

Jaime Juarez

N402

Name: \_\_\_\_\_

Class #: \_\_\_\_\_

Gateway Buick GMC

Dallas, TX

Dealership: \_\_\_\_\_

Location(s): \_\_\_\_\_

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How many people participated in this meeting? \_\_\_\_\_

What is your vision?

Customer for life <input type="checkbox"/>	Gross profit domination <input type="checkbox"/>	Both <input checked="" type="checkbox"/>	Other <input type="checkbox"/>
<p>Explain: We want to maximize profit in finance while giving the customer an exceptional buying experience. Gross is not a bad word</p>			

Identify a minimum of three strengths, weaknesses, opportunities, and threats.

<p><b>S</b>trengths Experience Process True selling (high penetrations with minimal chargebacks)</p>	<p><b>W</b>eaknesses Current PRU Time in Box Heat</p>
<p><b>O</b>pportunities We can get better on all of the listed weaknesses Higher gross profit Better customer retention</p>	<p><b>T</b>hreats Burnout Losing a finance manager no current We trainees to move into finance</p>

How will you improve or solidify your strengths?

We will get back to using Cyclops with Ethos to video record finance transactions. We can use this to train and help adhere to our processes

How will you address and improve any weaknesses?

Along with tighter process for selling, we will create a "deal in, deal out" sheet to hold our finance managers accountable to the time it is taking our customers to get in and out of finance.

How will you maximize or improve your opportunities?

We will also monitor and track "payment in, payment out". This will help us to identify whether our desk managers or finance managers are falling short.

How will you address and overcome any threats?

- Additional time off for performance
- Pay plan that encourages healthy competition
- Create a "finance trainee" program that prepares salesman wanting to move up into management for future openings

What is your expected time frame to achieve desired results? Months? By what date?  
 3 months(May 2023)  
 Have all these processes implemented and adhered to fully

What performance metric will you track to determine successful change? PVR? Products per? CSI?  
 Ethos monthly summary reports, and payment in payment out reports

Who participated in this SWOT?

Name Jaime Juarez	Title General Sales Manager
Name Carlos Trevino	Title Finance Manager
Name Don Gutierrez	Title Finance Manager
Name Mark Duron	Title Finance Manager
Name	Title
Signed 	Date 3/2/23
Signed by dealer Management 	Date 3/03/23