Zen and the Art of Time & Multi-Task Management for Today’s Super Controller

With
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Moderated by
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Zen and the Art of Time & Multi-Task Management for Today’s Super Controller

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How to have answers when the Dealer asks – “Are we doing this?” or “Is this being handled?”
## Zen = Control

<table>
<thead>
<tr>
<th>Less</th>
<th>More</th>
</tr>
</thead>
<tbody>
<tr>
<td>How much you get paid</td>
<td><strong>What you do with your time</strong></td>
</tr>
<tr>
<td>How many people you can have in the office</td>
<td>How many hours you work</td>
</tr>
<tr>
<td>How other people treat you</td>
<td>How you respond and react to other people</td>
</tr>
</tbody>
</table>

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How do you use your time?

<table>
<thead>
<tr>
<th>Minus time</th>
<th>Plus time – being in Zen Control</th>
</tr>
</thead>
<tbody>
<tr>
<td>Come in on Saturday since that is the only time you can get things done</td>
<td>Learn your DMS better</td>
</tr>
<tr>
<td>Bring home work to do in front of the TV at night</td>
<td>Get involved in HR</td>
</tr>
<tr>
<td>Work late, work late, work late….</td>
<td>Profit Projects = VALUE</td>
</tr>
<tr>
<td></td>
<td>Do Yoga</td>
</tr>
<tr>
<td></td>
<td>College, CPA</td>
</tr>
<tr>
<td></td>
<td>Train for another job; F&amp;I manager, service advisor, General Manager</td>
</tr>
<tr>
<td></td>
<td>Excel classes</td>
</tr>
</tbody>
</table>

What is your typical day like?
Case Study….  

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I can’t find the Chevrolet book.

I wonder why the red jelly beans are always gone?

Who used the last check?
Why do people come into your office?

*Your office is not a library, conference room or cafeteria!*

<table>
<thead>
<tr>
<th>Why they come in...</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>File cabinet with forms, checks</td>
<td>Move it outside your door</td>
</tr>
<tr>
<td>Bookshelf with manuals</td>
<td>Move it outside your door</td>
</tr>
<tr>
<td>Your inbox</td>
<td>Put on top of file cabinet</td>
</tr>
<tr>
<td>Checks to sign</td>
<td>3pm – outside your office</td>
</tr>
<tr>
<td>Sit and chat</td>
<td>Remove your chairs – or pile high</td>
</tr>
<tr>
<td>Eat candy</td>
<td>Really?</td>
</tr>
</tbody>
</table>
Action Plan – Time Management

1. Determine what you want to do with your extra time
2. Find your monkeys – who came in this week?
3. Clean out your office – move it!

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Why do you have less time?

**BEFORE - Case Study**
- We’d set the DOC to print in the job stack
- It would print, we’d tear apart and hand out – *done in seconds!*

**WHY?** Not what today’s managers need – flat, lack dynamic content

**New Technology**
- Excel Spreadsheet – Super DOC
- Download from DMS,
- Conversion, Import
- Refresh, Email
Why do you have less time?

Case Study – More control over the Dealership -- Expense example

“If your sales managers are having difficulty sticking to their budget, move the purchase order function to the controller and do not allow advertising without a purchase order.”

Super Controller II - Expenses

• Before
  ◦ Detail the Advertising expense if requested

• After
  ◦ Get a Budget from managers
  ◦ Issue Purchase Orders
  ◦ Do an Budget vs. Actual
What is Zen Time Management?

- Complete tasks quickly so that we can “open the door to new opportunities.”
- By letting tasks get backlogged, controllers start to get dragged down by the weight of these pending duties.
- Your minds get cluttered with incomplete tasks. You don’t feel very light or energetic and it eats away at you subtly from inside.
Task Management

The biggest reasons why controllers and office managers get overwhelmed by incomplete tasks is that they don’t delegate to their office staff.

“It is often easier just to do it ourselves instead of spending the time and energy to train someone who will probably do it wrong.”
EMPLOYEE SKILL LEVELS

Before you can delegate, you need to determine the skill levels of your office personnel and tasks

A. Almost anyone can perform
B. Better trained and qualified person
C. CAT ; Confidential, Accurate, Timely

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Training made easy

"I hear and I forget. I see and I remember. I do and I understand."

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Creating “How to”

Benefits of a Redbook binder

- Conforms to company policy
- Consistent method
- Easy to update spreadsheet file
Task Training

Self-Study Benefits

• Learn at own pace
• Flexible
• Can repeat if they don’t understand
• You don’t have to do it!

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Key Elements of Task Scheduling

- Due date
  - Daily, Weekly, Monthly – did we get it done?
  - Fixed Date – payroll taxes, sales tax, corporate reports
- Email Alerts – why do you email a “due?”
- Assignments with Skills

### Task Schedule

<table>
<thead>
<tr>
<th>Alert</th>
<th>Task Name</th>
<th>Due Date</th>
<th>Assigned To</th>
<th>Email</th>
<th>Skill</th>
<th>Last Done</th>
<th>Done by</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Done (2)</td>
<td>Advertising - Manager Budget</td>
<td>8/24/2010</td>
<td>Sandi Jerome</td>
<td><a href="mailto:sandi@crsauto.com">sandi@crsauto.com</a></td>
<td>B-Better</td>
<td>7/24/2010</td>
<td>Sue Smith</td>
<td>Monthly</td>
</tr>
<tr>
<td>Done (1)</td>
<td>Advertising - Accrue</td>
<td>8/1/2010</td>
<td>Angie Smith</td>
<td><a href="mailto:angie@crsauto.com">angie@crsauto.com</a></td>
<td>B-Better</td>
<td>7/1/2010</td>
<td>Sue Smith</td>
<td>Monthly</td>
</tr>
<tr>
<td>Done (1)</td>
<td>Advertising Budget Vs Actual Report</td>
<td>9/2/2010</td>
<td>Jenny Smith</td>
<td><a href="mailto:jenny@crsauto.com">jenny@crsauto.com</a></td>
<td>A-Anyone</td>
<td>8/2/2010</td>
<td>Sandi Jerome</td>
<td>Monthly</td>
</tr>
<tr>
<td>Done (1)</td>
<td>AR - NSF check receivable - Review</td>
<td>8/9/2010</td>
<td>Jenny Smith</td>
<td><a href="mailto:jenny@crsauto.com">jenny@crsauto.com</a></td>
<td>B-Better</td>
<td>8/2/2010</td>
<td>Jenny Smith</td>
<td>Weekly</td>
</tr>
<tr>
<td>Done (1)</td>
<td>AR - NSF checks - Adjust bank</td>
<td>8/10/2010</td>
<td>Sue Allen</td>
<td><a href="mailto:sueallen@crsauto.com">sueallen@crsauto.com</a></td>
<td>C-Cat</td>
<td>8/3/2010</td>
<td>Sue Allen</td>
<td>Weekly</td>
</tr>
</tbody>
</table>
Task Management = Multi-Tasking

Are we doing this?

Is it handled?
Action Plan - Multi Tasking

• Create your Redbook to organize tasks with 3 tabs
• Organize by 3 skill levels
• Develop your own “How to” and Tips
• Create an incentive for the your staff to learn new tasks
• Use technology to organize files on your server by
  • Skill
  • Frequency – Due Date

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Questions?

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