

From Data Rich to Data Driven: Using the Enterprise Dashboard to Run Your Store



Your Monday Morning Outcome

By following this guide, you will have a ten-minute Monday morning habit built around six dashboard tabs and six management questions – so performance problems surface before month end and department conversations happen with data already in hand.

Before You Start



Pre-Implementation Checklist

✓ Dashboard access confirmed

Enterprise Dashboard access verified. Navigation: ARC → Enterprise Dashboard.

✓ One full month of posted data

Comparison Period requires a prior month baseline. At least one complete month of posted data must be in the system.

✓ Store count and brand mix known

Multi-rooftop and multi-franchise operators will use scope and brand filters differently than single-point stores.

✓ Baseline captured

How long does your current weekly performance review take? Note it. You will compare after 30 days.

✓ Calendar hold set

Block 10 minutes every Monday morning before your first meeting. Recurring. This is the habit.

Before You Start

Setting	Configuration
Comparison Period	Set to Prior Month for Monday mornings. Mid-month: rolling 30-day. Seasonal: same month last year.
Regions and Store	Scope control. All stores, a region, a brand group, or a single rooftop.
Include Projections	Toggle ON. Current month includes deals sold but not yet posted. Real-time view of where the month is headed.
Brands	Multi-franchise filter. Separate OEMs when comparing same-store performance.



STEP 01/04

Company Performance – Your Monday Morning Starting Point

Time: 10 minutes | **Navigation:** Enterprise Dashboard → Company Performance

Feature	What to Read
GP% (not gross dollars)	GP% removes volume noise. A store can pull back on deals and become more efficient. Read GP% first, always.
Department Breakdown	Color-coded variance cells. When one department moves harder than the rest, that is your first conversation.
12-Month Trending Grid	Two or more points moving three consecutive months is a pattern, not noise. Act on patterns.
Include Projections	Deals sold but not posted. The real version of where the month is headed.

CHECKPOINT

GP% read. Department with largest variance identified. Trending grid checked for patterns.

Operations – What Is Costing You Money Right Now

Time: 10 minutes | **Navigation:** Enterprise Dashboard → Operations

Widget	What to Read
Deals Not Posted	Revenue generated, not recognized. Your controller should know this number before Monday starts.
Contracts in Transit	Exposure: trade payoff, floorplan, and downstream all in holding pattern. Check lender distribution before calling.
Open ROs > 7 days	Not a service metric. Parts delay, capacity problem, or customer who has not heard from an advisor.

CHECKPOINT

Deals Not Posted count and CIT overdue count noted. Lender distribution reviewed. Three widgets, three calls, before the week starts.

Inventory Performance and Controllables – Cash and Gross

Time: 15 minutes | **Navigation:** Enterprise Dashboard → Inventory Performance | Controllables

Feature	What to Read
Aged Percentage (not unit count)	Tells you how exposed you are. \$45,000 unit at 6% floor plan = ~\$225/month carrying cost. Multiply across aged count.
New vs. Used Toggle	New aging = allocation/demand. Used aging = pricing/reconditioning. Different owners, different fixes.
Controllables KPI Cards	Find the card with the largest variance. Check 13-month Summary table: one bad month = data point. Two+ months = pattern.
Structural vs. One-Time	Company Performance told you a problem exists. Controllables tells you where it lives and whether it is structural.

CHECKPOINT

Aged percentage noted. Used view checked. KPI card with largest variance identified and Summary table reviewed for persistence.

Accounts Receivable, Leaderboards, and Spotter

Time: 15 min | **Navigation:** Enterprise Dashboard → AR | Leaderboards | Spotter

Feature	What to Read
At Risk Balance	60-day preview of what Overdue looks like if nothing changes. OEM: 90-day clock. Wholesale: 15-day clock. Rebates: hard deadlines.
CIT Cascade	One deal in CIT = trade payoff delayed, title delayed, wholesale buyer delayed. Three problems on two tabs.
Leaderboards	Coaching timing tool. Anyone trending down two periods gets 20 minutes before Friday. Ask what changed first.
Spotter	When a tab flags a number, ask Spotter why. Plain language. No separate report. The meeting becomes a decision conversation.

CHECKPOINT

At Risk balance noted. Coaching conversation identified. One Spotter query practiced.

Measure Your Results



Report	Navigation	What to Look For
Company Performance	Enterprise Dashboard → Tab 1	GP% direction. Department driving variance. Trending grid patterns.
Operations	Enterprise Dashboard → Tab 2	Deals Not Posted count. CIT overdue. Open ROs > 7 days.
Inventory Performance	Enterprise Dashboard → Tab 3	Aged percentage. Turn rate vs. NADA benchmarks (47 days new, 45-60 used).

Best Practices



✓ **Block 10 minutes every Monday. Non-negotiable.**

Six tabs. Six questions. Before your first meeting. The habit is the implementation.

✓ **Bring the Spotter answer to the meeting, not the question**

The meeting becomes a decision conversation instead of a discovery conversation.

✓ **Always read GP%, not gross dollars**

GP% removes the volume noise. It separates the efficiency story from the volume story.

Common Pitfalls



What You See	Likely Cause	Fix
Dashboard is open but no action taken	Browsing without a question. No framework.	Use the six-tab framework. Every tab has one question. Ask it, answer it, move on.
Month-end surprise on GP	Data was visible every Monday but nobody acted	Use action triggers: GP% moved > 1 point = conversation before noon.
Wrong conversation with department head	Read gross dollars instead of GP%	Always read GP% first. A store pulling back on volume is a different story than a margin problem.



Role	Responsibility
Dealer Principal / GM	Owens the Monday morning habit. Reviews all six tabs. Initiates department conversations.
Controller	Monitors Company Performance (GP%), Operations (Deals Not Posted, CIT), and Accounts Receivable.
Sales Manager	Responds to Inventory Performance flags and Leaderboard coaching triggers.
Service Manager	Responds to Operations (Open ROs) and AR (OEM warranty submission status).