB3JR399150	BLACK	52,058.00	0	-52,058.00
18-70776	30	C300W4	WDDWF4KB9JR401385	GRAY	51,081.00	0	-51,081.00
18-70860	28	C300W4	55SWF4KB3JU272929	SILVER-S	42,868.03	0	-42,781.00
18-70803	25	GLC300W4	WDC0G4KB8JV102422	GRAY	0	42,253.00	-45,530.00
18-70794	25	G63W4	WDCYC7DH9JX297369	BLACK	0	149,353.00	-149,353.00
18-70796	25	C300W4	WDDWF4KBXJR401508	WHITE	47,836.00	0	-47,836.00
18-70798	25	GLC300W4	WDC0G4KB5JV104063	WHITE	0	49,936.00	-49,936.00
18-70806	25	E400W4	WDDZF6GB8JA468933	WHITE	62,746.00	0	-62,746.00
18-70805	25	E300W	WDDZF4JB4JA471406	BLACK	46,509.43	0	-46,343.00
18-70813	24	GLC300W4	WDC0G4KBXJV103006	BLUE	0	47,177.00	-47,177.00
18-70863	24	C300W4	55SWF4KB0JU273553	SILVER-S	46,381.00	0	-46,381.00
18-70865	24	C43W4	55SWF6EB5JU273801	BLACK	58,907.00	0	-58,837.00
18-70810	24	E300W	WDDZF4JB3JA468948	BLACK	46,509.43	0	-46,343.00
18-70821	23	GLA250W4	WDCTG4GB2JJ522741	RED	0	37,218.00	-37,218.00
18-70822	23	GLA250W4	WDCTG4GB3JJ521629	BLACK	0	40,660.00	-40,660.00
18-70823	23	E300W4	WDDZF4KBXJA471117	BLACK-S	57,602.00	0	-57,602.00
18-70824	23	GLC300W4	WDC0G4KB2JV103503	RED	0	49,964.00	-49,964.00
18-70817	23	S450V4	WDDUG6EB0JA397916	WHITE-S	104,208.83	0	0
18-70829	22	GLE350W4	4JGDA5HB7JB152778	BLACK-S	0	57,519.00	0
18-70847	18	GLA250W4	WDCTG4GB2JJ521458	WHITE	0	40,613.00	-40,613.00
18-70850	18	GLC300W4	WDC0G4KBXJV105340	BLACK	0	46,850.00	-46,850.00
18-70853	18	GLC300W4	WDC0G4KB2JV105171	BLACK	0	48,954.00	-48,954.00
18-70851	18	GLA250W4	WDCTG4GB3JU000151	WHITE	0	38,981.33	-38,906.00
18-70855	17	GLC300W4	WDC0G4KB4JV105589	WHITE	0	46,098.17	-49,673.00
18-70871	15	E300W4	WDDZF4KB6JA461071	WHITE	58,313.00	0	-58,243.00
18-70870	15	E300W4	WDDZF4KB6JA455884	SILVER	61,302.83	0	-61,208.00
18-70875	14	GLC300W4	WDC0G4KB7JV105845	WHITE	0	48,954.00	-48,954.00
18-70876	14	E300W4	WDDZF4KB0JA441074	BLACK	58,243.00	0	-58,243.00
18-70877	14	E300W4	WDDZF4KB0JA463561	BLUE	58,916.00	0	-58,916.00
18-70878	14	E300W4	WDDZF4KB1JA406916	WHITE	57,542.00	0	-57,542.00
18-70879	14	E300W4	WDDZF4KB2JA467269	WHITE	60,535.00	0	-60,535.00
18-70880	14	C300W4	55SWF4KB9JU273857	BLACK	47,766.00	0	-47,766.00
18-70907	14	GLE350W4	4JGDA5HB3JB153698	SILVER	0	64,480.00	-64,480.00
18-70908	14	GLE350W4	4JGDA5HB4JB154066	BLUE	0	60,183.00	-60,183.00
18-70910	14	C300W4	55SWF4KB2JU272677	GREY-S	44,511.00	0	-44,511.00
18-70911	14	C300W4	55SWF4KB4JU273653	SILVER	48,439.00	0	-48,439.00
18-70912	14	C300W4	55SWF4KB9JU272708	BLAXK	47,766.00	0	-47,766.00
18-70913	14	C300W4	55SWF4KB9JU274684	SILVER	44,511.00	0	-44,511.00
18-70914	14	C43W4	55SWF6EB0JU274547	WHITE	60,287.00	0	-60,287.00
18-70931	14	GLE350W4	4JGDA5HB4JB154567	BLUE	0	61,114.00	-61,114.00
18-70932	14	GLE350W4	4JGDA5HB5JB153539	SILVER	0	66,912.00	-66,912.00
18-70933	14	GLS450W4	4JGDF6EE1JB155567	WHITE-S	0	79,497.83	-79,481.00
18-70906	14	GLE350W4	4JGDA5HB3JB153071	WHITE-S	0	60,553.72	-60,441.00
18-70884	11	GLC300W4	WDC0G4KB1JV108644	WHITE	0	45,709.00	-45,709.00
18-70887	11	E300W4	WDDZF4KB2JA477476	SILVER-S	58,229.00	0	-58,229.00
18-70888	11	E300W4	WDDZF4KBXJA480612	SILVER-S	57,948.00	0	-57,948.00
18-70891	10	E300W4	WDDZF4KB3JA478359	BLACK-S	57,808.00	0	-57,808.00
18-70892	10	E43W4	WDDZF6EB3JA480538	SILVER	75,937.00	0	-75,937.00
18-70889	10	E400C4	WDD1J6GB6JF020849	BLACK	71,033.23	0	0
18-70895	9	E300W4	WDDZF4KB6JA476945	WHITE-S	60,239.00	0	-60,239.00

18-70896	9	E300W4	WDDZF4KB7JA480793	BLACK-S	57,275.00	0	-57,275.00
18-70898	8	GLC300W4	WDC0G4KB8JV107085	BLACK	0	46,662.00	-46,662.00
18-70903	8	GLC300W4	WDC0G4KB8JV111010	BLUE	0	49,627.00	-49,627.00
18-70904	8	E300W4	WDDZF4KB0JA477623	BLACK	57,041.00	0	-57,041.00
18-70900	8	E400C4	WDD1J6GBXJF065745	WHITE-S	70,660.83	0	-70,566.00
18-70901	8	S560V4	WDDUG8GB2JA418001	BLACK	108,182.08	0	0
18-70916	7	S560C4	WDDXJ8GB7JA035380	BLUE-S	133,619.00	0	-133,619.00
18-70918	7	E400C4	WDD1J6GB2JF065349	WHITE	66,251.00	0	-66,251.00
18-70920	7	E400W4	WDDZF6GB9JA481660	SILVER	63,419.00	0	-63,419.00
18-70922	7	SL450R	WDDJK6GA0JF054192	SILVER-S	91,589.00	0	-91,589.00
18-70923	7	SL550R	WDDJK7DA1JF054230	BLACK	108,840.00	0	-108,840.00
18-70924	7	E300W4	WDDZF4KB4JA483442	BLUE-S	57,948.00	0	-57,948.00
18-70917	7	E63W4S	WDDZF8KB0JA473238	BLUE	110,368.83	0	-110,274.00
18-70919	7	E300W4	WDDZF4KBXJA481548	WHITE-S	57,699.88	0	-57,602.00
18-70915	5	S560V4	WDDUG8GB3JA419173	BLACK	123,334.00	0	-123,334.00
18-70928	4	GLC300W4	WDC0G4KB7JV106381	BLUE	0	50,646.00	-50,646.00
18-70930	4	E300W4	WDDZF4KB6JA476931	GREY-S	60,441.00	0	-60,441.00
18-70935	4	GLC300W4	WDC0G4KBXJV109548	BLACK-S	0	45,166.00	-45,166.00
18-70936	4	E400A4	WDD1K6GB1JF068000	BLUE-S	75,386.00	0	-75,386.00
18-70929	4	GLA250W4	WDCTG4GB2JJ526966	BLACK-S	0	38,677.33	-38,602.00
18-70934	4	GLC300W4	WDC0G4KB8JV110293	RED	0	49,928.03	-49,841.00
18-70939	3	GLC300W4	WDC0G4KB5JV109411	WHITE	0	50,768.00	-50,768.00
18-70940	3	GLC300W4	WDC0G4KB5JV110039	WHITE	0	48,954.00	-48,954.00
18-70941	3	GLC300W4	WDC0G4KBXJV113082	BLUE-S	0	46,746.00	-46,746.00
18-70942	3	GLC300W4	WDC0G4KB7JV110267	BLUE	0	49,627.00	-49,627.00
18-70943	3	GLC300W4	WDC0G4KBXJV110344	GREY	0	47,523.00	-47,523.00
18-70944	3	E43W4	WDDZF6EB8JA477683	BLACK	75,834.00	0	-75,834.00
18-70945	2	E300W4	WDDZF4KB8JA476753	SILVER-S	58,322.00	0	0
17-67804	0	SMARTC	WMEFJ5DA1HK219865	RED	0	0	0
18-70974	✓ 0	E300W4	WDDZF4KB8JA476803	GREEN-S	58,870.00	0	0

Polk's Territory Pro™ Report

RALLYE MOTORS LLC - 55109



The **objective** of this report is to identify key opportunities within your AOI to help drive sales, revenue and profitability across your new, used and fixed operations.

In order to achieve this objective, the following key questions will be addressed:

- How is the Mercedes-Benz brand performing in my market?
- How does Mercedes-Benz compare against my local competition?
- How should I focus my sales and marketing efforts?
- Where are my customers?
- What are other Mercedes-Benz dealers selling in my market?
- Who are the buyers in my market?
- What are my opportunities in the used market?
- What is the market potential for my fixed operations?

Definition of Terms

- All industry data and market share calculations are based on Total Competitive Group definition
- **Data as of:** Sep-2016
- **R3MO** – Rolling 3 Months (Jul-2016 to Sep-2016)
- **AOI** – Area of Primary Responsibility
- Your AOI includes all or some of the following ZIP Codes:
11005, 11030, 11040, 11042, 11050, 11051, 11052, 11053, 11054, 11055, 11501, 11507, 11514, 11542, 11545, 11547, 11548, 11560, 11568, 11576, 11577, 11579, 11590, 11596, 11709, 11732, 11753, 11765, 11771, 11773, 11791, 11797, 11801, 11802, 11803, 11815, 11819, 11853, 11854



AOI Overview / Key Points / Action Items

New Car

- Mercedes-Benz Market share in my AOI is
 - Up compared to last year
 - Above the regional average
- BMW is the top competitor in my market
- Mercedes-Benz leasing in my market is 4.8 points above the industry average
- Cla is the model with the greatest opportunity for my dealership
- Other dealers sold 453 units in my market, 49.2% of the total Mercedes-Benz volume in my AOI
- There are an estimated 118,463 households currently in market to purchase a new vehicle in my AOI within the next 6 months

Used Car

- There are an average of 257 used vehicle (2016-2011MY) transactions in my market every month. The MERCEDES-BENZ E-CLASS is the number one selling used vehicle
- Overall, there are 0.3 used vehicles registered for every 1 new vehicle in my market
- There are an estimated 119,000 households currently in market to purchase a used vehicle in my AOI within the next 6 months

Fixed Operations

- There is \$5,915,852 fixed ops revenue potential in my market assuming between \$400-850 per RO (depending on age band) and 75/59/25% penetration of Mercedes-Benz UJO
- There are 38,120 likely Mercedes-Benz DIY households and 96,599 likely Mercedes-Benz DIFM households in my AOI.

AOI

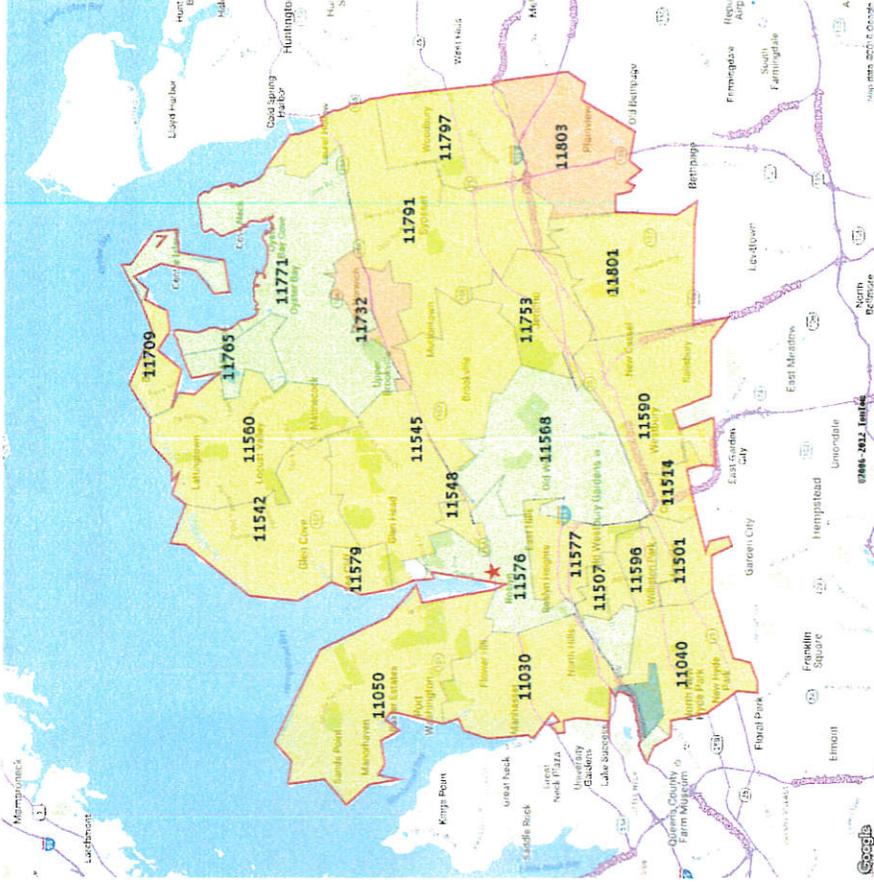


Dealer Location		Boundaries	
★	RALLYE MOTORS LLC - 55109	<input type="checkbox"/>	Zip Code
		<input checked="" type="checkbox"/>	RALLYE MOTORS LLC - 55109

How is the Mercedes-Benz brand performing in my market?

- Overall, Mercedes-Benz market share is 27.3%, an increase of 2.1 points vs. last year
- The ZIP code with the most industry registrations is 11030, where Mercedes-Benz has a market share of 33.4% to rank 1 in the ZIP
- The second largest industry ZIP code is 11791, where Mercedes-Benz has a market share of 24.4% to rank 1 in the ZIP

Share R3MO - September 2016



This map displays share performance throughout the AOI, highlighting areas of both strength and opportunity.

Dealer Location	Boundaries	Share
RALLYE MOTORS LLC - 55109	Zip Code	
	RALLYE MOTORS LLC - 55109	0.0-6.08
		6.08-18.23
		18.23-36.45
		36.45-60.76
		60.76-100.0





Sales Loyalty Report

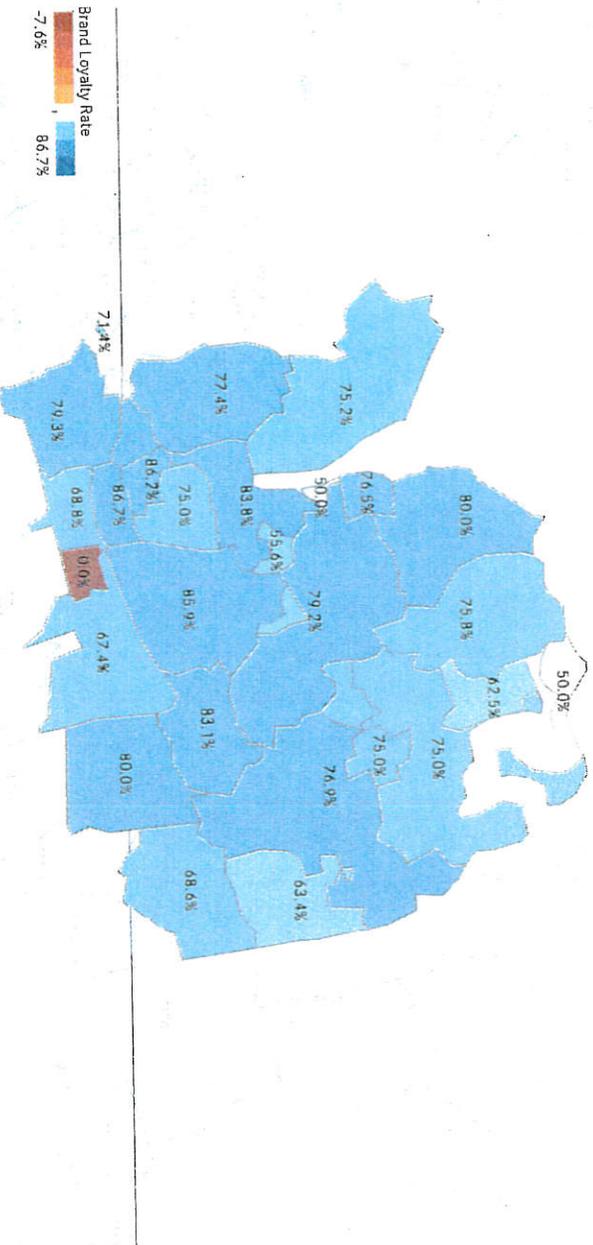
R12 May 2018

55109 - RALLYE MOTORS LLC

7 Sales Loyalty

Model	Return To Market	Brand Loyalty	Brand Loyalty %	Dealer Loyalty	Dealer Loyalty %	Defections	Defections %	Conquest	Conquest %	C/D Ratio	C/D Net
E Class Luxury Sedan--Sedan	438	355	81.1%	304	69.4%	83	18.9%	21	3.1%	0.3	-62
M Class SUV	383	285	74.4%	226	59.0%	98	25.6%	16	2.4%	0.2	-82
C Class Luxury Sedan--Sedan	371	295	79.5%	228	61.5%	76	20.5%	14	2.1%	0.2	-62
S Class Sedan	335	268	80.0%	220	65.7%	67	20.0%	29	4.3%	0.4	-38
GL Class SUV	204	135	66.2%	106	52.0%	69	33.8%	7	1.0%	0.1	-62
GLK Class SUV	114	80	70.2%	65	57.0%	34	29.8%	14	2.1%	0.4	-20
CLA Class Coupe	87	59	67.8%	45	51.7%	28	32.2%	17	2.5%	0.6	-11
E Class Sedan	78	59	75.6%	46	59.0%	19	24.4%	71	10.6%	3.7	52
GLE Class SUV	72	50	69.4%	43	59.7%	22	30.6%	99	14.8%	4.5	77
GLS Class SUV	65	39	60.0%	24	36.9%	26	40.0%	84	12.5%	3.2	58
All Others	462	353	76.4%	284	61.5%	109	23.6%	298	44.5%	2.7	189
Total	2,609	1,978	75.8%	1,591	61.0%	631	24.2%	670	100.0%	1.1	39

R12 Brand Loyalty Map



R12 Brand Loyalty By ZIP Code (Top 20 ZIP Codes by RTM)

Zip Code	Purchased	Return To Market (RTM)	Brand Loyalty	Brand Loyalty Rate
11030	164	127	77.4%	77.4%
11576	136	114	83.8%	83.8%
11545	125	99	79.2%	79.2%
11050	113	85	75.2%	75.2%
11791	91	70	76.9%	76.9%
11568	71	61	85.9%	85.9%
11753	71	59	83.1%	83.1%
11577	68	51	75.0%	75.0%
11040	58	46	79.3%	79.3%
11542	50	40	80.0%	80.0%
11771	44	33	75.0%	75.0%
11590	43	29	67.4%	67.4%
11797	41	26	63.4%	63.4%
11803	35	24	68.6%	68.6%
11560	33	25	75.8%	75.8%
11507	29	25	86.2%	86.2%
11801	25	20	80.0%	80.0%
11579	17	13	76.5%	76.5%
11501	16	11	68.8%	68.8%
11732	16	12	75.0%	75.0%



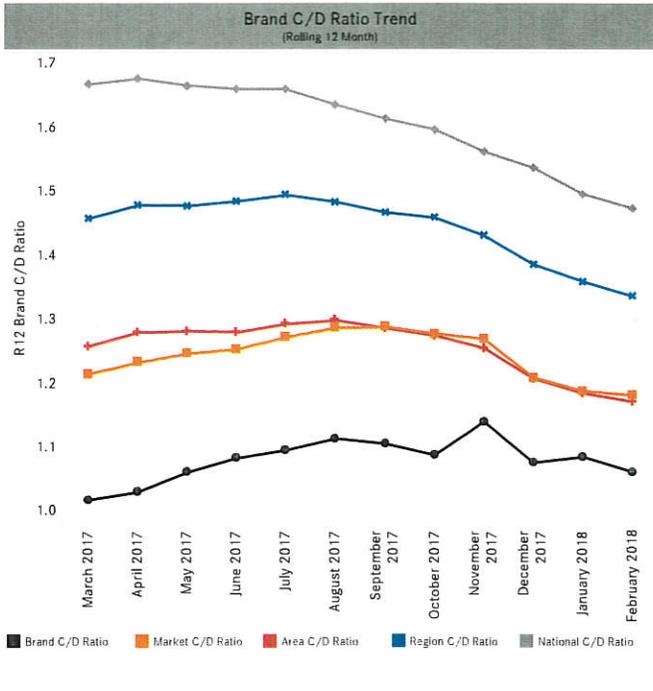
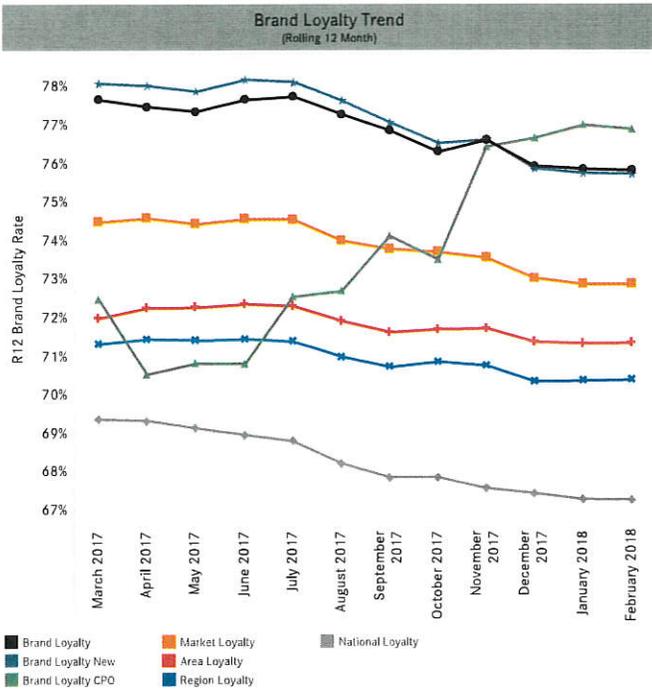
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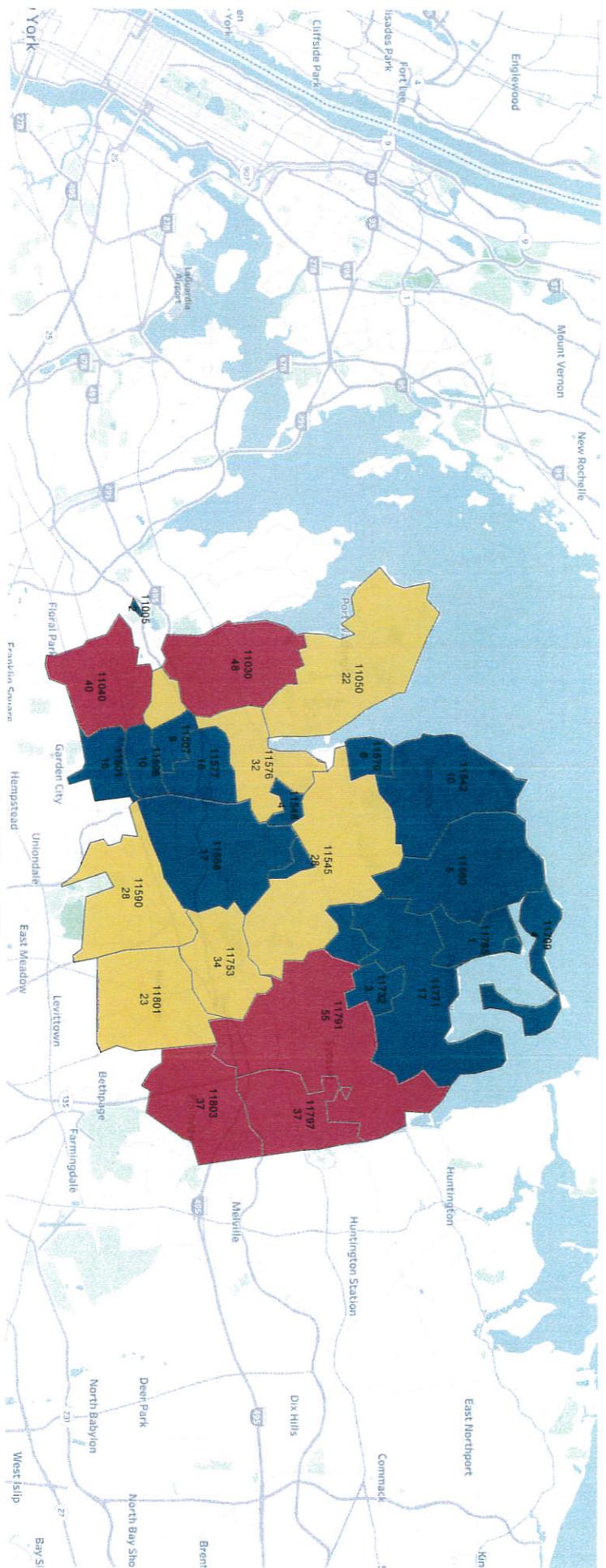


Sales Loyalty Report

R12 May 2018

55109 - RALLYE MOTORS LLC





Pump In ZIP Map - April 2018
 CYTD 55109 RALLYE MOTORS LLC
 New Retail Mercedes-Benz Only
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Rallye Motors

Salesperson: _____ Date: _____ Stock #: _____

Year: _____ Make: _____ Model: _____ MSRP: _____

Name: _____ Address: _____

Phone #: _____ Email: _____

How did you hear about Rallye Motors? _____

How do you want your vehicle equipped? _____

Besides PRICE what are the most important considerations for you in the selection of a new vehicle?
i.e. Safety, Reliability

A. _____ B. _____

C. _____ D. _____

Specifically what about A, B, C, D are important to you? _____

Current Vehicle:

Year: _____ Make: _____ Model: _____ Miles: _____ Condition: _____

What don't you like about your current vehicle? _____

Estimated Payoff: _____ Name of Lender: _____ Acct #: _____

Will you be adding or replacing: _____ Current Payment? _____

How did you get it so low? _____ Are you the primary driver? _____

How many miles do you drive a year? _____ Will that change? _____

Would you consider a low mileage Mercedes either Mercedes certified or a loaner? _____

How would you like us to present pricing on your new vehicle? _____

Finance, Lease Options, Cash Price: _____

When figures are agreeable and we pick out the right vehicle in-stock could you take your new vehicle home today?

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Rallye Motors (Mercedes-Benz)

1600 Northern Blvd.
Roslyn NY 11576
It's different here

Date: 6/18/2018
Time: 3:50:02 PM

Name _____

Address _____

Home Telephone _____ Business Telephone _____ E-Mail _____

Vehicle _____

2018 MERCEDES BENZ E CLASS E300W4 4dr Sdn E300 Sport 4MATIC

Stock No. _____ VIN _____ Color _____ Odometer _____

Options _____

Option A - Base Lease Payments				RETAIL	
	Out Of Pocket				
Term	\$4,386.10	\$7,000.00	\$9,000.00	Selling Price	\$61,550.00
30 MO / 12K	\$915.94	\$822.72	\$751.40	Options	\$0.00
36 MO / 12K	\$832.78	\$755.05	\$695.58	Sub-Total	\$61,550.00
39 MO / 12K	\$826.75	\$754.49	\$699.52	*Fees	\$85.00
				**SalesTax	\$5,321.19
				Net Sales Price	\$66,956.19

1st. Payment, security deposit, tax on down payment, license, title and documentation due at delivery.

* Fees include: Inspection \$10.00, Registration \$75.00
**Finance Tax 8.6250%, Tire Tax \$12.50

Customer Approval

Management Approval



Mercedes-Benz



SERVICE (516) 625-1000

RALLYE MOTORS

1600 NORTHERN BLVD. ROSLYN, N.Y. 11576

www.rallyemotors.com

SALES AND LEASING (516) 625-1600



PARTS (516) 625-1122

PURCHASER'S NAME _____ DATE _____

ADDRESS _____ CITY _____ ST _____ ZIP _____

RESIDENCE PHONE _____ BUSINESS PHONE _____ CELL PHONE _____

NEW PRE OWNED DEMO STOCK NO. _____ EMAIL _____

YEAR	MAKE	MODEL	TYPE	VIN
COLOR	TRIM	ESTIMATED DELIVERY DATE	PLACE OF DELIVERY	SALESPERSON

NOTICE TO CONSUMER: IF THE VEHICLE IS NOT DELIVERED IN ACCORDANCE WITH THIS AGREEMENT WITHIN 30 DAYS AFTER THE ESTIMATED DELIVERY DATE AND THE DELAY IS NOT ATTRIBUTABLE TO YOU, YOU HAVE THE RIGHT TO CANCEL THIS AGREEMENT AND TO RECEIVE A FULL REFUND OF YOUR DEPOSIT.

CASH PRICE OF CAR		
EQUIPMENT		
TOTAL		

PAYMENT SUBJECT TO TIER 1 APPROVAL

	NYS REQUIRED TIRE RECYCLING FEE (\$2.50 PER TIRE)		
	Dealer's optional fee for processing application for registration and/or certificate of title, and for securing special or distinctive plates (if applicable). THIS IS NOT A DMV FEE \$75.00		
	N.Y. STATE INSPECTION (NOT TO EXCEED \$37.00)		
	REGISTRATION FEE	COD	
TOTAL CASH DELIVERY PRICE			

CREDITS	DEPOSIT	(-)		
	ALLOWANCE FOR USED TRADE-IN, AS APPRAISED	(-)		
	PAY-OFF	(+)		
	OTHER	(-)/(+)		

DESCRIPTION OF TRADE-IN			SUB - TOTAL	
YEAR	MAKE	MODEL	BALANCE DUE	
SER NO.	MILEAGE		COD / CONTRACT	

THE FRONT AND BACK OF THIS ORDER COMPRISE THE ENTIRE AGREEMENT AFFECTING THIS PURCHASE AND NO OTHER AGREEMENT OR UNDERSTANDING OF ANY NATURE CONCERNING SAME HAS BEEN MADE OR ENTERED INTO, OR WILL BE RECOGNIZED. I HEREBY CERTIFY THAT NO CREDIT HAS BEEN EXTENDED TO ME FOR THE PURCHASE OF THIS MOTOR VEHICLE EXCEPT AS APPEARS IN WRITING ON THE FACE OF THIS AGREEMENT.

I HAVE READ THE MATTER PRINTED ON THE BACK HEREOF AND AGREE TO IT AS A PART OF THIS ORDER THE SAME AS IF IT WERE PRINTED ABOVE MY SIGNATURE. I CERTIFY THAT I AM OF LEGAL AGE, OR OLDER, AND HEREBY ACKNOWLEDGE OF A COPY OF THIS ORDER.

THIS AGREEMENT SHALL NOT BECOME BINDING UPON THE RETAILER UNTIL APPROVED BY AN OFFICER OF THE COMPANY.

CASH OR CERTIFIED CHECK ONLY ON DELIVERY

Each vehicle purchased entitles you to a free loaner car when the vehicle is in for service under the manufacturer's warranty.

APPROVED _____
BY _____
SUBJECT TO SATISFACTORY CREDIT RATING

SIGNED _____ PURCHASER
SALESPERSON _____

SPECIAL NOTICE TO CONSUMER
IF UNDER THE LAW OF THE STATE OF NEW YORK CONTROLLING THE SALE OF PRE-OWNED MOTOR VEHICLES, YOU SHOULD BE ENTITLED TO A REFUND IN CONNECTION WITH THIS TRANSACTION, THE VALUE OF ANY VEHICLE YOU MAY HAVE TRADED-IN (IF THE SELLER CHOOSES NOT TO RETURN IT YOU) SHALL NOT BE THE VALUE LISTED IN THIS DOCUMENT. INSTEAD, THE VALUE WILL BE DETERMINED BASED ON THE NATIONAL AUTO DEALER ASSOCIATION USED CAR GUIDE WHOLESALE VALUE OR OTHER GUIDE APPROVED BY THE COMMISSIONER OF MOTOR VEHICLES AND ADJUSTED FOR MILEAGE, IMPROVEMENTS AND ANY MAJOR PHYSICAL OR MECHANICAL DEFECTS.

SEE OTHER SIDE FOR ADDITIONAL TERMS
IF YOU AGREE TO ASSIST ME IN OBTAINING FINANCING FOR ANY PART OF THE PURCHASE PRICE, THIS ORDER SHALL NOT BE BINDING UP ON YOU OR ME UNTIL ALL OF THE CREDIT TERMS ARE PRESENTED TO ME IN ACCORDANCE WITH REGULATION "Z" (TRUTH-IN-LENDING) AND ACCEPTED BY ME. IF DO NOT ACCEPT THE CREDIT TERMS WHEN PRESENTED, I MAY CANCEL THIS ORDER AND MY DEPOSIT WILL BE REFUNDED

IF THIS AGREEMENT IS FOR A USED VEHICLE THE INFORMATION YOU SEE ON THE (FEDERAL TRADE COMMISSION) WINDOW FORM IS PART OF THIS AGREEMENT. INFORMATION ON THE WINDOW FORM OVERRIDES ANY CONTRARY PROVISIONS IN THE CONTRACT OF SALE.

ADDITIONAL TERMS OF AGREEMENT

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"I", "me", and "my" refer to the Buyer and Co-Buyer. "You" and "your" refer to the Seller.

I agree this order is subject to the following terms:

1. Trade-In Credit May Change. If I do not deliver the trade-in vehicle to you when this Agreement is signed, I agree, that at the time the trade-in vehicle is delivered to you, should the value of my trade-in be materially diminished as a result of physical damage, alteration or deterioration in mechanical condition other than normal wear and tear, YOU HAVE THE RIGHT TO REAPPRAISE THE VEHICLE. AS A RESULT OF SUCH REAPPRAISAL, I UNDERSTAND THAT THE TRADE-IN ALLOWANCE ON MY VEHICLE MAY BE REDUCED AND THAT THIS WILL IN TURN INCREASE THE NET PRICE WHICH I WILL HAVE TO PAY FOR THE VEHICLE IF I DECIDE TO PURCHASE THE VEHICLE. If the trade-in credit is reduced and I am not satisfied, I understand that I can cancel this agreement IF the purchased vehicle has not been registered in my name or delivered to me or you have not accepted delivery of the trade-in vehicle.

2. Trade-in: Buyer's Obligations. At the time I deliver the trade-in vehicle to you, I promise to sign a Bill of Sale and a mileage certification statement and give you satisfactory proof that I own the vehicle. I warrant (guarantee) (a) that there are no liens on the trade-in vehicle and that I owe no one any money for the vehicle or repairs to the vehicle, except as may be shown on the face of this agreement; (b) that the trade-in vehicle does not have a welded or bent frame and that the motor block is not cracked, welded or repaired; and (c) that the vehicle has not been flood damaged or declared a total loss for insurance purposes; and (d) that emission control devices have not been altered and/or removed, and nothing has been removed from the trade, including all seat belts, that was originally seen. The engine and/or transmission has not been tampered with to pass your inspection; and that the trade-in vehicle has never been used as a public conveyance or police car.

3. Buyer's Refusal to Purchase. Unless this agreement is non-binding because you are arranging credit for me, I understand that the cash deposit I have given to you can be retained, in accordance with your refund policy, to offset your damages if I refuse to complete my purchase. I also understand that I may be responsible for any other damages which you may incur as a result of my failure to perform my obligations under the terms of this agreement.

4. If, after dealer has sold trade-in vehicle, purchaser shall be entitled to and does cancel this agreement, dealer shall pay purchaser the amount received upon such sale, less a selling commission of 15% and any expense incurred in storing, repairing, insuring or advertising said trade-in vehicle for sale.

5. Delays in Delivery. I understand that you shall not be liable for delays caused by the manufacturer, accidents, surties, fires or other causes beyond your control. Provided you promptly place my order with the manufacturer and the manufacturer refuses to accept the order or fails to deliver the vehicle after accepting the order, upon your prompt notification and refund of my deposit, I will not hold you liable and this agreement shall be cancelled.

6. Disclaimer of Warranties. I UNDERSTAND THAT YOU EXPRESSLY DISCLAIM ALL WARRANTIES, EXPRESS OR IMPLIED, INCLUDING ANY IMPLIED WARRANTY OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE, AND THAT YOU NEITHER ASSUME NOR AUTHORIZE ANY OTHER PERSON TO ASSUME FOR YOU ANY LIABILITY IN CONNECTION WITH THE SALE OF THE VEHICLE, except as otherwise provided in writing by YOU in an attachment to this Agreement or in a document delivered to ME when the vehicle is delivered.

(a) Factory Warranty: Any warranty of any new vehicle or a used vehicle still subject to a manufacturer's warranty is made by the manufacturer only.

(b) Used vehicle whether or not subject to a manufacturer's warranty: This used vehicle is sold subject to Sect. 193-b, General Business Law.

Limitation on Implied warranties. Some States do not allow either (1) Limitations on how long an implied warranty lasts or (2) the exclusion or limitation of incidental or consequential damages, so these limitations may not apply.

7. Price Changes

(a) THE TOTAL CASH PRICE DELIVERED LESS THE TRADE-IN ALLOWANCE SHOWN ON THE FRONT OF THIS AGREEMENT IS THE FINAL CONTRACT PRICE TO WHICH YOU AND I HAVE AGREED, AND, IF THE VEHICLE IS A NEW MOTOR VEHICLE, NO ADDITIONAL FEE OR CHARGE WILL BE IMPOSED OR COLLECTED DUE TO CHANGES IN THE MANUFACTURER'S LIST PRICE, OR CHANGES IN THE COST OF FREIGHT OF SERVICES PROVIDED BY YOU.

(b) A REDUCTION IN THE VALUE OF THE TRADE-IN MAY RESULT IN AN INCREASE IN THE CASH PRICE DELIVERED I WILL HAVE TO PAY AS PROVIDED IN PARAGRAPH 1 OF THIS AGREEMENT.

(c) IF THE BALANCE I OWE ON MY TRADE-IN AT THE TIME OF DELIVERY OF THE TRADE-IN TO YOU IS DIFFERENT THAN THE AMOUNT I HAVE TOLD YOU AND WHICH AMOUNT IS SHOWN ON THE FRONT OF THIS AGREEMENT, THEN THE CASH PRICE DELIVERED OF THE VEHICLE I AM PURCHASING SHALL CHANGE ACCORDINGLY.

(d) IF THE REGISTRATION FEE VARIES FROM THE AMOUNT YOU HAVE ESTIMATED ON THE FRONT OF THIS AGREEMENT, THEN THE CASH PRICE DELIVERED SHALL CHANGE ACCORDINGLY.

(e) I AGREE THAT I WILL PAY THE FINAL CASH PRICE DELIVERED AS SHOWN ON THE FRONT OF THIS AGREEMENT. IF THERE HAVE BEEN ANY CHANGES IN THE TOTAL CASH PRICE DELIVERED FOR REASONS STATED IN THIS PARAGRAPH 6 THEN I WILL PAY THE CASH PRICE DELIVERED AS CHANGED BY ANY SUCH ADJUSTMENT. MY PAYMENT WILL BE EITHER IN CASH, BANK, OR CERTIFIED CHECK AT THE TIME OF DELIVERY OF THE VEHICLES I HAVE PURCHASED.

8. Change of Design. I understand that the manufacturer has the right to change the design of the vehicle, its chassis, accessories or any parts at any time without notice to YOU or ME. In the event of such a change by the manufacturer, YOU shall have no duty to ME except to deliver the vehicle as made by the manufacturer.

9. Additional Terms. In the event that the transaction referred to in this order is not a cash transaction, I, before or at the time of delivery of the motor vehicle ordered, in accordance with the terms of payment shown on the front of this order, will sign a chattel mortgage, conditional sales contract lease or such other form of agreement as any be shown on the front of this order.

10. New York Law Applies. You and I agree that this Agreement is governed by New York State Law.

11. No Other Agreements. There are no understandings or agreements between you and me other than those set forth in this Agreement and attachments to this Agreement if there are any such attachments.

Position	MB	Bodyshop
Salesman 	Commission Level based on New and used cars delivered in the prior month 0-10 units delivered = 15% 11-13 = 16.5% 14+ = 18% Maximum commission rate = 19% Current posted monthly IBS Score of 95 or above = add 1% to commission level Current Posted 3 months IBS score of 94 or less = deduct 1.5% from commission level Used Cars will be paid at 20% of the net after all repair orders 15% All lease reserves 10% All finance reserves Used Car appraisal adjustments through the auction at 15% only 10% on any hard item sold and extended warranty All trade assist vehicles count towards volume and commissions paid DEPP vehicles do not count towards volume or commission level	
F & I	Weekly Salary 19% All aftersale items 19% All finance reserved Finance reserves will be reconciled monthly and will be adjusted accordingly All chargebacks will be adjusted the following week All delivery paperwork must be complete There will be no draw allowed	
Technician 40 ✓	35 Hour Guarantee 35-40 Regular Rate 40< Step Program Saturday pay for non scheduled Saturday employees are based on actual hours produced at a rate of 130% of hourly pay Step Program 40-43.9 = additional \$.50 44-47.9 = additional \$1 48-51.9 = additional \$2 52-55.9 = additional \$3 56-59.9 = additional \$4 60-69.9 = additional \$5 70 and up = additional \$7.5 **Dollar values retroactive back to your first hour	Hourly Rate with no OT 100% Regular Rate until Monthly hours achieved 130% Regular Rate up to 250 hours 150% Regular Rate over 250 hours
Service Advisor	Weekly Salary Weekly Incentive Qualifiers: Rate A Previous month CSI 941 or > Previous month email capture 80% or > Previous month customer pay hrs 325 or > Rate B Previous month CSI <940 Previous month email capture <79% Previous month customer pay hrs <324	

#10

Pay Rate:

Rate A

- Customer labor \$\$ - 7.5%
- Access Labor SS -15.0%
- Align & Moc Labor \$\$ - 12.0%
- Warranty labor \$\$ - 4.2%
- Accessory parts \$\$ - 12.0%

MOC parts \$\$ - 8.0%

Rate B

- Customer labor SS - 5.5%
- Access Labor \$\$ -15.0%
- Align & Moc Labor \$\$ - 10.0%
- Warranty labor \$\$ - 3.0%

Accessory parts \$\$ - 12.0%

MOC parts \$\$ - 6.0%

Monthly Incentives

- 10% Sublet customer pay
- HVAC/HAVCB = \$10ea
- PPM/ELW Contracts = \$100ea
- Op Code #29/Trans Fluid/Filter = \$25ea

Monthly Alignments

- 25-30 = \$275
- 31-35 = \$325
- 36plus = \$400

CEI/Individual Scores

- MB Only 952> = \$750
- Sprinter Only 875> = \$250

Customer Pay Hours/Month

- 375-399 Hours = \$250
- 400-450 Hours = \$500
- 451-499 Hours = \$750
- 500 > Hours = \$1,000

Shop Foreman	Weekly Salary Production pay based on number of tech and total hours (see attached chart) Medallia Monthly Service Quality 941> = \$1,000
Shop Dispatcher	Weekly Salary Commission based on shop hours (see attached chart)
Shop Dispatch Coordinator	Weekly Salary Production pay based on number of tech and total hours (see attached chart)
Service Production Coordinator	Weekly Salary Production pay based on number of tech and total hours (see attached chart)
Warranty Administrator	Weekly Salary Commission based on warranty hours (see attached chart)
Booker/Biller/Timekeeper	Weekly Salary Commission based on warranty hours (see attached chart)
Loaner/Valet Supervisor	Weekly Salary CEP/CSI Bonus \$500 if indicator is green from previous
Parts Assistant Manager	Weekly salary Weekly commission based on shop hours CSI Bonus \$200
Parts Counterman	Paid hourly Weekly commission based on shop hours CSI Bonus \$200
Parts Wholesale	Weekly salary Weekly commission based on shop hours .5%-2% Wholesale Gross Monthly
Parts Driver	Paid hourly

#12

Dealership	Name	Job Title	Term Date	Reason
Mercedes	- Adames Zapata, Yorky	001144 - MB Trainee	11/02/2017	R - Resigned
Mercedes	- Angone, Matthew X	001140 - MB Tech	04/26/2018	D - Discharged
Mercedes	- Aprea, Marco A	001140 - MB Tech	10/02/2017	R - Resigned
Mercedes	- Arboleda-Martinez, Nicolas	001163 - MB Showroom Valets	03/17/2018	R - Resigned
Mercedes	- Athenas, Donna X	001112 - Quality Control Mngmt	11/03/2017	R - Resigned
Mercedes	- Barrientos, Richard A	001140 - MB Tech	10/06/2017	R - Resigned
Mercedes	- Bell, Harry X	001131 - MB Svc Supervision	02/14/2018	D - Discharged
Mercedes	- Binda, Jason J	001159 - Body Shop Valets	07/19/2017	D - Discharged
Mercedes	- Bowling, Dave X	000150 - Interco Mercedes	09/01/2017	D - Discharged
Mercedes	- Braunstein, Leslie X	001125 - MB Sales Clerical	01/24/2018	D - Discharged
Mercedes	- Burkert, Veronica X	001118 - BDC Sales MB	09/07/2017	D - Discharged
Mercedes	- Casola, Karen	001125 - MB Sales Clerical	07/07/2017	R - Resigned
Mercedes	- Caybasi, Devin	001164 - MB Service Valets	07/19/2017	D - Discharged
Mercedes	- Caybasi, Dillan B	001164 - MB Service Valets	07/19/2017	D - Discharged
Mercedes	- Cola, Tatiana	001125 - MB Sales Clerical	05/19/2017	R - Resigned
Mercedes	- Dahdal, Joseph	001140 - MB Tech	10/13/2017	D - Discharged
Mercedes	- D'Chiutiis, Anthony T	001110 - MB Sales	02/16/2018	R - Resigned
Mercedes	- Digregorio, Joseph	001114 - Sales Sprinter	12/29/2017	U - Normal Retirement
Mercedes	- Done, Andres	001140 - MB Tech	08/30/2017	D - Discharged
Mercedes	- Edlinger, Rosalie F	001125 - MB Sales Clerical	11/04/2017	D - Discharged
Mercedes	- Faath, Kenneth X	001105 - MB Director	04/06/2018	D - Discharged
Mercedes	- Galindo-Sanchez, Jonathan B	001164 - MB Service Valets	07/03/2017	R - Resigned
Mercedes	- Garcia Granados, Jhecsson	001164 - MB Service Valets	02/19/2018	L - No-show
Mercedes	- Garcia Jose, Joel	001162 - Prep Center	08/03/2017	D - Discharged
Mercedes	- Gonzalez, Edwin O	001151 - MB Maint	12/15/2017	R - Resigned
Mercedes	- Graf, Richard X	001158 - Body Shop Advisors	04/09/2018	D - Discharged
Mercedes	- Guevara, Eric N	001164 - MB Service Valets	12/15/2017	L - No-show
Mercedes	- Habibi, Melissa X	001112 - Quality Control Mngmt	01/22/2018	D - Discharged
Mercedes	- Harizanov, Assen	001133 - MB Timekeepers	04/26/2018	R - Resigned
Mercedes	- Hen, Ami X	001110 - MB Sales	07/01/2017	D - Discharged
Mercedes	- Hernandez, Rufino	001170 - MB Parts	12/01/2017	R - Resigned
Mercedes	- Herrera, Pablo	001161 - Body Shop Mechanics	09/28/2017	D - Discharged
Mercedes	- Khan, Zahid M	001156 - Body Shop Painters	05/22/2017	D - Discharged
Mercedes	- Koziel, Adrian	001164 - MB Service Valets	09/29/2017	L - No-show
Mercedes	- Lewis, Shaniqua JM	001119 - BDC Svc MB	10/24/2017	R - Resigned
Mercedes	- Loba, Krzysztof X	001114 - Sales Sprinter	03/10/2018	M - Performance
Mercedes	- Matan, Martin		04/27/2018	D - Discharged
Mercedes	- Miles, Shannon X	001172 - MB Service Clerical	08/11/2017	R - Resigned
Mercedes	- Moss, George F	C - Contractor	10/31/2017	D - Discharged
Mercedes	- Moss, Richard	C - Contractor	10/31/2017	D - Discharged
Mercedes	- Norton, Paul	C - Contractor	10/31/2017	D - Discharged
Mercedes	- Ortiz, Ysrael	001157 - Body Shop Polishers	04/27/2018	D - Discharged
Mercedes	- Posch, Andrew J	001140 - MB Tech	01/05/2018	R - Resigned
Mercedes	- Rodriguez, Dario	001157 - Body Shop Polishers	04/27/2018	D - Discharged
Mercedes	- Rodriguez, Michael A X	001164 - MB Service Valets	11/17/2017	D - Discharged
Mercedes	- Savin III, Frank	001140 - MB Tech	04/11/2018	R - Resigned
Mercedes	- Sayay, Cesar	001161 - Body Shop Mechanics	04/27/2018	D - Discharged
Mercedes	- Schubert, Susan X	001115 - Leasing	01/11/2018	R - Resigned
Mercedes	- Shugrue, Barbara	C - Contractor	10/31/2017	D - Discharged
Mercedes	- Singh, Preeti	001156 - Body Shop Painters	11/27/2017	D - Discharged
Mercedes	- Timm, Kaylee R	001172 - MB Service Clerical	08/25/2017	R - Resigned
Mercedes	- Valerio, Jeffrey J	001164 - MB Service Valets	04/17/2018	R - Resigned
Mercedes	- Weber, Janet X	001172 - MB Service Clerical	04/30/2018	D - Discharged
Mercedes	- Willems, William T	001159 - Body Shop Valets	04/27/2018	D - Discharged
Mercedes	- Woloz, Jeremy M	001151 - MB Maint	05/05/2017	D - Discharged

Voluntary Terminated
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Additional Information

- 1 Please provide aging information from your DMS parts department inventory report.

The name of the report varies by DMS. It could say Movement, Sales by Last Activity etc. The basic form will be similar to:

0 - 3 months	\$ 1,018,747
4 - 6 months	\$ 1,803,552
7 - 9 months	\$ 1,768,668
10 - 12 months	\$ 294,422
12+ months	\$

You can bring a copy of your report and not fill in the blanks above.

- 2 New Vehicle Aging Information

	Units	\$\$
0 - 30 Days	100	5,081,568
31 - 60 Days	40	2,704,755
61 - 90 Days	27	2,497,042
91 - 120 Days	22	1,504,915
120 + Days	24	2,605,488

- 3 Used Vehicle Aging Information

	Units	\$\$
0 - 30 Days	122	3,578,581
31 - 60 Days	40	1,351,830
61 - 90 Days	13	628,258
91 - 120 Days	20	4,599,599
120 + Days	10	1,252,244

- 4 **GM Dealers** - Holdback Receivable is not listed separately on your financial statement.

Please see your controller / office manager and list your holdback receivable that ties to the financial statement you are bringing to class.

Holdback Receivable \$ 4,270,922

Grand Total

RALLY MOTORS
MONTHLY SUMMARY REPORT

	NBR OF PARTS	PERCENT	PARTS PIECES	PERCENT	PARTS COST	PERCENT
Inventory Balance	36,980					
Active Parts	7,948	21.49	48,666	91.94	1,425,156.84	93.62
NS Parts	27,082	73.23	44,745	0.46	1,334,326.59	1.77
MO Parts	290	0.78	3,446	7.08	25,299.47	2.45
AP Parts	962	2.60	238	0.48	35,041.97	1.84
DP Parts	1	0.00			26,347.19	
SP Parts	680	1.83	11	0.02	4,141.62	0.29
DELT Parts	17	0.04				
Parts With No Cost	4	0.01	13	0.02		
Parts With Negative On-Hand	3	0.00	10		-48.63	
Core/Exchange	222	0.60	309	0.63	36,730.05	
Memos On File	4,196					
Parts Added	1,054	2.85	74	0.15	11,287.84	0.79
Active Parts	40	3.79	34	45.94	4,217.40	37.36
NS Parts	352	33.39	25	33.78	2,664.40	23.60
MO Parts	6	0.56	4	5.40	264.42	2.34
AP Parts						
DP Parts						
SP Parts	656	62.23	11	14.86	4,141.62	36.69
Parts & Memos Deleted	1,177					
Inventory Movement - Sales						
0 to 3 Months	8,489	22.95	41,673	85.63	1,018,747.73	71.48
4 to 6 Months	3,172	8.57	3,336	6.85	180,352.87	12.65
7 to 12 Months	5,098	13.78	2,993	6.15	176,868.39	12.41
Over 12 Months	19,533	52.82	529	1.08	29,442.51	2.06
New Parts No Sales	688	1.86	135	0.27	19,745.34	1.38
Inventory Movement - Receipts						
0 to 3 Months	8,333	22.53	37,328	76.70	1,005,475.13	70.55
4 to 6 Months	3,570	9.65	4,580	9.41	212,456.31	14.90
7 to 12 Months	5,450	14.73	3,722	7.64	169,843.47	11.91
Over 12 Months	19,415	52.50	3,036	6.23	37,381.93	2.62
New Parts No Receipts	212	0.57				
Outstanding Orders	369	0.99	1,422		135,211.11	27.19
Stockorders	165	44.71	636	44.72	36,769.64	
Supplemental Orders						
Customer Orders	140	37.94	225	15.82	23,480.19	17.36
Backorders	83	22.49	561	39.45	74,961.28	55.44
Stockorder Backorders	29	7.85	373	26.23	26,936.08	19.92
Supplementl Backorders						
Customer Backorders	63	17.07	188	13.22	48,025.20	35.51
Outstanding Forced Orders						

RALLY MOTORS
MONTHLY SUMMARY REPORT

	NBR OF PARTS	PERCENT	PARTS PIECES	PERCENT	PARTS COST	PERCENT	TRANS COUNT
Grand Total							
Gross Sales	4,636	12.53	51,527	96.13	1,478,724.93	93.98	21,423
Regular	4,485	96.74	49,534	3.86	1,389,763.23	6.01	21,191
No History	228	4.91	1,993		88,961.70		232
Drop Ship							
Wholesale							
Wholesale No History							
Wholesale Drop Ship							
Warranty							
Warranty No History							
Warranty Drop Ship							
Lost Sales	48	0.12	48		6,978.50		48
Return Sales							
Regular	1,122	3.03	3,457	99.56	234,866.73	99.07	1,794
No History	1,118	99.64	3,442	0.43	232,688.73	0.92	1,790
Defective	4	0.35	15		2,178.00		4
Wholesale							
Wholesale No History							
Wholesale Defective							
Warranty							
Warranty No History							
Warranty Defective							
Receipts							
Stockorders	3,752	10.14	48,574	33.90	1,243,682.46	47.06	5,564
Supplemental Orders	1,578	42.05	16,471	9.17	585,298.40	33.04	2,601
Customer Orders	1,650	43.97	4,455	56.91	410,919.87	19.89	1,919
Emergency Purchases							
Other Receipts	824	21.96	27,648		247,464.19		1,044
Overages							
Net Adjustments	125	0.33	1,206	80.92	-11,378.33		145
Plus	18	14.40	976	19.07	7,488.35		27
Minus	107	85.60	230		-18,866.68		118
Factory Returns	253	0.68	506		-49,066.29		254
Net Appreciation	144	0.38	12,728	26.15	5,017.78		382
Positive	112	77.77	10,946	85.99	6,169.20		251
Negative	32	22.22	1,782	14.00	-1,151.42		131
Parts Updated With Cost	1,097	2.96					1,097
Parts With Comments	1						
Misc & Sublet Items							
Gross Sales							
Lost Sales							
Return Sales							
Parts Not On File, But Sold							
Gross Sales			46		2,356.30		87
Lost Sales			14		2,056.00		11
Return Sales							

#14

Rallye Phone Skills

RALLYE PHONE SKILLS

Rallye Phone Skills

General Phone Strategies:

1 - Understand the four goals of the phone call.

- Obtain the Client's information (Name, Phone, Email)
- Build Rapport (Get them to like you)
- Create some energy!
- SELL the appointment!

2 - Obtain the client's contact information early in the call because it is much more difficult later in the conversation.

- It is important to gain contact information before asking for/selling an appointment

3 - Building Rapport means you must "like people" and enjoy the conversation.

- Ask about them, share about you!
- Calling from a different area code? Ask!
- Dog barking? Ask!
- Baby crying? Ask!
- Just moved to the area? Ask!

4 - Creating Energy means finding a reason for excitement

- Special Programs
- Current Availability
- Multiple vehicles to select from
- NEW models
- WOW factors

5 - Selling the appointment means creating value in having an appointment. Why is an appointment a good thing for the client?

- Saves the client time
- Changes the experience
 - They don't have to say, "I'm just looking"
 - They get a special parking space?
 - The vehicle they want is in front and ready for them
 - Appointment to meet manager directly
 - They like you!

Rallye Phone Skills

-
- You are "connecting them " They get to "have you ready when you arrive!"

Continued...

6 - Take control and GUIDE the call!

- Never say, "Let me know" or "Do you want to"
- The next step is...
- What I recommend we do next is...
- Most of our clients in this situation find that _____ is the way to move forward.
- Let me do this for you...

7 - Ask Strategic Questions:

- **What is your timeframe for getting into a new car? (Are you looking at sometime in the next few days or after that?) – I can help you either way.**
- You don't need to take delivery of a vehicle today do you?
 - These questions are IMPERATIVE! Most of the client's questions will be about inventory and price.
 - If the customer says "next few days / immediately / now / soon" then there is an urgency and the best way to make this happen is to come to the center – this can help selling an appointment later in the conversation.
 - If the client says "after that" or indicates that the need is not immediate then current inventory isn't all that important so the "do you have it?" question is minimized.
- Will you be servicing your vehicle with us?
 - This tells you whether or not the live or work locally. If they are close by, use this for rapport
- Will this vehicle be for family or work?
 - Work: What kind of work do you do?
 - Family: Great, I have
- Will this be your first BMW/Lexus/Mercedes/Acura?
- What are you currently driving?
 - What are your plans for that vehicle?
- Are you familiar with Roadshow BMW/Lexus/Mercedes/Acura?

8 - Transition to the appointment with "Would you consider?"

- The most important thing to remember here is that it doesn't matter if the client says, "Yes" or "No"

Rallye Phone Skills

-
- Would you consider one of our Executive Demos/Service Demos if we have one available?
 - Yes – Great let's set up a time to show them to you as well as the _____.
 - No – Sounds like you're committed to the _____ and we do have that available! Here's what I'd like to do for you...

Create value in the appointment even after the customer has agreed to it

- Special reserved parking space
- Manager will be expecting you
- Vehicle will be ready for you to drive
- Our focus will be respecting your time

9 - Handling common Objections:

- Price is really the easy part, we've sold more than three thousand vehicles in the past few years to people just like you – and all of them were concerned about price. We deliver them the best value and we will do this for you too. I have times available...
- Today, our XXX price on that car today is \$XX,XXX, however, we have several other similar (MODELS) that we may be able to give you an even better deal on.
- I've been given some pricing already by another dealer: "Great, bring those with you, if our price isn't already better, we'll beat it." Are you familiar with our price guarantee?
- The weekends are very busy here and I want to make the best use of your time. I recommend we schedule you an appointment with my Senior Manager (before the weekend) so that we can be prepared for your visit and give you the service you'd expect. Do you have time tomorrow afternoon or are evenings better?
 - Since weekends are best for you, I strongly suggest we schedule you with our Senior Manager before 10am so we can be prepared for your visit and give you the service you'd expect.
- I don't want you to regret your decision every time you see our license plate frame over the next few years. It's truly worth your time to see what we can do for you.

Rallye Phone Skills

DPG Inbound Call Strategy Guide

Goals: 1) Create Excitement! 2) Obtain Contact Information! 3) Sell an APPOINTMENT!

1 – Reduce Friction & Gain Control: Ask questions to control the conversation

Thank you for choosing (Thank you for holding) Rallye _____, this is _____, (How can I help you today?)

Great, I can help you with that. (Excellent, that sounds great). When are you looking to take delivery of the vehicle, within the next few days or after that? (Pause for response) And by the way, how did you hear about us?

--**“IF”** questioned...*Okay, I can help you either way, I just want to know whether I should take a look at what we have coming in or limit my search to the selection that we have immediately available--*

2 – Contact Information: Obtain caller details BEFORE asking for an appointment

Great, now that I understand your timeframe and a little bit about what you're looking for, let me check what we have available and get the details... It should only take me about 2 minutes. Are you calling from work, home, or cell?

And the number there is? <Phone Number> _____

How do you spell your LAST NAME? _____ And your FIRST? _____

3 – Create Excitement and Rapport: Choose two or three questions to build excitement (Use Worksheet)

Will this be your first _____? 	Will this be for work or family? 	What are you currently driving? 	Are you familiar with (WOW Factor)? 
---	---	--	--

4 – Ask for the Appointment: Lead in with “would you consider?”

The best way to make this happen for you is to set you up with our an appointment so you can get everything you need. This way we can (SOLUTION) <SELL the Appointment!> Are you available today or is tomorrow better? Okay, would you prefer daytimes or evenings? Great, then I have an opening as early as _____:15 or _____:45?

5 – Confirm the Appointment: Establish the value of the appointment

Do you know where we are located? <Give Directions if needed>

When you arrive, come directly inside to the reception desk. Our reception team will be there to greet you. Let them know you have an appointment (with NAME). I'll give them your information and they will be ready for you. If someone approaches you, just let them know you have an appointment and they'll direct you to our reception desk.

I'll also send these details to you, what email address is best? <Document Email Address>

Again, my name is (NAME) in case you need anything before your arrival here. We're looking forward to your visit. Thank you for calling and have a GREAT day!

Rallye Phone Skills

GREETING		INTERNET OUTBOUND CALL GUIDE	
Hi, may I speak to [Customer Name] please. This is [Your Name] calling from Rallye _____. I am reaching out in response to your recent internet inquiry on the _____ MAKE _____ MODEL Are you looking to purchase in the next few days or do we have a little time to work together?			
INFORMATION			
Our job at Rallye _____ is to make the buying process as convenient as possible for you. So that I better know what you are looking for, are there any features that you specifically want or do not want? Great. One more question, are you specifically and only looking for this particular vehicle or are you open if we have a similar vehicle that is new, used, certified or even possibly a demo? We can help either way.			
BUILD RAPPORT			
Will this vehicle be for Business or Family? <input type="checkbox"/> Business <input type="checkbox"/> Family	What are you currently driving? (Trade?) <input type="checkbox"/> Yes <input type="checkbox"/> No	Have you ever owned a _____ before? <input type="checkbox"/> Yes <input type="checkbox"/> No	Are you familiar with Rallye _____? <input type="checkbox"/> Yes <input type="checkbox"/> No
CONSULTATIVE DIRECTION: REASON → RECOMMENDATION → BENEFIT			
Reasons to Visit: <input type="checkbox"/> Product /Feature Uncertainty <input type="checkbox"/> New to BMW <input type="checkbox"/> New to US <input type="checkbox"/> Lease Inspection <input type="checkbox"/> Short Timeline <input type="checkbox"/> Lease vs Finance <input type="checkbox"/> Pricing <input type="checkbox"/> Test Drive <input type="checkbox"/> New vs Used <input type="checkbox"/> Trade In <input type="checkbox"/> Financing Questions: <input type="checkbox"/> Vehicle Order/find <input type="checkbox"/> Other _____			
OFFER AN APPOINTMENT DATE AND TIME			
Here is what I recommend. Because you mentioned ABOVE REASONS I recommend you come in and meet directly with our Senior Manager. This way you will be able to LIST BENEFITS Would a weekday or weekend work better for you? Okay, would you prefer mornings or afternoons? Perfect! I have (DATE/TIME) available or would (DATE/TIME) work better? (Appointment Details: Date: _____ Time: _____)			
Ok, I have you confirmed for (DATE/TIME). When you arrive simply check-in at the front desk and let them know you have an appointment with (NAME). If you're running late or need to reschedule can you please give me a call? (PAUSE) (Provide Phone). (NAME), what email address is best to send your appointment confirmation? (Email: _____) Is there anything else I can assist you with today? Thank you for calling, have a great day.			

The following word tracks focus on specific frequently asked questions. Price is cover also. The strategy behind these word tracks:

Rallye Phone Skills

- Control – Asking strategic questions keeps you in control and moving towards the appointment.
- Preparation – YOU should be ready for every question, BEFORE they ask it.
- Answer all their questions, but ask a strategic questions next.

You should know this information after every call when no appointment has been set:

- You next call schedule and agreed to with the client.
- What are they driving?
- Trade?
- Have they driven the vehicle of interest?

“Just tell me if you have the car?”

With vehicles moving very quickly and the inventory changing on an hourly basis, it may take me a few minutes to get you the accurate information. Are you calling from your cell?

“Don’t you know your inventory?”

With over ___ vehicles available now and thousands in our group access, I want to ensure I provide you with accurate information. It should only take approximately 5 minutes...are you calling from work or your cell?

“I just want to know if you still have this particular car”

Allow me to speak with our inventory manager to check the status of that vehicle. It will only take me approximately 5 minutes. Are you calling from your cell?

“Why did you ask my timeframe?”

I’d like to know if I should look at what we have coming in or limit my search to the selection we have immediately available. I can help you either way...

Rallye Phone Skills

“Price, Price, Price – Right off the bat...Price!”

“Mr Cordova there are usually two prices given over the phone; MSRP and a get'm in price that may or may not be available when you arrive. We don't work that way, your presence in the Center showroom is your greatest negotiating tool. I have time's available today or is tomorrow better for you?”

“Mr. Cordova we sell more _____ that anyone else in the area. We do this with better value, great service and by taking the time to be sure we get you the “right” vehicle. _____ does this better than anyone. I have times available today or is tomorrow better for you?”

“Mr. Cordova the nationally advertised special on that model is at _____. The _____ is leasing for as little as _____. I have time available today or would tomorrow be better for your?”

BEST PRACTICE - “Mr. Cordova I understand you are looking to get the best price. We've sold over _____ in the last three years. Everyone of those clients wanted the best price and we delivered! I have times available today or is tomorrow better for you.”