

Index

Click on the Page

[Formulas](#)

[LOST SALE CALC](#)

[PERFORMA](#)

[FTFR](#)

[RR Scorecard](#)

[ADP Scorecard](#)

[ARKONA Scorecard](#)

[UCS Scorecard](#)

[PARTS DEPT ACTION PLAN](#)

March Sales Distribution MTD		
Category	Sales	% Of Total
Repair Order	\$ 179,737.00	21%
Repair Order B.S.	\$ 183,375.00	22%
Counter Retail	\$ 17,369.00	2%
Warranty	\$ 287,882.00	34%
Internal	\$ 33,990.00	4%
Wholesale	\$ 139,015.00	17%
		0%
		0%
Total Department (MTD)	\$ 841,368.00	100%

Sales Distribution YTD		
Category	Sales	% Of Total
Repair Order	\$ 551,165.00	0.00%
Repair Order B.S.	\$ 511,068.00	0.00%
Counter Retail	\$ 47,911.00	2%
Warranty	\$ 693,630.00	30%
Internal	\$ 99,004.00	4%
Wholesale	\$ 405,507.00	18%
		0%
		0%
Total Department (YTD)	\$ 2,308,285.00	100%

April Sales Distribution MTD		
Category	Sales	% Of Total

Repair Order	\$ 163,974.00	25%
Repair Order B.S.	\$ 112,002.00	17%
Counter Retail	\$ 16,340.00	2%
Warranty	\$ 217,290.00	33%
Internal	\$ 29,690.00	4%
Wholesale	\$ 128,486.00	19%
		0%
		0%
Total Department (MTD)	\$ 667,782.00	100%

Sales Distribution YTD		
Category	Sales	% Of Total
Repair Order	\$ 715,139.00	24%
Repair Order B.S.	\$ 623,071.00	21%
Counter Retail	\$ 64,251.00	2%
Warranty	\$ 910,920.00	31%
Internal	\$ 128,694.00	4%
Wholesale	\$ 533,993.00	18%
		0%
		0%
Total Department (YTD)	\$ 2,976,068.00	100%

March Gross Profit Contribution MTD				
Category	Gross	% of Total	% of Sales	Profile %
Repair Order	\$ 60,688.00	21.31%	33.76%	41%
Repair Order B.S.	\$ 65,553.00	23.02%	35.75%	30-35%
Counter Retail	\$ 7,359.00	2.58%	42.37%	41%
Warranty	\$ 112,890.00	39.64%	39.21%	28-40%
Internal	\$ 12,833.00	4.51%	37.76%	41%
Wholesale	\$ 25,500.00	8.95%	18.34%	25%
		0.00%	0.00%	
		0.00%	0.00%	
Total Department (MTD)	\$ 284,823.00	100.00%	33.85%	38%

Gross Profit Contribution YTD				
Category	Gross	% of Total	% of Sales	Profile%
Repair Order	\$ 193,316.00	25.04%	35.07%	41%
Repair Order B.S.	\$ 181,183.00	23.46%	35.45%	30-35%
Counter Retail	\$ 20,153.00	2.61%	42.06%	41%
Warranty	\$ 268,081.00	34.72%	38.65%	28-40%
Internal	\$ 36,802.00	4.77%	37.17%	41%
Wholesale	\$ 72,646.00	9.41%	17.91%	25%
		0.00%	0.00%	
		0.00%	0.00%	
Total Department (YTD)	\$ 772,181.00	100.00%	33.45%	38%

April Gross Profit Contribution MTD				
Category	Gross	% of Total	% of Sales	Profile %

Repair Order	\$ 53,463.00	23.72%	32.60%	41%
Repair Order B.S.	\$ 40,467.00	17.96%	36.13%	30-35%
Counter Retail	\$ 6,855.00	3.04%	41.95%	41%
Warranty	\$ 84,895.00	37.67%	39.07%	28-40%
Internal	\$ 15,487.00	6.87%	52.16%	41%
Wholesale	\$ 24,200.00	10.74%	18.83%	25%
		0.00%	0.00%	
		0.00%	0.00%	
Total Department (MTD)	\$ 225,367.00	100.00%	33.75%	38%

Gross Profit Contribution YTD				
Category	Gross	% of Total	% of Sales	Profile%
Repair Order	\$ 246,779.00	24.74%	34.51%	41%
Repair Order B.S.	\$ 221,650.00	22.22%	35.57%	30-35%
Counter Retail	\$ 27,008.00	2.71%	42.04%	41%
Warranty	\$ 352,976.00	35.38%	38.75%	28-40%
Internal	\$ 52,289.00	5.24%	40.63%	41%
Wholesale	\$ 96,846.00	9.71%	18.14%	25%
		0.00%	0.00%	
		0.00%	0.00%	
Total Department (YTD)	\$ 997,548.00	100.00%	33.52%	38%

March Parts Emplo

Category	Dollar Amount
Sales (Total)	\$ 960,126
Gross Profit	\$ 321,375
Expenses (Total)	\$ 56,927
Department Net P	\$ 264,448

Parts Employe

Category	Dollar Amount
Sales (Total)	\$ 2,634,881
Gross Profit	\$ 890,196
Expenses (Total)	\$ 153,338
Department Net P	\$ 736,858

April Parts Emplo

Category	Dollar Amount
----------	---------------

Sales (Total)	\$ 895,665
Gross Profit	\$ 274,203
Expenses (Total)	\$ 56,366
Department Net P	\$ 217,837

Parts Employee

Category	Dollar Amount
Sales (Total)	\$ 3,530,548
Gross Profit	\$ 1,164,402
Expenses (Total)	\$ 209,704
Department Net P	\$ 954,698

Employee Productivity MTD

÷	# Employees	=	Per Employee
÷	10.00	=	\$ 96,013
÷	10.00	=	\$ 32,138
÷	10.00	=	\$ 5,693
÷	10.00	=	\$ 26,445

Employee Productivity YTD

÷	# Employees	=	Per Employee
÷	10.00	=	\$ 263,488
÷	10.00	=	\$ 89,020
÷	10.00	=	\$ 15,334
÷	10.00	=	\$ 73,686

March Monthly Reconciliation Of Parts To General Ledger

Dollar value of parts on dealership management report	
Dollar value of packing lists for parts received, but not invoiced	
Dollar Value of bulk oil, gear lube, trans fluid in stock	
Credits due for parts returned	
Inventory Core Value - clean	
Cores to be returned for credit - dirty	
Work in Process - Repair Orders & Invoices	
Dollar Value of NPN parts	
Dollar value of parts with no cost record	
Plus / Minus	
Inv Adjustments (Bin Counts, Mnthly Updates, Emer Purchases)	
Total Inventory	
Inventory Per Financial Statement	
Difference	

Employee Productivity MTD

÷	# Employees	=	Per Employee
---	-------------	---	--------------

April Monthly Reconciliation Of Parts To General Ledger

÷	10.00	=	\$ 89,567
÷	10.00	=	\$ 27,420
÷	10.00	=	\$ 5,637
÷	10.00	=	\$ 21,784

e Productivity YTD

÷	# Employees	=	Per Employee
÷	10.00	=	\$ 353,055
÷	10.00	=	\$ 116,440
÷	10.00	=	\$ 20,970
÷	10.00	=	\$ 95,470

Dollar value of parts on dealership management report

Dollar value of packing lists for parts received, but not invoiced

Dollar Value of bulk oil, gear lube, trans fluid in stock

Credits due for parts returned

Inventory Core Value - clean

Cores to be returned for credit - dirty

Work in Process - Repair Orders & Invoices

Dollar Value of NPN parts

Dollar value of parts with no cost record

Plus / Minus

Inv Adjustments (Bin Counts, Mnthly Updates, Emer Purchases)

Total Inventory

Inventory Per Financial Statement

Difference

ral Ledger

\$ 734,087

Minus

\$ (1,239)

\$ 18,435

Plus

\$ 24,000

\$ 4,647

\$ 2,600

\$ 50,938

\$ 400

\$ 2,300

Minus

+/- \$ 19,176

\$ 820,952

\$ 816,062

\$ 4,890

Difference as a % of t

0.59

al Ledger

	\$ 724,304
--	------------

Minus

ded	\$ (1,239)
-----	------------

	\$ 15,989
--	-----------

Plus

	\$ 23,000
--	-----------

	\$ 5,140
--	----------

	\$ 2,600
--	----------

	\$ 81,081
--	-----------

	\$ 400
--	--------

	\$ 2,300
--	----------

Minus

+/-	\$ 11,867
-----	-----------

ntory	\$ 835,942
--------------	------------

ment	\$ 824,929
-------------	------------

rence	\$ 11,013
--------------	-----------

Difference as a % of t

1.33

March Monthly Cost Of Sales

Year To Date Parts & Accessories Sales	\$ 2,308,285
Year To Date Parts & Accessories Gro -	\$ 772,181
Subtotal =	\$ 1,536,104

Number of Months in Year	÷	3
Average Month Cost Of Sales	=	\$ 512,035

Stat

DMS

he Financial Statement inventory

April Monthly Cost Of Sales

Year To Date Parts & Accessories Sales	\$ 2,976,068	Stat
Year To Date Parts & Accessories Gro -	\$ 997,548	
Subtotal =	\$ 1,978,520	
Number of Months in Year	÷ 4	
Average Month Cost Of Sales =	\$ 494,630	DMS

he Financial Statement inventory

March Months' Supply Of Inventory

Inventory

Inventory	\$ 797,626
Divided by Average Month Cost-of-Sale ÷	\$ 512,035
Equals Months' Supply	= 1.557757808

Inventory

Inventory	\$ 765,753
Divided by Average Month Cost-Of Sale ÷	\$ 512,035
Equals Months' Supply	= 1.49551007

April Months' Supply Of Inventory

March

Reflects the dollar value of parts that had been able to fill all requests. Need to have an accurate lost sale

\$	1,536,104	+
Cost of Parts Sold (Sales - Gross) YTD		

April

ement Inventory

Inventory	\$ 808,911
Divided by Average Month Cost-of-Sale ÷	\$ 494,630
Equals Months' Supply	= 1.635386046

Reflects the dollar value of parts that had been able to fill all requests. We need to have an accurate lost sale

\$ 1,978,520	+
Cost of Parts Sold (Sales - Gross) YTD	(

i Inventory

Inventory	\$ 740,917
Divided by Average Month Cost-Of Sale ÷	\$ 494,630
Equals Months' Supply	= 1.497921679

Total Sales Demand

The department would have been able to sell if it
To arrive at an accurate sales demand figure you
as amount.

\$ 63,438	=	\$ 1,599,542
Cost of Lost Sales per DMS Summary		Total Sales Demand

Marc

Level of service is an indi
is able to meet the needs
batting average. If 100 c
times are you able to fill t

Total Demand	
Emergency Purchases	-
Lost Sales	-

Total Demand ÷

Total Sales Demand

Apri

he department would have been able to sell if it
To arrive at an accurate sales demand figure you
s amount.

\$	36,970	=	\$	2,015,490
Cost of Lost Sales per DMS Summary			Total Sales Demand	

Level of service is an indi
is able to meet the needs
batting average. If 100 c
times are you able to fill t

Total Demand	
Emergency Purchases -	
Lost Sales	-

Total Demand ÷

h Level Of Service

ication of how well the parts inventory
; of the customers. Think of it as a
customers request a part, how many
he request? The following calculation

\$	1,599,542
\$	245
\$	63,438
Subtotal =	\$ 1,535,859
\$	1,599,542
Level of Service =	96.02%

March Gross

Annualized Cost-Of Sale

$$\begin{array}{r} \$ 2,308,285 \\ \text{YTD Sales} \end{array} - \begin{array}{r} \$ 772,181 \\ \text{YTD Gross} \end{array}$$

$$\begin{array}{r} \$ 1,536,104 \\ \text{YTD COS} \end{array} \div \begin{array}{r} 3 \\ \text{\# of Months} \end{array}$$

$$\begin{array}{r} \$ 6,144,416 \\ \text{Annualized} \\ \text{Cost-Of-Sale} \end{array} \div \begin{array}{r} \$ 765,753 \\ \text{Parts Inventory} \\ \text{(Per DMS Inv)} \end{array}$$

l Level Of Service

April Gross

ication of how well the parts inventory
 ; of the customers. Think of it as a
 ustomers request a part, how many
 he request? The following calculation

\$	2,015,490
\$	30,143
\$	36,970
Subtotal =	\$ 1,948,377
\$	2,015,490
Level of Service =	96.67%

Annualized Cost-Of Sale

\$ 2,976,068	-	\$ 997,548
YTD Sales		YTD Gross
\$ 1,978,520	÷	4
YTD COS		# of Months
\$ 5,935,560	÷	\$ 740,917
Annualized Cost-Of-Sale		Parts Inventory (Per DMS Inv)

Turn

Costs ÷ Inventory

$$= \frac{\$ 1,536,104}{\text{YTD COS}}$$

$$= \frac{\$ 512,035}{\text{Average Month Cost-Of-Sales}}$$

$$= \frac{8.0}{\text{Gross Turns}}$$

March True Turn

Annualized Stock Purchases ÷ Inventory

$$\frac{\$ 659,003}{\text{YTD Stock Purchases}} \div \frac{3}{\text{\# of Months}} = \frac{\$ 219,668}{\text{Average Month Stock Purchases}}$$

$$\frac{\$ 2,636,012}{\text{Annualized Stock}} \div \frac{\$ 765,753}{\text{Parts Inventory}} = \frac{3.4}{\text{True Turns}}$$

Turn

April True Turn

is ÷ Inventory

$$= \frac{\$ 1,978,520}{\text{YTD COS}}$$

$$= \frac{\$ 494,630}{\text{Average Month Cost-Of-Sales}}$$

$$= \frac{8.0}{\text{Gross Turns}}$$

Annualized Stock Purchases ÷ Inventory

$$\frac{\$ 626,018}{\text{YTD Stock Purchases}} \div \frac{4}{\text{\# of Months}} = \frac{\$ 156,505}{\text{Average Month Stock Purchases}}$$

$$\frac{\$ 1,878,054}{\text{Annualized Stock}} \div \frac{\$ 740,917}{\text{Parts Inventory}} = \frac{2.5}{\text{True Turns}}$$

Lost Sale Calculator

inv.# from below	# of people	# of days	avg. part \$
5	7	26	\$15.71

Inventory Divider - see below	VS.Actual Lost S
\$715,473.00	\$55,538.00

Inventory - OBSO		Inventory \$ from
*0-250k	3	\$734,473.00
*251-500k	4	
*501-750k	5	Obsolescence ir
*751-1 mil	6	\$19,000.00

possible lost sales
\$14,296.10
sales \$ on Mgt. Rpt.
n Mgt Report
n \$

Proforma

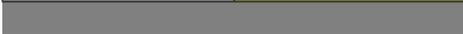
	Repair Order Mechanical	Repair Order Body Shop	Counter Retail	Internal (new/used)
YTD Sales	\$715,139.00	\$623,071.00	\$64,251.00	\$128,694.00
YTD Gross Profit	\$246,779.00	\$221,650.00	\$27,008.00	\$52,289.00
YTD Cost of Sales	\$468,360.00	\$401,421.00	\$37,243.00	\$76,405.00
NEW Mark-Up Factor	1.61	1.61	1.72	1.67
Desired Gross %	38.00	38.00	42.00	40.00
	62.00	62.00	58.00	60.00
NEW YTD Sales	\$755,419.35	\$647,453.23	\$64,212.07	\$127,341.67
OLD YTD Sales	\$715,139.00	\$623,071.00	\$64,251.00	\$128,694.00
Additional Gross Profit	\$40,280.35	\$24,382.23	(\$38.93)	(\$1,352.33)

PLEASE FILL IN ALL THE WHITE CELLS

Wholesale	Warranty	TOTAL
\$533,993.00	\$910,920.00	\$2,976,068.00
\$96,846.00	\$352,976.00	\$997,548.00
\$437,147.00	\$557,944.00	\$1,978,520.00
1.22	1.67	1.58
18.00	40.00	36.00
82.00	60.00	64.00
\$533,106.10	\$929,906.67	\$3,057,439.08
\$533,993.00	\$910,920.00	\$2,976,068.00
(\$886.90)	\$18,986.67	\$81,371.08



RO's Not Filled Same Day	Actual 1st Time Fill Rate %
0	100.00%
2	35.71%
3	68.75%
	#VALUE!
	#DIV/0!
5	62.00%



REYNOLDS 2213				
Stocking Status		Inventory Value	% of Inventory	Guide
INVESTMENT				
Normal or Active Stock			#DIV/0!	over 70%
Automatic Phase Out			#DIV/0!	Less than 35%
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*				Greater than 70% of PN's
Core Clean			#DIV/0!	0%
Core Dirty			#DIV/0!	
Replace by hold			#DIV/0!	NA
				NA
Total Inventory		\$0	#DIV/0!	
EXTRA LINES	SNS	0		
EXTRA LINES	RBH	0		

REYNOLDS

					NADA
Activity		Value	% of inven	Guide	Notes
Current			#DIV/0!	75%	this is your current and healthy parts inventory
1-3 Months			#DIV/0!	included	
4-6 Months			#DIV/0!	23%	
7-9 Months			#DIV/0!	2%	65% Will likely become ob
10-12 Months			#DIV/0!	included	85% Will likely become ob
13-24 Months			#DIV/0!	0%	Technically Obsolete
25+ months			#DIV/0!	0%	
TOTAL		\$0	#DIV/0!		
CRITICAL OBSERVATIONS:(How do you feel about these observations?) Color Coat					
OBOSO POSITION (LINES 23-26 FROM ABOVE)					

NEG-ON-HAND (MINUS-ON-HAND)

CLEAN CORE

DIRTY CORE (can you run the DMS Summary and find exactly what it says? If not print "FAIL")

LOST SALES CALCULATOR VS. ACTUAL (how close are you?)

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

active

active

	OBSO POSITION MATH DONE BELOW	
so	.65 TIMES THE 7-9 MONTH VALU	\$0
so	.85 TIMES THE 10-12 MONTH VA	\$0
	PLUS THE 13-24 MONTH VALUE	\$0
	PLUS THE 25+ VALUE EQUALS	\$0

	OBSO AS A % OF TOTAL	\$ -	#DIV/0!
--	----------------------	------	---------

PASS/ FAIL



CDK Stocking Status		Inventory	% of Inventory	Guide
INVESTMENT		Value		
Normal or Active Stock		495320	0.681919	over 70%
Automatic Phase Out		60285	0.082996	Less than 35%
Dealer Phase Out		10055	0.013843	Less than 1%
Manual Order		97530	0.134272	Less than 3%
Non Stock Part \$'s		56512	0.077801	Less than 5%
Non Stock Part #'s*		15510	0.7047	Greater than 70% of PN's
No Phase Out	Not on ADP	\$0		NA
Repace by Hold	Not on ADP	\$0		NA
Clean Core		\$4,160	0.57%	p/n pieces
Dirty Core		\$2,500	0.34%	
Total Inventory		\$726,362	100.00%	

CDK

Activity	Value \$	% of Invent	%	Notes & Guides
0-3 Months	554868		0.781831	ACTIVE INVENTORY at 75%
4-6 Months	60591		0.085375	ACTIVE INVENTORY at 23%
7-12 Months	38054		0.05362	75% will likely become Obso 2%
Over 12 Months	33071		0.046598	Technical Obsolescence 2% is g
New parts no sales	23119		0.032576	Minimal Amount
Total Inventory	\$709,703		100%	

CRITICAL OBSERVATIONS:(How do you feel about these observations?) Color Coat

OBSO POSITION (LINES 23-26 FROM ABOVE)

NEG-ON-HAND (MINUS-ON-HAND)

CLEAN CORE

DIRTY CORE (can you run the DMS Summary and find exactly what it says? If not print "FAIL")

LOST SALES CALCULATOR VS. ACTUAL (how close are you?)

COLOR SCORING			
GOOD			
WARNING			
DANGER			
GREAT			
Seldom used			
OK....BUT..			
OUCH !!!			
OUCH !!!!!			
ouch!!!			
OBSO POSITION			
is guide	.75 TIMES \$		28540.5
uide	PLUS		33,071
	PLUS		23,119
	EQUALS	0.119389	84730.5
PASS/ FAIL			
FAIL			
FAIL			
PASS			
PASS			

PASS

ARKONA STATUS			MONTH OF:				PROFILES BEST OF CLASS
			%	3	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							
							INSTRUCTORS NOTE
			VALUE	%	ACUM %		
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

- CRITICAL OBSERVATIONS:(How do you feel about these observations?) Color Coat
- OBSO POSITION (LINES 23-26 FROM ABOVE)
- NEG-ON-HAND (MINUS-ON-HAND)
- CLEAN CORE
- DIRTY CORE (can you run the DMS Summary and find exactly what it says? If not print "FAIL")
- LOST SALES CALCULATOR VS. ACTUAL (how close are you?)

CLASS	COLOR
	SCORING
	GOOD
	WARNING
	DANGER
	GREAT
	Seldom used
	OK....BUT..
	OUCH !!!
ES	
BSO	
BSO	
S IF YOUR PHASE	

HY PARTS	
STATUS	
PASS/ FAIL	

UCS SCORECARD 2014				
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 Activity	Value	% of inven	NADA 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!		

CRITICAL OBSERVATIONS:(How do you feel about these observations?) Color Coat

OBSO POSITION (LINES 23-26 FROM ABOVE)

NEG-ON-HAND (MINUS-ON-HAND)

CLEAN CORE

DIRTY CORE (can you run the DMS Summary and find exactly what it says? If not print "FAIL")

LOST SALES CALCULATOR VS. ACTUAL (how close are you?)

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

Black box

nd active
ory

e obso	\$0.00
--------	--------

obso	\$0.00
------	--------

OBSO	\$0
------	-----

--	--

--	--

	\$0.00	#DIV/0!
--	--------	---------

PASS/ FAIL

Yellow box

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Departmental Action Plan

Dealership

BILL PENNEY TOYOTA

Academy Week

WEEK 2 FIXED OPERATIONS 1 - PARTS

Class & I

Current Situation

We have two parts drivers and after looking at our out of city wholesale customers. These six customers are ordering less than \$500 per week. After looking at the over 30hrs delivering parts way to far out.

Overall Objective:

1. We need one warehouse worker due to the overall increase in business in s out of city wholesale deliveries this decision will stop a long term relationship employee for the department to move to the warehouse. We also will be more deliveries and giving them the best service.

Proposed Timeline

We gave all six wholesale customers 30 days to make arrangements or they c they pay for shipping. We also came up with paid shipping if they spend more

Action Plan

Describe necessary actions to reach desired result: 1. Call and notify all six c sell to the used car dept. 3. Re-task two employees for the needs of the dept.

Requirements

Meeting with Dealer: 4/17/17

1. Action Proposed: Stop out of city wholesale deliveries

2. Meeting with stakeholder(s) (dealership personnel): Gary & Phil, Describe what goal: **1. Training:** Mike Taylor will train Phillip on his new job roll in the warehouse the team on a KPI board to show them what each team member can do to increase **results:** We lost all six customers with over ten years service but its the best a sells and upset customers dur to the store re-alignment, free up employees, save on gas money. save on insurance liability

3. Accountability: Monitoring progress:
Who: Phillips progress in the warehouse
What: no more what because were done with out of city wholesale
By When: May 1st
How: We will take care of service and the body shop with better service. We are better since we have all the focus on them now.

4. Describe checkpoints that have been established to measure progress:
Daily / Weekly / Bi-weekly / Monthly / We will check monthly on the in city to service them.
Date(s) for review: Month end June 30th

5. Estimated cost for implementation: Loss of \$900 in gross

Projected Date of Completion:

MAY 1ST

Sponsor Signature:

Zack Penr

Evaluation of Results: Include measured results. (± Metrics)

Impact Areas: **Sales** \$2000 **Gross** \$200 **Expenses** \$500 depreciation monthly, \$600 in gas, \$1600 in \$1500 **CSI NA Results** Are still pending, we will have a decrease in total sells but that decrease will be in parts.

Student Name HUNTER JOHNSON

Student Number 323

mers its determined we are losing money.
e drivers in and out times both are spending

service, parts and body shop sells. 2. Eliminate
is with six customers. Doing this frees up one
profitable putting all our focus on in city

an order from us by pick up or ship by mail if
e than \$2000 per week.

customers 2. Ground the extra parts truck and

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

at is in place to support desired
ise. 2. **Coaching:** Mike Taylor will also coach
ease profit. 3. **±Consequences related to**
action plan for us to grow. 4. Pain & Gain: loss
ave on depreciation on the parts truck, save

Also will service the in city wholesale customers

wholesale progress since we have more time

ney

personal, insurance liability, parts returns **Net profit**
be outweighed by reducing in expenses in wholesale