



## Dealer Self-Assessment Worksheet

Our Self-Assessment Worksheet is designed to guide dealers through a comprehensive, systematic review of their organizations' activities and results, and provide a roadmap for future actions.

Based on Solomon Coyle's extensive industry experience, this powerful online diagnostic tool helps the dealer assess operational strengths and weaknesses, diagnose problems, highlight areas of opportunity for improvement, and stimulate discussion on how to drive competitiveness. A field-proven business intelligence resource, it can be used for periodic organizational check-ups, as a strategic planning tool or as a means to align the focus and priorities of the dealership.

The worksheet evaluates dealership performance in relation to 130 industry best-practice statements and provides a method for rating effectiveness in each of 10 core business areas:

- ▶ Order Implementation
- ▶ Sales and Marketing
- ▶ Design
- ▶ Project Management
- ▶ Customer Service
- ▶ Warehousing, Delivery and Installation
- ▶ Automation
- ▶ Human Resources
- ▶ Finance
- ▶ General Management

All members of the management team as well as key employees should participate collaboratively in the organizational self-discovery process. Engaging primary stakeholders provides additional data and lays the foundation for moving forward as a team. Some dealers choose to engage all employees in the process, using the self-assessment worksheet as a mechanism for feedback from across the organization, at every level.

Applying our seasoned perspective to the completed worksheet, Solomon Coyle develops a gap analysis that:

- ▶ Confirms strengths to determine the current value proposition
- ▶ Identifies learning opportunities to improve the organization's skill set
- ▶ Uncovers problem areas that otherwise may be overlooked
- ▶ Informs resource and planning decisions
- ▶ Provides a baseline for measuring progress

The Solomon Coyle team also provides personal follow-up to make the self-assessment process a success and help dealers convert knowledge into effective forward action.

There are no right or wrong answers. The worksheet is an internal audit tool to help dealers dig deep, understand their organizations' capabilities, and create their future.