



## Financial Management Action Plan Homework

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

**Student Name:** Jason Goss

**Academy Class #:**

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### GOAL WRITING

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

**What is your Goal? Increase monthly customer pay gross by 15% over LY by January 2021.**

**How do you plan to achieve your goal:**

**We are going to hire an in-house BDR to solicit customer pay by letting our customers know about specials we are running in the service department. We are going to implement 100% T.O. with service advisors on declined service. Have BDR complete a 3 day follow up on declined services and offer a discount. Use TVI program to implement better marketing strategy.**

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

**We will track the raw number daily, weekly, and monthly in our daily huddle meetings. We will also track the year over year percentage increase and by dollars increased year over year.**

**The benefits of achieving this goal will be:**

**Increased Gross Profit, which increases Net Profit and better customer retention. This will also drive more customers into the service department which will increase Xchange sales.**

**Take Action!**

**Potential Obstacles**

**Potential Solutions**

**Monitoring T.O Process**

**Put a process in**

**place to document and verify that the T.O. took place**

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

**Service Director-Rod Sangster, Lane Manager-George Bell**

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

**What?**

**Expected Completion**

**Completed**

**Sign up for TVI\_\_\_\_\_ Nov 1, 2019**

**Hire BDR**

**Nov 1, 2019**

**Written process for T.O.'s**

**Nov 1, 2019**

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