



Financial Management Objective Homework

Student Name:

Anne Croteau

Academy

N323

Class #

I plan to accomplish the following objective by our next class
April 3rd 2017

Review composite with GM *on:*
to find areas of opportunity

Provide the relevant composite

Department	Month	Page	Column
Service	Feb17	29	11

data

Action plan for achieving objective

What is the area of focus? Service is the area of focus. Met with the GM and discussed the homework. We reviewed the composite and looked at areas in service that stood out. I emailed the service manager that evening and asked if he was willing to work with me this year with regard to some opportunities in his department and we set up a time to meet.

What is the proposed plan? How will you achieve it? Met with Aaron and reviewed the composite to see what he thought was the best area to work on. We went with increasing the gross per tech. Our number is lower than the best of class Ford and has been stronger in the past. Aaron mentioned that he is having some personnel issues that are affecting the gross and his current plan is to try to recruit 2 to 3 more technicians. We discussed some of the ideas that came back from the first week of the academy. Since replacing or adding personnel is always an ongoing project in a dealership we discussed adding the three tenths idea to each repair order. Aaron had recently worked the desk and was able to offer items like wiper blades, cabin filters and other maintenance items to each customer with success. We talked about menu selling and if that would be something that he thought would benefit the service salespeople. He presented a menu that can be generated on the Ford website, specific to the customer and the current mileage on their vehicle. The problem seems to be that there isn't always enough time to print this menu for each customer or that the website is slow and sometimes they are unable to connect. We discussed a menu that could be presented similar to the practices used in the Fandi department. I met with the Fandi director for our group to look at the menu process. We discussed bringing this similar function to the service department. I will need to set a new time to discuss some of the software versus paper menu options with Aaron to see what his ideas are and how best they can fit within the write up process.

How will you track your progress? What measurements, KPI's? How often will you track?

We are going to track our progress using the composite. Once a menu is devised we will need to listen and watch to see if it works smoothly with the write up process. We will track the number at the end of each week using the MIS and again at month end with the statement and the composite.

Who are the employees that will be involved, or impacted? Will they require training or assistance?

Aaron Pratt, Kelly Connors, Greg Pratt, Anne Croteau, Charles Albrecht. Training will be required.

Is there a cost, or estimated cost for implementation?

There will be a cost but I do not have an estimate at this time. The tablet version versus a paper menu is being discussed at this point.

Projected date of completion? Menu completion and in use by the end of May 2017

Jan.	Feb.	March	April	May	June
July	Aug.	Sept.	Oct.	Nov.	Dec.