

Sales Analysis - Menu Package Design Worksheet

Trial Version Expiration Date: 04/15/2009

Welcome ! It's assumed that if you're reading this help screen that you already have a good understanding on how to Create, Cost and Design Maintenance & Menu Packages. So instead of more directions, below you will find a simple worksheet which may be useful when completing your Profitable Sales Marketing Packages.

It's not mandatory that you use or complete this worksheet, only a helpful suggestion. These values are **Not Transferred** to the Package Design worksheet since determining an Average Hourly Rate varies within each organization.

Factors to Consider when Calculating Average Hourly Rate....

- 1) Technicians not producing an Efficiency Rate equal to 100% or better and guaranteed a minimum 40 hours of pay.
- 2) Individual Technicians throughout the shop on Multiple Customer Pay Rate Scales.
- 3) Varying Percentage of Maintenance & Menu Sales between Individual Technicians

Special Note: The formula below assumes all technicians equally perform Maintenance & Menu work. If a disproportionate percentage of sales is performed by a highly paid technician, obviously your Average Hourly Labor Cost would be higher, in turn reducing Labor Sales Gross Profit Margins and you may want to consider increasing your average hourly rate to reflect this factor. The opposite of course will occur with a lesser paid Technician.

Calculating Cost of Labor - Average Labor Cost per Hour

	Technician - Laborer Names	Maintenance	Average Hours per Work Week			Technician Summary		
		Hourly Pay Rate	Clock	Flat Rate	Efficiency	Actual Hourly	Avg. Hourly	
1	Technician Name (1)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
2	Technician Name (2)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
3	Technician Name (3)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
4	Technician Name (4)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
5	Technician Name (5)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
6	Technician Name (6)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
7	Technician Name (7)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
8	Technician Name (8)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
9	Technician Name (9)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
10	Technician Name (10)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
11	Technician Name (11)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
12	Technician Name (12)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
13	Technician Name (13)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
14	Technician Name (14)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
15	Technician Name (15)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
16	Technician Name (16)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
17	Technician Name (17)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
18	Technician Name (18)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
19	Technician Name (19)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
20	Technician Name (20)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
21	Technician Name (21)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
22	Technician Name (22)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
23	Technician Name (23)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
24	Technician Name (24)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
25	Technician Name (25)	\$ -	0.00	0.00	0.00%	\$ -	\$ -	
Average Labor Cost per Hour - Grand Total			0.00	0.00	0.00%	\$ -	\$ -	

* Average Hourly Rate will always be an approximation, true cost may only be calculated by completing an in-depth analysis of sales.

Estimated Average Labor Cost per Hour: \$ -

It is Required even after utilizing this worksheet that you **Enter your Final Average Hourly Rate** determination on the Package Design worksheet .

Additional help is available by reading the comment boxes on the worksheet or feel free to either e-mail or call IntactAuto® for additional support.

Be sure to check for program updates; Technician Efficiency will inevitably become an intricate part of this Software package.

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Frequently Asked Questions

What procedures should I follow if a Service Consultant is No longer active?

Step 1: Access the **Default Setting** worksheet from the Main Menu and enter an employment termination date.

This is a mandatory entry required to properly determine Average Monthly Sales for both the individual and total business entity.

Step 2: Access the **Create & Modify Menu Programs** worksheet from the Main Menu and enter the **Forecasted Sales Routine**.

Within the Forecasted Sales worksheet you would than **zero** all remaining forecasted sales for that specific Service Consultant since they will No longer be selling Maintenance - Menu Packages. Be sure to do this for ALL REMAINING MONTHS within each quarter.

You may at this time want to modify the existing forecasted sales values of the remaining **Active Service Consultants** since they now have the ability to sell Maintenance - Menu Packages to additional prospects previously shared.

Step 3: DO NOT Delete or Overwrite this Service Consultants sales history or name for that individuals sales are factored into the organizations total year-to-date sales and Gross Profit. If replaced simply add the next Service Consultant into the next available open Consultant Cell/Slot on the Default Settings worksheet.

If no additional slots are available contact IntactAuto support, there are ways around this program restriction.

What if I want to Modify, End or Add Maintenance-Menu Packages throughout the 12 Month Reporting period?

With every software program there are always some limitations, the real key is to develop a strategy that gets around these limitations.

1) Modifying a Sales Package:

First; you **may change at anytime** a Maintenance - Menu Package Structure, being either Parts Cost, Labor Rates or Labor Time.

This adjustment/modification will NOT Effect prior month activity such as Counts, Gross Profit, Sales, etc., if the month is **LOCKED** and no longer modified since it is finalized and closed. (Locking a Month is done on the Default Setting worksheet)

Drawback; If you modify the Parts Cost, Labor Rates or Labor Time **Mid-Month** the software will effect the **Currently Active Month** Values, prior to the package modification. Now this change may create a small variance in values that you're willing to accept and tolerate.

If the variance is significant enough and must be accounted for, there are ways around it by manually overriding month-end sales values, but this is tedious & time-consuming. Contact IntactAuto support if this is the case prior to modifying a package Mid-Month if you want a manual override.

Conclusion; Plan all changes for the beginning of each month after Finalizing & Locking the prior month. This will eliminate any need to manually override Mid-Month values and provide you with accurate Sales values at all times.

How to change:

Simply access the **Create & Modify Menu Programs** worksheet from the Main Menu and within the yellow cells type-in your new values.

Remember you may have utilized the Worksheet Protection Measures routine and LOCKED your package designs on the Default Settings worksheet.

You'll have Unlock the worksheet, make your changes, and then Relocked the worksheet.

2) End a Sales Package:

Do Nothing; Simply leave the package as is, so that it sales values are reflected in the total organizations Year-to-Date Sales totals, if the program has any earnings significant. You also may develop a similar package at a later date & after modify the Package structure utilizing it again.

3) Add a Maintenance - Menu Sales Package:

Simple; Just enter it within the next available unused Maintenance - Menu Package Design worksheet column at anytime.

Customized Program Announcement: Due to the success and profitability of Maintenance & Menu Marketing Packages offered by many organizations. IntactAuto® is making available at a nominal upgrade fee the ability to expanded your workbook. **You can now manage up to 32 Maintenance & Menu Packages** and enjoy even greater design, tracking and analysis capabilities. Contact IntactAuto Support for additional information.

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