

DEALER PRINCIPAL/ GENERAL MANAGER WEEKLY PLANNING CALENDAR



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

SECTOR

Motor Dealer Services

General	Tick
Reconcile forecast with new rebates and incentives, economic trends, inventories.	
Review sales trend figures for traffic control, closing ratios, gross profits.	
Review customer satisfaction plan.	
Review personnel status changes – hires, terminations, warnings, pay changes – and commissioned technicians and salespeople who did not meet minimums.	
Distribute staff payslips.	
Verify that all vehicle displays are rotated.	
Analyse advertising effectiveness by medium and results; review and/or adjust advertising plans.	
Examine all – dealership CSI reports.	

Accounting	Tick
Review week's financial data, including: <ul style="list-style-type: none"> • Bank balances. • Collected funds. • Offset accounts. • Factory past-due receivables (incentive, rebate). • Vehicle sales, service (including warranty) and parts past-due receivables. • Contracts-in-transit past-due balances. • Finance company chargebacks. • Past-due extended service contract bills. • Rejected warranty claims. • Policy work charges. • Incentive cheques. • Expenses. 	
Take action, challenge expense items as needed.	
Check accuracy, prompt payment of floor plan.	
Review all accounts receivable.	

Parts	Tick
Review inventory of special order parts – quantity, days in stock.	
Check on critical parts orders.	
Review level of service to service department; compare to weekly average.	
Review inventory schedule – on hand, in transit.	
Review parts accounts receivable.	

Vehicle Sales	Tick
Analyse trends - retail units delivered, grosses per unit, variance, leads.	
<ul style="list-style-type: none"> • Check buyer follow-up satisfaction, prospects. • Check volume, gross, commissions/salesperson. • Review random 25 deals, discuss lost deals with sales manager. 	
Review actions to move aged inventory, e.g., used vehicles 30+ days in stock. Compare inventory values with current auction prices.	
Analyse used-vehicles wholesaled – to whom, purchase or trade, days in inventory, profit/loss.	
Review week's wholesale plan with managers.	
Review factory invoice receivables.	
Conduct sales and service meetings.	
Review advertisements and specials.	
Perform a competitive analysis of used-vehicle pricing.	

Service	Tick
Review service advisor productivity: hours sold, retail vs. warranty ROs, policy charges by reason, advisor.	
Review technician productivity, efficiency, work performance index.	
Analyse labour hours by category (retail, internal, warranty).	
Compare Effective Labour Rate to posted labour rate.	
Test-drive a used-vehicle for condition; check ROs written on it, compare book value to actual.	
Review technicians' pay against daily time cards, job tickets, Repair Order flags. Check idle time, overtime, tardiness, etc.	
Check write-up vehicle condition, equipment, estimated reconditioning.	

MORE INFORMATION

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