

**SERVICE OPERATIONS ASSIGNMENT – ACTION PLAN**

**S** Specific    **M** Measurable    **A** Achievable    **R** Relevant    **T** Time bound

What is your goal? What do you want to achieve? From what metric? To what metric? By what date?  
 Example: "I will decrease my 5K run time from 30 minutes to 21 minutes by June 15, 2020."

**S M T**

Sales minded / Trained Service Advisors 18% upsell to 30%  
 Technician Efficiency = 30 hrs per tech per week to  
 40-45 hrs per week  
 by June 1, 2023

How does this goal align with or support your dealer's vision?  
 What are the BENEFITS of achieving your goal? What are the CONSEQUENCES if you don't?  
 Why is this goal important to you?

**R**

It aligns with our goal of ~~200k~~ 300k+  
 per month by our service department. Right  
 Now we Avg 220k - 250k.

- More gross for our dealership. consequences would be to stay mediocre + lose business to our competitors.
- This is important to me because this is my future and I plan to retire here.

**SERVICE OPERATIONS HOMEWORK – ACTION PLAN**

How will you track your progress? Where will you find the information? How often will you check in?



I will track the numbers weekly in our DMS (Dealertrak)

Potential Obstacles?



- Advisors may think the way they are doing it is fine.  
- Techs may get upset for pushing for more hours

Potential Solutions?



- spiff on upsell  
- hire parts runners for the tech/apprentices

**BOTTOM LINE!** What is the financial impact (expressed in dollars) of achieving your goal?



I hope to have our service numbers over 300k monthly by June 1, 2023

**CONGRATULATIONS!** You've accomplished your goal! You 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.



Tracking monthly and annual Training for Advisors

FIXED OPERATIONS 2 – SERVICE

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, & CHECK POINT DATES
hold manager accountable	training	Service manager	increase in tech hours	2-22-23 5-1-23
parts Runner	part time employees	Techs	↓	↓
Training for service advisors	NADA	Service Advisors Managers	increase in service gross	↓