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|  | **Garry House & Associates Co.** |
|  **Dealership Resources Professionals** |
|  **Management Advisory Services** |
|  |  |
| **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)** |
|  |  |

|  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 |

| Competency Analysis for Automotive Retail Management  |
| --- |
| **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 |

| Competency Analysis for Automotive Retail Management  |
| --- |
| **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  |

| Competency Analysis for Automotive Retail Management  |
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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  |