



## HOMEWORK ACTION PLAN

S SPECIFIC   
 M MEASURABLE   
 A ACHIEVABLE   
 R RELEVANT   
 T TIME-BOUND

Name <u>THOMAS TANTALO</u>	Class # <u>N426</u>
Dealership <u>MATTHEWS KIA OF GREECE</u>	Date <u>1/28/2024</u>

Current Situation or Challenge to be Addressed:	Matthehs KIA of greece is well below the group average in product per retail (PPR).		
Current Performance Level (include specific measure):	Matthew KIA of greece ended 2023 with an avergae product per retail average of \$924 per copy.		
Goal (what do you want to achieve?)	The goal is to increase Mattehws KIA of Greece product per retail avergae to match the Matthews Auto Group product per retail average. This will be done by a sales and F&I process change in conjunction with training and utilizing current technology. Sales managers F&I manager and sales staff will all be involved in accomplishing this goal. We will use data from Taillight and Darwin to track progress.		
Goal Performance Level (include specific measure)	The goal is to raise ther product per retail from \$924 to \$1224 by August 1st 2024.		
Goal Start Date:	3/1/2024	Goal End Date:	8/1/2024
First Check-in Date:	4/2/2024	Performance Objective:	PPR monthly average of \$1000
Second Check-in Date:	5/1/2024	Performance Objective:	PPR monthly average of \$1075
Third Check-in Date:	6/1/2024	Performance Objective:	PPR monthly avergae of \$1150
Fourth Check-in Date:	7/1/2024	Performance Objective:	PPR monthly average of \$1224
How does your goal align with the dealers' vision?	Our goal is to sell more product per retail verse reserve to a 70% PPR and 30% reserve. This will increase the customers ownership experience because they will have been protected against future repair costs.		
What are the potential benefits of achieving your goal?	The benfits will be better retention in service, which will lead to more future retail sales. Also if we increase the PPR \$300 a copy to meet the groups average based on the unit sales staying the same form last year		

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	at 1071 will be an increase of \$321,300 in gross without selling one more additional unit.
What are the potential consequences if you don't achieve your goal?	Lower profits and customer retention. If we do not increase F&I income we will not be able to attract and keep quality sales and F&I managers.
Why is the goal important to you?	The goal is important to me not only financially for the store but to demonstrate to the entire auto group that this store can improve in a short period of time through process changes, training and accountability.
Potential Obstacles	Potential obstacles will be push back from current managers and sales staff.
Potential Solutions	Payplan changes to incentivize managers and sales staff, along with continued training and support from internal and external sources.
<b>BOTTOM LINE!</b> Financial Impact of Achieving Your Goal (expressed in dollars)	\$321,300 in additional gross without selling one additional unit increase over 2023 sales.

What specific actions or steps will you take to accomplish your goal? What will you do differently or improve? For each, be sure to include necessary resources, who is accountable, the measurable result, and dates.

SPECIFIC ACTION/STEP	NECESSARY RESOURCE(S)	ACCOUNTABLE PERSON(S)	EXPECTED RESULT	START, END, & CHECKPOINT DATES
Gather and review current and historical PPR results for KIA of Greece with GM, GSM, SM, BM using Data from Taillight Finance report.	Taillight finance report for Matthews KIA of Greece for 2023 and YTD.	Thomas Tantalò, Massimo Castelli Market GM, Brian Salomone GSM, Ryan Allen SM, Jeff Morgan BM.	Review past and current PPR and review incremental increases to achieve the goal of \$1224 PPR by 8/1/2024	Start date and end date of the meeting is 3/1/24.
Train and retrain all Managers and sales staff on product	Mosaic product training portal	Thomas Tantalò, Massimo Castelli, Brian Salomone, Ryan Allen, Jeff	All accountable personnel will complete or retake all product	Start Date will be 3/1/24 and 100% completed by 3/8/24 with a

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knowledge using online training tools.		Morgan and sales team members.	knowledge online classes and receive 100%.	check and progress report emailed to the GM and posted every day in the sales office and sales bull pen showing who has completed and who has not completed.
Train sales team and managers on Simon Sinek's the "why".	Simon Sinek's 18 minute YouTube video of the "why" and use of the conference room.	Thomas Tantalò	The entire team to understand its not what you sell but why you sell it. When it comes to products its to fill the gaps from the manufactureres coverage to protect the customer and avoid future repair bills.	March 4th and 5th. I will hold 3 one hour training sessions to cover the entire team.
Add into the current sales process requiring all trade ins to be valued with the customer before introducing them to a manager that will put the final number on the trade. We will teach them to have a constructive conversation with	Trade walk training powerpoint, trade in evaluation form.	Thomas Tantalò, Massimo Castelli, Brian Salamone, Ryan Allen, Jeff Morgan entire sales team	Train sales team and managers on how to properly value the trade in a transparent conversational manner. Planting seeds but NOT SELLING during the trade walk. After the training we will role play each day for 15 minutes with the managers and sales team until	Start March 4th and 5th with classes and continue role play with everyone being 100% proficient by March 9th.

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the customer to be able to properly justify the condition of the trade NOT DEVALUE IT.			they all have perfected it 100%.	
Change current TO from F&I from being at time of delivery to time of sale. Also using the ownership review in Darwin 100% of the time to customize your presentation to the customer based on what "they said" from the ownership review.	Darwin Ownership review and Darwin utilization report	Thomas Tantalo, Massimo castelli, Jeff Morgan	100 % Ownership review in Darwin prior to a menu presentation. We can verify by tracking iPad usage running the Darwin utilization report.	Start 3/2/24 and have a 80% usage by 3/9/24, a 90% usage by 3/16/24 and 100% usage by 3/30/24
Change current presentation of products from a paper worksheet upfront by sales team to an F&I manager at the time of sales using a customized menu in Darwin on the iPad presentation followed by a final acceptance.	Darwin and Darwin utilization report for tracking of usage	Thomas Tantalo, Massimo castelli, Jeff Morgan	100 % menu presentation using an iPad and a Darwin menu and final acceptance	Start 3/2/24 and have a 80% usage by 3/9/24, a 90% usage by 3/16/24 and 100% usage by 3/30/24
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As you work toward your goal, it's important to have interim check points with specific, measurable objectives so your team can hold themselves accountable. If everyone knows the goal and objectives, you don't have to spend your valuable time micromanaging.

Once you've accomplished your goal, added or adjusted policies, procedures, and behaviors, now what? How will you ensure you and your staff do not fall back into the previous habits that produced poor results? Be specific.

In order to not go backwards once we hit our goal. I will have monthly 1 on 1 with the sales staff to review the previous months results along with individual PPR goal setting and identifying any areas of training for sales to reach there current goal. Also will do the same with finance managers and sales managers. Also we will continue to practice the trade walk, ownship review and presentations in conjunction with contests and spiffs for sales staff when the store hits its month PPR objective.

Describe any planning or implementation meetings conducted as part of development of your plan.

Currently being out of the office I will not have any planning meetings until my return March 4th. Once I do I will have a meeting with the GM, GSM, SM and BM to review my ganme plan and make any adjustments. Then we will role this out to the sales staff and show them individual what this increase will mean to them finacially.