



SALES MANAGER OBJECTIVES TOOLKIT

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Introduction

This document is intended as a guide to the kind of areas that you may find useful to discuss with your GM/owner as part of your business/personal objectives meetings or any performance reviews you decide to have with your sales teams. It will also help you to decide where best to focus for your attention on a daily basis to develop and improve the dealership experience for your customers.

Clearly it is up to you to determine the agenda for each meeting, thinking about business priorities, sales targets, and dealership performance measurements. They are unlikely to encompass all areas at every meeting.

However, the information given here provides a useful basis to help you plan and prepare for any such meetings, and to be able to conduct them in a consistent and thorough way to ultimately get the most out of them.

To start, let's look at the role of the Sales Manager.

Summary of your role as a Sales Manager!

- To maximise business profit by getting as many people as possible to visit your dealership through cost effective marketing.
- To manage the sales team to maximise conversion of sales leads to sales.
- To maximise the profit per customer through selling add on products and finance.
- To maximise ROI through effective stock management.
- To ensure customer satisfaction to drive customer recommendation & repeat purchase.
- To ensure compliance with all relevant legislation.
- To minimise costs to the business.

Items to present in your monthly meeting with your GM/owner

- Discuss the actions you have completed from the last meeting.
- Review your accounts from the previous month identifying growth areas.
- Discuss the marketing campaigns in place to increase footfall into the dealership. Do they meet the marketing minimum standards document? Are you delivering a rounded marketing mix and consistent message, cost effectively? Explain the process you have in place to ensure relevant customers on your database are reviewed and considered for an upgrade.
- Demonstrate your service customer lead process and relevant audit trail.
- When did you last listen to a sales call and last review the sales diary system with each sales person one-to-one? Demonstrate how you are driving sales processes which motivates your sales people on every contact, every day?
- Discuss your 'Accessory and clothing' and 'service plan' sales processes and performance figures for last month. Demonstrate how every customer gets offered every product all of the time. Is this process lead?
- Discuss the outcome of meetings you have had with your team and any coaching you have carried out. Discuss how you are getting a maximum return on your biggest investment – salaries and wages.
- Go over your commission sheets by sales person and the sales funnel report from the sales diary system. Discuss and come up with an action plan for any related performance issues.
- Discuss your monthly F&I sheet and F&I commissions/performance.
- Discuss the return on your stock of used cars, stock levels/values, stock turn, GP, ROI and PPU. Prove that you understand your figures, where are your opportunities.
- Discuss your list of pre-registered and fully paid new cars. Review your plans for these. Walk your GM/owner round your 90 plus days used cars.
- Discuss your used car retail prices SIV's and CAP and Glass's values and review your retail prices together.
- Does every member of your staff treat customers as they would like to be treated themselves (WAC)? Present the latest CSI measurements for your department (internal or manufacturer).

- Discuss progress with sales versus objective for your sales target so far this period. Where do you need to focus?
- Discuss last month in terms of units GP and NP to previous years and budget. Build action plan together to address shortfalls.
- Are you on track to ring all the bells to maximise margin earnings for the quarter and year? Talk through the standards.

Minimum standards

The following items are expected as a minimum standard.

- Focus all day every day on where your next deal is coming from; remember paperwork comes second to driving sales process!
- Hold a sales meeting every morning with your sales team, involving sales administration if relevant. Ensure everyone knows their priorities for the day. Review the previous 2 days enquiries with your team (from sales diary system) and agree next actions for them all. Update your deal hit list for the day on the wall. Who do you expect to deal that day? Check the handovers going out and that everything is in place for handovers for the following day. Finally, review service customers due in that day (cover off any other relevant points as per meeting agenda document).
- Your site is always presented immaculately, striving to achieve “Apple Store” retail standards both in your showroom and on your used car display.
- You treat your customers and staff as you would like to be treated yourself.
- You take the health and safety of your team and all visitors to your site seriously.
- Your sales team target a profit of £XXX per unit and £XXX per unit F&I income.
- Your sales team are motivated to achieve a minimum of 50% cars sold with GAP and car protection packages.
- No car leaves the site without being invoiced on the Dealer Management System and paid for in full with fully cleared funds or confirmation of pay-out received by finance houses.
- You submit your DOC daily before 5pm without fail and you organise someone else to do it in your absence.
- You know at the end of each day how much you have grossed.
- Achieve your monthly GP target.

General items to consider regularly

Generally

- Walk your site more than once a day with your team highlighting any actions to be taken.
- The health & safety of our customers and staff must come FIRST in everything you do in your department. Ensure you are constantly managing and monitoring health and safety issues for you and your team.
- Ensure ALL customers in the showroom and on the used car display are spoken to, qualified and looked after in accordance with your sales process.
- In addition to any objectives discussed with your GM, set your own monthly goals and add them to action points to be discussed.
- Discuss your annual budgets and agree any tweaks or amendments with your GM monthly and quarterly.

People Management

Part of your role includes managing a team of people. The following is a list of key responsibilities you must consider on an on-going basis.

- Ensure any recruitment activity has been done in conjunction with the right people in your dealership and that no jobs are offered without having completed company standard paperwork, and that the required authority is given.
- Ensure all new starts receive a full induction including a full talk through the company handbook, a full coaching session on what is expected of them on a daily basis and that this is documented to them. Give them a tour of the site and introduce them to the team.
- Ensure all new starters are booked on to the right training course to give them a great start.
- Ensure all your staff have a daily bullet point list of tasks and responsibilities in priority order.
- Ensure you spend time with your team showing them what you want them to do and a minimum of once per month you spend at least 5 minutes one to one time with them without distractions, talking about their performance. Highlight good points and development areas in a sandwiched kind of feedback with the objective of the employee leaving the room feeling motivated and focused on the areas you want them to focus on.

- A minimum of once per year (perhaps in November or December) hold an in-depth appraisal documenting the outcome as per your company's appraisal guidelines.
- Highlight any issues that might be of a disciplinary nature to your GM immediately you find out about them to allow them to support you through any disciplinary process which must be followed.

Figures

- Sell a minimum number of cars as per budgets.
- Keep your recommended stock of retail used cars maintained consistently at any one time.
- Turn your stock no less than X times per year taking into account winter trading.
- Aim for maximum stocking days of 60 per car and never exceed 90 days during the season.
- Aim to never have any fully paid new stock.
- Aim to liquidate all demonstrators before 180 days.

Retail Standards

- Ensure your valeter and dealership cleaner know your priorities each day and that you manage them to achieve the required retail standards.
- Ensure all cars on the used car display are neatly lined up and have a price on at all times (including demos). Ensure your staff check the cleanliness of demos first thing daily.
- Have every model and engine available on site to test ride (where reasonable).
- Company cars should never have personal items in them at any time and should be neatly lined up every morning.
- Utilise point of sale effectively to make your site look busy and inviting.
- Ensure new arrivals not yet valeted have AWAITING PREPARATION signs on them and that they are prepared within 7 days.
- Ensure your sales team and their work areas are always clean tidy and professional looking, ESPECIALLY DESKS IN SHOWROOM.

Sales Process

- Coach and motivate your team to follow the sales process.
- Ensure every enquiry goes in to the sales diary system.
- Go through sales exec diary weekly with each of your sales team, identifying opportunities and helping them convert customers in to appointments and ultimately deals.
- Assist your administrative support person by ensuring your team give a minimum 48 hrs notice of a requirement to tax and deliver a car.
- Ensure your order forms are completed to meet the dealership minimum standards.
- Ensure your sales team follow the dealership order process after a car is sold.
- Ensure your team have an action plan in place to sell any 90-day cars and any fully paid new cars, and any demo over 180 days and that they know these cars very well and are actively focused on them.

OEM Relationship

- Hit your manufacturer targets every campaign period.
- Ensure your department meets the 's minimum operating standards at all times and that you could pass an audit on these.
- Keep your team up to date with bulletins using a solid process.
- Ensure you hit your CSI target and that you have an action plan in place and front of mind for continuously improving it.
- Ensure your sales team is aware of the current situation of sales versus target. Ensure your targets are split out and delegated to your team.
- Ensure your sales team are aware of how they are measured by CSI & mystery shop.

Customer Service

- Ensure your customers are treated, as you would like to be treated yourself.
- Ensure any customer complaints are dealt with promptly and proactively.
- Ensure you and your team ALWAYS call customers back promptly without fail.
- Set customer expectations at a level which are easy to exceed.
- Ensure your sales team fulfil to the letter any commitments made to customers and that these commitments are always clearly typed into the sales diary system for duplication on to order forms so everyone in the dealership knows what has been agreed with customers.
- Support your GM/owner in finding resolutions to customer issues; very few issues should get to GM/owner level.

Business Controls

- Ensure that each month you are fully on top of your aged debtors and a minimum of once per week chase each outstanding debt. You must be fully aware of these at all times.
- Ensure that no car leaves your site without being invoiced on the Dealer Management System first, including trade cars.
- Ensure all trade and retail cars are paid for in full and that 'Confirmation of Pay-out' is received before cars leave your site.
- Ensure that all invoicing is done through the Dealer Management System.
- Ensure trade/scrap cars are dealt with and are gone within 7 working days of them arriving.
- Ensure all money taken is in compliance with the rules of taking deposits within your dealership.
- Ensure you own your targets and stock, always focusing on selling demos and aged new units before fresh stock and ordering stock from the OEM.

General checklists to aid management discussions

1	Use of daily task list/personal organisation.	
2	Addressed previous month action points.	
3	Addressed any additional action points (you have added in the month).	
4	Ensure you are ringing all the bells to maximise margin and bonus payments	
5	Discussed performance for the month from the accounts. Discussed actual versus budget.	
6	Discussed the units sold, calendar YTD, actual versus budget. Discussed position with OEM targets.	
7	Discussed individual performance on units sold, profit, finance penetration & income, protection packs, GAP, warranty and service plan.	
8	Discussed commissions paid to each person and profits on deals. Proved gone through the DMS commission sheets and the commission summary sheet with each sales person.	
9	Discussed meetings already held to discuss the month with your team. Proved from action lists from the meetings.	
10	Discussed the coaching and training carried out with staff and prove it has taken place. Discussed any franchise or other training any staff have attended. Discussed focus for next month.	
11	Discussed SALES DIARY SYSTEM. Proved it has been reviewed daily with staff in on each day. Discussed sales funnels and who is speaking to most customers etc.	
12	Discussed sales mark (the mark you would give yourself when walking the site with your GM/owner.	
13	Discussed over aged cars, new and used, and agreed actions.	
14	Discussed coaching.	
15	Discussed Top 5 priority cars on site.	
16	Discussed the "Key questions of your operation".	
17	Able to discuss any item on your whole checklist, as you see is relevant.	
18	Discussed your objectives for the year and how you are progressing towards them.	

Sales Manager Objectives Toolkit

	Discussed?	Comments	Action – Who?	When?
Review month and YTD sales, targets, PY				
OEM marketing support?				
Finance income by whole site and by sales person				
OEM penetration figures, TIV etc.				
Review demo situation				
Review loan cars, write-downs etc.				
Review how next month is going				
What sales cars have you got lent out to who and why				
Review the sales process, is it working?				
Free publicity and PR?				
Review marketing – web, papers, radio, ad words,				
Review marketing – DMS & other, parc data?				
Discuss partner relationships				
Discuss finance company relationships				
Franchise bonus/support claims				
Incentive trips				
T-card board, sales office displays of info				
Overall appearance to customers				
General cleanliness, in & out showrooms				
Presentation of cars, silent salesmen, flags, etc.				
Health & Safety issues				
Desks				
Price lists, brochures, accessory displays				
Other promotional POS displays				
General paperwork/accounts				
Staff (e.g. performance this month, timekeeping, appearance, training, wage issues, benefits, etc.)				
Any on-going customer issues				

	Comments	Action by	When
	ACTION POINTS		