



**Boston CDJRF  
Service & Parts Managers  
20 Group Meeting  
- In-Person & Virtual -  
May 3 & 4, 2022  
Four Points by Sheraton - Norwood**

**- Final -  
Conference Agenda**

- All times are Eastern Time / Breaks are as needed -

**Monday, May 2**

- Hotel arrival and check-in (Out-of-towners)
- Meet & Greet at **One Bistro Restaurant Bar** (Located in the hotel) 8:00 pm-?

**Tuesday, May 3**

- Continental Breakfast 7:30 am (in-person only)
- The meeting begins 8:30 am - 4:00 pm (Lunch 12:00 pm - 1:00 pm in-person only)
- Group Dinner 6:00 pmish - TBD (in-person only)

**Wednesday, May 4**

- Continental Breakfast 6:30 am (in-person only)
- Meeting begins 7:30 am - 2:00 pm (Lunch 11:30 am - 12:30 pm in-person only)

**For those attending VIRTUALLY:**

Although *not* required, we *strongly* suggest you attend from home to avoid distractions. Multiple attendees may participate in the same room. Please use your desktop, laptop, or tablet's camera. Use your camera's microphone or your cell phone (as your microphone).

Join Zoom Meeting: [Click Here](#)

Meeting ID: 995 811 3033

Passcode: 225127

Dial by your location: <https://us06web.zoom.us/j/9958113033>

For those attending *IN-PERSON*, please bring your laptop or tablet with you.

**8:30 am** WELCOMING REMARKS

## INTRODUCTIONS OF NEW AND CURRENT MEMBERS

- Discussion - since the pandemic, what is one business practice you've instituted in your department that has paid dividends either in customer retention or sales? - **Please be prepared to discuss**

## 20 GROUP INFORMATION

## FINANCIAL STATEMENT/COMPOSITE REVIEW - March 2022 YTD vs. March 2021 YTD

- *Please review your dealership's Composite before our meeting and become familiar with your department's financial numbers! Should you have any questions, don't hesitate to get in touch with either Jen or Mark*
- Case studies of all dealership Service & Parts department's financials
- Set individual dealership objectives based on the moderator's recommendations

**11:00 am** GUEST SPEAKERS - QB Business Solutions, Thomas Hall and Lumena Litts**12:00 pm** BREAK FOR LUNCH - 1 Hour**1:00 pm** UPDATES and NEWS

- Industry News
- Stellantis Performance Institute Updates

## CONTINUATION OF COMPOSITE REVIEW (As Needed)

- Brief discussion of what you learned about your department(s) from the review of the Financial Composite

**~ 3:00 pm** BEST PRACTICE SESSION (Please see rules on Page 3 & 4.) *You must see Page 4***~ 4:00 pm** MEETING ADJOURNED**6:00 pmish** GROUP DINNER OUTING - TBD**7:30 am** MEMBER'S CONTACT INFORMATION VERIFICATION

## MEETING CALLED TO ORDER

- Further discussion of any unfinished business from Day 1, Sessions 1 or 2

## SALES EXPENSE DISCUSSION

- Service Department
  - Salaries - Acct. 340A & Vacation & Time Off - Acct. 341A

- Parts Department
  - Salaries, Wages & Incentives - Parts - Acct. 350

iEXAM REPORTS REVIEW (If iExam is up and running!)

PRESENTATION - Mark Beaton - Influencing Customer Behavior *(As time allows\*)*

**11:30 am** LUNCH - 1 Hour

**12:30 pm** DEPARTMENTAL DISCUSSIONS

- Separate Service and Parts Managers Breakout Groups to discuss any issues or ideas that your group decides *(As time allows\*)*

SET GROUP OBJECTIVES

- Group objectives for the fall meeting

**~ 2:00 pm** MEETING ADJOURNED

### BEST PRACTICE COMPETITION RULES - PLEASE, READ THESE RULES CAREFULLY!

*It is NOT mandatory*, but each DEALERSHIP is encouraged to submit ONE Best Practice (one per dealership) *for the spring meeting ONLY*. (NO Best Practice Session for the fall meeting.) This includes members attending in-person and those attending virtually.

The Best Practice competition is open to any Service or Parts idea that has been successful in your dealership. Each represented store should **submit at least one best practice idea**.

- Your best practice should be tried and proven. (Not, "I started this last week." -or- "I thought this up on the way here because I didn't have time to put together my idea." or "I couldn't think of an idea to share, and I don't want to pay the without-an-idea fee." This is not allowed in our session. We need to know it worked, what it cost, the pitfalls, and how successful it was. Take time before leaving the dealership to put together your best practice Service or Parts "Idea" and **submit it as a PDF to Mark by midnight Sunday, May 1**.

- The entry fee is \$20 per store with a Best Practice or \$30 per store without a Best Practice. Please submit your entry fee through PayPal or Venmo to MBA Dealer Services, LLC if you attend virtually.

- New members/dealerships **DO NOT** have to pay the \$30.00 penalty at the first meeting if they do not have a best practice to share. They spend the entry fee only if they have a Best Practice to share. "New Members" are defined as individuals that have not attended either an FCA Performance Group or an FCA/Stellantis 20 Group meeting since 2010, i.e., they are attending our meetings for the first time.

• **All Best Practices must be submitted to Mark by midnight Sunday, May 1st as a PDF.**

- You may use the overhead projector, along with your printed copies, to make your presentation
- You will have up to five minutes to present your idea
- You may take questions or comments during your presentation
- After each idea presentation, all dealerships will vote on that idea on a scale of 1-10 (ballots available at the meeting)
- Each dealership has one vote
- Total points determine placement winners
- The winners divide the cash; awards to the top THREE ideas by the sergeant-at-arms

New this year is this award going to the first-place Best Practice winner! This Apex Crystal has an impressive design with beveled edges, creating the perfect presentation award for whoever lands the *best* 'Best Practice'. This crystal award is 5-¾" wide by 8" tall, making it a great piece to display in your office at work or your office at home.

*Are you in?*

**Please, don't wait to put your Best Practice together and submit it to Mark!**

