



## HOMEWORK ACTION PLAN

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

Name	ZACHARY SHIMKO	Class	#	VO2
Dealership	WASHINGTON HYUNDAI	Date		7/23/2021

Current Situation or Challenge to be Addressed:	BELOW AVERAGE F&I PROFIT ON ALL DEALS		
Current Performance Level (include specific measure):	BELOW AVERAGE		
Goal (what do you want to achieve?):	GETTING TO OVER \$1,000 PER COPY		
Goal Performance Level (include specific measure)	ABOVE AVERAGE		
Goal Start Date:	7/23/2021	Goal End Date:	8/27/2021
First Check-in Date:	7/30/2021	Performance Objective:	See increasing gross profit
Second Check-in Date:	8/6/2021	Performance Objective:	See increasing gross profit
Third Check-in Date:	8/13/2021	Performance Objective:	See increasing gross profit
Fourth Check-in Date:	8/20/2021	Performance Objective:	See goal of \$1,000 PER COPY REACHED
How does your goal align with the dealers' vision?	This aligns with our goals		
What are the potential benefits of achieving your goal?	Better gross profit for the dealership, increase in pay for finance managers and sales. Better customer satisfaction when products payoff.		
What are the potential consequences if you don't achieve your goal?	Less gross, lower pay for finance managers and sales. Disgruntled customers when products were needed and not purchased.		
Why is the goal	Shows growth in F&I department.		

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important to you?	
Potential Obstacles	Unwillingness to try new strategies, lack of training, lack of roleplaying
Potential Solutions	Training on correct word tracks and sales presentation.
<b>BOTTOM LINE!</b> Financial Impact of Achieving Your Goal (expressed in dollars)	Increased gross profit on every deal.

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
Initial training	Training session/ manuals	Zach Shimko/Jerry Gold	Enthusiasm from personel	7/24
Continuing training	Office/Computers	Zach Shimko/Jerry Gold	Better word tracks and presentations	7/30, 8/6, 8/13
Progress meetings	Office	Zach Shimko/Brian Flannery	Two way feedback	7/31, 8/7, 8/14
Better reporting/ metric evaluation	CRM system	Zach Shimko/Brian Flannery	Numbers will improve	7/30, 8/6, 8/13
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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.

Constant continuing education and training.

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

Meeting on first day of achieving goal, and every week until goal end. Monthly meeting afterwards

Sponsor Signature: \_\_\_\_\_