

Professional Services Group

Accelerator: Utilization Evaluation



Our experienced consultants can help evaluate your dealership's strengths and identify opportunities for effectively taking advantage of your CDK Global Heavy Equipment solutions. The Readiness Organization Assessment process will be our guide when working with you and your teams to analyze your overall dealership system utilization.

Areas of focus include: Accounting / Parts / Sales / Service / IntelliTech / Customer Portal

During our Utilization Overview visit, our Consultant will work with you to understand your dealership's goals and priorities, and recommend a plan for improvement.

Focus areas for evaluating strategic management priorities and goals

- Showroom, phone and internet leads
- Sold equipment follow up
- Service optimization
- Inventory management
- Cash flow, accounts receivable and accounts payable
- Management of customer and prospect database

Proper management of your dealership processes will help provide:

- Collaborative procedures to help align dealership processes, employees & CDK solutions
- Clear, concise, detailed analysis of financial data, with fully customized views
- Dealership personnel the ability to access department information quickly and easily
- Access to CDK reporting tools for customization of standard reports
- Long-term success of the initiative driven by the GM/President

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Accelerator Deliverables: Utilization Evaluation

Key Deliverables for all Accelerators

- Review current state of dealership operations with Dealer Principal, General Manager or Chief Financial Officer to understand the 'Ideal Future State' objective
- Review and report detailed Readiness Organizational Assessment results and recommendations for future improvement with Dealer Principal, General Manager and Chief Financial Officer
- Recommend dealership implementation of identified Accelerator opportunities

Service Department

- Review processes for technician scheduling and service agreement management to help improve customer retention
- Evaluate daily processes and procedures, including that of the Technicians, to help leverage electronic communication

Accounting

- Review subledgers, journals and chart of accounts
- Review month-end checklist
- Review process, reports, set-ups and management of accounts receivables, warranty receivables, accounts payable

Parts

- Evaluate utilization of inventory control tools that can help improve cash flow and stock order performance, and help maximize manufacturer discounts and return allowances
- Review pricing set-ups – price matrices
- Identify manufacturer returns separate from inventory adjustments on the Parts management report

Sales

- Review Sales setups
- Demonstrate input process for equipment deals and review selling tools
- Review deal posting procedures, and update posting templates to help minimize need for manual input

CDK CRM with Portals

- Observe improved process for point of sale workflow and entering and finalizing of deals
- Host Sales Department leadership meeting to review and discuss current state
- Review Daily Functions for Sales Departments, including 1-on-1 meetings and collecting customer information.
- Evaluate owner and prospect communication, leads process, and direct marketing plan
- Assess entire workflow, from logging a lead, to completing the deal
- Discuss recommendations for leveraging favorite vendors and generating first pencil options

To learn how Professional Services Group can help streamline your operations, call 519.474.5212.