

# Road to Retention

## Special Analysis & Consultation: Menus

5-1

**Marketing**

**Merchandising**

**Measuring**

**Special Analysis and Consultation to Review Menu Presentations, Sales & Maintenance % Trend by Advisor**

**OVERVIEW**

This analysis and consultation is a critical part of Dynatrons Road to Retention program. Programs started must be sustained to be valuable to the dealership. Constant review and monitoring is essential to the programs success.

By now, almost everyone in the automotive industry agrees that dealerships will improve profits and maintenance sales by having a accurate service menu that is consistently presented to customers on the service drive. In addition, it is proven that a VIN specific online menu system provides numerous benefits over paper menus.

The problem lies in the fact that implementing an online menu system at your dealership usually requires a significant process change for service advisors. This change must be properly managed to obtain the maximum benefits of an online menu system.

This phase provides a formal review of the online menu presentation process and analyzes the success of the program by reviewing a special analysis report prepared for you by Dynatron. By studying this report we will be able to analyze data to see if there is a direct correlation between the number of menu presentations being made versus the menu sales being booked. In this analysis we will compare advisors to each other much like a benchmark or baseline. If the percentage of sales to presentations is high for an advisor but the sales seem below average it may indicate the advisor is presenting menus but needs more training on doing effective presentations.

Initiatives for change will be successful when managers put emphasis on the area. This requires proper tools to Measure the program put in place as well as formal review sessions with those involved. Once your Advisors know you have an easy effective way to see their results and monitor their performance they are more inclined to initiate the change you desire. Once they start seeing the results they start seeing the benefits as evidenced by their compensation increases.

**BENEFITS**

- Improves online menu presentations and maintenance sales.
- Improves advisor training efficiency by highlighting specific areas of opportunity.
- When used with Dynatrons complete Road to Retention program, typical dealers have experienced average menu sales increases of 17.3%.

**IMPLEMENTATION KEYS**

- A Dynatron representative will complete the analysis and schedule a time for consultation
- The analysis must be shared with Advisors to be effective
  - Identify Advisors that require improving the quality of their presentations or ones that require training on making more presentations
  - Schedule Advisor trainings
  - To emphasize the changes, incorporate menu presentation minimums into your quarterly contest to qualify for the incentive contest.
- Follow up during the next 90 days every week on: 1) Menu Usage Reports and 2) ESP Reports to see if the training and metrics are improving towards the desired goals. Remember it takes at least 6 weeks to break habits and to form new ones.
- This review process can be repeated but should not be necessary if you review the ESP and Menu Usage reports weekly with your Advisors. Post them on a board where they all can see their results.
- Utilize our Road to Retention Marketing phases 3.2 Menu and Postponed Services Wizards. Including menus on our reminder postcards is also helpful.

**DYNATRON SOFTWARE**

### One Solution for Customer Retention and Profitability

## ROAD TO RETENTION

**Marketing**  
 Customer Relationship Management  
 Personalized Communications  
 Promotions to Capture Lost Opportunities

**Merchandising**  
 Online Menus  
 Appointments  
 RO History

**Measuring**  
 Analyze Your Numbers  
 Prove Your Profits  
 Built in Accountability

# Special Analysis & Consultation: Menus

For this formal review we reviewed data from 2 reports: 1) Menu Usage by Advisor 2) Executive Summary package (ESP) to create the Special Analysis: Menu Usage and Sales by Advisors. **Our Goals of this analysis:** 1) Identify Advisors that require additional training on presentations 2) Identify Advisors that need to do a higher percentage of presentations.

ABC Toyota									
Special Analysis: Menu Usage and Sales by Advisor									
Months Reviewed: September 08 - October 08									
Advisor Name	ANDREW LA	CARLOS MURILLO	CHRIS OSTERBERG	DARREN L WELLS	EVAN KEENAN	JASON JONES	RANDY GEORGE	TODD PACKER	Total
<b>September</b>									
# CP ROs	393	299	289	318	447	321	354	337	2758
# Presented	151	187	121	212	98	198	226	265	1458
# Sold	96	150	99	118	54	100	146	102	865
% Sold to Presented	63.6%	80.2%	81.8%	55.7%	55.1%	50.5%	64.6%	38.5%	59.3%
% Presented to CP ROs	38.4%	62.5%	41.9%	66.7%	21.9%	61.7%	63.8%	78.6%	52.9%
Menu Penetration %	24.4%	50.2%	34.3%	37.1%	12.1%	31.2%	41.2%	30.3%	31.3%
Primary Retail %	0.8%	1.3%	2.8%	3.1%	0.0%	8.7%	4.5%	2.4%	2.8%
Other Retail %	51.1%	42.5%	55.7%	47.2%	64.2%	58.6%	46.0%	52.2%	51.1%
<b>October</b>									
# CP ROs	326	332	315	322	469	334	370	435	2903
# Presented	100	180	145	202	121	211	287	243	1489
# Sold	59	140	107	127	93	108	176	154	964
% Sold to Presented	59.0%	77.8%	73.8%	62.9%	76.9%	51.2%	61.3%	63.4%	64.7%
% Presented to CP ROs	30.7%	54.2%	46.0%	62.7%	25.8%	63.2%	77.6%	55.9%	51.3%
Menu Penetration %	18.1%	42.2%	34.0%	39.4%	19.8%	32.3%	47.6%	35.4%	33.0%
Primary Retail %	0.0%	18.7%	20.0%	25.5%	0.0%	19.8%	26.8%	11.7%	14.5%
Other Retail %	65.3%	50.0%	47.6%	43.2%	62.3%	56.6%	38.9%	49.7%	51.7%
<b>2 Month Average</b>									
# CP ROs	360	316	302	320	458	328	362	386	2831
# Presented	126	184	133	207	110	205	257	254	1474
# Sold	78	145	103	123	74	104	161	128	915
% Sold to Presented	61.8%	79.0%	77.4%	59.2%	67.1%	50.9%	62.8%	50.4%	62.1%
% Presented to CP ROs	34.9%	58.2%	44.0%	64.7%	23.9%	62.4%	70.9%	65.8%	52.1%
Menu Penetration %	21.3%	46.2%	34.2%	38.3%	16.0%	31.8%	44.4%	32.9%	32.2%
Primary Retail %	0.4%	10.0%	11.4%	14.3%	0.0%	14.3%	15.7%	7.1%	8.7%
Other Retail %	58.2%	46.3%	51.7%	45.2%	63.3%	57.6%	42.5%	51.0%	51.4%
Key: Green is at or above Dealership Total; Yellow is within 10%; Red is below 10%									
<b>Suggested Training</b>									
Online Menu System	Yes	No	Yes	No	Yes	No	No	No	
Presentation Skills	Yes	No	No	No	Yes	Yes	No	No	

The **Special Analysis: Menu Usage and Sales by Advisor** provides a quick easy means to determine which advisors need training on using the online menu system and which need help further training on their presentations skills.

The determination is based on each advisors performance in comparison to the dealerships average performance. Constant improvement will occur as some advisors will always fall below the average of all advisors. Working with these advisors to bring them up to the dealership average will produce huge results.

Critical percents are color coded based on their relationship to the dealership average. GREEN is at or above dealership average. YELLOW is within 90% of the dealership average, and RED is below 90% of the dealership average.

Typical results will usually show that advisors that present less online menus as a percent of their total CP ROs will have lower menu and other retail sales penetration percents. These advisors need to use the menu system more.

If the presentation % to CP ROs is above average but menu or other retail sales percents are below average, the advisor needs additional training on making better quality presentations.

At the very bottom of the report the recommendations for training are noted.

## Source Reports for the Special Analysis

The **Service Advisor Summary** report provides a "snap shot" of key metrics for each advisor as well as the totals for the dealership. The CP ROs, Primary Sales %, Menu %, and Other Sales % are all obtained from this report.

The **Menu Usage Report** can be displayed for any date range for the entire dealership or specific Advisors. The number of menu presentations is obtained from this report.

Valwood Auto Group															
Service Advisor Summary															
Date Range: 7/1/2008 - 7/15/2008															
Customer Pay															
Name	ROs	1 Line ROs	Prmy Sales	Prmy Sales%	Menus	Menus%	Other Sales	Other Sales%	Lbr \$	Lbr \$/RO	Dr Hrs/RO	Hrs/RO	Lbr GP%	ELR	Prn \$
CHRIS SMITH	78	28	15	19.2%	13	16.7%	551	706.4%	\$11,660	\$149	1.3	1.0	73.2%	\$78	\$6,322
DALE JONES	81	41	21	25.9%	8	9.9%	485	598.8%	\$11,958	\$148	1.5	2	71.2%	\$75	\$5,734
JAMES WELLS	0	0	0	0%	0	0%	0	0%	\$0	\$0	0	0	0%	\$0	\$0
JOHN GARRET	0	0	0	0%	0	0%	0	0%	\$0	\$0	0	0	0%	\$0	\$0
MARK COLLINS	0	0	0	0%	0	0%	0	0%	\$0	\$0	0	0	0%	\$0	\$0
PAUL TAYLOR	0	0	0	0%	0	0%	0	0%	\$0	\$0	0	0	0%	\$0	\$0
RENE MILLER	76	30	27	35.5%	11	14.5%	542	713.2%	\$12,238	\$161	1.6	2	73.4%	\$81	\$6,874
	32	38.6%	14	16.9%	588	708.4%	\$14,865	\$179	1.8	2.1	75.7%	\$87	\$11,063		
	95	29.8%	46	14.5%	2,166	681.1%	\$50,721	\$160	1.6	2	73.5%	\$81	\$29,993		

Executive Summary Package



Login Tracking Report	
Show Dates From	9/19/2008 to 9/26/2008 User: [ ] Go!
UserName	LookupCount
aftrantuuono	4
asilva	141
dprendimano	5
eschneider	18
foanner	111
gthomas	3
kalmonte	1
kpelletier	97
pmckenna	5
ppalladino	43
pprendimano	6
rkatechis	7
salevander	18
vdemelo	10
ugallimore	45