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PARTS MANAGER

Daily List

Tasks

- ☐ Daily check-in with team
- ☐ Walk department to verify that proper merchandising
- ☐ Review sales from prior day
- ☐ Check any outstanding repair order / invoices
- ☐ Customers notified of all special orders that have been received
- ☐ Receive Parts that came in on order
- ☐ Check surveys and respond to all of them, positive or negative
- ☐ Submit daily order/ Emergency Orders
- ☐ Perform daily cycle count
- ☐ Monitor returns from the shop/ prepare returns for Aftermarket
- ☐ Negative On Hands

Reports

- ☐ Invoices with discounts
- ☐ Invoices that are returns
- ☐ Inventory adjustment log
- ☐ Average days from lead to close (dashboard)
- ☐ Managers Daily Doc / PG&A Sales Performance
- ☐ Inventory adjustments
- ☐ Outstanding special orders to be picked up
- ☐ Check backorder reports
- ☐ Orders to be placed
- ☐ Inbound orders
- ☐ Supplier Returns
- ☐ Average order value, average items per order by salesperson

Weekly List

Tasks

- ☐ Run stocking order
- ☐ Visual check stock daily
- ☐ Review lost sales and determine if any items need to be added to stock or pricing needs adjustment
- ☐ Follow up on outstanding backorders and text customers the status, even if unchanged
- ☐ Abandoned BOPUIS (Buy Online Pick Up In Store) items reshelfed
- ☐ Abandoned special orders to be binned back (30 days from receiving considered abandoned)
- ☐ Ensure team is maintaining daily cycle count cadence
- ☐ Send cores back with any parts returns
- ☐ Check hourly team member hours against schedule; monitor overtime
- ☐ Monitor Inventory Shrinkage accounts

Reports

- ☐ Negative on hand and negative margins
 - ☐ Low margin items
 - ☐ Open backorders
 - ☐ Week old layaway items cleared
 - ☐ Average order value, average items per order by counterperson
 - ☐ NPS
 - ☐ CSI
 - ☐ Timeclock
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Monthly List

Tasks

- ☐ Outline team goals for following month
- ☐ One on one with team members
- ☐ Monitor aged inventory through reporting to see if inventory can be exchanged or returned
- ☐ Confirm customer returns are in process to return to vendor
- ☐ Review fastest 50 moving parts margins listed on website
- ☐ Review if aged inventory can be listed online and delegate to list, create it on a website, Ebay
- ☐ Review on website what they have available to sell online and offline listed with key SEO keywords
- ☐ Compare freight and drop-ship fee income to freight and drop-ship expense; adjust rates accordingly
- ☐ Abandoned special orders reshelfed or returned to vendor
- ☐ Review warranty call-back bins and dispose of parts beyond 90 days
- ☐ Review NPS and identify MVPs, training opportunities
- ☐ Compare core charge and excise tax revenue to the expense, and adjust accordingly
- ☐ Update price files and cross references in the DMS, if not automatically updated
- ☐ Confirm escalator settings are appropriate and that they are still working correctly
- ☐ Audit a sample of tax exempt transactions to ensure files are accurate
- ☐ Move aging packaged goods that are non-returnable to a clearance section and price them to move
- ☐ Monitor overtime and adjust schedules to minimize
- ☐ Monitor turns and adjust stocking levels in DMS accordingly
- ☐ Update on-hold phone message highlighting new products and specials
- ☐ Audit all departmental freight charges (goal of reducing future expenses)
- ☐ Determine if any aging items are eligible for exchange orders
- ☐ Training / Continued Knowledge Base Opportunities
- ☐ Monitor Inventory Shrinkage Accounts

Reports

- ☐ Employee purchases
 - ☐ Purchase orders open more than 30 days
 - ☐ Special orders open more than 30 days
 - ☐ Department sales and gross profit
 - ☐ Sales and gross profit by line (add in freight, if system doesn't include it)
 - ☐ Sales and gross profit by counterperson
 - ☐ Fill rate
 - ☐ NPS (rolling 30 days)
 - ☐ Text/chat logs for employees with low CSI scores
 - ☐ Any 20-group reports that are mandated
 - ☐ Dead stock report
 - ☐ Payroll
 - ☐ Turns by line
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Quarterly List

Tasks

- ☐ Check balances on manufacturer return programs ensuring that all available return programs are being fully utilized
- ☐ Update Staff page of employee website with photos and bios of team
- ☐ Audit DMS security levels. Remove any employees who are no longer with the company and ensure that security levels for staff align with their mission
- ☐ Make sure all employees are up to date with manufacturer training programs
- ☐ Confirm department is compliant with OEM certification programs

Reports

- ☐ Review customer discount list to ensure customers with discounts still qualify for their current discount level
- ☐ Review tax-exempt customers making sure certificates on file have not expired

Link to General Manager's Daily Dozen (future project)

Link to Finance Manager's Daily Dozen (future project)

[Link to Parts Manager's Daily Dozen](#)

[Link to Sales Manager's Daily Dozen](#)

[Link to Service Manager's Daily Dozen](#)