



HOMEWORK ACTION PLAN

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

Name	CODY FORRESTER & MICHAEL MANNING	Class	#	N387
Dealership	FORRESTER LINCOLN	Date		4/20/2022

Current Situation or Challenge to be Addressed:	TO BUY VEHICLES IN OUR SERVICE LANE		
Current Performance Level (include specific measure):	0		
Goal (what do you want to achieve?)	TO BUY 8 CARS A MONTH OPUT OF THE SERVICE DEPT.		
Goal Performance Level (include specific measure)	\$4244 IS OUR CURRENT FRONT END GROSS X 8 PURCHASES = \$33952 POTENTIAL FRONT END GROSS. \$1789 F&I PVR X 8 PURCHASES = \$14,312 POTENTIAL F&I INCOME. AND A CONTINUING SERVICE CUSTOMER.		
Goal Start Date:	5/2/2022	Goal End Date:	5/31/2022
First Check-in Date:	5/9/2022	Performance Objective:	HAVE PURCHASED ATLEAST 2 VEHICLES
Second Check-in Date:	5/16/2022	Performance Objective:	HAVE PURCHASED ATLEAST 4 VEHICLES
Third Check-in Date:	5/23/2022	Performance Objective:	HAVE PURCHASED ATLEAST 6 VEHICLES
Fourth Check-in Date:	5/31/2022	Performance Objective:	HAVE PURCHASED ATLEAST 8 VEHICLES FOR THE MONTH!
How does your goal align with the dealers' vision?	MY DEALER HAS BEEN INTERESTED/EXCITED IN TRYING TO BUY FROM THE SERVICE LANE FOR ABOUT A YEAR SINCE HEARING OTHER DEALERS IN OUR NADA 20 GROUP HAVING SUCCESS WITH THIS PLATFORM.		
What are the potential benefits of achieving your goal?	KEEPING OUR CURRENT CUSTOMERS AND RETAINING THEM FOR FUTURE SERVICE, \$33952 POTENTIAL FRONT END GROSS, \$14,312 POTENTIAL F&I. ALSO THE POSSIBLE TRADES FROM THESE ADDITIONAL 8 SALES.		
What are the potential	LOSING OUT ON ADDITIONAL FRONT AND BACK END DOLLARS. LOSING A		

HOMEWORK ACTION PLAN

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

consequences if you don't achieve your goal?	CURRENT SERVICE CUSTOMER IF THEY BUY ELSEWHERE AND BEGIN TO HAVE THAT DEALER SERVICE THEIR VEHICLE.
Why is the goal important to you?	TO ADD MORE \$\$ TO THE BOTTOM LINE WITH BOTH SALES AND SERVICE. RETAIN AND ALSO GAIN POTENTIAL CUSTOMERS.
Potential Obstacles	TRYING TO GET THAT CUSTOMER INTO A NEW/NEWER VEHICLE WITH A SIMILAR PAYMENT IN THE CURRENT MARKET. IF A CUSTOMER WASN'T THINKING OF BUYING A NEW VEHICLE AT THIS TIME BUT WITH THE VALUE WE PRESENT THEY THEN GO ELSEWHERE AND BUY A VEHICLE IF WE DON'T HAVE ONE TO SUIT THEM AND THEN LOSE THAT CUSTOMER COMPLETELY.
Potential Solutions	KEEP THAT CUSTOMER ENGAGED WITH OUR CURRENT INVENTORY AND IF WE DON'T HAVE EXACTLY WHAT THEY NEED/WANT WE WILL DO EVERYTHING IN OUR POWER TO GO OUT AND GET THE VEHICLE THAT FITS THEIR NEEDS TO KEEP THAT CUSTOMER WITH US.
BOTTOM LINE! Financial Impact of Achieving Your Goal (expressed in dollars)	POSSIBILITY TO ADD \$48,264 IN ONE MONTH FRONT AND BACK END GROSS.

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
LOOK AT NEXT DAY SERVICE APPTS.	PRELOAD THAT VEHICLE INTO VAUTO	MANAGER	8 PURCHASES PER MONTH	MONTH OF MAY, CHECK IN DAILY WITH MANAGER
COMMUNICATE VALUE TO CUSTOMER	SALESPERSON AND APPRAISAL PURCHASE OFFER.	SALESPERSON AND MANAGER	8 PURCHASES PER MONTH	MONTH OF MAY CHECK IN DAILY WITH MANAGER
EACH SALESPERSON SPEND A DAY IN SERVICE DRIVE.	SALESPERSON AND COMPUTER	SALESPERSON	MORE CUSTOMER/SALES PERSON INTERACTION	MONTH OF MAY, CHECK IN DAILY WITH SALESPERSON

HOMEWORK ACTION PLAN

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

SPECIFIC ACTION/STEP	NECESSARY RESOURCE(S)	ACCOUNTABLE PERSON(S)	EXPECTED RESULT	START, END, & CHECKPOINT DATES
			AND 8 PURCHASES PER MONTH	AND MANAGER
Click or tap here to enter text.				
Click or tap here to enter text.				
Click or tap here to enter text.				
Click or tap here to enter text.				

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.

FOR THE FIRST THREE MONTHS WE WILL HAVE OUR SALES CONSULTANTS ROTATE IN THE SERVICE DRIVE TO COMMUNICATE THE VALUE TO THE CUSTOMER AND PAY THEM A \$250 SPIFF PER VEHICLE PURCHASED. ONCE WE GIVE THIS PROGRAM A TEST DRIVE AND SEE IT WORKING WE WILL HIRE A DEDICATED CONSULTANT JUST TO WORK THE SERVICE DRIVE PURCHASES TO KEEP THIS PROCEDURE IN PLACE.

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

WE WILL ADD A STATION IN OUR SERVICE BOOTH FOR THE CONSULTANT TO INTERACT WITH THE SERVICE ADVISORS AND BE THERE TO INFORM THE CUSTOMER OF THEIR CURRENT VEHICLE VALUE. MEETING WITH THE SERVICE ADVISORS INITIALLY TO LET THEM KNOW OUR GOAL AND HOW THEY CAN WORK WITH THE SALESPERSON. MEETING WITH OUR SALES STAFF TO LET THEM KNOW OUR NEW PLAN AND GET THEM EXCITED ABOUT THE POSSIBILITY OF MORE DOLLARS IN THEIR POCKET WITH MORE SALES AND PURCHASES.



HOMework ACTION PLAN

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

Sponsor Signature: _____