Monthly Checklist for Dealership Owners and General Managers

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

**Week 2:**

**Week 1:**

* Biweekly Managers Meeting
* Outstanding Warranty claimed /not claimed – No unclaimed over 10 days – Run Aged Unclaimed Warranty Report in your DMS
* Obsolete Parts Review – Access this information in your DMS in the Parts Manager module
* Accessory Store Inventory Review – New items for Accessory Store
* Monthly & Quarterly Financial Review – Run balance sheet & P/L report, consolidated reports where necessary, and build & run the DMS financial report
* Dealership-owned service tools inspection – Air compressor
* 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
* Review Sales Monthly Goals with Sales Managers/salespeople
* Review Parts and Accessory Sales Goals with Manager
* Review Service Sales goals with Manager
* Review AR with Accounting and Warranty AR, Retail Repair Orders – Use AR Manager Menu in your DMS and filter by AR/departmental code
* Outstanding Warranty claimed/not claimed – No unclaimed over 10 days – Run Aged Unclaimed Warranty Report in your DMS
* Leads distribution and follow-up
* Cash Report – Anticipated cash flow, current cash, and upcoming major expenses, contracts in transit, floor plan payments
* View RECT Reports – Review repair event cycle time to identify service bottlenecks and compare your dealerships performance against industry benchmarks
* Biweekly Mangers Meeting
* Outstanding Warranty claimed /not claimed – No unclaimed over 10 days – Run Aged Unclaimed Warranty Report in your DMS
* Contracts in Transit – Monitor via your DMS AR Manager
* Strategic Market planning
* Leads distribution and follow-up
* Lost sales – Sales Department
* Lost sales – Accessory Store / Service
* Cash Report – Anticipated cash flow, current cash, and upcoming major expenses, contracts in transit, floor plan payments
* Company vehicle inspection

**Week 3:**

**Week 4:**

* Outstanding Warranty claimed /not claimed – no unclaimed over 10 days – Run Aged Unclaimed Warranty Report in your DMS
* Contracts in Transit – Monitor via your DMS AR Manager
* Sales Inventory Review
* Set Sales Monthly Goals with Sales Managers/Salespeople
* Set Parts and Accessory Sales Goals with Manager
* Set Service Sales Goals with Manager
* Leads distribution and follow-up
* Cash Report – Anticipated cash flow, current cash, and upcoming major expenses, contracts in transit, floor plan

payments

**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, and say thank you
* 10 minutes of reflection – No interruptions!

**Ready to get comprehensive RECT Reporting for your dealership?**

**IDS RECT** gives you the ability to pinpoint and solve key bottlenecks at your dealership, so you can speed up service, reduce employee burnout, and deliver a better customer experience.

Call IDS to leaTo get your free RECT report, visit here:

[**www.ids-astra.com/services/rect/**](http://www.ids-astra.com/services/rect/)