



## Financial Management Objective Homework

**Student** Neil Fyda
**Name:** 36
**Academy**  
**Class #**

*I plan to accomplish the following objective* Develop CRM
*by our next class on:*

**Provide the relevant composite data**

| Department | Month | Page | Column |
|------------|-------|------|--------|
| Sales      |       |      |        |

| Action plan for achieving objective   |
|---|
| <b>What is the area of focus?</b><br>Sales, falling into Parts, then Service  |
| <b>What is the proposed plan? How will you achieve it?</b><br>Hire an IT consultant to streamline our current CRM and sales process   |
| <b>How will you track your progress? What measurements, KPI's? How often will you track?</b><br>There are very real benchmarks to achieve. 1. Deep and accurate customer information. 2. Develop useful report and business views. 3. Reconcile the CRM with the DMS. 4. Create a sales template. |
| <b>Who are the employees that will be involved, or impacted? Will they require training or assistance?</b><br>Controller, IT, GM, All Managers, Salesmen, Parts Counter, Service Writers.<br>Currently 70% trained,<br>will continue to roll out as they come online                              |
| <b>Is there a cost, or estimated cost for implementation?</b><br>\$30000  |
| <b>Projected date of completion? December 31</b>  |

|             |             |              |              |             |             |
|-------------|-------------|--------------|--------------|-------------|-------------|
| <b>Jan.</b> | <b>Feb.</b> | <b>March</b> | <b>April</b> | <b>May</b>  | <b>June</b> |
| <b>July</b> | <b>Aug.</b> | <b>Sept.</b> | <b>Oct.</b>  | <b>Nov.</b> | <b>Dec.</b> |