



### Financial Management Action Plan Homework

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

Student Name: ANA GARCIA  
9/3/2019

Academy Class #: DEALER GROUP 014 PAG  
FINANCIAL  
MANAGEMENT

#### GOAL WRITING

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

What is your Goal? TO UNDERSTAND ALL ASPECTS OF FINANCIAL STATEMENT  
from? ONLY UNDERSTANDING FIXED NUMBERS to? FULLY UNDERSTANDING FINANCIAL STATEMENT by? DECEMBER 31, 2019

How do you plan to achieve your goal:

BY PARTNERING WITH MY ASSISTANT CONTROLLER AND MY GENERAL MANAGER, BY ASKING TO BE PART OF THE MONTHLY BOOK REVIEW MEETINGS

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

I WILL CHALLENGE MYSELF BY REVIEWING THE FINANCIAL STATEMENT ON A MONTHLY BASIS ON MY OWN AND ASKING QUESTIONS TO MY ASSISTANT CONTROLLER ABOUT ITEMS ON FINANCIAL STATEMENT I DON'T UNDERSTAND

The benefits of achieving this goal will be:

LEARNING TO READ THE FINANCIAL STATEMENT WILL BE VERY HELPFUL DURING MY CURRENT ROLE, BUT DEFINITELY A MUST, IF I WANT TO TRANSITION INTO GM ROLE

Take Action!

Potential Obstacles

ASSISTANT CONTROLLER UNAVAILABLE  
MISSING ON MEETINGS DUE TO BUSINESS DEMANDS W/ CLIENTS

Potential Solutions

SCHEDULE MONTHLY VISITS TO BUSINESS OFFICE  
EMAIL QUESTIONS TO ASSISTANT CONTROLLER

NOT MAKING TIME FOR  
BOOK REVIEW MEETINGS

RECAP W/GM ABOUT MEETINGS

NOT HAVING ENOUGH TIME  
TO REVIEW FINANCIAL  
STATEMENTS

SCHEDULING AT LEAST  
30 MINUTES TWICE A  
MONTH TO REVIEW STATEMENTS

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

ASSISTANT CONTROLLER - RENEE CHAUDRIN

GENERAL MANAGER - CRAIG HAUFENSTEIN

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

What?	Expected Completion	Completed
<u>STUDY FINANCIAL STATEMENT</u>	<u>MONTHLY ONGOING</u>	<u>ONGOING</u>
<u>SCHEDULE MEETINGS W/ ASSISTANT CONTROLLER ON OUTLOOK</u>	<u>EVERY MID MONTH</u>	<u>DEC 31, 2019</u>
<u>REQUEST TO PARTICIPATE ON BOOK REVIEW MEETINGS</u>	<u>LAST WEEK OF MONTH</u>	<u>DEC 31, 2019</u>
<u>CONDUCT DEEP DIVES INTO FINANCIAL STATEMENT ON MONTHLY BASIS TO DETERMINE</u>	<u>ON A MONTHLY BASIS</u>	<u>DEC 31, 2019</u>