

IDS Regional Training Class

Minneapolis, MN
March 25-28, 2008



The regional training class format focuses on specific topics within Astra. Classes are open for several members of any one dealership to attend the topic or topics of their choice.

All classes begin promptly at 8:30 am. Continental breakfast will be available beginning at 8:00 am for all class participants.

Day 1	Tuesday, March 25
Parts	8:30 am-4:30 pm
Proper Setup of Parts <ul style="list-style-type: none">▪ Units of measure▪ Average and Supplier costs▪ Primary suppliers▪ Price markups and margins▪ Loading new part prices from vendors	
Parts Purchasing and Receiving <ul style="list-style-type: none">▪ Automatic purchasing routines▪ EDI availability and ordering▪ Updating vendor, cost and price changes▪ Quick receiving▪ Received But Not Invoiced (RBNI) and its effect on the parts general ledger	
Parts Usage Over the Counter and On Work Orders	
Special Orders <ul style="list-style-type: none">▪ Special orders from part sales▪ Special orders from work orders▪ Special order comments, freight and releasing a special order▪ Special order reporting and tracking	
Parts Transfers <ul style="list-style-type: none">▪ Transfer entry, display and reporting▪ TAP process	
Preparing for Year End Parts Inventory <ul style="list-style-type: none">▪ Cycle counting▪ Physical year end	
Reports for Managing Parts	
Other <ul style="list-style-type: none">▪ Merging Parts▪ Parts configurations▪ Bin Locations and merge▪ Reconciling the parts actual value to the general ledger value	



Day 2	Wednesday, March 26
Service	8:30 am-4:30 pm
Proper Setup of Service <ul style="list-style-type: none">▪ Mechanic setup for general ledger cost of sale and payroll purposes▪ Category work order setup of body shop, paint, fiberglass or other service profit center▪ Module configurations▪ Setup of work order extras, rates and internal bill codes	
Effective Use of Canned Jobs and Work Order Estimates	
Delivery Appointments from Sales	
Work Order Functions and Management <ul style="list-style-type: none">▪ Tracking parts special order purchase orders and status▪ Technician labor entry methods▪ Sublet entry, purchase orders and completion▪ Open work order review and reports	
Analysis <ul style="list-style-type: none">▪ Service department profitability▪ How to calculate your effective labor rate▪ Mechanic hours actual vs. chargeable vs. payroll hours▪ How much are you losing to inefficiency?▪ Tracking customer service history, how to find prior service work history for both sales and off-the-street customers	
Warranty <ul style="list-style-type: none">▪ Submitting warranty claims▪ EDI capabilities▪ Reporting warranty claims▪ Warranty shortages and how to track them based on unit brand	

Days 3 & 4	Thursday & Friday, March 27-28
Prospecting/Sales/F&I/Documents	8:30 am-4:30 pm
Prospect Management <ul style="list-style-type: none">▪ Capturing and tracking customer information▪ Definition of a walk-in vs. an up▪ Measuring salesperson productivity and effectiveness▪ Daily follow-up routines and reports▪ Tracking lost deals▪ Managing customer database with inactive/sold customers▪ Tracking advertising penetration, effectiveness and opportunity	



Days 3 & 4

Thursday & Friday, March 27-28

Prospecting/Sales/F&I/Documents

8:30 am-4:30 pm

(continued)

Sales Management Tools

- Desking deals and updating sales and finance quotes
- Working the gross profit screen and verifying sales cost
- Updating dealer options
- Monitoring and verifying sales costs, work order capitalization costs and all deal costs
- Printing formatted purchase agreements from sales and/or finance quote
- Prospecting letters using mail merge
- Merging letters to email

How to Format Your Own F&I Documents

- Adjusting existing forms
- Creating new forms

Who Should Attend Each Class? (recommended)

Parts

Parts Manager
Parts Assistant Manager
Director of Fixed Operations
Controller
Any Employees involved with special orders
Any Employees involved with parts inventory

Service

Service Manager
Service Writer
Warranty Administrator
Director of Fixed Operations
Controller

IDS reserves the right to adjust the times and material as appropriate per class.