



## HOMEWORK ACTION PLAN

S SPECIFIC  
 M MEASURABLE  
 A ACHIEVABLE  
 R RELEVANT  
 T TIME-BOUND

What are the potential consequences if you don't achieve your goal?	Clear expectations equal predictable results. Without a KPI dashboard the sales teams can not be held accountable.
Why is the goal important to you?	The goal is important to me as it creates unity with parts & service. All three departments will be held to a set of standards.
Potential Obstacles	One obstacle will be building reporting that is automative rather than manual. Another one could potentially be that the "inputs to processes" are not being done the same at each branch and therefore will need to be standardized before a metric can be reported on.
Potential Solutions	Work with IT and Subject Matter Experts (SME) to build robust reporting. Utilize the SME to collaborate on standardization.
BOTTOM LINE! Financial Impact of Achieving Your Goal (expressed in dollars)	If this tool is used to raise the performance in each branch to the established KPI, the bottom line financial impact is tremendous. One example, KPI Gross Margin set at 5.75%. If each branch achieved 5.75% it would be a gross profit increase of \$165762 over YTD current state.

What specific actions or steps will you take to accomplish your goal? What will you do differently or improve? For each, be sure to include necessary resources, who is accountable, the measurable result, and dates.

SPECIFIC ACTION/STEP	NECESSARY RESOURCE(S)	ACCOUNTABLE PERSON(S)	EXPECTED RESULT	START, END, & CHECKPOINT DATES
Develop dashboard	None	Michelle	Draft 1 built	complete by June 15
Present dashboard for approval to C Level and GM's	None	Michelle	Discussion and revisions as required to draft. Final approved	Complete by June 30
Work with IT to automate as much data points as possible	IT department	Darryl	Ease of data entry	Complete by July 30
Introduce and distribute first month (July) dashboard populated to sales	None	Michelle	Intro and Q&A after results sent out	Complete by August 10



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managers and consultants				
Check in for feedback to ensure it is a useful tool and starting to drive performance	None	Michelle	Modify dashboard as required	Complete by Sept 30
Use dashboard as tool for 2022 planning sessions. Branches can identify their areas for improvement and build into 2022	None	Sales Manager at each branch	2022 branch action plans to address weakness	On going
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As you work toward your goal, it's important to have interim check points with specific, measurable objectives so your team can hold themselves accountable. If everyone knows the goal and objectives, you don't have to spend your valuable time micromanaging.

Once you've accomplished your goal, added or adjusted policies, procedures, and behaviors, now what? How will you ensure you and your staff do not fall back into the previous habits that produced poor results? Be specific.

Dashboard will be distributed monthly and monitored by GM's and Sales Managers to drive performance.

Describe any planning or implementation meetings conducted as part of development of your plan.

Included in action plan above.

Sponsor Signature: \_\_\_\_\_ Kevin Kotyk, CFO