



Professional Series Pre-Course Work

Interview your Direct Supervisor in order to answer the following questions.

1. What do you want me (the student) to learn or achieve from the NADA Management Professional course?

I would like you to be able to analyze expenses & know where we should be at for the store our size & feel confident in the allocation of fixed expenses. I would like for you to be able to create a trend analysis to easily see the differences from year to year as well as month to month. In addition I would like for you to identify not only which expenses we can control but how to maintain those accounts. I would like for you to learn to develop a month end process for parts inventory reconciliation or to see if the current process makes sense.

2. What would you like me to bring back to the workplace as a result of this training?

I want you to develop best practices within the DMS system & work flow. I would like you to be able to analyze all pages of the financial statement in order to easily compile information & study the accounts and to present concerns & solutions if needed. I want you to bring back a check in balance system when calculation managers pay or a way that we can feel confident that the financial statement is correct.

3. How will what I learn in the program be shared with the rest of the team (if applicable)?

Depending on the information we will determine at that time if it makes more sense to meet with managers one on one, or to hold a managers meeting.

4. How will what I learn be integrated into day-to-day work upon return?

Like with any change we will have a meeting to include Office Managers, GM & Owner. We will clearly define the change in process & align it to our business goals. We will determine the impacts and who will be affected. We will develop a communication strategy & provide effective training to implement a support structure. Lastly we will measure the change process & evaluate if it is working as is or if we need to adjust any areas in order to maximize our goals.



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5. In your role as a Direct Supervisor, what three things challenge you the most?

Analyzing all pages of the financial statement to easily compile information & study the accounts to present any concerns & solutions.

Finding time to not only hold managers meetings but to make the most out of those meetings.

Keeping expenses down to maximize profitability.

Self-reflect on the following question:

1. What is my purpose for attending this course?

I want to gain great knowledge in analyzing the financial statement. I want to be able to breakdown every page and be able to explain the accounts to my GM & Owner. I would like to be able to close the financial statement with confidence. I would also like to learn best practices within DMS and work flow to be able to work efficiently & effectively.

Thank you for your participation! See you in the course.