

First Time Fill Rate

DEALERSHIP NAME	NADA Motors	rst time fill rate		
DATE	RO'S	1st Time	Same Day	Day
8/14/2019	5	5	0	0
8/18/2019	5	2	2	1
8/21/2019	10	8	1	1
8/29/2019	10	7	3	0
9/2/2019	15	12	2	1
9/5/2019	5	4	1	0
Totals	50	38	9	3



Rate %
100.00%
40.00%
80.00%
70.00%
80.00%
80.00%
#DIV/0!
76.00%



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 Templ
FTFR (FIRST TIME FILL RATE)

COLOR SCORING

GOOD

WARNING

DANGER

GREAT

Seldom used

OK....BUT..

OUCH !!!!!

ouch!!!

uide

OBSO POSITION

.75 TIMES \$ 0

PLUS 0

PLUS 0

EQUALS #DIV/0! 0

Pass or Fail ?

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%	
TOTAL	\$0	#DIV/0!		
CRITICAL OBSERVATIONS:(How do you feel about these observations?) Color Coat				
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	\$87,457	17.63%	over 70%	GREAT	
Auto Phase Out Parts	\$36,753	7.41%	Less than 30%	Seldom us	
Dealer Phase Out Parts	\$17	0%	Less than 1%	OK....BUT	
Manual Order Parts	\$2,698	1%	Less than 3%	OUCH !!!!!	
Non Stock Part \$'s	\$366,856	74%	Less than 5%	YIKES	
Non Stock Part #'s*	6838	72%	Greater than 70% of PN's		
Core Clean	\$2,350	0%	pn	pieces	
Core Dirty	\$0	Check	0%	pn	pieces
		0%			
Total Inventory	\$496,130	100%			

AUTO MATE

Activity	AUTO MATE Value	% of inven	NADA Guide	Notes
		0.00%		this is your current and active healthy parts inventory
Current to 3 Months	\$144,231	55.58%	75%	
4-6 Months	\$61,000	23.51%	23%	
7-9 Months	\$41,692	16.07%	2%	65% Will likely become obso
10-12 Months	\$8,622	3.32%	included	85% Will likely become obso
over 12 Months	\$3,935	1.52%	0%	Technically Obsolete
		0.00%		
TOTAL	\$259,480	100.00%		
CRITICAL OBSERVATIONS:(How do you feel about these observations?) Color Coat				PASS/ FAI
OBSO POSITION (LINES 23-25 FROM ABOVE)				PASS
CLEAN CORE				PASS
DIRTY CORE				PASS
LOST SALES CALCULATOR VS. ACTUAL				FAIL
AVERAGE STOCK ORDER (NEEDED FOR FS TEMPLATE TRUE TURN CALCULATION)				PASS
MONTHS SUPPLY (FS TEMPLATE)				PASS
GROSS (TOTAL) TURNS (from your FS Template)				PASS
TRUE (STOCK) TURNS (from your FS Template)				PASS
FTFR (FIRST TIME FILL RATE) (from your parts class homework assignment)				FAIL

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Additional Data Available From Auto Mate			
		\$ Value	Grade
DP2	Total Idle Capital	1.18%	
DP3	Negative On Hand	17791.62	
DP4	Parts with no bin	48864.04	
DP5	Parts with no cost	302.13	
DP6	Monthly Closing Inv Value	493780.4	
DP7	Lost Sales	2250.59	
	Value of Stocking parts with MNS 6-11 Mo.	7199.74	
	Value of Stocking parts with MNS 12 Plus M	0	
	Value of Non-Stock Parts w MNS 3-5	66781.52	
	Value of Non-Stock Parts w MNS 6-8	37542.91	
	Value of Non-Stock Parts w MNS 9-11	17844.86	
	Value of Non-Stock Parts w MNS 12 Plus	5820.43	
		135189.5	

OBSO POSITION MATH DONE BELOW		
.65 TIMES THE 7-9 MONTH VAL	\$27,100	
.85 TIMES THE 10-12 MONTH V	\$7,329	
PLUS THE 13-24 MONTH VALU	\$3,935	
PLUS THE 25+ VALU EQUALS	\$0	
OBSO AS A % OF TOTAL	\$38,364	14.78%

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

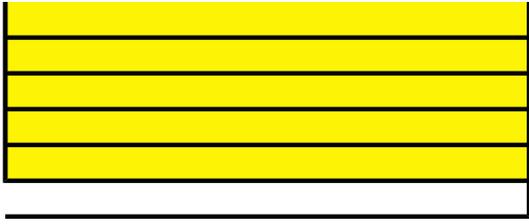
Activity from Source	Value \$	% of Inven	%	Notes & Guides
0-3 Months			#DIV/0!	ACTIVE INVENTORY at 75%
4-6 Months			#DIV/0!	ACTIVE INVENTORY at 23%
7-12 Months			#DIV/0!	75% will likely become Obso 2% is
13-18 Months			#DIV/0!	Technical Obsolescence 2% is gui
New parts no sales			#DIV/0!	Minimal Amount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

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)

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
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 "
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!		THIS IS YOUR ACT
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)



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!	

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

% is guide

OBSO POSITION

guide

.75 TIMES \$ 0

PLUS 0

PLUS 0

EQUALS #DIV/0! 0

Pass or Fail ?

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!		
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 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!

Departmental Action Plan

Dealership **Goldstein Subaru**

Academy Week **Week 2 - Fixed Operation - Parts**

Class & I

Current Situation

Our current situation is that we do not have a strong SOP process in place and our technical obsolescence position, as of 5/31/19, is \$3,935.35 or 271 total parts. Our potential obsolescence position, as of 5/31/19, is \$50,314.05 or 1,112 parts. This should not have almost 11% of our inventory as obsolete and over 7 months old, most of which are SOPs, because the parts are just placed on shelves and cu

Overall Objective:

My overall objective is to put a process in place where service and parts employees can see what SOPs are. We need to make it easier for service and parts employees to see what SOPs have been sitting there and this will create a sense of urgency to get these parts off of vehicles. We need to have a policy in place where we schedule an appointment for parts to be ordered and then if the installation is not complete within Subaru's 45 day return policy, we will return the parts within the 45 day mark. With this being said, we are in the process of creating an exc

Proposed Timeline

1. Review current SOP process and what is currently working **August 1st**
2. Introduce new SOP process to employees.
3. Train employees on new SOP process and procedures.
4. Evaluate new process and re-train employees if needed.

Action Plan

Describe necessary actions to reach desired result:

- **Step 1:** Review current SOP process and what is not.
- **Step 2:** Inform, educate, and train employees on the new SOP process.
- **Step 3:** Make sure everyone that needs access has access to SOP excel file.
- **Step 4:** Any part over 45 days will be returned based on Subaru's return policy.
- **Step 5:** Review with employees the need for this new process and the causes of c

Meeting with Dealer:

1. **Action Proposed:** Proposed the above action plan to the dealer principle and exec

Meeting with stakeholder(s) (dealership personnel):

2. **Describe what is in place to support desired goal:**

Training / Coaching / ±Consequences related to results / Pain & Gain

internal training on accessing and monitoring the shared excel log for SOP will be no skills to acquire the information they need

Accountability: Monitoring progress:

Who: Parts counter employees, service advisors, parts manager, service manager,

What: Parts employees accountable for ordering the part in a timely manner and in

3. **Service employees responsible for scheduling appointment with customer and getting SOP does not have to be returned.**

By When: The plan is currently in the works now and should be completed by the s

Describe checkpoints that have been established to measure progress:

Daily / Weekly / Bi-weekly / Monthly /

4. **Daily** – Parts manager to print SOP list and compare it to the SOPs sitting on the shelf stocking it in or not costing the part out properly on the RO.

Weekly – Parts manager, parts advisors, service manager, and service advisors will would be improved with the SOP process of putting the parts on the shared excel fil

5. **Estimated cost for implementation:** Realistically the cost is ultimately free. The s

Projected Date of Completion:

12/31/19

Sponsor Signature:

Stefanie C

Evaluation of Results: Include measured results.

(± Metrics)

Impact Areas:

Sales / Gross / Expenses / Net Profit / CSI /

will remain steady. This plan is to improve process and improve aged inventory so sales will not necessarily process that will require the SOP to be installed in a timely manner or returned to free up frozen capital. H more labor by installing more parts on more cars with an improved process.

related with sales of parts and or labor. Again, with just improving a process to get more parts installed qui sales will not necessarily change. Gross will increase however if a warranty labor rate increase is applied f excel file has already been created and therefore there is no additional expenses to the dealership from th increased labor sales and other potential areas of additional increases in income (warranty labor rate incre slightly.

customers will be getting their parts installed on their vehicles quicker and in a much more timely and orga to be installed on their vehicles that are just sitting on the parts shelves and the customers are not being c

Student Name Lucas Goldstein

Student Number N353-13

and therefore have aging and obsolete inventory. parts. This equates to .8% of our inventory. Our is equates to 10.1% of our inventory. We old! Parts are sitting on shelves for too long, stomers are not being followed up.

employees are held more accountable for SOPs. are on the shelves and how long they have f the shelves and installed on the customers it for a customer the same day that the part is urn policy then the part would be returned at :el file that everyone has access to on their

t 10th, 2019
August 20th, 2019
October 1st, 2019
November 1st, 2019 - ongoing

OP process - keep doing what is working & stop

obsolescence and frozen capital as well as the

utives.

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

Training –
necessary so everyone involved has the necessary

dealership GM
putting it onto shared excel sheet file.
ing customer into dealership in a timely manner so

part of the fourth quarter of this year (2019)

self and see if any were missed either by not
I meet and discuss what is working and what
e as well as removing the part when installed and

shared excel file is already set up and active between

Goldstein

Sales: Sales
y increase. Cash flow will improve due to a real plan in
owever, sales from service labor will increase with getting
Gross: Gross is directly
cker gross may increase from increase labor sales but parts
or.
Expenses: The shared
ie new process.
Net Profit: Through
ase, parts sales increase, etc) net profit should increase
CSI: CSI will increase because
nized manner. Customers will no longer be waiting for parts
ontacted.

