



ABC FORD – SAMPLE ASSESSMENT AGENDA

Wholesale Parts Sales Improvement Assessment Agenda

Pre-Visit:

- Review Wholesale Sales – 2024 YTD and June 2023 PYTD
- Mystery Shop Dealers Wholesale Parts Department
- Review Pg 5 of Dealer Financial Statement (Advance Copy requested; if not available, I will ask for a copy to review during our kickoff meeting)

Day 1

8:00 am Walk the Facility with Parts Manager and key department personnel.

9:00 am Kick Off Meeting with Key Management Personnel
Determine primary concerns with parts operation from management.

10:00 am Parts Manager Interview

- Review Agenda
- Manage Expectations
- Conduct PM Interview
- Review 2024 CPWD Standards

12:00 pm Lunch

1:00 pm – 4:00 pm Parts Operations Observations, Interviews and create profile

- Collect relevant information:
 - Meet Parts Dept Personnel
 - Review Parts Department Inventory Management processes w/Parts Manager
 - RIM Program and knowledge/comfort level of program
 - Days' Supply strategy
 - Aged Inventory strategy
 - Off the Shelf Fill Rate
 - Use of ADMI
 - Review Delivery Process
 - Parts picking
 - Staging
 - Bin Set Up
 - Delivery Vehicles and Routes
 - Use of Technology
 - FordParts.com or Equivalent
 - Use of other tools – (PSX, CollisionLink, RepairLink, Route Optimization Tools (Elite Extra, etc.)

Day 2

7:00 am **Observe Parts Staging and AM delivery operations.**

- Observe morning parts delivery and staging processes.
- Interview Parts stocking and shipping personnel, including dispatcher.
- Understand delivery process, timing and people involved.

9:00 am **Inventory Review**

- Take a deeper dive into Inventory Management
 - RIM Management
 - Idle Inventory and Off the Shelf conversation
 - Lost Sales Tracking
 - Phase in and out criteria
 - Core Return Process
 - Special Order Process
 - Scrap process and how it is funded (escrow?). What is your frequency of scraping idle inventory?
 - Backordered Parts Process, including COPIS utilization

10:00 am **Pricing Strategy**

- Understanding dealers pricing strategy (wholesale sales only)
- Use of WINS in wholesale pricing strategy – Blue Box and Red Box strategies
- Review customer coding and WINS process, including rejected claim reconciliation.

12:00 pm **Lunch**

1:00 PM – 5:00 pm

Parts Department Personnel Reviews

- Review STARS Training and Job Roles for all Parts Dept Employees
- Review training status of all employees with Parts Manager
 - Note: Training planners (if necessary) will be completed as part of Phase 2*
- Review utilization of CPWD Website and all the marketing tools (TRC, utilization of Parts Product Line Info, Marketing Materials, etc.) that are available to you as a CPWD.
(NOTE: The Parts Manager and OSR should be available for this topic)

Day 3

8:00 am **Marketing and Promotions; CRM Tools**

- Review current Business Plan
- Introduce the Business Plan I use, which includes Sales Forecasts for Wholesale Sales, Gross Profit and executable Action Plans that will help the store get to their Sales Forecasts (*Create an action plan and determine who completes the task by a specific date in a “Who does What by When” format*)
- Motorcraft Professional Service Network – Earn back program for IRF’s.
- Motorcraft University – Training for Fleets and IRF’s that you sponsor (Fleets and IRF’s pay to attend live instructor led classes. Web Based classes are also available for your wholesale customers)
- Review current wholesale marketing and promotions (in dealer and manufacturer sponsor promotions)
 - Wholesale Business Growth Funds – utilization of earned funds and eligible expenses they can be allocated towards
 - Wholesale Parts rewards
 - Internal and External Wholesale Sales Promotions

CRM Tools

- **PSX – Parts Sales Xcelerator:** This is a web-based Wholesale Sales Management Tool that allows you to view all DMS customers sales data and allows you to create reports that get pushed to you each morning. It is also a customer relationship tool that allows your OSR to create his/her call reports in live time and supports real time communication with the OSR in the field and your Parts Counter Personnel. If not currently enrolled, we will have a demo by OEConnection in Phase 2
- OSR Call Reports – why they are important and why they should be considered a “must do” by all OSR’s.

Extra Time for Open Items

12:00 pm **Lunch**

3:00 pm **Report Out Meeting with Key Management Personnel**

The agenda for the third day will take us up to lunch, then we will need time to recap the 3-day assessment period. I will take the afternoon summarizing the assessment in a review document which will be presented during a report out to the Key Management Personnel.