First Time Fill Rate

Jake Sweeney Mazda West		First time fill rate		
DATE	RO'S	1st Time	Same Day	Day
1/22/2019	4	1	2	1
1/24/2019	2	1	1	
1/28/2019	8	2	4	2
1/29/2019	7	3	2	2
2/5/2019	5	2	3	
2/7/2019	9	4	2	3
2/8/2019	8	3	2	3
2/12/2019	4	2	2	
2/13/2019	3	1	2	
Totals	50	19	20	11

Rate %
25.00%
50.00%
25.00%
42.86%
40.00%
44.44%
37.50%
50.00%
33.33%
#DIV/0!
#DIV/0!
#DIV/0!
#DIV/0!
#DIV/0!
#DIV/0!
38.00%

CDK Stocking Status INVESTMENT	Inventory Value	% of Inventory	Guide	
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*			Greater than 70% of PN's	
Clean Core		#DIV/0!	# PIECES	PART #
Dirty Core		#DIV/0!		
Total Inventory	$0	#DIV/0!		

Activity	Value $	%	Notes & Guides
0-3 Months		#DIV/0!	ACTIVE INVENTORY at 75%
4-6 Months		#DIV/0!	ACTIVE INVENTORY at 23%
7-12 Months		#DIV/0!	75% will likely become Obso 2% is g
Over 12 Months		#DIV/0!	Technical Obsolescence 2% is guide
New parts no sales		#DIV/0!	Minimal Amount
Total Inventory	0	#DIV/0!	

CRITICAL OBSERVATIONS:(How do you feel about these observations?) Color Coat
OBSO POSITION (LINES 20-22 FROM ABOVE)
NEG-ON-HAND (MINUS-ON-HAND)
CLEAN CORE
DIRTY CORE (RDCI) OR DONE MANUALLY
LOST SALES CALCULATOR VS. ACTUAL
AVERAGE STOCK ORDER (Obtain data from
MONTHS SUPPLY (This calculation from you
GROSS (TOTAL) TURNS (from your FS Temp
TRUE (STOCK) TURNS (from your FS Templa
FTFR (FIRST TIME FILL RATE)

COLOR SCORING		
GOOD		
WARNING		
DANGER		
GREAT		
Seldom used		
OK….BUT..		
OUCH !!!!!!		
ouch!!!		

	OBSO POSITION		
uide	.75 TIMES	$	0
	PLUS		0
	PLUS		0
	EQUALS	#DIV/0!	0

Pass or Fail ?

REYNOLDS 2213 Stocking Status INVESTMENT	Inventory Value	% of Inventory	Guide		
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*			Greater than 70% of PN's		
Core Clean		#DIV/0!	pn		pieces
Core Dirty		#DIV/0!	pn		pieces
Replace by hold RBH		#DIV/0!	pn	NA	pieces
			NA		
Total Inventory	$0	#DIV/0!			

REYNOLDS

Activity	Value	% of inventory	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!		

OBSO POSITION (LINES 23-26 FROM ABOVE)	
NEG-ON-HAND (MINUS-ON-HAND)	
CLEAN CORE	
DIRTY CORE	
LOST SALES CALCULATOR VS. ACTUAL	
AVERAGE STOCK ORDER (NEEDED FOR FS	
MONTHS SUPPLY (FS TEMPLATE)	
GROSS (TOTAL) TURNS (from your FSTempla	
TRUE (STOCK) TURNS (from your FS Templa	
FTFR (FIRST TIME FILL RATE) (from your par	
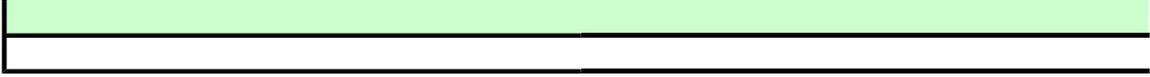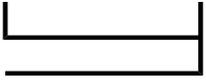
GOOD	
WARNING	
DANGER	
GREAT	
Seldom used	
OK....BUT..	
OUCH !!!!!!!!!!	
YIKES	

and 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!

PASS/ FAIL

AUTO MATE Stocking Status INVESTMENT	Inventory Value		% of Inventory	Guide		
					GOOD	
					WARNING	
					DANGER	
Active parts			#DIV/0!	over 70%	GREAT	
Auto Phase Out Parts			#DIV/0!	Less than 30%	Seldom us	
Dealer Phase Out Parts			#DIV/0!	Less than 1%	OK….BUT	
Manual Order Parts			#DIV/0!	Less than 3%	OUCH !!!!!	
Non Stock Part $'s			#DIV/0!	Less than 5%	YIKES	
Non Stock Part #'s*				Greater than 70% of PN's		
Core Clean			#DIV/0!	pn pieces		
Core Dirty			#DIV/0!	pn pieces		
			#DIV/0!			
Total Inventory	$0		#DIV/0!			

AUTO MATE

Activity	AUTO MATE Value		% of inven	NADA Guide	Notes
			#DIV/0!		this is your current and active
Current to 3 Months			#DIV/0!	75%	healthy parts inventory
4-6 Months			#DIV/0!	23%	
7-9 Months			#DIV/0!	2%	65% Will likely become obso
10-12 Months			#DIV/0!	included	85% Will likely become obso
over 12 Months			#DIV/0!	0%	Technically Obsolete
			#DIV/0!		
TOTAL	$0		#DIV/0!		
CRITICAL OBSERVATIONS:(How do you feel about these observations?) Color Coat					PASS/ FAI
OBSO POSITION (LINES 23-25 FROM ABOVE)					
CLEAN CORE					
DIRTY CORE					
LOST SALES CALCULATOR VS. ACTUAL					
AVERAGE STOCK ORDER (NEEDED FOR FS TEMPLATE TRUE TURN CALCULATION)					
MONTHS SUPPLY (FS TEMPLATE)					
GROSS (TOTAL) TURNS (from your FSTemplate)					
TRUE (STOCK) TURNS (from your FS Template)					
FTFR (FIRST TIME FILL RATE) (from your parts class homework assignment)					

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Additional Data Available From Auto Mate		
	$ Value	Grade
DP2 Total Idle Capital	0	
DP3 Negative On Hand	0	
DP4 Parts with no bin	0	
DP5 Parts with no cost	0	
DP6 Monthly Closing Inv Value	0	
DP7 Lost Sales	0	
Value of Stocking parts with MNS 6-11 Mo.	0	
Value of Stocking parts with MNS 12 Plus M	0	
Value of Non-Stock Parts w MNS 3-5	0	
Value of Non-Stock Parts w MNS 6-8	0	
Value of Non-Stock Parts w MNS 9-11	0	
Value of Non-Stock Parts w MNS 12 Plus	0	
	0	

OBSO POSITION MATH DONE BELOW		
.65 TIMES THE 7-9 MONTH VAL	$0	
.85 TIMES THE 10-12 MONTH V	$0	
PLUS THE 13-24 MONTH VALU	$0	
PLUS THE 25+ VALU EQUALS	$0	
OBSO AS A % OF TOTAL	$ -	#DIV/0!

AUTO SOFT Stocking Status INVESTMENT	Inventory Value		% of Inventory	Guide	
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*				Greater than 70% of PN's	
No Phase Out				NA	
Repace by Hold				NA	
Clean Core				#DIV/0!	# PIECES	PART #
Dirty Core				#DIV/0!		
Total Inventory	$0		#DIV/0!		

AUTO SOFT

Activity from Source	Value $	% of Inven	%	Notes & Guides	
0-3 Months			#DIV/0!	ACTIVE INVENTORY at 75%	
4-6 Months			#DIV/0!	ACTIVE INVENTORY at 23%	
7-12 Months			#DIV/0!	75% will likely become Obso 2% is	
13-18 Months			#DIV/0!	Technical Obsolescence 2% is gu	
New parts no sales			#DIV/0!	Minimal Amount	
Total Inventory			#DIV/0!		

CRITICAL OBSERVATIONS:(How do you feel about these observations?) Color Coat
OBSO POSITION (LINES 20-22 FROM ABOVE)
NEG-ON-HAND (MINUS-ON-HAND)
CLEAN CORE
DIRTY CORE (RDCI) OR DONE MANUALLY
LOST SALES CALCULATOR VS. ACTUAL
AVERAGE STOCK ORDER (Obtain data from your OE)
MONTHS SUPPLY (This calculation from your FS Template)
GROSS (TOTAL) TURNS (from your FS Template)
TRUE (STOCK) TURNS (from your FS Template)
FTFR (FIRST TIME FILL RATE)(this is a post class assignment)

COLOR SCORING
GOOD
WARNING
DANGER
GREAT
Seldom used
OK….BUT..
OUCH !!!

OUCH !!!!!!

ouch!!!

	OBSO POSITION		
s guide	.75 TIMES $		0
ide	PLUS		0
	PLUS		0
	EQUALS	#DIV/0!	0

Pass or Fail ?

DEALER TRACK ARKONA	STATUS	MONTH OF:				PROFILES
		%	#	PIECES	VALUE	
ACTIVE PARTS: STOCKED		#DIV/0!				See 9 D
ACTIVE PARTS: EXCESS STOCK		#DIV/0!				LESS THA
ACTIVE PARTS: UNDERSTOCKED		#DIV/0!				LESS THA
ACTIVE PARTS:TO PHASE OUT		#DIV/0!				LESS THA
TOTAL ACTIVE PARTS		#DIV/0!				70%
SUPERCEDED W/ON HAND		#DIV/0!				LOW DBL
INACTIVE W/ON HAND		#DIV/0!				LESS THA
INACTIVE PART NUMBER # AND %						
TOTAL INV. TO SELL		#DIV/0!				
CORES ON HAND						LOW PIEC
NEG-ON-HAND						LOW DBL
TOTAL OF INVENTORY						
PARTS ON OPEN R. O.'S						ONE DAYS
VALUE OF TOTAL INVENTORY						
NOT ON FACTORY MASTER						MINIMAL
PARTS WITH OUT COST						MINIMAL

INVENTORY AGING BY LAST SOLD						
		VALUE	%	ACUM %	INS	
NEVER SOLD			#DIV/0!	#DIV/0!		
ONE YEAR AGO PLUS			#DIV/0!	#DIV/0!	THIS	
ELEVEN MONTHS AGO			#DIV/0!	#DIV/0!		
TEN MONTHS AGO			#DIV/0!	#DIV/0!	THIS	
NINE MONTHS AGO			#DIV/0!	#DIV/0!		
EIGHT MONTHS AGO			#DIV/0!	#DIV/0!	THESE PARTS WILL BE IN A "A	
SEVEN MONTHS AGO			#DIV/0!	#DIV/0!		
SIX MONTHS AGO			#DIV/0!	#DIV/0!		
FIVE MONTHS AGO			#DIV/0!	#DIV/0!		
FOUR MONTHS AGO			#DIV/0!	#DIV/0!	THIS IS YOUR ACT	
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!		Guide is 1.5 Months Suppl	
CORES WITH ON HAND					CONFIRM DIRT	

CRITICAL OBSERVATIONS:(How do you feel about these observations?) Color Coat	
OBSO POSITION (LINES 25 to 31 FROM ABOVE) (includes potential and technicle OBSO)	
NEG-ON-HAND	
CLEAN CORE (Provide the # of part #'s and # of pieces)	
DIRTY CORE	
LOST SALES CALCULATOR VS. ACTUAL	
AVERAGE STOCK ORDER (this will help you calculate your true turnfound in the FS temp)	
MONTHS SUPPLY (this calculation is found in the FS template)	

GROSS (TOTAL) TURNS (from your FS Template)	
TRUE (STOCK) TURNS (from your FS Template)	
FTFR (FIRST TIME FILL RATE) (from your parts class homework assignment)	

	COLOR
GUIDES	**SCORING**
	GOOD
	WARNING
N 1 %	**DANGER**
N 1 %	**GREAT**
N 30%	**Seldom used**
	OK….BUT..
NUMBERS	**OUCH !!!**
N 30% these are Auto Phase Out Parts	

E COUNTS
NUMBERS

AVG SALES

TRUCTORS NOTES

IS TECHNICAL OBSO

IS POTENTIAL OBSO

AP" STATUS IF YOUR PHASE OUT IS SET AT 0 IN 6

TIVE HEALTHY PARTS INVENTORY

y

Y & CLEAN STATUS (see below)

Pass or Fail ?
#DIV/0!
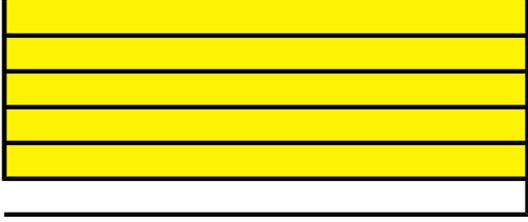
Lightyear Stocking Status INVESTMENT	Inventory Value		% of Inventory	Guide		
Normal or Active Stock			#DIV/0!	over 70%		
Automatic Phase Out			#DIV/0!	Less than 30%		
Dealer Phase Out			#DIV/0!	Less than 1%		
Manual Order			#DIV/0!	Less than 3%		
Non Stock Part $'s			#DIV/0!	Less than 5%		
Non Stock Part #'s*				Greater than 70% of PN's		
No Phase Out				NA		
				NA		
Clean Core			#DIV/0!	# PIECES	PART #	
Dirty Core			#DIV/0!			
Total Inventory	$0		#DIV/0!			

Lightyear

Activity	Value $	% of Inven	%	Notes & Guides
1-2 Months			#DIV/0!	ACTIVE INVENTORY at 75%
3-5 Months			#DIV/0!	ACTIVE INVENTORY at 23%
6-11 Months			#DIV/0!	75% will likely become Obso 2%
Over 12 Months			#DIV/0!	Technical Obsolescence 2% is (
New parts no sales			#DIV/0!	Minimal Amount
Total Inventory			#DIV/0!	

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

OBSO POSITION (LINES 20-22 FROM ABOVE)

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

CLEAN CORE

DIRTY CORE (RDCI) OR DONE MANUALLY

LOST SALES CALCULATOR VS. ACTUAL

AVERAGE STOCK ORDER (Obtain data from your OE)

MONTHS SUPPLY (This calculation from your FS Template)

GROSS (TOTAL) TURNS (from your FS Template)

TRUE (STOCK) TURNS (from your FS Template)

FTFR (FIRST TIME FILL RATE)   (This is a post class assignment)

COLOR SCORING	
GOOD	
WARNING	
DANGER	
GREAT	
Seldom used	
OK....BUT..	
OUCH !!!	
OUCH !!!!!!	
ouch!!!	

	OBSO POSITION		
% is guide	.75 TIMES $		0
guide	PLUS		0
	PLUS		0
	EQUALS	#DIV/0!	0

Pass or Fail ?

PBS SCORECARD Stocking Status INVESTMENT	Inventory Value	% of Inventory	Guide	GOOD WARNING DANGER
Stock Parts		#DIV/0!	over 70%	GREAT
Automatic Phase Out		#DIV/0!	Less than 30%	Seldom us
		#DIV/0!		OK….BUT
Manual Order		#DIV/0!	Less than 3%	OUCH !!!!!
Test Part $'s		#DIV/0!	Less than 5%	YIKES
Test Part #'s*			Greater than 70% of PN's	
Core Parts		#DIV/0!	pn pieces	
Core Dirty		#DIV/0!	pn pieces	
Superseded Parts		#DIV/0!	pn NA pieces	
			NA	
Total Inventory	$0	#DIV/0!		

REYNOLDS

Activity	Value	% of inven	NADA Guide	Notes
Current		#DIV/0!	75%	this is your current and active
1-3 Months		#DIV/0!	included	healthy parts inventory
4-6 Months		#DIV/0!	23%	
7-9 Months		#DIV/0!	2%	65% Will likely become obso
10-12 Months		#DIV/0!	included	85% Will likely become obso
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				PASS/ FAI
OBSO POSITION (LINES 23-26 FROM ABOVE)				
NEG-ON-HAND (MINUS-ON-HAND)				
CLEAN CORE				
DIRTY CORE				
LOST SALES CALCULATOR VS. ACTUAL				
AVERAGE STOCK ORDER (NEEDED FOR FS TEMPLATE TRUE TURN CALCULATION)				
MONTHS SUPPLY (FS TEMPLATE)				
GROSS (TOTAL) TURNS (from your FSTemplate)				
TRUE (STOCK) TURNS (from your FS Template)				
FTFR (FIRST TIME FILL RATE) (from your parts class homework assignment)				

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OBSO POSITION MATH DONE BELOW		
.65 TIMES THE 7-9 MONTH VAL	$0	
.85 TIMES THE 10-12 MONTH V	$0	
PLUS THE 13-24 MONTH VALU	$0	
PLUS THE 25+ VALU EQUALS	$0	
OBSO AS A % OF TOTAL	$ -	#DIV/0!

UCS SCORECARD Stocking Status Observations	Inventory Value	% of Inventory	Guide		
				GOOD	
				WARNING	
				DANGER	
Active Stock (0-6 month activity)			over 70%	GREAT	
Zero Guide (Auto Phase out)			Less than 30%	Seldom used	
No bin Location Parts			Less than 1%	OK….BUT..	
Manual Order Review			Less than 3%	OUCH !!!!!!!!!!	
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?		
			NA		
			NA		
Total Inventory	$0				
EXTRA LINES					
EXTRA LINES					

UCS

Investment Activity	Value	% of inven	NADA Guide	Notes
Current TO 3 Months		#DIV/0!	75%	this is your current and active
3 to 6 Months		#DIV/0!	included	healthy parts inventory
6-9 Months		#DIV/0!	23%	65% Will likely become obso
9-12 Months		#DIV/0!	2%	85% Will likely become obso
12 Months + Over		#DIV/0!	included	This is your Technical OBSO
		#DIV/0!		
		#DIV/0!		
TOTAL	$0	#DIV/0!		
CRITICAL OBSERVATIONS:(How do you feel about these observations?) Color Coat				Pass or Fail ?
OBSO POSITION (LINES 23-26 FROM ABOVE)				
NEG-ON-HAND (MINUS-ON-HAND) (minus balance parts)				
CLEAN CORE				
DIRTY CORE				
LOST SALES CALCULATOR VS. ACTUAL				
AVERAGE STOCK ORDER				
MONTHS SUPPLY				
GROSS (TOTAL) TURNS (from your FS templat				
TRUE (STOCK) TURNS (from your FS Template				
FTFR (FIRST TIME FILL RATE) (from your part				

$0.00	
$0.00	
$0	
$0.00	#DIV/0!

Departmental Action Plan

Dealership | Jake Sweeney Mazda West

Academy Week | December 17-21, 2018 Parts | **Class & ：**

Current Situation

Our parts department is calculating the markup on interal work by hand. We h
the markup percentage is outdated and was not properly set up when our con
We were also using the same percent markup for every part excluding tires. F
bracket the same as a transmission.

Overall Objective:

Our overall objective is to create an automatic pricing matrix that will keep ou
while maintain gross. We also want to take away human error and parts disco

Proposed Timeline

We have changed our price code to automatically price internal work with a m
has changed for internal: $0-$5.99 cost plus 350%, $6-$10.99 cost plus 290%,
plus 198%, anything over 20.99 will be priced at list. We will have a more com

Action Plan

Our plan going forward is to monitor the new pricing matrix and see if the inte
using a performa. While monitor our changes our parts manager has been cal
pricing on various parts. Our internal pricing matrix is password protected no
password is our parts manager. Using our parts managers findings we will cr
higher priced parts to keep us competitive.

Requirements

1. I met with Robert Sabbagh who is the general manager of the store in late Dec
for all of the different parts customer ie. Ro mechanical, counter retail, interna
make such a huge change, so we decieded changing our interal pricing would
other pricing structures.

2. I met with Mark Schnedl (Parts Manager) and Martin Thomas (Parts counter) t... what they need to execute and inforce the changes. Both were very excited th... pricing and having CDK automate the prices for them. They needed some trai... as well as the operation code that would prompt to pricing out internally. Our ... of this up and met with them to go over the changes.

3. Mark Schnedl, Derek Dorger , and myslef will be accountable for monitoring t... Mark and the process to make sure we are not discounting. Derek is responsi... working properly for us. We are going to monitor our current set up until the e... adjustments if necessary.

4. I have talked to Mark every single Monday morning to see how this new matri... using CDK. Mark, Derek, and myself will be meeting at the end of February an...

5. We really didn't have a monitary cost associated with making these changes. ... do matrix pricing, really just took time and communication.

| **Projected Date of Completion:** | March 31st, 2019 | **Sponsor Signature:** | Robert Sa... |

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

We belive that our gross and net profit will be effected in a positve matter by elimating discounting... matrix. We just made the change in January so it is hard to show specific results, but we predict a... change should increase them equally due to no expense added in making these changes.

Student Name Luke Sweeney

Student Number N344 #1

have a pricing matrix set up in our system, but
mpany changed our internal pricing structure.
For instance we would mark up a licences plate

r interal used car parts pricing competitive,
ounting which our current situation allows.

matrix on January 1, 2019. Our pricing matrix
$11-$15.99 cost plus 225%, $16-$20.99 cost
plete matrix finished by the end of the March.

ernal discounting and gross margain change
lling other parts departments to compare
w and the only employee that has the
eate a more detailed matrix breakdown on

cember to go over changing our parts matrix
al new/used, and wholesale. He was hesitant to
d paint a picture for what it could do for our

o brainstorm on the changes being made and
at we were making changes on internal
ning on what pricing code needed to be used
fixed operations director Derek Dorger set all

he process. I am accountable for mointoring
ble for monitoring CDK and the technology is
end of March. Which at that time will make

x is working and if they are having any trouble
d March to check on our progress.

We already had CDK which has the cability to

bbagh

g on internal parts pricing with an automated pricing
n increase of 1-2% change in gross and net profit. This