First Time Fill Rate

DEALERSHIP NAME	Covina Chevrost time fill rate			
DATE	RO'S	1st Time	Same Day	Day
5/14/2018	10	7	2	1
5/15/2018	12	8	2	2
5/16/2018	10	9	1	0
5/17/2018	10	6	3	1
5/18/2018	10	9	1	0
Totals	52	39	9	4

Rate %
70.00%
66.67%
90.00%
60.00%
90.00%
#DIV/0!
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75.00%

CDK Stocking Status INVESTMENT	Inventory Value		% of Inventory	Guide
Normal or Active Stock	$150,273		77.38%	over 70%
Automatic Phase Out	$40,517		20.86%	Less than 35%
Dealer Phase Out	$235		0.12%	Less than 1%
Manual Order	$0		0.00%	Less than 3%
Non Stock Part $'s	$0		0.00%	Less than 5%
Non Stock Part #'s*	4,515	MEMO		Greater than 70% of PN's
No Phase Out Not on ADP				NA
Repace by Hold Not on ADP				NA
Clean Core	$3,167		1.63%	p/n	pieces	
Dirty Core			0.00%			
Total Inventory	$194,192		100.00%	

			ADP	

Activity	Value $	% of Invent	%	Notes & Guides
0-3 Months	81,804		43%	ACTIVE INVENTORY at 75%
4-6 Months	33,236		17%	ACTIVE INVENTORY at 23%
7-12 Months	15,913		8%	75% will likely become Obso 2%
Over 12 Months	38,115		20%	Technical Obsolescence 2% is
New parts no sales	21,956		11%	Minimal Amount
Total Inventory	$191,025		100%	

COLOR		
SCORING		
GOOD		
WARNING		
DANGER		
GREAT		
Seldom used		
OK….BUT..		
OUCH !!!		
OUCH !!!!!!		
ouch!!!		

	OBSO POSITION		
% is guide	.75 TIMES $		**11935.12**
guide	**PLUS**		**38,115**
	PLUS		**21,956**
	EQUALS	**38%**	**72006.11**

Departmental Action Plan

Dealership | Covina Chevrolet

Academy Week | Week II - Fixed Ops | **Class &**

Current Situation
The dealership and the parts department are still within the first year of oper make good habits, of looking at the reports, sharing financial information an is not looking at daily doc, tracking daily/monthly sales, using the monthly s tracking his expenses. It is challenging to start tackling our issues of obsole parameters, mountiing expenses, and inventory trends when the parts mana the data available. department needs to be run by the numbers, using guide

Overall Objective:
The objective is to share the information available with the parts manager so make decisions based on the data. In order to improve gross by reducing ex obsolescence, track inventory to prevent future obsolescence, and identify a reports, the performa and excel templates that he must first have access to t

Proposed Timeline
This is a solution that can be implemented immediately and with each week calculated it will reinforce running the department and the dealership by "the action plan.

Action Plan
Describe necessary actions to reach desired result:Train the parts manager party reporting system) to track the department through out the month, revie use excel. Provide parts sales and gross profit as part of the daily doc so the growth opportunies and possible weaknesses. On a weekly basis review the repair orders and review recievables. On a monthly basis use the financial st excel templates and monthly reconcilation to identify areas for growth and a

Requirements

1. **Meeting with Dealer: Met with Randy Uyehara - Fixed Ops Director for the Co**

   Action Proposed: share financial reports with parts manager to improve dep

2. **Meeting with stakeholder(s) (dealership personnel): Met with Kamal Bhavsar**

   Describe what is in place to support desired goal:
   Training: Learn how to run DMS reports and look up information, use Excel t
   use Axcessa reports.
   weekly with managers to go over weekly reports, set monthly sales objective
   improvement and make an action plan
   related to results: DIscussed possible change in pay plan and implement a b
   performance

3. **Accountability: Monitoring progress:**
   Who: Fixed Ops director, parts manager, and the controller
   What: Reviews reports with parts manager, helps to identify areas of opportu
   By When: By the 5th working day following month end
   How: work with the controller to improve the daily doc to include MTD parts
   to run and understand the summary report and use the DMS scorecard. Draf
   run or calculate on a daily, weekly and monthly basis. Work together with the
   will be for the current month, such as increasing sales or reduce expense, in

4. **Describe checkpoints that have been established to measure progress:**
   Daily - review daily doc and see how the month's sales and gross are trendir
   Weekly - run summary report, fill out the DMS Scorecare and grade the inver
   accounts recievable, check SOP bins
   Monthly - review financial statment (expenses, gross profit percentage by sa
   excel templates (where sales are coming from, which sales types are most p
   employee productivity, break even analysis, months supply of inventory and

5. **Estimated cost for implementation: No cost to implement but it will become**

Projected Date of Completion:	Policy and training complete - July 1st	Sponsor Signature:

Evaluation of Results: Include measured results.   (± Metrics)

Impact Areas:
Sales / Gross / Expenses / Net Profit / CSI /

Student Name Rebecca Salinas

Student Number N335-04

ation. I believe we need to form processes,
d setting goals. Currently the parts manager
ummary report to track inventory trends, or
scence, low sales volume, the phase-in
ger is unaware of them and doesn't analyze
as a reference.

o he will be able to track his department and
penses, free up frozen capital by reducing
areas of opportunity by using the DMS
he data.

and month that the reports are reviewed and
e numbers". There is no end time for this

how to run DMS reports, use Axcessa (a third
w and analyze the financial statement and
ere are no surprises at month end and look for
 summary report, work in process, open
tatement, month end summary report, the
reas that need improvement.

orporation

artment gross profit

emplates, and reconcile inventory monthly,
Coaching: Meet
es and target an area for growth or
±Consequences
bonus structure basis on the departments

unity. Sets goals to be tracked and chased

sales and gross, teach the parts manager how
t a policy that clearly states which reports to
e parts manager to determine what the focus
nventory mix or reducing obsolescence.

ng, track lost sales, use Axcessa reports
ntory, WIP, parts sales on open repair orders,

le type), monthly inventory reconciliation,
rofitable and which have growth opportunity
inventory turns)

costly to not implement.