

Monthly Check List for Owners and General Managers

“He who fails to plan, plans to fail.”

Week 1

- Review Sales Monthly goals with Sales Managers/Sales people
- Review Parts and Accessory sales goals with Manager
- Review Service Sales goals with Manager
- Review AR with Accounting and Warranty AR, Retail Repair Orders
- Outstanding Warranty claimed /not claimed – no unclaimed over 10 days
- Electronic leads distribution and follow-up
- Cash Report – anticipated cash flow, current cash, and upcoming major expenses, Contracts in Transit, Floor plan Payments

Week 2

- Biweekly Managers Meeting
- Outstanding Warranty claimed /not claimed – no unclaimed over 10 days
- Obsolete parts Review
- Accessory Store Inventory review -New items for Accessory store
- Monthly, Quarterly financial review
- Dealership owned Service Tools inspection – Air Compressor
- Electronic leads distribution and follow-up
- Cash Report – anticipated cash flow, current cash, and upcoming major expenses, Contracts in Transit, Floor plan Payments
- Marketing plan update and follow-through
- Strategic Business operation planning

Week 3

- Outstanding Warranty claimed /not claimed – no unclaimed over 10 days
- Contracts in Transit
- Sales Inventory Review
- Set Sales Monthly goals with Sales Managers/Sales people
- Set Parts and Accessory sales goals with Manager
- Set Service Sales goals with Manager
- Electronic leads distribution and follow-up
- Cash Report – anticipated cash flow, current cash, upcoming major expenses, Contracts in Transit, Floor plan Payments

Week 4

- Biweekly Managers Meeting
- Outstanding Warranty claimed /not claimed – no unclaimed over 10 days
- Contracts in Transit
- Strategic Market planning
- Electronic leads distribution and follow-up
- Lost sales – Sales Department
- Lost sales – Accessory Store / Service
- Cash Report – anticipated cash flow, current cash, upcoming major expenses, Contracts in Transit, Floor plan Payments
- Company Vehicle inspection

Daily

- Recent Customer delivery follow-up call
- Recent Service Customer follow-up call
- Daily walk around – Sales Lot, Service Bays, Warehouse, Showroom, Offices, Washrooms, break area, closets and utility rooms – choose 2 daily
- Check Facebook, Twitter, LinkedIn, website, other social marketing accounts.
- Daily Service Meeting – 10 minutes be sure to review goal progress
- Daily Sales Meeting – 10 minutes be sure to review goal progress
- Daily Office Meeting – 10 minutes be sure to review goal progress
- Find someone in dealership that has gone above and beyond and recognize them, pat on the back, thank you, etc. Not a big production, usually done during walk around
- 10 minutes of contemplation – no interruptions