

Turn Data Into Action: Using Experience And A.I. to Improve Profitability

BROOKE SAMPLES, PRESIDENT
Profit Blueprints, LLC

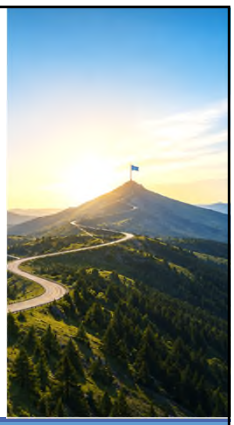
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RECAP OF PREVIOUS WEBINAR:

Turn Your Dealership Data Into Better Decisions And Higher Profits

- Benchmarks Tell Us What *"Good"* Looks Like
- KPIs Measure Our Performance
- Trends Tell Us Where We Are Heading
- Leading Indicators Are *"Early Warning Systems"*
- Goals Define What *"Success"* Looks Like

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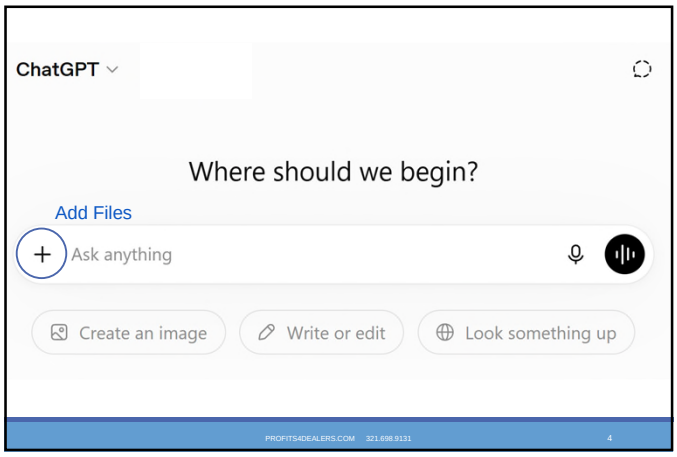
Continue With The Transformation Of The Managers of Paradise Motors

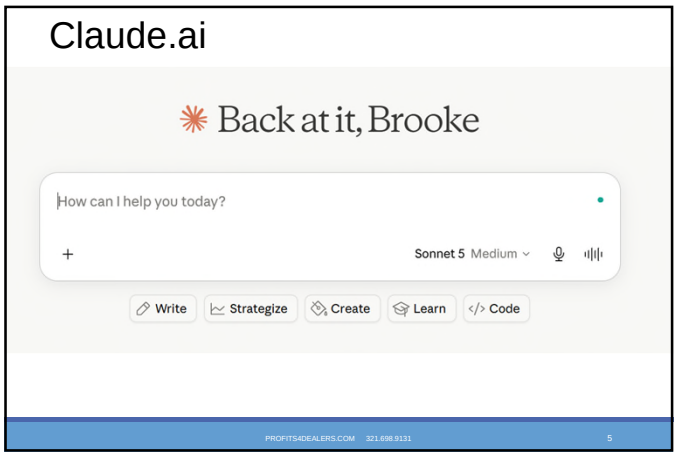
Jeff, Jennifer and John Now Know More About Their Numbers

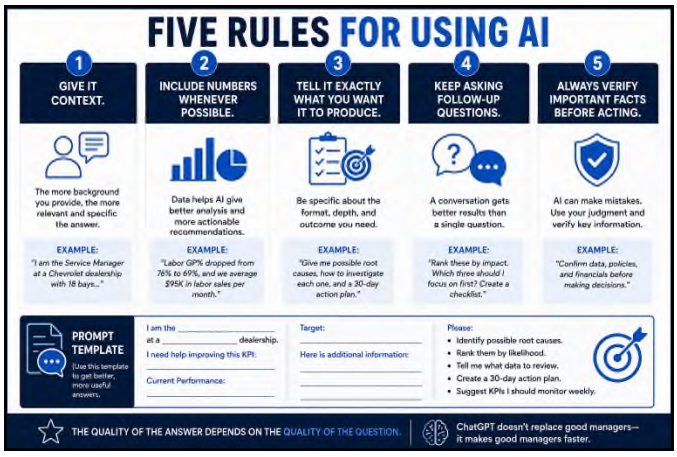
Today's Webinar Isn't About Measuring Performance, It's About IMPROVING Performance



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How to Write a Good Prompt in Claude

Practical tips for dealership managers

Give context, not just a question
"I run the service department at a Toyota dealership — here's our monthly data. What stands out?"

Be specific about the output
Say the format, audience, and length: "Give me 5 bullet points I can read in a meeting."

Break big asks into steps
Start with "Tell me our 3 weakest metrics," then tackle each one in a follow-up.

Show an example of "good"
Paste a review response you liked and say "match this tone and style."

Iterate like a conversation
"Make that shorter." "Now less formal." Claude keeps the thread — no need to restart.

Upload the actual file
Drop in the CSV, PDF, or spreadsheet directly instead of retyping the numbers.

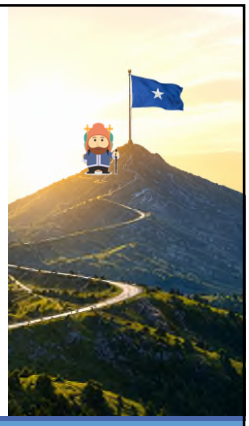


Identify Your Opportunities

Benchmarks Tell You What "Top Performers" Do & How You Compare

Benchmarks Don't Show You How To Get There

You Get There With Experience
(not just yours)
Co-workers, Other Managers, Experts
& A.I.



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Identify Your KPIs By Examining Benchmarks

Or Ask A.I.



Jeff

Prompt

For A Domestic Dealership, What Is The Gross Profit Retention Benchmark For Customer Pay Labor?

Performance Level	Customer Pay Labor Gross Profit Retention
Best-in-Class	80%+
Strong	78%–80%
Average	75%–77%
Needs Improvement	Below 75%

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A.I. Explains The Benchmark

Why 78% Is A Common Target

Many Dealership Consultants (Including NCM, ATI, And Other 20 Groups) Use 78% As A Practical Target Because It Generally Indicates:

- **Effective Labor Rate Management**
- **Good Technician Productivity And Efficiency**
- **Proper Discount Control**
- **Limited Labor Write-downs**
- **Appropriate Warranty/Customer-pay Mix**

(Not Sure What That Has To Do With 78% Retention)

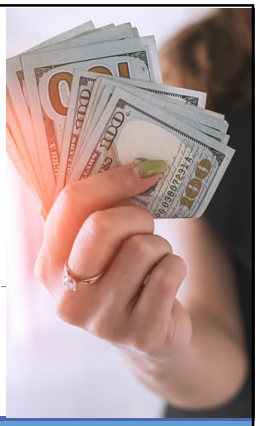
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Before You Fix Anything, Calculate The Profit Opportunity

If You Are Off Your KPI or Benchmark, Don't Immediately Start Changing Processes

Instead Ask :

What Is The Financial Impact Of Improvement And Where Will I Get The Biggest Return From My Time?



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Calculate Your Profit Opportunity

Profit Opportunity = KPI Gap × Financial Base

(A) Benchmark or KPI (Usually a % or a Dollar Amount)

Minus

(B) Your Actual # = KPI GAP

Multiplied by Your Financial Basis

(C) Units or Sales/Gross Profit (Financial Basis Affected By KPI)

Some KPIs Require More Than One Calculation To Estimate The Financial Impact. Translate Into Dollars So You Can See The Reward.



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Profit Opportunity = KPI Gap × Financial Base

KPI Gap	Financial Base
Average Gross Per Vehicle	Vehicles Sold
Gross Profit Retention % (Sales/Gross Profit)	Sales
Sales Per Repair Order	Number of ROs
Closing Ratio	Opportunities × Average Gross
Expenses as a % of GP	Gross Profit

Example:

KPI: Gross Profit Per Used Unit Retailed = $1,500
June Gross Profit Per Used Unit Retailed = $1,000
Gap = $500

Units Sold 70 x Gap = $35,000 Less Gross Profit

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Profit Opportunity = KPI Gap × Financial Base

KPI Gap	Financial Base
Average Gross Per Vehicle	Vehicles Sold
Gross Profit Retention % (Sales/Gross Profit)	Sales
Sales Per Repair Order	Number of ROs
Closing Ratio	Opportunities × Average Gross
Expenses as a % of GP	Gross Profit

Example:

Benchmark for Direct Payroll: 30% **You're at 37% (30% - 37% = -7%)**

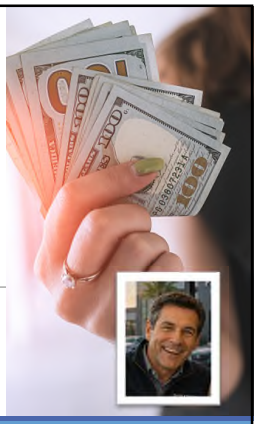
Current Gross Profit: $425,000 x 7% Gap = $29,750 Excess!

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Calculate The Profit Opportunity

PARADISE MOTORS "TRUE" NUMBERS		
A)	Service Customer Pay Labor Sales	$ 83,300
B)	Service Customer Pay Labor Gross Profit	$ 55,142
C)	% Retained (B/A)	66.2%
D)	Benchmark For Customer Pay Labor	78.0%
E)	Variance From Benchmark to Reality (D - C)	11.8%
F)	Value Of Hitting Benchmark Per Month (E x A)	$ 9,832
	Annualized Profit Opportunity	$ 117,984



$83,300 x 1% = $833
For Each 1% Improvement

$833 X 11.8 = $9,832 for 11.8% Improvement

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Have A.I. Calculate The Profit Opportunity

Prompt *My service department's average labor sales are $83,300 and we currently retain 66.2% of them. If the target is 78% retention, how much more will I make if I hit the target?*

CLAUDE

At **66.2% retention**, you're keeping **$55,142** of your $83,300 in labor sales.
At **78% retention**, you'd keep **$71,760**.
That's an additional $9,832 per month — or roughly **$117,984 per year** — by hitting your target retention rate.

VS

CHATGPT

- **Average Customer Pay Labor Sales:** $83,300
- **Current Retention:** 66.2%
- **Target Retention:** 78.0%

If $83,300 represents **66.2%** of the available labor opportunity:
($83,300/66.2%) x 78% - $83,330 = $14,848 ×12 = $178,176

Verify That A.I. Knows What You Want

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Before You Fix Anything, Calculate The Profit Opportunity

First, Focus On The Opportunities That Deliver The Greatest Profit *With The Least Effort*

If The Opportunity Is Only $500/Month, Don't Spend Six Months Fixing It.
Focus On High-impact Opportunities First!



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	Low Effort	High Effort
High Profit	**Do First - Quick Wins** • **Highest ROI** • **Implement Immediately** • **Build Momentum**	**Strategic Projects** • High Return • Requires Planning • Assign Ownership & Timeline
Low Profit	**If Time Allows** • Easy Improvements • Nice to Have • Complete When Resources Permit	**Avoid** • Low Return • Consumes Resources • Usually Not Worth the Investment

Not Every Problem Deserves Equal Attention

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Visible Symptoms =
Missed Targets, Low Gross Profit, Poor CSI, High Expenses

Hidden Causes = Process Failures, Staffing Issues, Training Gaps, Accountability Problems

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Would You Put A Band Aid On A Broken Arm?

If That Didn't Help, Would You Put On More Band Aids



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Stop Putting Band-Aids on Problems!

Use Root-Cause Analysis To Fix It Right The First Time



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Root-Cause Analysis

Think Of This Like A Medical Diagnosis



- **5 Whys = Interview The Patient**
- **Fishbone = Review Every Body System**
- **Drill Down = Order The Lab Tests**

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5 Whys

A Technique, Pioneered At Toyota, To Identify The Root Cause Of A Problem By Repeatedly Asking "Why?"

Finance Income per Retail Deal dropped from $1,825 to $1,500



Let's Help Jennifer

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Example of 5 Whys

Problem?	Why Did New F&I Income Drop $300 Per Retail Unit? *Because Finance Penetration % Dropped*
WHY?	Why Did The Finance Penetration Drop? *Because More Customers Financed Elsewhere*
WHY?	Why Did More Customers Finance Elsewhere? *Because Jennifer Didn't Speak To Every Customer*
WHY	Why Didn't Jennifer Speak To Every Customer? *Because Internet Customers Don't Speak To F&I*
WHY	Why Don't Internet Customers Speak To F&I? *Because There Isn't A Digital Handoff Process*

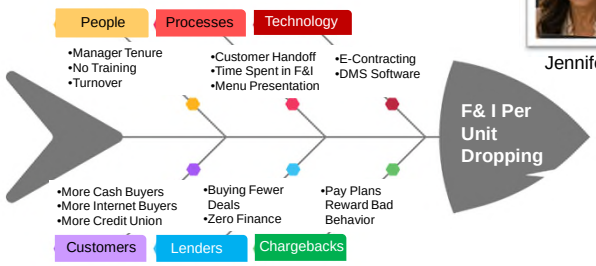
Solution: Create A Mandatory F&I Introduction For Every Deal, Including Internet Deals

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Fishbone Diagram



Jennifer



Keeps Managers From Blaming One Thing Too Quickly

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Look A Little Deeper



Jennifer

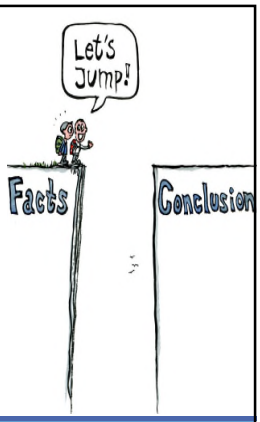


What Should We Do About Chris?
Coaching? Training? Is He In The Wrong Job?

	Units Sold	# of Opportunities	Closing Ratio	% Financed
Andi	21	45	47%	85%
Brooke	19	37	51%	79%
Chris	11	69	16%	36%
Ollie	6	15	40%	66%
Pat	6	25	24%	100%
Average	12.6	38.2	33%	73%

Easiest Way to Make BAD Decisions

- **Make Assumptions:**
  Accepting Something Is True Without Proof
- **Jump To Conclusions:**
  Formulate An Answer, Bypassing Logical Reflection Entirely



Drill Down Analysis

Now That John Gets The Financial Statement,
He Can See The Drop in GP Retention On CP Parts



John

Usual Retention % on Customer Pay Parts = 40% - 42%

May Retention % on Customer Pay Parts = 38.4%

June Retention % on Customer Pay Parts = 37.0%

"Oh, It's Because We Sold More Tires"

"But, We Track Tire Sales In Separate Accounts"

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It May Sound Old School, But…



Verify the Numbers First

Check Journal Sources

For Expenses, Check Details

Bad Data = Bad Decisions

Drill Down Analysis

Drop in Gross Profit Retention On Customer Pay Parts

SLOW DOWN!

1) Confirm That Only Entries From The **Customer Pay Repair Order Journal Are In The Sale And Cost Of Sale Accounts**

Journal 30 Sale Account	**$167,500 cr**
Journal 30 Cost Of Sale Account	**$100,500 db**
Journal 80 Journal Entry to COS	**$ 5,000 db**



$167,500 - $100,500 - $5,000 = **$62,000/$167,500 = 37%**

Drill Down Analysis

Drop in Gross Profit Retention On Customer Pay Parts

1) Confirm That Only Entries From The **Customer Pay Repair Order Journal Are In The Sale And Cost Of Sale Accounts**

Journal 30 Sale Account	**$167,500 cr**
Journal 30 Cost Of Sale Account	**$105,500 db**

$167,500 - $105,500 = $62,000 **$62,000/$167,500 = 37%**



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Drill Down Analysis

Low Gross Profit Retention On Customer Pay Parts

2) Look at Retention % by Parts Sources – Compare Previous Months

Source	Sales	COS	Profit	Profit %
101	$293,229.59	$173,765.71	$119,463.88	41%
102	$33,288.01	$19,275.54	$14,012.47	42%
105	$42,830.69	$25,487.00	$17,343.69	40%
110	$33,666.05	$31,654.54	$2,011.51	6%
200	$22,559.84	$12,407.91	$10,151.93	45%
	$425,574.18	$262,590.70	$162,983.48	38%

t Sources?

nths



John

FIND THE ROOT CAUSE BEFORE YOU MAKE A CHANGE

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Jeff

Failure to *"Dig Deeper"* Could Result In A Waste Of Time & Money

	Karen	Jaime
# ROs Written	280	275
Labor Sales	$87,360	$65,520
Average Labor/RO	$312	$238
Billed Hours Per RO	1.6	1.2
Average Mileage	84,139	41,231

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The Financial Statement Doesn't Show Trends – Just Current Month and Current Year-to-Date

		MECHANICAL DEPT.			
		MONTH		YEAR-TO-DATE	
NET SALES		975,548	% OF SALES	3,679,953	% OF SALES
GROSS PROFIT/INCOME		538,376	55.0	2,112,490	57.0
EXPENSES					
VEH. SLSPLE COMPENSATION & OTHER	11				
DELIVERY EXPENSE	13				
POLICY WORK-VEHICLES	15				
TOTAL VARIABLE			% GRS PROFIT		% GRS PROFIT
SALARIES-OWNERS / EXECUTIVE MANAGERS	20	3,363	1.0	30,544	1.0
SALARIES-SUPERVISION	21	70,563	13.0	209,533	10.0
SALARIES-CLERICAL	22	7,551	1.0	25,539	1.0
OTHER SALARIES AND WAGES	23	102,272	19.0	407,731	19.0
ABSENTEE COMPENSATION	24	9,800	2.0	58,598	3.0
INCENTIVES-SUPERVISION	26	17,321	3.0	62,786	3.0
TAXES-PAYROLL	25	27,879	5.0	119,975	6.0
EMPLOYEE BENEFITS	27	29,918	6.0	116,015	5.0
RETIREMENT BENEFITS	29	0	0.0	0	0.0
TOTAL PERSONNEL		268,667	49.0	1,030,721	48.0

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INTERNAL TREND ANALYSIS

Use DOCs (Daily Operating Control)To Analyze Most Accounts & Include A Comparison To Previous Months (or Day/Month/Year) Spot Operational Issues Immediately

Expense Category	January	February	March	April
▸ SEMI-FIXED EXPENSES (Fixed Operations)				
Company Vehicle Expense	$6,500	$4,876	$7,718	$6,509
Office Supplies & Expenses	$1,993	$3,618	$1,885	$3,379
Other Supplies	$12,982	$7,134	$9,840	$6,345
% of Gross Profit (KPI <1%)	1.9%	1.0%	1.3%	0.9%



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USE A.I. TO TREND YOUR DATA

- **Attach Documents To Your Prompt**
- **Do Not Leave Your Dealership's Name On Attachments**

Prompt *Using the 4 financial statements, could you create an Excel spreadsheet showing Service and Parts Expenses as percentages of Gross Profit so I can track how they change month over month?*

USE A.I. TO ANALYZE YOUR DATA

CHEVROLET DEALERSHIP | Fixed Operations (Service & Parts) — Expense Tracker

January – April 2026 | All dollar amounts sourced from GM Dealer Operating Report (Page 2, Fixed Operations Column)

Expense Category	January	February	March	April	Jan→Apr Chg	Avg % of GP	Trend
▸ GROSS PROFIT REFERENCE (Source: Page 2, Fixed Operations Column)							
Fixed Ops Net Sales (Monthly $)	$1,412,585	$1,475,787	$1,606,621	$1,627,598	15.2%		
Fixed Ops Gross Profit (Monthly $)	$692,598	$698,084	$752,623	$736,515	6.3%		
Total Dealership Gross Profit (Monthly $)	$909,300	$1,046,188	$1,255,103	$1,235,266	35.8%		
▸ PERSONNEL EXPENSES (Fixed Operations)							
Salaries – Owners / Executive Mgrs	$20,850	$9,774	$4,324	$4,324	(79.3%)	1.39%	▼
Salaries – Supervision	$50,988	$55,843	$69,712	$89,297	75.1%	9.19%	▲
Salaries – Clerical	$6,963	$7,407	$8,757	$9,708	39.4%	1.14%	▲
Other Salaries & Wages	$125,086	$109,927	$117,006	$117,233	(6.3%)	16.32%	▼
Absentee Compensation	$33,103	$12,600	$12,600	$12,600	(61.9%)	2.49%	▼
Incentives – Supervision	$30,884	$31,618	$36,478	$31,880	3.2%	4.54%	▼
Taxes – Payroll	$37,527	$32,753	$32,206	$30,581	(18.5%)	4.64%	▼
Employee Benefits	$32,509	$32,603	$32,325	$34,023	4.7%	4.57%	▼
TOTAL PERSONNEL	$337,910	$292,525	$313,408	$329,646	(2.4%)	44.27%	▼
▸ SEMI-FIXED EXPENSES (Fixed Operations)							
Company Vehicle Expense	$6,500	$4,876	$7,718	$6,509	0.1%	0.89%	▼
Office Supplies & Expenses	$1,993	$3,618	$1,885	$3,379	69.5%	0.38%	▲
Other Supplies	$12,982	$7,134	$9,840	$6,345	(51.1%)	1.27%	▼

USE A.I. TO ANALYZE YOUR DATA

Category	January	February	March	April
Total Personnel	48.8%	41.9%	41.6%	44.8%
Outside Services	10.8%	12.0%	11.7%	10.2%
IT Services	5.4%	4.3%	5.2%	3.9%
Advertising (Net)	6.4%	5.1%	4.1%	3.8%
Real Estate Taxes	2.9%	2.9%	2.7%	2.7%
Insurance Other	2.9%	1.5%	2.0%	1.4%
Utilities	1.6%	1.6%	1.5%	1.4%
Policy Wk – Pts/Svc	1.9%	1.8%	1.9%	1.0%

Going forward, when you get May's statement, just update the dollar values in the Data Input tab — all percentages, subtotals, and trend arrows will recalculate automatically.

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INTERNAL TREND ANALYSIS

Use DOCs (Daily Operating Control)To Analyze Most Accounts & Include A Comparison To Previous Months

Spot Operational Issues **Immediately**

Expense Category	January	February	March	April
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% of Gross Profit (KPI <1%)	1.9%	1.0%	1.3%	0.9%



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USE A.I. TO INDENTIFY TRENDS

Upload:

- **12 Months of Effective Labor Rate**
- **12 Months of Sales Per Customer Pay RO**
- **12 Months of Labor Gross Profit Retention**

Prompt

"Identify trends, seasonality, anomalies, and potential concerns."

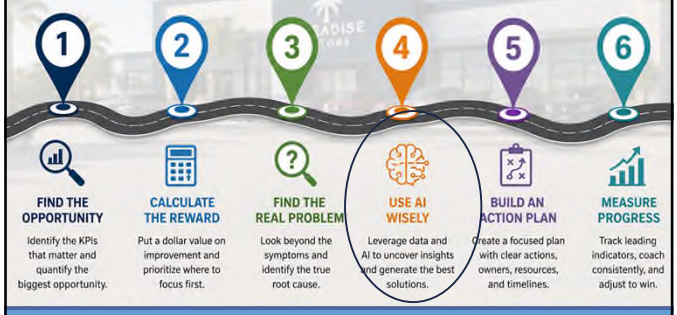
A.I. Can Highlight:

- Consistent Decline/Improvement
- Seasonal Patterns
- Sudden Shifts

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TODAY'S JOURNEY

Turning Data Into Decisions... And Decisions Into Profit



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Create Action Plans

A.I. Generates More & Better Options

- Don't Blindly Implement Everything
- But DO Something!

Evaluate:
- Cost
- Impact
- Timeline
- Return On Investment



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A.I. Is Great At

✓ Generating Ideas
✓ Finding Patterns
✓ Organizing Information
✓ Saving Time

Managers Must Still
✓ Verify
✓ Prioritize
✓ Decide
✓ Lead



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What We Know About Service

Dealerships Win Over Aftermarket Quick Lube Centers By Using An MPI To Uncover And Perform The Additional Maintenance And Repairs Each Vehicle Legitimately Needs



Jeff

July 2026	MTD	Tracking	Target
# of Customer Pay ROs	421	617	600
Total Customer Pay Sales	$89,484	$131,243	$210,600
→ Sales Per Repair Order	$212.55	$212.55	$351.00
Percent of Target	61%	61%	100%
→ Upsells From MPI/MPVI	84	123	300
% of CP ROs	20%	20%	50%

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Calculate The Profit Opportunity

Average Labor Gross Profit Per Upsell = $110

July 2026	MTD	Tracking	Target
# of Customer Pay ROs	421	617	600
Upsells From MPI/MPVI	84	123	300
% of CP ROs	20%	20%	50%

300 – 123 = 177 Potential Repair Orders

177 X $110 = **$19,470** Increase in Labor Gross Profit

$19,470 x 12 = $233,640! Plus, Profit in Parts!

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Use A.I. To Generate Options

Be As Specific As You Can: Location, Franchise, Employee Counts, Area To Improve, Etc.

Prompt **Provide Me 20 Ways A Chevy Dealership In Paradise, FL Could Increase Sales Per CP RO?**

Which Five Solutions Have The Highest ROI?
Of These, Which Two Are Easiest To Implement?
Build Me A 90-day Implementation Plan For MPI

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Action Plans Using A.I. & Experience

Your Plan to Increase Sold Work From Multipoint Inspection From 20% To 50%

1) ROOT CAUSE ANALYSIS: Review 50 Declined MPIs From The Last 30 Days To Identify The Most Common Reasons Customers Declined Repairs. **(OP Code To Add To ROs Where Recommendations Were Declined)**

2) Observe Each Advisor Performing Five MPI Presentations And Provide Coaching (How Many Customers Do The Advisors Write Up Daily?)

3) Verify Every Vehicle Receives A Completed MPI Before RO Is Closed (Verify Service Advisors Are Getting The MPI Results BEFORE The Customer's Requested Work Is Completed and, THEY ARE CALLING the CUSTOMERS!!!)

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Action Plans Using A.I. & Experience

4) Review MPI/MPVI For Tech Consistency & Quality
Train Techs on Your Inspection Process - Monthly

5) Standardize Advisor Presentation Language For Recommended Repairs

6) Require Advisors To Contact Customers Within 10 Minutes Of Technician Recommendations - Monitor Daily

7) Track Sold Percentage By Advisor And Review Results Every Tuesday

8) Recognize The Highest MPI Conversion Advisor And Technician Each Month



DIG A LITTLE DEEPER

Every week, ask:

- **Why Are Customers Saying No? $, Time, Convenience?**
- **Which Advisor Closes The Highest Percentage?**
- **Which Technician Writes The Clearest Inspections?**
- **Are We Recommending Enough Work?**
  Check Average Mileage
- **Are We Recommending The Right Work?**
  Or Are We Just Recommending Flushes Where Techs & Advisors Get Spiffed



Don't Wait Until Month-end To See If You Reached 50%, **Monitor These Weekly**:

- **Sold Work %** (MPI Conversion)
- MPI Completion Rate
- Photo/Video Usage %
- Advisor Presentation Rate
- Advisor-by-Advisor Closing Rate
- Estimate Contact Time
- Average Recommendations per RO
- Average Dollars Recommended
- Average Dollars Sold

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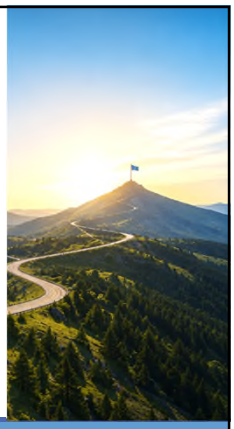
Prompt Create A One-page Form For Me To Track (If none already exists):

Leading Indicator	Goal	This Week	Last Week	Trend ↑ ↓ →	Notes / Action Required
Sold Work % (MPI Conversion)	_____%	_____%	_____%	☐ ↑ ☐ ↓ ☐ →	
MPI Completion Rate	%	%	%	☐ ↑ ☐ ↓ ☐ →	
Average pe Recommen					
Photo / Vide					
Advisor Presentation Rate	_____%	_____%	_____%	☐ ↑ ☐ ↓ ☐ →	
Average Estimate Contact Time	_____ min	_____ min	_____ min	☐ ↑ ☐ ↓ ☐ →	
Customer Decline Rate	_____%	_____%	_____%	☐ ↑ ☐ ↓ ☐ →	
Average Dollars Recommended	$_____	$_____	$_____	☐ ↑ ☐ ↓ ☐ →	
Average Dollars Sold	$	$	$	☐ ↑ ☐ ↓ ☐ →	

Print Every Tuesday Morning And Review In 10 Minutes. Use To Track Leading Indicators To Tell You If You're On Track Before The Month Ends.

Create Action Plans

- Who Will Be Involved
- What Actions To Take
- What Resources Do You Need To Make Changes?
- How Will We Measure Impact Of Change?



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Profit Blueprints® Manager's Action Plan Worksheet

Manager: _____ **Start Date:** _____**Complete Date:**_____

Define Area to Improve: _____

1. Identify the Opportunity KPI description: _____ Current: _____ KPI: _____

2. Calculate the Reward - (KPI – Current) x Financial Basis

(_____-_____) x_____ x 12 = **Potential Annual Profit Opportunity**: $_____

3. Find the Root Cause

Category: ☐ Process ☐ Training ☐ Staffing ☐ Communication ☐ Customer ☐ Inventory ☐ Equipment ☐ Other _____

Evidence: _____

4. Needs to Implement Change: ☐ Tools ☐ Training ☐ Staffing ☐ Forms ☐ Inventory ☐ Equipment ☐ ☐ Other _____

5. Action Plan

Action Step (or attach)	Owner	Due

6. Success & Follow-Up

Weekly KPI Goal: _____ Monthly KPI Goal: _____

Resources Needed: _____

Potential Obstacles: _____

AI Assistance Description: _____

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Share the Scoreboard

Give People the Numbers They Influence



People Cannot Improve What They Never See

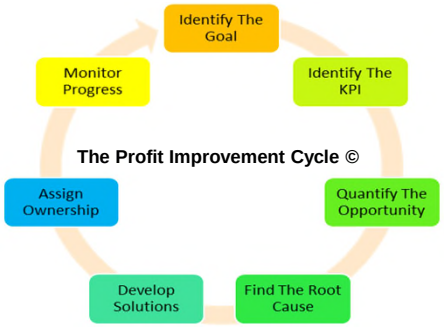
Celebrate the wins!!



The Dealership's Goal Is To Increase Net Profit By Optimizing Revenue Streams, Controlling Costs, And Managing Assets Effectively

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Reach Your Dealership's Goals Just Like Paradise Motors





TAKE THE CHALLENGE

In The Next 5 Days…

- Identify One KPI That's Underperforming
- Calculate The Financial Opportunity
- Find The Root Cause
- Build One Action Plan
- Review It Every Tuesday For 90 Days



I've Spent Over 25 Years Speaking With Managers – They All Knew Their Numbers

The Managers Who Consistently Outperform The Targets Weren't Smarter Than The Others. They Simply Acted On Their Numbers With A Sense Of Urgency, Asked Better Questions, Dug Deeper, And Used The Numbers To Coach And Motivate Their Employees.

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Sense of Urgency

- Used-vehicle Reconditioning
- Sending Deals To Accounting
- Collecting Receivables
- Technician Training
- New-employee Onboarding
- Month-end Close
- Answering The Phone



A.I. Gives You The Time You Need!

- Build Training & Marketing Materials
- Evaluate Vendor Choices
- Create Forms and Spread Sheets
- Evaluate Your Service & Finance Menus
- Create Staff Schedules
- Topics for Sales Meetings

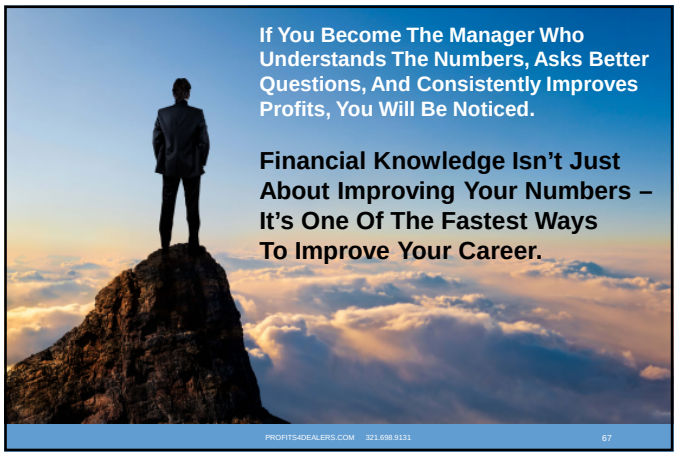




Great Managers

Don't Chase Numbers.
They Improve The People, The Processes & The Decisions That Produce The Numbers.

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Profit Blueprints® Manager's Action Plan Worksheet

Manager: _____ Start Date: _____Complete Date:_____

Define Area to Improve: _____

1. Identify the Opportunity KPI description: _____ Current: _____ KPI: _____

2. Calculate the Reward - (KPI – Current) x Financial Basis

(_____-_____) x_____ x 12 = **Potential Annual Profit Opportunity**: $_____

3. Find the Root Cause

Category: ☐ Process ☐ Training ☐ Staffing ☐ Communication ☐ Customer ☐ Inventory ☐ Equipment ☐ Other _____

Evidence: _____

4. Needs to Implement Change: ☐ Tools ☐ Training ☐ Staffing ☐ Forms ☐ Inventory ☐ Equipment ☐ ☐ Other _____

5. Action Plan

Action Step (or attach)	Owner	Due

6. Success & Follow-Up

Weekly KPI Goal: _____ Monthly KPI Goal: _____

Resources Needed: _____

Potential Obstacles: _____

AI Assistance Description: _____

Manager Signature: _____

FIVE RULES FOR USING AI

1 GIVE IT CONTEXT.



The more background you provide, the more relevant and specific the answer.

EXAMPLE:

"I am the Service Manager at a Chevrolet dealership with 18 bays..."

2 INCLUDE NUMBERS WHENEVER POSSIBLE.



Data helps AI give better analysis and more actionable recommendations.

EXAMPLE:

"Labor GP% dropped from 76% to 69%, and we average $95K in labor sales per month."

3 TELL IT EXACTLY WHAT YOU WANT IT TO PRODUCE.



Be specific about the format, depth, and outcome you need.

EXAMPLE:

"Give me possible root causes, how to investigate each one, and a 30-day action plan."

4 KEEP ASKING FOLLOW-UP QUESTIONS.



A conversation gets better results than a single question.

EXAMPLE:

"Rank these by impact. Which three should I focus on first? Create a checklist."

5 ALWAYS VERIFY IMPORTANT FACTS BEFORE ACTING.



AI can make mistakes. Use your judgment and verify key information.

EXAMPLE:

"Confirm data, policies, and financials before making decisions."



PROMPT TEMPLATE

(Use this template to get better, more useful answers.

I am the _____

at a _____ dealership.

I need help improving this KPI:

_____

Current Performance:

_____

Target:

_____

Here is additional information:

_____

_____

_____

Please:

- Identify possible root causes.
- Rank them by likelihood.
- Tell me what data to review.
- Create a 30-day action plan.
- Suggest KPIs I should monitor weekly.





THE QUALITY OF THE ANSWER DEPENDS ON THE QUALITY OF THE QUESTION.



ChatGPT doesn't replace good managers—it makes good managers faster.

How to Write a Good Prompt in Claude

Practical tips for dealership managers

Give context, not just a question

"I run the service department at a Toyota dealership — here's our monthly data. What stands out?"

Be specific about the output

Say the format, audience, and length: "Give me 5 bullet points I can read in a meeting."

Break big asks into steps

Start with "Tell me our 3 weakest metrics," then tackle each one in a follow-up.

Show an example of "good"

Paste a review response you liked and say "match this tone and style."

Iterate like a conversation

"Make that shorter." "Now less formal." Claude keeps the thread — no need to restart.

Upload the actual file

Drop in the CSV, PDF, or spreadsheet directly instead of retyping the numbers.



Brooke E. Samples

PROFILE

CONTACT

PHONE:
321.698.9131

EMAIL:
Brookesamples.411@gmail.com

WEBSITE:
Profits4dealers.com

BOOK:
Dealersedge.com/accountingguide

SKILLS

Dealership Financial Analysis
(Analyzed over 28,000 statements)

Extensive Public Speaking Experience

Creative Strategist

Advanced MSPowerPoint Skills

Advanced MSWord and MSPublisher

Intermediate MSExcel Skills

WORK EXPERIENCE

Profit Blueprints, LLC: President
2009–Present
Based on my client's requests, I started Profit Blueprints, an Automotive Consulting company. Monthly, I provide Dealers with Trend Analysis Reports, Action Plans for underperforming areas and conduct conference calls to ensure they are moving their departments to higher profits. I also write a monthly newsletter to provide my Dealers with innovative and actionable ideas.

Dealer Service Corporation: Automotive Consultant
1998–2009
Oversaw the financial analysis of over 200 Dealerships in the U.S. and Canada. Wrote more than 125 Action Plans to help department Managers monetize their opportunities based on data and best practices. Five of the years at DSC I headed the Profit Solutions division of NCM Associates, a Peer Performance Firm – originator of the 20-Groups. I also moderated two Human Resource Groups and presented topics of interest to Controller Groups.

Dealerships in Florida & Virginia: Controller and Operations Manager
1981–1997
Responsible for Dealership Accounting Offices (single and multipoint Dealerships) in Central Florida, Miami, and the Washington D.C. Area. I right-sized the Accounting staff and implemented efficiencies to maximize profits and improve cash flow.

ACCOMPLISHMENTS

- Partnered with Volkswagen University to train the Volkswagen Group of America's Field Managers to analyze their Dealers' financial statements to be true partners for profit improvement
- Presented two workshops at the National AICPA conference on Key Performance Indicators and Personnel Staffing for Dealerships
- Conducted a five-day workshop for Automotive Controllers
- Conduct training meetings for Dealer Groups and one-on-one training for Controllers
- Presented over twenty workshops for DealersEdge.com, covering a range of topics for every Dealership department
- In 2022, I Published *Accounting Guide for Dealership Controllers and General Managers.* Topics covered are:
  Financial Statement, Balance Sheet, Make the Most of Your DMS, Key Performance Indicators, Expense Management, Forecasting and Budgeting, Preparing for Disasters, Efficiency Strategies, Dealership Staffing and Pay Plans, Maximize Profits, and Minimize Internal Theft.
- Writer for Australian Auto Dealers Association's Monthly Magazine