



# HOMWORK ACTION PLAN

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

Name Jessenia De Casas Class # N-395  
 Dealership Bravo CDJR of Alhambra Date 10/31/2022

Current Situation or Challenge to be Addressed:	Increase F&I Profit Average		
Current Performance Level (include specific measure):	Currently at \$2,900 for the month of October		
Goal (what do you want to achieve?)	Increase F&I Profit Average from \$2,900 to \$3,100		
Goal Performance Level (include specific measure)	Increase F&I average by \$200		
Goal Start Date:	11/4/2022	Goal End Date:	11/30/2022
First Check-in Date:	11/11/2022	Performance Objective:	Increase by \$50- \$80
Second Check-in Date:	11/18/2022	Performance Objective:	Increase by \$80- \$100
Third Check-in Date:	11/25/2022	Performance Objective:	Increase to by \$100 - \$150
Fourth Check-in Date:	11/30/2022	Performance Objective:	Increase by \$150-\$200
How does your goal align with the dealers' vision?	This goal aligns with our vision for growth, for both the compny and our employees.		
What are the potential benefits of achieving your goal?	Additional GP for the Sales department, higher penetration rates.		
What are the potential consequences if you don't achieve your goal?	No sense of growth, no additional opportunities for profit.		
Why is the goal important to you?	Achieving this goal would represent, 170 units x \$200 = an additional		

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	\$34k
Potential Obstacles	Staff, finance managers who are unfamiliar with bank programs, which help maximize opportunities.
Potential Solutions	Proper training, include F& I managers in Sales managers meetings and emails with program details
<b>BOTTOM LINE!</b> Financial Impact of Achieving Your Goal (expressed in dollars)	Additional \$34k in profit for back end products.

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
Include staff has access to systems	Dealer Connect, Dealer Track	General Sales Manager	Ensure maximization of programs	11/1/22 - 11/30/22
Pre Load Vehicles w/ Back End Accesories	Tracking devices, paint & fabric etc.	General Sales Manager	Increase of about 20% of products sold	11/1/22 check point 11/15/22 end point 11/31/22
Add appealing accessories such as digital plates	Digital licence plates, people to intall and program	Finance Managers	Additional profit of \$1,100 per plate	11/1/22 check point 11/10/22 check point#2 11/20/22 end point 11/30/22
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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.

Consistently set goals for each F&I Manager and set dept goals. Track and push for them to hit their numbers on a monthly basis.

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

Weekly Finance Meetings to keep everyone informed of new programs or opportunities, along with weekly tracking of progress.

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