

Variable 2

Pre Class Assignment

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1. Latest Financial Statement
2. Other income and deductions.
 - a. Investigate the new vehicle sources and deductions to this account
 - i. DOC Fees
 - ii. Factory incentives and programs
 - iii. Distributor payments
 - b. Total all additions to income attributable to new vehicle sales _____
3. What is your dealerships ideal months' supply of new vehicles? Prepare to defend this number.

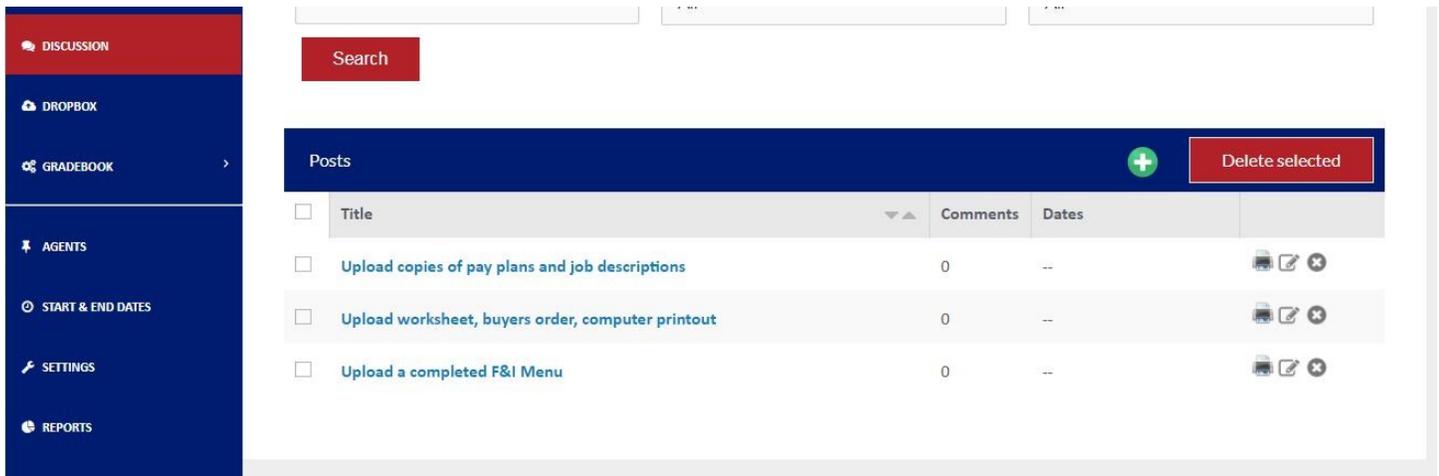
4. New Vehicle Inventory sorted by age (Bring Copy to Class)

Run right before class... does not need to match with the statement)
 - a. -Subtotal in following age buckets (calculate units and dollars for each bucket)
 - 0-30 days
 - 31-45 days
 - 46-60 days
 - 61-90 days
 - 91-120 days
 - Over 120 days
5. Investigate your dealerships floorplan financing interest rate: _____ %
 - a. Does the dealership earn incentives based on retail contract penetration?

Briefly describe your New Vehicle floorplan assistance program:

6. Print and bring your New Car Area of Responsibility Map (available from your manufacturer).

7. Bring sales effectiveness report card from your manufacturer, including pump in and pump out information, owner loyalty/customer retention and units in operation. (5, 7, 10 year)
8. What is the size of your active unique owner base? _____
(number of active customers you still do business with from all departments)
9. Bring a copy of a 'worksheet' / 'buyers order' / 'computer printout' utilized in the sales department when working a deal with a customer. Prepare to share the process and overcoming customer objections with the class
10. Copies of Pay Plans and job descriptions sales person, f&I and service advisor.
11. On class site **Discussions then doc sharing to upload required files.**



12. What is the total number of employees that left dealership employment during the previous 12 months? _____ How many left **voluntarily**? _____
13. What is the total percentage of 'mini's' or 'flats' paid to the sales force on new car sales for the last 12 months _____
14. Bring current phone call guide used by Sales Consultant when ***taking incoming sales calls and for placing outbound internet and phone communications***
15. How much time does it take to purchase a vehicle at your store? _____
16. Bring a completed F & I Menu (if you are using one and I hope you are!) If you are using DocuPad please take a screen shot and bring with you.
17. Have your F & I Manager complete attached F & I performance data form.
18. Does every retail customer go through the F & I office at time of sale? _____
If not, what percentage do? _____

19. What are the goals of the F & I office in your dealership, financial and otherwise?

20. Review and observe the following during your next sales, service and management meetings at your dealership: content, effectiveness and level of participant satisfaction.

To be provided by F & I Manager/ Retail Sales

Please use YTD total for month ending _____

	A	B	C	D	E	
	Year To Date Production					Total Units
Units	Non Lease New Vehicle	New Vehicle Lease	CPO-OEM	Non CPO Used		
1 Units Delivered						
2 Finance or Lease Contracts						
3 Service Contracts						
4 Pre-Paid Maintenance						
5 GAP						
6 Theft Deterrent						
7 Paint Sealant & Appearance						
8 Tire/Wheel						Total
9 Lease Care						Income
10 Other _____						
	Year To Date Income					
Incomes	Non Lease New Vehicle	New Vehicle Lease	CPO-OEM	Non CPO Used		
11 Finance or Lease Reserve						
12 Service Contracts						
13 Pre-Paid maintenance						
14 GAP						
15 Theft Deterrent						Total
16 Paint Sealant & Appearance						Chargeback
17 Tire/Wheel						
18 Lease Care						
19 Other _____						

		Year To Date Charge backs			
Charge backs		Non Lease New Vehicle	New Vehicle Lease	CPO-OEM	Non CPO Used
20	Finance or Lease Reserve				
21	Service Contracts				
22	Pre-paid Maintenance				
23	GAP				
24	Theft Deterrent				
25	Paint Sealant & Appearance				
26	Tire/Wheel				
27	Lease Care				
28	Other _____				