

First Time Fill Rate

DEALERSHIP NAME	NADA Motors	rst time fill rate		
DATE	RO'S	1st Time	Same Day	Day
7/30/2018	46	39	39	7
7/31/2018	36	32	32	4
8/1/2018	31	26	26	5
8/2/2018	21	17	17	3
8/3/2018	26	23	23	3
Totals	160	137	137	22



Rate %
84.78%
88.89%
83.87%
80.95%
88.46%
#DIV/0!
85.63%



REYNOLDS 2213				
Stocking Status	Inventory		% of Inventory	Guide
INVESTMENT	Value			
Normal or Active Stock			#DIV/0!	over 70%
Automatic Phase Out			#DIV/0!	Less than 30%
Dealer Phase Out			#DIV/0!	Less than 1%
Manual Order			#DIV/0!	Less than 3%
Non Stock Part \$'s			#DIV/0!	Less than 5%
Non Stock Part #'s*			MEMO	Greater than 70% of PN's
Core Clean			#DIV/0!	PART # # PIECES
Core Dirty			#DIV/0!	PART # # PIECES
Replace by hold RBH			#DIV/0!	PART # NA # PIECES
				NA
Total Inventory	\$0		#DIV/0!	

REYNOLDS

Activity	Value	% of inven	NADA Guide	Notes
Current		#DIV/0!	75%	this is your current a
1-3 Months		#DIV/0!	included	healthy parts invento
4-6 Months		#DIV/0!	23%	
7-9 Months		#DIV/0!	2%	65% Will likely become
10-12 Months		#DIV/0!	included	85% Will likely become
13-24 Months		#DIV/0!	0%	Technically Obsolete
25+ months		#DIV/0!	0%	
TOTAL	\$0	#DIV/0!		

GOOD
WARNING
DANGER
GREAT
Seldom used
OK....BUT..
OUCH !!!!!!!!!!!
YIKES

nd active			
ory			
	OBSO POSITION MATH DONE BELOW		
obso	.65 TIMES THE 7-9 MONTH VALUE	\$0	
obso	.85 TIMES THE 10-12 MONTH VALUE	\$0	
	PLUS THE 13-24 MONTH VALUE	\$0	
	PLUS THE 25+ VALUE EQUALS	\$0	
	OBSO AS A % OF TOTAL	\$ -	#DIV/0!

CDK Stocking Status		Inventory	% of Inventory	Guide
INVESTMENT		Value		
Normal or Active Stock		\$93,992	80.93%	over 70%
Automatic Phase Out		\$8,283	7.13%	Less than 35%
Dealer Phase Out		\$1,126	0.97%	Less than 1%
Manual Order		\$2,235	1.92%	Less than 3%
Non Stock Part \$'s		\$10,502	9.04%	Less than 5%
Non Stock Part #'s*		296	MEMO	Greater than 70% of PN's
No Phase Out	Not on ADP	\$0		NA
Repape by Hold	Not on ADP	\$0		NA
Clean Core		\$0	0.00%	p/n pieces
Dirty Core		\$0	0.00%	0 0
Total Inventory		\$116,138	100.00%	

ADP

Activity	Value \$	% of Invent	%	Notes & Guides
0-3 Months	116,139		6%	ACTIVE INVENTORY at 75%
4-6 Months	116,139		6%	ACTIVE INVENTORY at 23%
7-12 Months	232,277		12%	75% will likely become Obso 2%
Over 12 Months	464,554		25%	Technical Obsolescence 2% is g
New parts no sales	929,108		50%	Minimal Amount
Total Inventory	\$1,858,217		100%	

COLOR SCORING				
GOOD				
WARNING				
DANGER				
GREAT				
Seldom used				
OK....BUT..				
OUCH !!!				
OUCH !!!!!				
ouch!!!				
OBSO POSITION				
is guide	.75 TIMES	\$		174207.8
uide	PLUS			464,554
	PLUS			929,108
	EQUALS		84%	1567870

DEALER TRACK STATUS			MONTH OF:			PROFILES BEST OF CLASS	
			%	0	PIECES	VALUE	
ACTIVE PARTS: STOCKED			#DIV/0!				70%
ACTIVE PARTS: EXCESS STOC			#DIV/0!				LESS THAN 1 %
ACTIVE PARTS: UNDERSTOCK			#DIV/0!				LESS THAN 1 %
ACTIVE PARTS: TO PHASE OUT			#DIV/0!				LESS THAN 30%
TOTAL ACTIVE PARTS			#DIV/0!				
SUPERCEDED W/ON HAND			#DIV/0!				LOW DBL NUMBERS
INACTIVE W/ON HAND			#DIV/0!				LESS THAN 30-35%
TOTAL INV. TO SELL			#DIV/0!				
CORES ON HAND							LOW PIECE COUNTS
NEG-ON-HAND							LOW DBL NUMBERS
TOTAL OF INVENTORY							
PARTS ON OPEN R. O.'S							ONE DAYS AVG SALES
VALUE OF TOTAL INVENTORY							
NOT ON FACTORY MASTER							MINIMAL
PARTS WITH OUT COST							MINIMAL
INVENTORY AGING BY LAST SOLD							
			VALUE	%	ACUM %	INSTRUCTORS NOTE	
NEVER SOLD				#DIV/0!	#DIV/0!	THIS IS TECHNICAL OI	
ONE YEAR AGO PLUS				#DIV/0!	#DIV/0!		
ELEVEN MONTHS AGO				#DIV/0!	#DIV/0!	THIS IS POTENTIAL OI	
TEN MONTHS AGO				#DIV/0!	#DIV/0!		
NINE MONTHS AGO				#DIV/0!	#DIV/0!	THESE PARTS WILL BE IN A "AP" STATUS! OUT IS SET AT 0 IN 6	
EIGHT MONTHS AGO				#DIV/0!	#DIV/0!		

SEVEN MONTHS AGO			#DIV/0!	#DIV/0!	
SIX MONTHS AGO			#DIV/0!	#DIV/0!	THIS IS YOUR ACTIVE HEALT INVENTORY
FIVE MONTHS AGO			#DIV/0!	#DIV/0!	
FOUR MONTHS AGO			#DIV/0!	#DIV/0!	
THREE MONTHS AGO			#DIV/0!	#DIV/0!	
TWO MONTHS AGO			#DIV/0!	#DIV/0!	
ONE MONTH AGO			#DIV/0!	#DIV/0!	
CURRENT MONTH			#DIV/0!	#DIV/0!	
TOTAL INVENTORY			#DIV/0!		
CORES WITH ON HAND					CONFIRM DIRTY & CLEAN

CLASS	COLOR
	SCORING
	GOOD
	WARNING
	DANGER
	GREAT
	Seldom used
	OK....BUT..
	OUCH !!!
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UCS SCORECARD				
Stocking Status Observations	Inventory Value		% of Inventory	Guide
Active Stock (0-6 month activity)				over 70%
Zero Guide (Auto Phase out)				Less than 35%
No bin Location Parts				Less than 1%
Manual Order Review				Less than 3%
No Match (Non Stock Part \$'s)				Less than 5%
Total Watch #'s (N/ Stock Part #'s)				Greater than 70% of PN's
Clean Core				
Dirty Core				Are controls in place?
Extra Lines				NA
Extra Lines				NA
Total Inventory	\$0			

UCS

Investment	NADA			
Activity	Value	% of inven	Guide	Notes
Current TO 3 Months		#DIV/0!	75%	this is your current a
3 to 6 Months		#DIV/0!	included	healthy parts invento
6-9 Months		#DIV/0!	23%	65% Will likely becom
9-12 Months		#DIV/0!	2%	85% Will likely becom
12 Months + Over		#DIV/0!	included	This is your Technical
		#DIV/0!		
		#DIV/0!		
TOTAL	\$0	#DIV/0!		

- GOOD
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- OK...BUT..
- OUCH !!!!!!!!



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Departmental Action Plan

Dealership Lexus of Colorado Springs

Student Name Kimberley Zacharias

Academy Week Week 2 (June4-8)

Class & Student Number N33625

Current Situation

We currently do not have a clear, solid process to track lost sales nor are we reviewing.

Overall Objective:

To maintain great guest service, to profitably build our inventory, to decrease loss of technician time and to ultimately capture all potential gross.

Proposed Timeline

By 9/1/18

Action Plan

Describe necessary actions to reach desired result: 1) Have a meeting and educate the Service Advisors on the importance of tracking lost sales. Require all advisors to track all declined work through an op code in Service. The advisor must post the lost sales and what was declined. The Service Assistant will follow up with phone calls and emails to the guest. The Service Assistant will review on a weekly basis. This will be reviewed with the Service Manager on a monthly basis. 2) Parts Staff is required to print the lost sale quote. Either immediately or after one day, if the part is not sold the parts associate will post the lost sale in CDK. The Parts Manager will review the report on a weekly basis. The Parts Manager will also review

Requirements

Meeting with Dealer: 8/1/18

1. Action Proposed: Meet with the GM and Service Manager regarding new process.

PLEASE BE ADVISED
THIS ASSIGNMENT BY
IT'S SELF IS WORTH 100
POINTS.TAKE YOUR
TIME AND GET IT
CORRECT

Meeting with stakeholder(s) (dealership personnel):8/6/18

2. Describe what is in place to support desired goal: Meeting to educate and train all Staff on new process. Weekly check-ins with all associates making sure they are tracking as REQUIRED. Buy in will be challenging but with clear communication and monthly accountability meetings we will be able to track and gain desired results
Training / Coaching / +Consequences related to results / Pain & Gain

Accountability: Monitoring progress:

Who: Parts and Service Associates

What: Posting and tracking of Lost Sales

3. By When: Starting asap on 8/6/18 and process complete with meetings in place by 9/1/18

How: Meeting to discuss and introduce, review and hold accountable, mandatory monthly meeting with Parts and Service Managers

Describe checkpoints that have been established to measure progress:

Daily / Weekly / Bi-weekly / Monthly /

4. Date(s) for review: 7/30/18:Meeting with Parts Associates 8/1/18:Meeting with GM 8/6/18:1st Meeting with Service Associates 8/13/18;8/20/18;8/27/18:Review Meeting with Service and Parts Associates 9/3/18:Monthly Meeting with Service and Parts Managers

5. Estimated cost for implementation: This will only cost time to meet and initial implementation. :)

Projected Date of Completion: 9/3/18

Sponsor Signature: _____

Evaluation of Results: Include measured results.

(± Metrics)

Impact Areas:

Sales / Gross / Expenses / Net Profit / CSI /