Learning Design Plan

Purpose: This form is a communications tool to outline the course plan across departments

Program/Curriculum: (*Sales New Hire, NSLC, NADA, etc.*)	Sales New Hire Under the Hood: A look into Automotive Dealerships	**LXD:**	Julie Pacheco Kim	**Type:** (Update/New)	New
Business Objective: (*Business problem trying to solve*)	To familiarize Associates with industry knowledge specific to the departments that comprise a typical baseline dealership account.	**Due Date:**	January 31, 2017	**Delivery Format:** (ppt, webinar, etc.)	2 Day Classroom workshop Deliverables: Facilitator guide, Learner guide/handout
Course Code:	n/a	**SME(s):**		**Stakeholder(s):**	
Course Title:	**Under the Hood: A Look into Dealership Inventory** (Monday & Tuesday)				
Course Description:	Communicate the key functions and processes used in a dealership workflow in Inventory through the lens of what needs to be accomplished by the department. This includes dealership workflows, roles in the dealership, challenges/hurts and dealership best practices, solutions, and referencing Products that impact inventory in the dealership.				
Learner Background Information:	Sales Experience, Assumption of no Automotive Industry Experience, Different Levels of Selling Skills				
Prerequisites:	Knowledge of the car-buying process. Dealership Overview Class. Time spent at a dealership (with the Dealership Workbook), other department deep dives				
eLearning: (*Total hours/mins*)	n/a	**Instructor Led:**	8.5 hours (over 2 days)		
Learner Audience:	New Sales Associates (ADE, ASE, TSE), (Inside Sales)				
Reviewers: (*Initials/Position/Date*)	(_____);				
	(_____);				

Topic: Inventory Day 1	Learning Goals & Objectives	Instructional Interactions	Facilitators	Time (hrs/mins) Day 1 – 6 hours Day 2 – 2.5 hours	Post Course Evaluation	Supporting Resources
Housekeeping and Warmer	**Goal:** Wrap up any leftover questions from the day before, transition to new topic. **Objectives:** ● Answer lingering questions ● Verbalize key points from the day before ● Cover agenda for next two days			15 minutes		
Pre-Assessment	**Goal:** ● Determine a baseline of associate Inventory knowledge prior to training. ● Value Measurement. Compare Inventory knowledge pre and post deep dive training. **Objectives:** ● Define key inventory terms and roles ● Introduce the importance of inventory management in the dealership	**Experience Share** In pairs, share inventory experience with each other. Take turns asking each other one of the questions below and record your partner's response. *(Depending on the learner's background, might already have an understanding of some of the key pieces of inventory, and not even realize it. Others may have interacted with dealerships as a consumer and could speak to experiences with appraisal and interactions with specific dealer roles. Or possibly they're from a retail background and understand the importance of inventory mix.)*	TBD	1 hr (15 minutes to share with each other; 15 minutes to share together as a class; 30 min for overview)		Questions on screen or write on board

		Questions will be in workbooks to follow along, and should also have on screen/board: 1. What terms come to mind when you hear the word "inventory"? 2. What types of tasks do you associate with inventory management? 3. What's the importance of inventory in a retail store? in a dealership? 4. Which roles in the dealership deal with stocking decisions? appraisals? sourcing? trades? 5. What's your own experience with inventory? in the dealership (if applicable, in a retail setting, or as a consumer? 6. What are some basic challenges in inventory management? Have each person come up and write down their partner's response for one question (on the board or flip chart). As questions start to fill up, instruct leaners to just fill in any responses/answers that are not already listed. If there are gaps, propose the question to the class. Use as a transition into general overview.				

		15 minute break				
Inventory Workflow Overview: Acquisition to Sale	**Goal:** For associates to review the inventory management workflow and familiarize themselves with the terminology, tasks, and high level pains **Objectives:** ● Build out the general inventory management workflow from acquisition to sale ● Identify subtasks in the workflow under: acquisition, data entry, pricing, merchandising/syndication, appraisals, turning inventory. ● List key tasks and responsibilities (by role) in inventory management ● Identify challenges at each level of the workflow	**Workflow Scramble** Randomly pass out 2-3 sheets of paper to each team – each sheet will have one inventory word related to workflow (e.g., acquisition, pricing, appraisal, turn time, data entry, ordering stock, auction, trade, wholesale, stock, inventory mix, website merchandising, rebates/incentives) Part 1 – 25 min Spend time in teams thinking about how these words apply in a retail setting in general, then more specifically in a dealership setting. *(If the class has a good base of dealership knowledge, skip the retail setting application. The idea here is that if they don't have dealership experience, maybe can think of these terms in more general retail setting to feel more comfortable with them and maybe find some crossover.)* Write down in area provided in workbook. Part 2 – 25 min In team, come up with at least one potential dealership pain for each word. Come together to discuss and write pains on the board or flipchart to refer back to over the next day and a half. Part 3 – 30 min Then work together as a class to put the words in order of the workflow and categorize subtasks/activities under workflow headings (e.g., first workflow heading - Acquisition; ordering		1h 30m		Board/wall, markers, paper, tape

		stock, auctions, and trades would be categorized underneath.) Do this to build out the entire workflow and subtasks together. Use this as a starting point to build discussion around each piece of the workflow – be sure to cover common pitfalls and which roles take on specific tasks.				
		1 Hour Lunch				
Key Players in Inventory	**Goal:** For associates to identify the key players, associated tasks, and challenges (by role) in inventory management **Objectives:** ● Describe the role and motivation for each of the following roles in terms of inventory management: Used Vehicle Manager, General Manager, General Sales Manager, and Controller ● Speak to inventory management pains specific to reach role and at each level of the workflow	**Key Players Discussion** Discuss each of the roles' inventory responsibilities and pitfalls. Drive the discussion with questions. 1. Ask the class who they think are the key players in inventory management. Some might be surprising. Write down each on the board. Should end up with a list similar to: GM, GSM, Used Vehicle Manager, Controller 2. What are the activities each role completes in inventory? 3. What's the motivation for each of these roles to improve the dealership's inventory performance? 4. What emotions are they experiencing in the process? 5. What potential pitfalls does each role need to watch out for? 6. Who do you think is the key decision maker here? Note: Create an empty chart in the workbook for learners to complete. One bubble for each role,		30min		.

		then branching bubbles for Activities/Tasks, Motivation, and Pitfalls				
Inventory Workflow: Deep Dive	**Goal:** For associates to analyze key inventory tasks, role relationships, and role/task specific challenges. Associates begin to problem-solve solutions. **Objectives:** ● Analyze the inventory workflow and relationships between different dealership roles ● Perform inventory tasks by role ● Explore challenges in the inventory management tasks ● Problem-solve solutions for gaps/challenges in the process	**Inventory Mix** (scenario based group activity) In groups, assign each person a role in the inventory world (Used Vehicle Mgr, GM, GSM, Sales Mgr). Set up the situation/handout with details (current dealership inventory KPIs, goals for improvement). They have to brainstorm all the tasks of their role and interact with the other roles to accomplish the following goals: 1. Balance inventory mix (auction, trade ins) 2. Target the right customers (research which cars are hot, target service customers in equity, run an equity campaign); find the right replacement vehicle for them 3. Conduct and complete an appraisal on a trade-in 4. Move inventory that's been sitting too long (pricing, turn time, rebates/incentives, merchandising, and margin)		1.5-2h (1-1.5h to work in groups; 30 min for debrief)		Written scenario describing dealership's current inventory performance, and specific goals for improvement. Include instructions for the activity, and the specified goals to complete.

		Learners should follow along in their workbook to make note all the tasks they need to complete in their role, in what order, who they need to interact with, and how they'd go about it. (Fill out a blank matrix in the workbook.) Then develop a master plan together as a team to achieve the inventory goals prescribed in the scenario. As a group, discuss challenges and what solution(s) are needed to help make the process more efficient. Come together as a class to share master plans, challenges, and solutions identified.				
Topic: **Inventory** **Day 2**	**Learning Goals & Objectives**	**Instructional Interactions**	**Facilitators**	**(hrs/mins)** Day 1: 6 hours Day 2: 2.5 hours	**Post Course Evaluation**	**Supporting Resources**
Housekeeping and Warmer	**Goal:** Wrap up any leftover questions from the day before, transition to new topic. **Objectives:** ● Answer lingering questions ● Verbalize key points from the day before.			15 minutes (transition to next)		
Solutions	**Goal:** Associates will be able to research and link insights to value that leads to our solutions.	**Insights: Building Value** Part 1		2 hours Insights Activity: ~ 1h		Learners will need their laptops for research

| | **Objectives:**
● Identify hurts at each level of the inventory workflow
● Speak to needed value using insights to highlight existing hurts in inventory
● Ask discovery question that unveil dealer hurts.
● Identify solutions that provide the needed value to mitigate hurts in inventory | In workbooks, write down the main inventory hurts for each area of the process/workflow.

Part 2
Find relevant insights to identify value needs that lead to our solutions. Go out to SalesLink to research on your own. Find one or two relevant insights for each solution and jot down.

Part 3
Next to each insight, write a short (1-3) sentence value statement around that insight. At this point, don't call out any specific solutions; just focus on the insights and value needs.

Example:
● **Hurt:** Ensuring pricing is updated with current rebates/incentives
● **Insight**: Dealers make 1-2 rebate errors per month. With an average rebate of $2000 dealers are losing on average $24,000 – $48,000 per month.
● **Value Need:** Manage rebates and incentives to protect gross by automatically identifying stackable incentives.

Ask for volunteers to share an insight and value statement.

Solutions | | Solutions activity:
~ 15m

Discovery:
~ 30m | | Dealer scenarios for role plays |

		Now that we have a good handle on what the main challenges are for dealers in inventory management and where they most need value added; let's explore the value we bring to dealers in helping them solve those challenges. Write down a solution that helps solve the hurts from the previous activity. List the key features of the solution that help resolve the hurt. **Discovery Role Play** Short scenarios will be provided to learners in their workbooks. In pairs, practice responding to common dealer objections with a question. If the dealer says x, what question can you ask? Avoid referring to the solution at this point, but what questions can ask to unveil hurts?				
Wrap up and Final Assessment	**Goal:** For associates to demonstrate the advancement of their understanding of inventory and how it relates to the rest of the dealership. **Objectives:** ● Demonstrate understanding of roles, responsibilities, and values. ● Demonstrate understanding of department challenges and ability to address them.			30m		

Draft – 12/13

Notes:

Throughout two day course, facilitator guide will be used to:
-Explain Activities
-Guide activities and brainstorms
-Provide blank spaces for definitions (students to fill in)
-Provide blank workflows for students to label.
-Provide blank pages for each section (things I want to remember)
-Provide a chart of products for each topic sub section, blank areas of chart (general definition, problems it solves, how it solves them) blank, to be filled by student.