

Departmental Action Plan

Student Name: Brandon Hemborg

Class & Student Number: N324/13

Academy Week: Week 4

Current situation or challenge you want to address: The current policy that is in place right now for how a car deal is handled after the customer is done in F&I is going to be the main focus for this action plan. The stock card for the trade in unit is made during the original contract signing with the customer. After F&I is done is with the customer the deal goes to the business office and the deal jacket doesn't usually get touched till the following day. The business office posts the fees from the deal, mark the unit as sold in the DMS, the jacket is made for the trade unit and the stock card is attached and it is filed. The deal jacket then goes to the GM where he looks it over and make sure the deal was worked properly on the foursquare, ESP sale to cost, and all correct areas have been signed. The GM gives the deal back to F&I where they attach the paper work showing that the deal is bought by a bank even if the deal was approved by a bank before it went to the business office the first time. F&I then sends the deal back to the business office. The contract clerk then packages the deal and sends it out to the bank, the deal is posted to the DMS for accounting, and the trade is released to the used car manager. The current process needs to be reworked so the amount of time it takes to complete a deal gets cut down by at minimum a day.

Overall Objective and Specific Desired Results: The over all goal, is to speed up the process of getting a car deal 100% complete and cut out unnecessary steps that slow everything down. With putting on pressure to make the steps more efficient the used car will be released faster and the store will have the ability to receive a faster return on the stores investment. The deal will be funded quicker, which will allow the flooring to be paid off faster and help the stores cash flow be more lucrative.

Describe your action plan in detail (be specific and include before and after measurements)

The main focus is going to be on that, everyone involved only needs to touch the Car deal one time and not twice. Before F&I delivers the car deal to the business office, they will now package the deal 100% and have all documentation showing that the deal is bought by a bank. If the business office is still open, F&I will be instructed to turn the deal in as soon as it is complete no exceptions, if not they will turn the deal in first thing the following morning. Once the deal gets into the business office, the Contract clerk will finish packaging the deal and send it to the bank, post the vehicle as sold, and do all necessary postings for accounting. The trade stock card and other documents will be given the DMV clerk for final processing, after the stock card will be given to the used car manger. The new structure will have every person involved only touch the deal once unless there are any appropriate circumstances. This is guaranteed to speed up the process of getting deals completed and sent to the bank which is going to allow the store to achieve a faster return on our investments with trade in vehicles, pay off flooring faster, and keep our cash flow moving.

Timeline: Describe specific short term and long-term checkpoints to monitor progress

When the new policy gets implemented at the end of October, the GSM will follow the deals to make sure that they are being handled as stated above and to fix any unforeseen road blocks. After a month on the new process we will do spot check to make sure that every deal is being handled with the same amount of urgency. If there seems to be any consistent problems with any of the employees involved, then we will introduce a time punch that everyone will use to monitor who is holding up the deal from being completed. Another way that we will track the progress of the new process is with our trade in vehicles. The used car manager will track on every trade in vehicle how many days it takes him to receive the stock card from the business office and report this information back to the GSM.

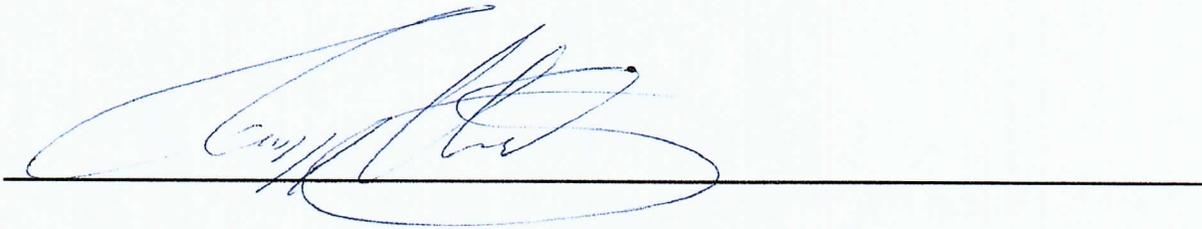
Meeting with Stakeholders (dealership personnel)

Describe what behavior change is needed to support desired goal. Address required coaching, training and/or consequences. Include timelines / Accountability / Monitoring process

- a. **Who:** F&I department, Business office (Contract clerk, DMV clerk, and the Business office manager), and the GSM.
- b. **What:** Each department will be responsible for their tasks to be completed 100% with the goal that no one has to touch the deal more than one time.
- c. **By When:** The new deal process will be 100% implemented by October 31 2017.
- d. **How:** All personnel from both departments that are involved with the process change will be met by with their manager to explain the new process and the reasoning behind it. The employees will be given a checklist of all portions that they are responsible for to ensure that each person only has to touch the deal one time. The employees need to buy into the new process and understand that the sense of urgency from everyone is going to make the new process thrive. After monitoring the new policy and it is seen that certain employees are not handling the deals at they pace they should be, then a time clock will be put in place to monitor when the receive the deal and when they are done with it. If there continues to be a problem with efficiency then it will be the manager's responsibility to deal with the employee having the issues. We want a faster turn on our investments, pay off flooring faster, and keep our cash flowing moving, this is one process that is going to make these three areas increase.

Dealer agreement:

If you need your sponsors support or approval to implement your plan, have it signed off before you start. If you can proceed on your own, present this action plan to your sponsor before next class. Describe the meeting:

A handwritten signature in blue ink is written over a solid black horizontal line. The signature is stylized and appears to be 'Campbell'.