

DEALER PRINCIPAL/ GENERAL MANAGER DAILY PLANNING CALENDAR



► **THIS TOOL SERVES TO ORGANISE ALL OF YOUR VARIOUS DAILY TASKS BY DEPARTMENT.**

SECTOR

Motor Dealer Services

General	Tick
Dealers - open and review all mail.	
Review/investigate any unsatisfactory CSI responses.	
Walk through all dealership departments and facilities.	
<ul style="list-style-type: none"> • Greet customers and dealership staff. • Note order and cleanliness of facilities, professionalism and appearance of personnel, general adherence to dealership systems and processes. 	
Address urgent personnel issues.	
Check the fuel level of each vehicle driven in the previous day.	

Accounting	Tick
Review Daily Operations Control (DOC).	
Review cash position.	
Review expense control.	
Review all accounts receivable.	
<ul style="list-style-type: none"> • Follow up on delinquent accounts. 	
Review all contracts-in-transit.	
Review lists of insufficient funds and stop payments by department.	
Compare bank with dealership bank balance figures; verify receipt of all interest earned on sweep account.	
Review progress toward daily financial objective throughout the day.	
Review vehicle payouts (actual vs. estimate) and days from delivery to payouts.	
Run an exception report.	

Vehicle Sales	Tick
Walk new-vehicle stock; check demos; check aging; dollars, days.	
Walk used-vehicle inventory, review days in inventory, models, costs, condition, purchases.	
Review previous day's new and used unit sales and grosses.	
Review traffic count, phone inquiries vs. appointments, internet activity logs.	
Review previous day's lost deals and appraisals.	
Review deals pending finance approval.	
Review F&I product penetration, grosses.	
Compare unit sales on the DOC against actual deliveries.	
Check on reconditioned vehicles.	

Service	Tick
For previous day:	
<ul style="list-style-type: none"> • Compare total hours sold, gross profit to goals. • Compare hours produced, gross generated per service advisor to goals. • Compare hours, gross per technician to goals. 	
Review calculations:	
<ul style="list-style-type: none"> • Hours produced as percentage available hours. • Gross profit percentage by labour category. • Effective Labour Rate (retail). 	
Review Repair Orders for accurate pricing, time estimates, etc.; keep track of holdovers and rental cars out.	
Review internal Repair Orders, especially open Repair Orders.	
Review adjustments.	
Review rejected warranty claims.	
Spot-check for compliance with manufacturer standards.	

Parts	Tick
For previous day:	
<ul style="list-style-type: none"> • Review lost sales. • Review parts price overrides. • Review previous day's sale against goals. • Compare sales per employee against daily forecast. • Review wholesale sales per wholesale counter person. • Review parts sales against daily DOC. • Review grosses against daily DOC. 	
Keep a perpetual inventory – check parts bins against an inventory management system.	
Review parts fill rate – make sure you are carrying the right mix of parts.	
<ul style="list-style-type: none"> • Check service department fill rate. 	

MORE INFORMATION

1300 138 991

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