

Variable 2

Pre Class Assignment

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DROP BOX

1. Latest Financial Statement
2. Other income and deductions. **En detail**
 - a. Investigate the new vehicle sources and deductions to this account
 - i. DOC Fees
 - ii. Factory incentives and programs
 - iii. Distributor payments
 - b. Total all additions to income attributable to new vehicle sales: **august : 141 673 \$**
3. What is your dealerships ideal months' supply of new vehicles? Prepare to defend this number.

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4. New Vehicle Inventory sorted by age (Bring Copy to Class)

Run right before class... does not need to match with the statement)

- a. -Subtotal in following age buckets (calculate units and dollars for each bucket)
 - 0-30 days
 - 31-45 days
 - 46-60 days
 - 61-90 days
 - 91-120 days
 - Over 120 days **Unitée et dollars**

5. Investigate your dealerships floorplan financing interest rate: **2.2 %**
 - a. Does the dealership earn incentives based on retail contract penetration?

Briefly describe your New Vehicle floorplan assistance program:

6. Print and bring your New Car Area of Responsibility Map (available from your manufacturer).

DMA ACCÈS

7. Bring sales effectiveness report card from your manufacturer, including pump in and pump out information, owner loyalty/customer retention and units in operation. (5, 7, 10 year) **55.9%**
 8. What is the size of your active unique owner base? **19887**
(number of active customers you still do business with from all departments)
 9. Upload to doc share a copy of a 'worksheet' / 'buyers order' / 'computer printout' utilized in the sales department when working a deal with a customer. Prepare to share the process and overcoming customer objections with the class. **(You will find more instructions in your class site on how to upload).**
 10. Copies of Pay Plans and job descriptions sales person, f&I and service advisor.
(You will find more instructions in your class site on how to upload).
 11. What is the total number of employees that left dealership employment during the previous 12 months? _____ **35** _____ How many left **voluntarily**? _____ **16** _____
 12. What is the total percentage of 'mini's' or 'flats' paid to the sales force on new car sales for the last 12 months **49%**
 13. **Bring current phone call guide used by Sales Consultant when *taking incoming sales calls and for placing outbound internet and phone communications***
 14. How much time does it take to purchase a vehicle at your store? _____ **1 hours** _____
 15. Upload to Doc Share a completed F & I Menu (if you are using one and I hope you are!) If you are using DocuPad please take a screen shot and upload. **(You will find more instructions in your class site on how to upload). NA**
 16. Have your F & I Manager complete attached F & I performance data form. **NO**
 17. Does every retail customer go through the F & I office at time of sale? _____ **No** _____ If not, what percentage do? **85%**
 18. What are the goals of the F & I office in your dealership, financial and otherwise?
Get \$ 600.00 average per car sold. Reach 40% extended warranty. In the longer term, train sellers to offer the F & I service on their own. One person for the whole process. Here is the long-term goal.
 19. **Review and observe the following during your next sales, service and management meetings at your dealership: content, effectiveness and level of participant satisfaction.**
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To be provided by F & I Manager/ Retail Sales

Please use YTD total for month ending August 2017

	A	B	C	D	E	
	Year To Date Production					Total Units
	Units	Non Lease New Vehicle	New Vehicle Lease	CPO-OEM	Non CPO Used	
1	Units Delivered	475	1018	259	644	2396
2	Finance or Lease Contracts	270	1018	203	340	1831
3	Service Contracts					
4	Pre-Paid Maintenance					
5	GAP	56	41	47	65	209
6	Theft Deterrent	9	16	0	0	2
7	Paint Sealant & Appearance	98	52	3	5	150
8	Tire/Wheel					230
9	Lease Care		230			514
10	Other__ECP__	126	388	38	56	
	Year To Date Income					Total Income
	Incomes	Non Lease New Vehicle	New Vehicle Lease	CPO-OEM	Non CPO Used	
11	Finance or Lease Reserve					72488
12	Service Contracts					4121
13	Pre-Paid maintenance					63570
14	GAP	44285	28203			
15	Theft Deterrent	1688.99	2438.04			73954
16	Paint Sealant & Appearance	40194.66	23376.16			404897
17	Tire/Wheel					
18	Lease Care		73954.16			
19	Other_____	116234.07	288663.13			
	Year To Date Charge backs					Total Chargeback
	Charge backs	Non Lease New Vehicle	New Vehicle Lease	CPO-OEM	Non CPO Used	
20	Finance or Lease Reserve					
21	Service Contracts					
22	Pre-paid Maintenance					
23	GAP					
24	Theft Deterrent					
25	Paint Sealant & Appearance					
26	Tire/Wheel					
27	Lease Care					
28	Other_____					