

# Service Management - Profit & Productivity

## General Comments: Excel Spreadsheet Usage & Directions

These spreadsheets will provide the crucial data needed to understand and effectively manage a profitable Service Department. With ease once the usage of the spreadsheets are in place and utilized within your dealership each and every Technicians daily productivity can be tracked and managed. You will have at your finger tips daily, weekly, and monthly Labor Hours produced and sold by each individual Technician. This information will greatly assist you in obtaining your desired level of profitability.

Most of the information which is required to maintain this program is probably **already being complied** within your dealership on a daily basis by either you or the accounting department and simply needs to be joined together to create a Service department plan and comprehensive reporting system.

### **Service Management & Analysis Reports:**

Listed below are a few of the easy to use spreadsheets available within this program.

**Technician Productivity and Dollar Value**

**Technician Efficiency and Proficiency**

**Detailed Technician Productivity \***

**Shop Productivity Report \***

**Percentage of Labor Sales Mix**

\* Daily, Weekly, and Month-To-Date Reporting

As for ones level of Excel and computer expertise needed to utilize these spreadsheets, they are design for the **inexperienced** user. Unique Excel programming features have been implemented to simplify the usage, such as Forms buttons, Menu Driven worksheet access, Macro programming, and much more. Prior research actually indicates that it is the more experienced user that has the most difficulty utilizing these spreadsheets, solely due to the fact it is so easy, no worksheets, no entering formulas, no spreadsheet tabs or design setup, simply enter the data in a Yellow Cells / Boxes. My advise is don't think so hard and **let the computer do the work, reduce your workload, and create an accurate, comprehensive sales reporting system.**

### **Program & Spreadsheet Usage:**

Cell color coding plays a big part in the program usage. The only cells that a users may input data are Yellow In Color. These are the only spreadsheet cells that need to be filled-in, otherwise you will find nearly all the calculations are completed with a click of a forms button.

An extensive amount of time was spent on developing user friendly comment box containing instructions, so wherever see a RED triangle, place your mouse pointer and a comment box will appear. You will also notice that many cells will change in color if a potential error exist.

As for time involved, setup can be the most time-consuming, after that you will simply enter individual technician labor hours sold and then enjoy extensive reporting with just a click of a button.

As for gathering individual Technician time, you may either reference the actual time tickets or utilize your in-house computer system. (e.g. ® Reynolds & Reynolds, Prg. #:3618, Option # 4)

### **So Let's begin, return to the Main Menu and click the forms button - Default Setup Worksheet.**

Additional Setup Instructions are located on the following worksheets;

**Default Setup Worksheet** - Establishing Technician Labor Cost Billable & Non-billable.

**Default Setup Worksheet** - Establishing an Active Monthly Calendar & Setup.

**Individual Technician Productivity Reports** - Entering Daily Labor Sales & Non-billable time.

Let it be know, these templates are not introducing earth-shaking techniques or scientific studies. These are calculations and reports developed through time by such recognized organizations as the ® National Automobile Dealers Association and Dealer groups. They provide you with in-depth information to help you understand why a situation may be occurring within your dealership. The data generated within these reports, just may provide the insight necessary to answer some of those questions.



**Technician Name**  
**Productivity Report**  
 IntactAuto.com

Return  
 Print  
 Instructions

Technician Efficiency Standing		Varying Technician Labor Cost Per Sales Type			
Desired Efficiency Level	0.0%	Customer	\$ -	Guarantee	\$ -
Month-To-Date Average	0.0%	Warranty	\$ -	Misc. Rate 1	\$ -
Current Efficiency Rating	0.0%	Internal	\$ -	Misc. Rate 2	\$ -

Currently Active Month  
 Start Date #: 0

April-08  
 End Date #: 0

Date #	Week Day	Date	Clock Hours	Flat Rate Hours	Technician Labor Cost	Billable Labor Hours Produced			Misc. Flagged Time		Labor Variances Time	\$ Value	Efficiency Rating	Guarantee Variable	Non-Billable Labor Expenses				Billable Labor Hours	Guarantee Variable	Misc. Hours Rate 1-Rate 2	Total Labor Cost
						Customer Hours	Warranty Hours	Internal Hours	Flagged Misc. Hrs	Calculated Payment					Misc. Hours	Rate 1	Rate 2	Wages Payable				
1	Wednesday	Apr-01	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
2	Thursday	Apr-02	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
3	Friday	Apr-03	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
4	Saturday	Apr-04	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
5	Sunday	Apr-05	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
6	Monday	Apr-06	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
7	Tuesday	Apr-07	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
<b>WEEK 1 TOTALS</b>						0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
8	Wednesday	Apr-08	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
9	Thursday	Apr-09	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
10	Friday	Apr-10	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
11	Saturday	Apr-11	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
12	Sunday	Apr-12	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
13	Monday	Apr-13	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
14	Tuesday	Apr-14	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
<b>WEEK 2 TOTALS</b>						0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
15	Wednesday	Apr-15	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
16	Thursday	Apr-16	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
17	Friday	Apr-17	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
18	Saturday	Apr-18	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
19	Sunday	Apr-19	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
20	Monday	Apr-20	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
21	Tuesday	Apr-21	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
<b>WEEK 3 TOTALS</b>						0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
22	Wednesday	Apr-22	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
23	Thursday	Apr-23	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
24	Friday	Apr-24	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
25	Saturday	Apr-25	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
26	Sunday	Apr-26	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
27	Monday	Apr-27	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
28	Tuesday	Apr-28	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
<b>WEEK 4 TOTALS</b>						0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
29	Wednesday	Apr-29	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
30	Thursday	Apr-30	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
31	Friday	May-01	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
32	Saturday	May-02	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
33	Sunday	May-03	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
34	Monday	May-04	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
35	Tuesday	May-05	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
<b>WEEK 5 TOTALS</b>						0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
36	Wednesday	May-06	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
37	Thursday	May-07	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
38	Friday	May-08	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
39	Saturday	May-09	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
40	Sunday	May-10	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
41	Monday	May-11	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
42	Tuesday	May-12	0.0	0.0	\$ -	0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
<b>WEEK 6 TOTALS</b>						0.0	0.0	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -	
<b>MONTH-TO-DATE ACTIVITY SUMMARY</b>																						
Week 1: Apr, 01 - Apr, 07						0.0	0.0	\$ -	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -
Week 2: Apr, 08 - Apr, 14						0.0	0.0	\$ -	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -
Week 3: Apr, 15 - Apr, 21						0.0	0.0	\$ -	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -
Week 4: Apr, 22 - Apr, 28						0.0	0.0	\$ -	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -
Week 5: Apr, 29 - May, 05						0.0	0.0	\$ -	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -
Week 6: May, 06 - May, 12						0.0	0.0	\$ -	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -
<b>GRAND TOTAL</b>						0.0	0.0	\$ -	0.0	0.0	0.0	0.00	0.0%	\$ -	0.0			\$ -	\$ -	\$ -	\$ -	\$ -



