



Financial Management Action Plan Homework

Homework is due the Monday of the week before you return for Parts Class

Student Name: _____ Paul Wareham _____
014 PAG

Academy Class #: DLR GRP

GOAL WRITING

Example: I will decrease my 5K run time from 30 minutes to 21 minutes by June 15, 2019.

What is your Goal? __Improve our Additional Service Recommendations to \$550K Monthly from? __\$458K_____ to? _____\$550K__ by? _____Dec 19 Year End__

How do you plan to achieve your goal?

Photograph and video all ASR's. Train the team to perform thorough MPI inspections. Train and develop the consultant team and work with the low performing consultants in this category.

How will you track your progress? What measurements, KPI's? (think about current vs past measures)

Through the DMS ASR reporting and our texting platform Update/Promise. Standalone Excel sheet to calculate the month over month improvement.

The benefits of achieving this goal will be:

__Increased Sales/Gross/Net. Customer retention and improved performance and morale of the technician and service consultant team

Take Action!

Potential Obstacles

Potential Solutions

The obstacles will be the team member's unwillingness to embrace and use new tools and software. The solution will be to hold them accountable by using the available reporting and demonstrating the benefit. Additionally the market could prove to be challenging this year and we have to find ways to continue to grow our RO count and ASR penetration. We will do this by providing a great experience in all facets of our business so our customers continue to choose us over the competition.

Who on you staff will need to be involved to accomplish this goal:

Service Management, Technicians, Service Consultants and Team leaders

Specific Action Steps: *What steps need to be taken to get you to your goal?*

What?

Expected Completion

Completed

Daily ASR tracking sent to the team	4/1/19
Update/Promise Reporting Monthly Tracking	4/1/19
Training Low Consultant Performers in ASR	7/1/19
Training Low Technician Performers in ASR Inspections	8/1/19