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|  | **Garry House & Associates Co.** |
| **Dealership Resources Professionals** |
| **Management Advisory Services** |
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| **Dealership Name:** | **(Enter the Name of the Dealership)** |
| **Senior Manager’s Name:** | **(Enter the Name of the Manager Completing this Analysis)** |
| **Senior Manager’s Position:** | **(Enter the Position of the Manager Completing this Analysis)** |
| **Employee’s Name:** | **(Enter the Name of the Employee Being Reviewed)** |
| **Employee’s Current Position: Name:** | **(Enter the Position of the Employee Being Reviewed)** |
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| Competency Analysis for Automotive Retail Management | |
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| **Factor Number** | **Description of Management Performance Factor** |
| **1.** | **Corporate “Essential Rules for Managers”**   1. Personally adheres to these rules 2. Encourages co-managers to adhere to these rules 3. Ensures that infractions of rules are reported to Senior Management   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |
| **2.** | **Corporate “Philosophy of Management”**   * Demonstrates a commitment to this philosophy * Personally “talks and walks” this philosophy * Encourages co-managers to practice this philosophy * Trains subordinates to practice this philosophy   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |
| **3.** | **Corporate “Philosophy and Method of Doing Business”**   * Seeks to enhance or improve this philosophy and method * Demonstrates commitment to, and practices this philosophy and method * Teaches, and encourages, others to practice this philosophy and method * Monitors and enforces the practice of this philosophy and method   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |
| **4.** | **Forecasting (Short-range, Mid-range, and Long-range)**   * Understands, and is committed to, the importance of the dealership planning process * Integrates departmental goals with those of his employees * Submits well-developed, timely, complete, accurate, and factually-supported forecasts * Demonstrates commitment to the final approved plan   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |

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| **Factor Number** | **Description of Management Performance Factor** | |
| **5.** | **Departmental Action Planning and Execution**   * Quickly recognizes “Areas of Opportunity” * Is “Pro-active”, rather than “Re-active” * Presents potential “solutions”, rather than just “defining the problem” * Action Plans are documented, and consistently answer the questions, “What?, Why?, When?, Who? How? and, if applicable, How Much?” * Maintains focus on the Action Plan; concentrates on the Action Plan; demonstrates persistence in “staying with the task” (no matter what!)   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always | |
| **6.** | | **Organizational Development**   * Seeks to enhance/improve the organizational structure of the department * Works to improve (both through internal training, counseling, and motivation and through external recruiting) the caliber of departmental personnel * Demonstrates skill in recruiting candidates to enhance or supplement existing departmental staff * Demonstrates skill in onboarding, indoctrinating, training, and nurturing departmental “new hires” * Ensures that each departmental employee has a documented job description; ensures that each depart­mental employee understands his job responsibilities.   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |
| **7.** | | **Training, Leadership, and Motivation**   * Assesses, and provides for, departmental training and development needs * Demonstrates skill motivating and counseling departmental employees * Provides recognition to departmental employees who meet or exceed their anticipated per­formance levels; and provides this recognition to all employees...not just to the top performers * Demonstrates a commitment and willingness to counsel with (and, if necessary, discipline) departmental employees who fail to meet anticipated performance levels * Encourages the departmental employees to function as a “team” * Understands and demonstrates that everyone on his staff “cannot be managed the same way” * Promotes harmonious relationships between departmental employees; and pro­motes harmonious interdepartmental relationships * Exhibits “fairness” and “consistency” when dealing with dealership employees * Administers Personnel Policies and Procedures according to established dealership guide­lines   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |

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| **Factor Number** | **Description of Management Performance Factor** |
| **8.** | **Corporate Standards**   * Corporate Vision - manager shares this vision and manager inspires others to share this vision * Is results and profit oriented; but is able to balance this orientation with other Corporate considerations * In general, manager welcomes (and is challenged by) change, rather than resisting it * Is open-minded, rather than rigid in his thinking * Demonstrates the willingness and enthusiasm to accept challenge, responsibility, and accountability * Understands, is committed to, adheres to, and enforces corporate policies, procedures, and standards * Understands, implements (when so directed), and follows the guidelines of programs offered by (or dictated by) the manufacturer   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |
| **9.** | **Technological Perception and General Adaptability**   * Understands, and foresees the benefits of taking advantage of, technological advances in the retail automotive industry * Exhibits a good understanding of available computer resources and potential applications * Functions in harmony with other members of the management staff, and with the employee body in general * Presents (and if necessary, defends) his/her ideas for dealership improvement * Welcomes and acknowledges new ideas from managers and/or employees; Accepts or respectfully challenges these new ideas; if these ideas are adopted by the management staff, this manager becomes 100% committed and lends his/her full effort to the implementation process * Recognizes priority occurrences, and immediately reports these occurrences to Senior Management   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |
| **10.** | **Departmental Standards (Customer Management, Employee Productivity, Gross Profit Generation and Control, Processes and Systems)**   * Ensures that standards are developed for each above area * Ensures that all standards are documented * Gains “commitment” to all standards from departmental employees * Ensures that all standards are continually communicated and reinforced * Measures or monitors performance against these standards * Makes departmental employees “accountable” for adherence to these standards * Does not condone incompetence or inappropriate behavior   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |
| **11.** | **Market Planning and Development**   * Conducts market research to better understand departmental sales potential * Gathers competitive intelligence to determine how his department compares to similar departments at other dealerships within the market area * Reviews departmental pricing policies and adapts these pricing policies to changes in market conditions * Thoroughly understands the corporate advertising and sales promotion philosophy, as well as guidelines for return on invested advertising and sales promotion dollars * Plans major sales events well in advance, so that the advertising and sales promotion investment matches available departmental resources (inventories, staffing, etc.) * Ensures that departmental personnel are ready (properly trained and motivated) to maximize departmental success with each sales event or advertisement * Effectively creates, implements, and monitors “Prospecting” and Customer Follow-up” programs for the department * Ensures that the departmental “customer management process” will identify, and measure the success of, each sales opportunity * Develops, implements, monitors, and adapts (as necessary) strategies for “sales presentation” and “closing”   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |
| **12.** | **Expense Management**   * Thoroughly understands that controllable departmental expense must maintain a pre-established rela­tionship to the gross profit structure * Focuses on managing those primary departmental expenses that most dominantly effect operating profit * Establishes and uses cost effective purchasing methods * Demonstrates an understanding of, and a commitment to, dealership credit policies * Effectively performs his responsibility in monitoring and collecting receivables generated by his depart­ment * Creates an “awareness” in subordinates to controllable departmental expenses * Has a personal commitment to ensure that dealership Fixed Expense is controlled to the lowest possible level * Encourages all dealership managers and employees to continually look for, and implement, methods to reduce Fixed Expense * Offers suggestions on how to reduce dealership expense in general   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |
| **13.** | **Capital Asset Planning & Management**   * Thoroughly understands that capital purchases must meet dealership “cost / benefit” guidelines * Follows corporate policy and procedure when making requests to purchase new, or replace, a depart­mental capital asset * Ensures that the department maximizes the utilization of those capital assets for which it is responsible * Ensures that all capital assets assigned to the department are regularly and adequately maintained * Follows dealership guidelines to maximize the security of capital assets assigned to the department * Encourages fellow managers and employees to maximize the protection of all capital assets of the deal­ership   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |
| **14.** | **Inventory Planning and Management**   * Effectively develops and implements plans for fulfilling the inventory needs of the department, accord­ing to dealership guidelines * Monitors all categories of departmental inventory to ensure that quantities are sufficient to match anticipated sales and to ensure that inventory quantities do not exceed dealership guidelines * Monitors all categories of department inventory to identify over-age items * Develops and implements plans to dispose of over-age inventory * Ensures that systems and processes are established, and followed, to maximize the security of depart­mental inventories * Submits inventory status reports, plans, and strategies to Senior Management for review and approval * Effectively manages inventories of departmental supplies, forms, and expendable tools and equipment   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |
| **15.** | **“Back-up Function” to Subordinates**   * Willingly and enthusiastically “fills in” and/or assists subordinates during peak periods and when subor­dinate employees are absent * Is not reluctant to “role up his sleeves” or “get his hands dirty” * Takes pride in his personal performance, and when required to “fill in” or assist, ensures that his per­sonal performance meets or exceeds departmental operating standards   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |
| **16.** | **Safety**   * Demonstrates knowledge of, and commitment to, dealership safety and accident prevention standards * Ensures that managers and employees, both within and out of his department, adhere to dealership safety and accident prevention standards * Promptly and professionally responds to, and reports, safety violations and/or accidents within the deal­ership   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |
| **17.** | **Housekeeping and Facility Maintenance**   * Demonstrates an understanding of, and a commitment to, dealership standards for cleanliness and orderliness * Ensures that his/her department is continually maintained in a clean and orderly fashion * Quickly recognizes, and responds to, to housekeeping deficiencies within other departments * Quickly recognizes, and responds to, deficiencies in general facility appearance that deter from dealer­ship standards of image and professionalism   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |
| **18.** | **Time Management**   * Demonstrates an understanding of, and commitment to, the practice of basic time management tech­niques * Effectively defines, and categorizes, the priorities that relate both to his professional and personal schedule * Understands and tries to practice the Cardinal Rule of Time Management; “Do Nothing You Can Delegate”! * Effectively schedules and manages the time of departmental subordinates * Plans for and anticipates unexpected situations * Encourages departmental subordinates and other dealership managers and employees to become more proficient in managing their time   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |
| **19.** | **Organization**   * Seems to be working according to a “plan” * Does not have difficulty establishing priorities * Frequently and clearly communicates his priorities, both upward and downward, to ensure that these priorities are shared, both by superiors and subordinates * Addresses and accomplishes his priorities in an organized fashion, focusing first on the most important issue * Ensures that departmental employees function in an organized fashion   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |

| Competency Analysis for Automotive Retail Management | |
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| **Factor Number** | **Description of Management Performance Factor** |
| **20.** | **Delegation and Empowerment**   * Demonstrates a good understanding of which tasks and/or responsibilities should (or could) be dele­gated * Delegates tasks and responsibilities to subordinates * Demonstrates a good understanding of, and commitment to, “empowering” subordinates to make, and be accountable for, front-line decisions * Trains and coaches subordinate employees to most effectively and efficiently respond to the challenges of “empowerment”   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |
| **21.** | **Communication**   * Exhibits good writing skills * Exhibits good verbal skills * Presents his ideas and beliefs clearly and concisely * Is assertive, persuasive, and convincing * Establishes credibility with presentation skills * Is a valuable participant in dealership meetings * Is able to conduct (and control) good meetings   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |
| **22.** | **Decisiveness**   * Demonstrates strong analytical skills * Anticipates risks, potential opportunities, and contingencies * Doesn’t shirk the responsibility of decision making * Is willing to take action without being told * Considers the long-term effects of his decisions, but is willing to take risks   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |
| **23.** | **Strength of Character**   * Is “tough-minded”; quickly confronts and constructively resolves difficult situations * Is honest with himself; recognizes his own strengths and weaknesses; solicits advice from others * Admits his mistakes and learns from them * Takes responsibility for the mistakes of his subordinates * Derives satisfaction from helping others succeed, rather than solely from personal accomplishment * Shares credit with others when appropriate * Is basically free from prejudice * Readily and willingly accepts feedback and constructive criticism * Is “true to promises” to customers, suppliers, employees, and members of the dealership man­agement staff * Is resilient; demonstrates the ability to withstand adversity; demonstrates the ability to recover from nega­tive experiences * Does not allow personal problems to interfere with his professional performance   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |
| **24.** | **Dependability**   * Is “on the job” when he’s expected to be * Willingly and enthusiastically accepts assignments from Senior Management * Follows directions and appropriate policies and procedures * Informs Senior Management of any need for exceptions to instructions, policies, or procedures * Masters and completes assigned tasks in a timely manner   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |
| **25.** | **Creativity and Aggressiveness**   * Is innovative in dealing with challenges and opportunities * Exhibits a high degree of flexibility in problem solving (trouble-shooting); develops sound, creative alternatives; demonstrates that, “if there’s a way to do it, he’ll find it!” * Stimulates others in the development of new ideas * Determines and pursues the necessary details for the implementation of new ideas * Believes in and practices “constructive networking”; maintains strong relationships with managers at other dealerships, factory personnel, suppliers, and consultants * Probes his own job responsibilities to find a “better way”   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |
| **26.** | **Growth Potential and Motivation**   * Exhibits that he Is exceptionally keen and bright * Demonstrates that he wishes to become “the best that he can be” * Does not convey the impression that he is “fat and lazy” or that “he has arrived” * Is focused on grooming a subordinate to succeed him * Believes that “learning” is growing; demonstrates the drive to learn * Is extremely quick to learn and understand * Seeks responsibilities beyond his job description * Always promotes and practices the principles of “continuous improvement” * Continually strives to improve his skills in his area of responsibility * Recognizes the benefits of computer technology; Is committed to become “computer literate” and to continually enhance his computer knowledge and skills   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |
| **27.** | **Internal Relationships**   * Displays empathy when dealing with employees and members of management * Demonstrates skill in handling diverse and difficult personalities * Displays tact and maturity in relationships with employees and members of management * Treats employees and co-workers with dignity and courtesy...even when criticizing * Inspires others to be courteous and pleasant * Is helpful and anticipates the needs and problems of his employees and co-workers * Is a good listener; Takes the time to hear a person’s concerns, complaints, and ideas; and he just doesn’t just pretend to listen...he really listens * Is committed to assisting all employees and members of management to expand their abilities and develop positive attitudes, with career enhancement as the goal   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |
| **28.** | **Professional and Personal Standards**   * Manager’s business practices meet or exceed dealership standards * Strives to exhibit the image of a professional, through his personal behavior, and demeanor * Maintains a professional appearance; is well groomed, very neat, excellent taste in dress * Always maintains a clean and orderly personal work area * Displays high standards in his personal relations with customers, dealership employees, factory person­nel, suppliers, and the community in general   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |

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| **Factor Number** | **Description of Management Performance Factor** |
| **29.** | **Energy Level, Enthusiasm, and Effort**   * Demonstrates a high energy level * Does not easily tire or become stressed * Greets each workday with enthusiasm * Generates enthusiasm in others * Devotes himself to promoting dealership and department goals and to enhancing dealership and department growth * Enjoys competition and promotes a competitive environment * Puts forth 100% effort or greater * Sets very high goals and strives incessantly to reach them * Demonstrates that he is a “can-do manager”...rather than “oughta-do” or “gotta-do”   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |
| **30.** | **General Job Knowledge and Execution**   * Demonstrates good knowledge of all areas within job responsibility * Handles advanced, complex, and unusual tasks * Strives for, and produces, the highest quality work within this job responsibility * Produces desired results within set deadlines   **Competency rating on a scale from 1-5**  1. Never 2. Rarely 3. Sometimes 4. Frequently 5. Always |