



Qualitative Analysis – Strengths

1. Loyal Employees: We have core group of team members who are willing to help, learn and care about each other. They have been with our organization and on this team for many years, which creates a family atmosphere and keeps them engaged.
2. Experienced team members: We have longevity in our team with average technician experience of 22 years. In addition, they continue to enhance their skills and knowledge through Ford/Lincoln training, along with peer-to-peer recommendations. Our advisor team has over 17 years of combined experience. This helps them in their ability to navigate most customer situations and help create a great experience for the customers. Another clear advantage of an experienced team is knowing who to assign the proper work to which create efficiencies in the shop.
3. Culture: The team members live out the Zeigler PRIDE (Passion, Reputation, Integrity, Drive, Execution) statement. We may not be perfect but we do help create and maintain a fun environment for team members. Culture is key and it is a reason so many employees have embraced this by complementing each other through diamond drops or our quarterly PRIDE awards.
4. Helpful mindset and work ethic: One thing that makes a difference is the willingness to help another team member or customer. This eliminates selfishness and replaces it with selflessness. The “Golden Rule” is lived out through our team members and they see it in action every day. This mentality stimulates a strong work ethic which becomes contagious to others leading to execution and performance.
5. Strong sales and market penetration: The sales team has continued to have strong results and helps create an onboarding opportunity for customers to have their vehicles serviced with us. They are willing to give loaners vehicles when needed to assist the customer and service department, along with greeting their customers during their appointments. This creates a relationship that will last for many years and in some cases a lifetime.



Qualitative Analysis – Weaknesses

1. Adaptability and willingness to change: We have employees who have been with us for a long time. With this comes comfort, consistency and sometimes the unwillingness to change. What has been “successful” for many years is not what will be successful tomorrow.
2. Organization and process improvement: We tend to be disorganized in scheduling and prioritizing the work flow. This can be frustrating for the technicians and cause us to complete repairs in wrong order. In addition, we have times in which the process is not consistent across all employees.
3. Sales to Service introduction: We feel there are a few ways we could improve this and help customers see the true value in bringing their vehicle back for every maintenance and repair.
4. Attitude and morale improvement: For the most part we have solid employees who come to work with a good attitude. We do have some opportunities to address a few employees who tend to pull down other team members. We need to work through areas of concerns along with finding ways to create a positive environment.
5. Fix right the first time: This comes down to a few areas we could improve. It begins with assigning the work to the best technician, then ensuring high level of execution. Having shared “best practices” on repairs helps as well to eliminate comebacks.
6. Parts stocking levels: While we follow the RIM program which has helped us increase stocking levels of some parts, there are still opportunities to look at fast moving parts or released recalls to stock more parts. We know this has been difficult with the supply issues, however we can head this off by being more aggressive to be ahead of these recalls.
7. Communication: Communication is always an area to improve. We all communicate in many forms (email, text, slack, call, etc.). Finding a consistent form helps along with what works well for the individual.
8. Diagnosis on drive: We have the ability to scan vehicles in the drive but sometimes this goes too far and can cost us sales along with misdiagnosis.
9. Technician down town: We have some areas in which we could help our technicians become more efficient and proficient. Parts wait times, customer approvals, repair assignments and smoke breaks are just a few to begin with.



Qualitative Analysis – Opportunities

1. **Develop Technicians:** Use the quick lube as an opportunity to develop technicians who can work in the main shop. Looking at skill sets, long term goals and performance is a great way to start. In addition, we have mid-level technicians that can develop more in-depth skills to perform more difficult repairs along with growing in technology advanced skills.
2. **Fleet Business:** We have a mobile repair van that currently is not our running. We lost the technician that was completing these repairs and need to replace them immediately. We also have a few large fleet companies within a 60-mile radius that we need to connect with.
3. **Scheduling:** We schedule based on appointments and the “comfort level” of the service advisors which means that we miss out on additional sales, gross and net profit.
4. **Quick Lube:** The quick lube manager is underperforming. We have taken time to develop him and work through different ways to present and upsell customers, yet he still is struggling. In addition, the quick lube team has the ability to create more value in our service along with potential to upsell customers on additional items needed.
5. **Development:** We have solid technicians that do not have a development/growth plan.
6. **Training:** We are missing opportunities to train across all positions in the fixed operations team. We schedule training for technicians through Ford but we rarely bring in trainers for the service advisors, quick lube team or parts department personal.
7. **Maintenance:** We are very competitive in maintenance items to help the customer maintain their vehicles. If we surveyed our customers, most would feel we are overpriced for these services.

Qualitative Analysis – Threats

1. Technician Age: We have an older group of technicians who will be retiring over the next few years. This is a direct threat to our business as these are strong producers with high skill levels.
2. Inflation: Inflation is a concern for most people at the moment. With rising prices on almost everything (parts, gas, oil, grease, etc.) it puts additional pressure on customers when making repairs or completing service.
3. Employee Wages: Wages are going up, even for entry level technicians. Not just the wages but also employee benefits are rising and the market is very competitive.
4. Customer Loyalty: Customer's loyalty levels continue to drop. The wait times, prices, lack of loaners and mindset to get their vehicle serviced now are causing friction for the customer.
5. Parts Supplies: Parts supplies have been a consistent issue throughout the Ford brand. The open recalls that are not able to be repaired because of lack of parts is causing frustration for employees and customers.
6. Higher Vehicle Prices: New vehicles sales continue to drive service business and retention. Prices continue to rise and the supply of new vehicles is extremely tight.
7. Competition: There are 4 Ford dealerships all in a very small distance from each other and the competition in pricing maintenance and services is clear evident. In addition to this, there are over 30 non-dealer service centers in the Elkhart market.
8. Laziness: Laziness is something that settles in quickly and can cause us to lose a customer almost immediately. We need team members who have PRIDE and come with a mindset to get the job done every day!



ACADEMY

Qualitative SWOT Analysis-Zeigler Ford/Lincoln Matt Thomas Class N393



STRENGTHS

- 1. Employee's.
- 2. Experience team members (techs/advisors).
- 3. Culture: Integrity, Perseverance, Fun Environment, Leaders who care.
- 4. Helpful mindset and work ethic between the teams.
- 5.

WEAKNESSES

- 1. Employees who are unwilling to change/adapt.
- 2. Lack of organization and processes in the service lane.
- 3. Sales to Service introduction.
- 4. Lack of leadership in key areas (QL, lane).
- 5. Poor Attitudes, shop morale.
- 6. Fix right the first time.
- 7. Parts stocking levels (risk verses reward).
- 8. Lack of Communication.
- 9. Diagnosis on the service drive.
- 10. Technician down time.
- 11.

OPPORTUNITIES

- 1. Develop techs from the QL lane.
- 2. Continue to grow the fleet business.
- 3. Schedule more customers and load the shop.
- 4. QL supervisor and additional upsells from QL.
- 5. Better communication.
- 6. Creating a clear development/growth plan for team members.
- 7. More training for all team members (techs, advisors and QL).
- 8. Be more aggressive on maintenance upsells.

THREATS

- 1. Older techs will begin to retire in the next few years.
- 2. Gas/Oil prices along with inflation.
- 3. Tech's/skilled trade workforce shrinking.
- 4. Rising employee wages.
- 5. Inability to Listen to the employees and customer.
- 6. Parts availability and supplies.
- 7. Higher vehicle prices.
- 8. Competition undercutting the price.
- 9. Laziness.
- 10.



Qualitative Analysis – Objectives

1. Increase technician and shop efficiency and proficiency.
2. Change the way we schedule service from appointments-based schedule to total available hours to sell every day.
3. Create an employee development plan for all team members that is updated every 6-months to ensure employees are meeting development goals.
4. Quick lube, quick up program. This is a fast-track program that allows quick lube technicians opportunities to move into the shop as full-time technicians.
5. Increase parts inventory based on fastest moving, outstanding recalls and other determined factors to help complete service repairs.
6. Immediately hire a fleet service technician and get them to max production so that we can expand fleet service to more customers.
7. Increase fixed overhead coverage for the dealership.



Qualitative Analysis – Strategies

1. Set new standards for technician hours turned, efficiencies and proficiencies for each hoist.
2. Track all technician hours on a “proficiency tracker” that is in the employee lounge along with the shop. This can be paper for now but we will move to digital.
3. Eliminate multiple hoists per technician and move to a shared hoist system to increase shop proficiency.
4. Weekly team meeting specifically to discuss technician hours turned and shop proficiency.
5. Change the way we schedule service appointments. We will base everything on available hours to sell each day and not a set number of appointments. The service manager will track these on a daily bases in CDK to facilitate max hours.
6. We will hire a new quick lube advisor and begin the development plan for each quick lube technician.

Qualitative Analysis – Tactics

1. The service manager will be in the lane every morning to work with the quick lube advisor.
2. The service manager will work with the recruiter team to find a new quick lube advisor.
3. Parts manager will work with the service manager on stocking levels for fastest moving parts, open recalls and increasing used vehicle efficiencies.
4. Adjust technicians pay to include additional bonus levels based on efficiency and proficiency levels.
5. Adjust advisors pay and service managers monthly bonus pay based on shop proficiency levels.
6. Create a shared bonus tier for the quick lube team based on upsells, additional products and total labor sales.
7. Weekly meeting to review the technician performance, shop proficiency and shop appointment schedule.

Action Plan	Who	Date
Weekly Technician Hours Review	GM, Service Manager	Weekly
Weekly Technician Proficiency Tracker	Service Manager	Weekly-Immediately
Reduce Multiple Hoists	Service Manager	Based on proficiency
Weekly Service Schedule Meeting	SM, Advisors	Weekly-Immediately
Create Bonus Plans-QL	GM, Service Manager	Immediately
Create Bonus Plans-Service Advisors	GM, Service Manager	5/1/2022
Hire New Quick Lube Advisor	Service Manager, Recruiter	5/1/2022



Synopsis

It is very clear that we have many areas of opportunity in our fixed operations departments. This class has opened our eyes to many different ways we can improve our departments that will help us increase technician hours, schedule more customers, create a stronger team and give the customer a great experience.

Viewing the entire shop from a proficiency level gives us the ability to put a value and basic standard for hours turned with every hoist. This allows us to track the same numbers for every technician and allows them to see how they stack up. This will help us make decisions based on the same data points and navigate conversations with technicians. Keeping a scorecard will increase our technician results, as no one likes being last.

These additional hours to sell will allow us to schedule more customers, reducing wait times for appointments. It will also allow us to turn our used vehicle inventory faster with reduced wait times on getting the vehicles through service.

We will need to enhance our recruiting package to add more technicians based on additional hoists available. We will bring in a strong quick lube advisor who will lead the team and help us create a new path for internal technician advancement.

One of the big changes and added values will be the new bonus program based around shop efficiency and proficiency. This will help team members see that we want to reward their continuous improvement and allow them to share in the additional service department income generated by these new changes. We want to reward good behavior and celebrate success together.

All of these additional improvements will increase employee performance, create shared goals, promote a winning culture, reward success, develop employees, and continue to give customers a great experience. These all line up with the Zeigler PRIDE values (Passion, Reputation, Integrity, Drive, Execution).