





Rate %
60.00%
57.14%
44.12%
88.89%
#DIV/0!
56.00%



CDK						
Stocking Status	Inventory Value	% of Inventory	Guide			
INVESTMENT						
Normal or Active Stock	\$477,756	58.68%	over 70%			
Automatic Phase Out	\$116,794	14.35%	Less than 30%			
Dealer Phase Out	\$40,271	4.95%	Less than 1%			
Manual Order		0.00%	Less than 3%			
Non Stock Part \$'s	\$147,324	18.10%	Less than 5%			
Non Stock Part #'s*	19,497	51.94%	Greater than 70% of PN's			
Clean Core	\$32,018	3.93%	# PIECES	PART #		
Dirty Core		0.00%				
Total Inventory	\$814,163	100.00%				

Activity	Value \$	%	Notes & Guides
0-3 Months	419,099	54%	ACTIVE INVENTORY at 75%
4-6 Months	102,357	13%	ACTIVE INVENTORY at 23%
7-12 Months	123,271	16%	75% will likely become Obso 2% is g
Over 12 Months	75,874	10%	Technical Obsolescence 2% is guide
New parts no sales	61,544	8%	Minimal Amount
Total Inventory	782,145	100%	

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 Templ
FTFR (FIRST TIME FILL RATE)

**COLOR SCORING**

**GOOD**

**WARNING**

**DANGER**

**GREAT**

**Seldom used**

**OK....BUT..**

**OUCH !!!!!**

ouch!!!

uide

**OBSO POSITION**

.75 TIMES \$ 92453.25

PLUS 75,874

PLUS 61,544

EQUALS 29% 229871.3

Pass or Fail ?

## Departmental Action Plan

Dealership **Lakeland Dodge**

Student Name **Richard Young**

Academy Week **Jan 7-11**

Class & Student Number **N345-12**

### Current Situation

We have an issue with the parts counter sales staff not attempting to upsell 100% of the customers that call in for parts. We have also had complaints from customers who are angry that our parts person did not inform the customer of additional parts they would need for a certain job. This is a big opportunity for an increase in gross sales and improved CEI scores.

### Overall Objective:

Our objective is to improve our counter staff's phone sales skills, increase sales and gross profit from upselling, and improve our CEI from our customers being satisfied with the skill level of our parts staff.

### Proposed Timeline

The processes we want to put in place will go into effect immediately. If followed and inspected dilligently, we should see positive results from these changes after a month, possibly up to three months with the customer survey scores.

### Action Plan

Describe necessary actions to reach desired result: We will put in-house training in place, including weekly one-on-ones between the counter sales staff and management to simulate up-selling scenarios. We will also include a 'Phone-up

worksheet that features lines for customer info, product desired, and spaces for at least 3 recommended parts that coincide with the customers orgianl part of interest. These sheets will be turned into and reviewed by the parts manager. There will also be an 'Sale Ranking Board' that displays gross sales of all counter staff to compare during this time.

## Requirements

### Meeting with Dealer:

1. **Action Proposed:** By creating a weekly training schedule and requiring counter staff to fill out the phone-up sheets to show what products they recommended, we will increase both gross sales and CEI scores.

### Meeting with stakeholder(s) (dealership personnel):

2. Describe what is in place to support desired goal: We are requiring weekly one-on-one training with the parts manager to sharpen phone skills when upselling customers. Staff will be required to document what products they pitched in addition to the part the customer inquired about. A completed phone up sheet will also be required for every phone up. Cash prizes will be awarded WEEKLY to highest selling counter staff. Failure to fill out a phone up sheet or attend training will result in disqualification from weekly contest and possible termination.  
Training / Coaching / ±Consequences related to results / Pain & Gain

### Accountability: Monitoring progress:

Who: Richard Young GM, Dennis Tackett PM and George Cox APM

What: Weekly One-on-one meetings

3. **By When:** Staff assigned to certain days of week.  
**How:** Monitoring gross sales and reviewing phone up sheets.

4. Describe checkpoints that have been established to measure progress:  
Daily / Weekly / Bi-weekly / Monthly /  
Every day counter staff meets with parts manager for training. The GM and Parts Manager meet every Monday to discuss progress or issues. Every month the GM and Parts manager meet with counter staff to discuss goals and pay out spiffs.  
Date(s) for review:

5. Estimated cost for implementation: \$1,000 for training worksheets, weekly spiffs and prize board.

Projected Date of Completion:

4/30/2019

Sponsor Signature: \_\_\_\_\_

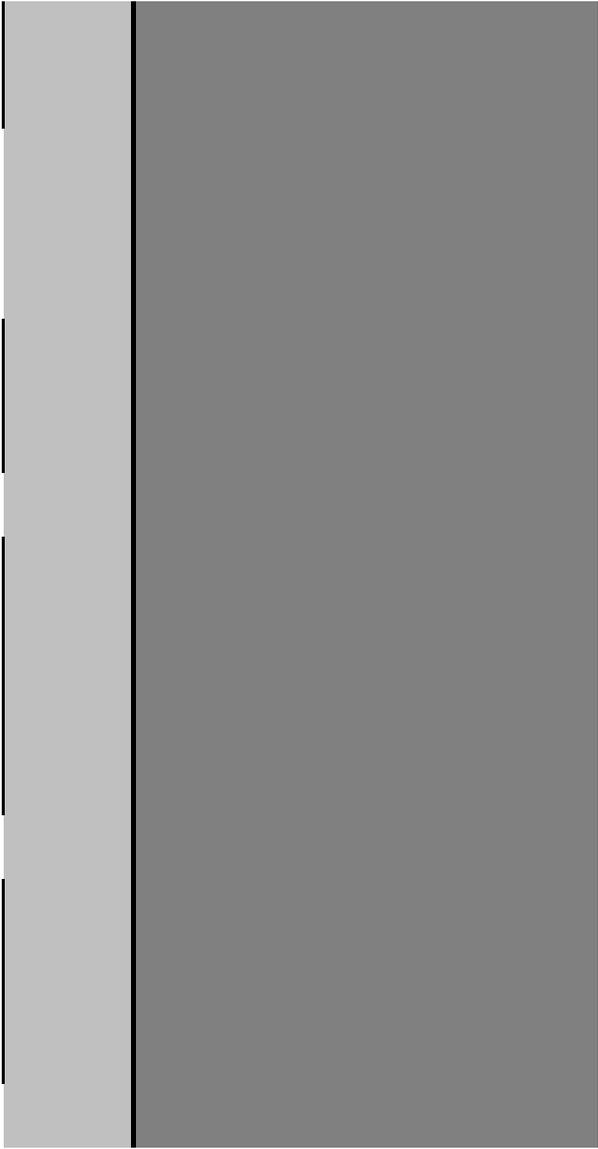
Evaluation of Results: Include measured results.

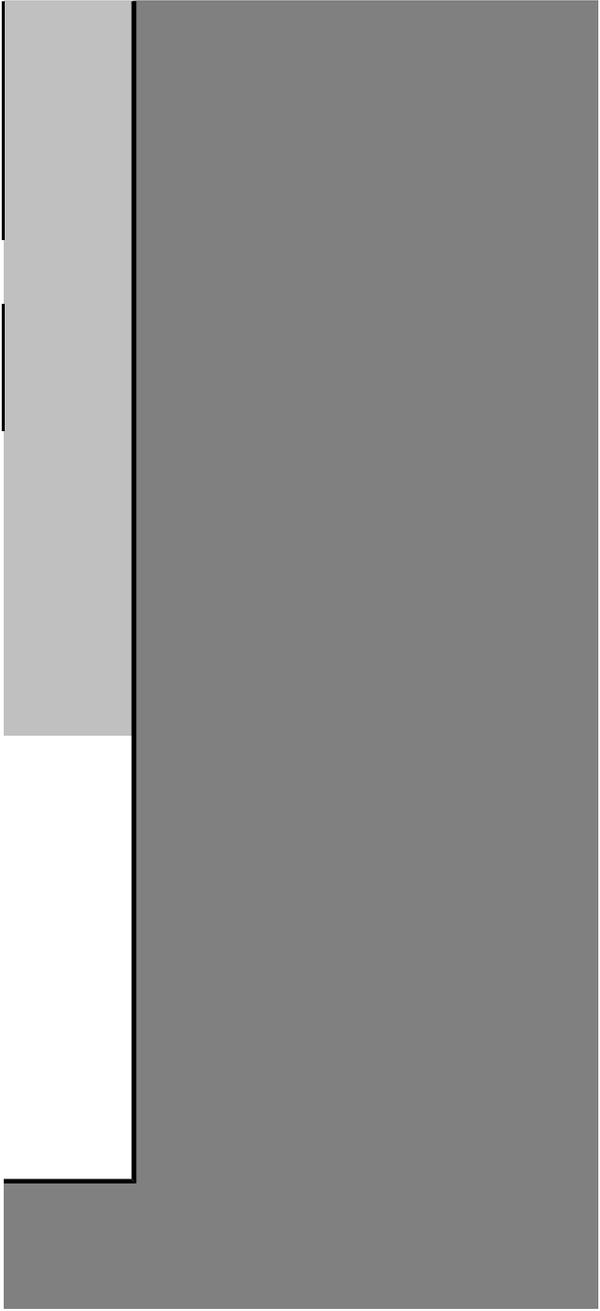
(± Metrics)

Impact Areas:

Sales / Gross / Expenses / Net Profit / CSI /

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

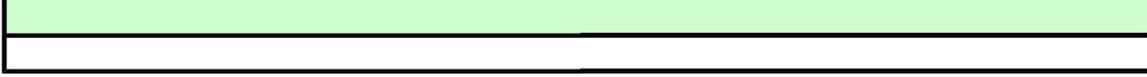




REYNOLDS 2213			
Stocking Status	Inventory Value	% of Inventory	Guide
INVESTMENT			
Normal or Active Stock		#DIV/0!	over 70%
Automatic Phase Out		#DIV/0!	Less than 30%
Dealer Phase Out		#DIV/0!	Less than 1%
Manual Order		#DIV/0!	Less than 3%
Non Stock Part \$'s		#DIV/0!	Less than 5%
Non Stock Part #'s*			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%	
<b>TOTAL</b>	<b>\$0</b>	<b>#DIV/0!</b>		
<b>CRITICAL OBSERVATIONS:(How do you feel about these observations?) Color Coat</b>				
OBISO 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 FS Templa				
TRUE (STOCK) TURNS (from your FS Templa				
FTFR (FIRST TIME FILL RATE) (from your par				







AUTO MATE				GOOD
Stocking Status	Inventory	% of Inventory	Guide	WARNING
INVESTMENT	Value			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	NADA		Notes
	Value	% of inven	Guide	
		#DIV/0!		this is your current and active healthy parts inventory
Current to 3 Months		#DIV/0!	75%	
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!		
<b>CRITICAL OBSERVATIONS:(How do you feel about these observations?) Color Coat</b>				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 FS Template)				
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	Inventory Value	% of Inventory	Guide
INVESTMENT			
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 gui
New parts no sales			#DIV/0!	Minimal Amount
Total Inventory			#DIV/0!	

<b>CRITICAL OBSERVATIONS:(How do you feel about these observations?) Color Coat</b>
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!!!

s guide

ide

Pass or Fail ?

**OBSO POSITION**

.75 TIMES \$ 0

PLUS 0

PLUS 0

EQUALS #DIV/0! 0

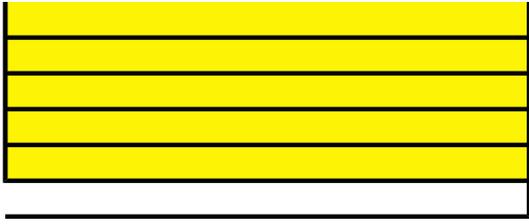


DEALER TRACK ARKONA		MONTH OF:				PROFILES
STATUS		%	#	PIECES	VALUE	
ACTIVE PARTS: STOCKED		#DIV/0!				See 9 D
ACTIVE PARTS: EXCESS STOCK		#DIV/0!				LESS THA
ACTIVE PARTS: UNDERSTOCKED		#DIV/0!				LESS THA
ACTIVE PARTS: TO PHASE OUT		#DIV/0!				LESS THA
TOTAL ACTIVE PARTS		#DIV/0!				70%
SUPERCEDED 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
<b>INVENTORY AGING BY LAST SOLD</b>						
		<b>VALUE</b>	<b>%</b>	<b>ACUM %</b>	<b>INS</b>	
NEVER SOLD			#DIV/0!	#DIV/0!		
ONE YEAR AGO PLUS			#DIV/0!	#DIV/0!	<b>THIS</b>	
ELEVEN MONTHS AGO			#DIV/0!	#DIV/0!		
TEN MONTHS AGO			#DIV/0!	#DIV/0!	<b>THIS</b>	
NINE MONTHS AGO			#DIV/0!	#DIV/0!		
EIGHT MONTHS AGO			#DIV/0!	#DIV/0!	THESE PARTS WILL BE IN 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!		
THREE MONTHS AGO			#DIV/0!	#DIV/0!	<b>THIS IS YOUR ACT</b>	
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					<b>CONFIRM DIRT</b>	

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

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)





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 c
New parts no sales			#DIV/0!	Minimal Amount
Total Inventory			#DIV/0!	

<b>CRITICAL OBSERVATIONS:(How do you feel about these observations?) Color Coat</b>				
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)				



PBS SCORECARD				GOOD
Stocking Status	Inventory	% of Inventory	Guide	WARNING
INVESTMENT	Value			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 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 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!		
<b>CRITICAL OBSERVATIONS:(How do you feel about these observations?) Color Coat</b>				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 FS Template)				
TRUE (STOCK) TURNS (from your FS Template)				
FTFR (FIRST TIME FILL RATE) (from your parts class homework assignment)				

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

UCS SCORECARD				GOOD
Stocking Status	Inventory Value	% of Inventory	Guide	WARNING
Observations				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 healthy parts inventory
3 to 6 Months		#DIV/0!	included	
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!