

Dealer / GM's Version

Terms and Definitions

5 levels of leadership:

1. Position – I have a title and that's why they follow me
2. Permission – I have a relationship and they choose to follow me
3. Production – I have increased their production and that's why they follow me
4. People development – I have made them a better person/employee that's why they follow me
5. Pinnacle – I have developed them to be a leader and that's why they follow me

4 skills of department manager / leader:

- Tasks & Job duties – ability to perform the specific responsibilities and duties of the department
- Communication – ability to adapt & communicate with the personality or style of any employee
- Mindset – ability to stay focused, organized, motivated and maintains goals with a good attitude
- Training & development – ability to train, hold accountable and develop their team members

5 phases of life focus:

1. Physiological – food, shelter, paying bills, transportation
2. Psychological – protection, security, stability, savings, peace or mind
3. Relational – affection, love, belongingness, happiness at home
4. Personal – self-esteem, freedom, prestige, confidence
5. Peak experiential – self-fulfillment, personal growth, optimizing potential

6 core needs:

- Certainty – they need structure, consistency, organization and clear expectations
- Variety – they need change, creativity, freedom, and like uncertainty
- Community – they need to feel like they are part of something bigger, a team and group
- Significance – they need to feel separate, special, like attention, and want to receive praise
- Contribution – they need to give, share, teach, and coach others
- Growth – they need to improve, grow, and want to see an opportunity for advancement

5 languages of appreciation:

- Words of encouragement – constant praise; both public and private declarations of value
- Quality time – spending time one on one; in and out of work situations
- Tangible gifts – token gestures; ranging from tickets, to trophies to a can of Red Bull
- Acts of service – assisting with a project, assignment or completion of tasks
- Touch – acknowledgement through high fives, hand-shakes, and pats on the back

Management's version

Terms and Definitions

5 levels of leadership (in order of lowest to highest level of influence)

1. Position – They have a title and that's why I follow them
2. Permission – They have a relationship with me and that's why I choose to follow them
3. Production – They have increased my production and that's why I follow them
4. People development – They have made me a better person/employee that's I follow them
5. Pinnacle – They have developed me to be a leader and that's I follow them

4 skills of department manager / leader:

- Tasks & Job duties – ability to perform the specific responsibilities and duties of the department
- Communication – ability to adapt & communicate with the personality or style of any employee
- Mindset – ability to stay focused, organized, motivated and maintains goals with a good attitude
- Training & development – ability to train, hold accountable and develop their team members

5 phases of life focus (in order of lowest to highest level of importance)

1. Physiological – food, shelter, paying bills, transportation
2. Psychological – protection, security, stability, savings, peace or mind
3. Relational – affection, love, belongingness, happiness at home
4. Personal – self-esteem, freedom, prestige, confidence
5. Peak experiential – self-fulfillment, personal growth, optimizing potential

6 core needs (in no particular order)

- Certainty – they need structure, consistency, organization and clear expectations
- Variety – they need change, creativity, freedom, and like uncertainty
- Community – they need to feel like they are part of something bigger, a team and group
- Significance – they need to feel separate, special, like attention, and want to receive praise
- Contribution – they need to give, share, teach, and coach others
- Growth – they need to improve, grow, and want to see an opportunity for advancement

5 languages of appreciation (in no particular order)

- Words of encouragement – constant praise; both public and private declarations of value
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- Touch – acknowledgement through high fives, hand-shakes, and pats on the back

Dealer / GM's Version

Name: _____ Years of experience: _____ Time with company: _____

1. Current level of leadership I have with **this** team leader: _____ (pick a number 1-5)
2. Their #1 dominant skill: _____ (pick their strongest skill from the list)
3. Their 2nd best developed: _____ (pick their 2nd strongest skill from the list)
4. Primary phase of focus: _____ (select the phase they are most focused on)
5. Their top 2 core needs: _____ & _____ (select 2 of the 6)
6. Their top 2 languages of appreciation: _____ & _____ (select 2 of the 5)
7. Last year's average income: \$ _____ / month average & \$ _____ / total last year
8. Highest ever earned income: \$ _____ / in a month, \$ _____ / in a year (ever)
9. Minimum income to meet their basic bills: \$ _____ / month (to cover their lifestyle)
10. Income goal range for the year: Minimum desired \$ _____ up to \$ _____
11. Primary wish/goal for this year to achieve/accomplish/acquire: _____

Process, Performance, Personality, Production & Profitability Rating

1. On a scale of 1 – 10 how well do they **understand** their department job duties & tasks: _____
 2. On a scale of 1 – 10 how well do they **perform** the daily duties & tasks required of them: _____
 3. On a scale of 1 – 10 how well does their **personality** contribute to the culture: _____
 4. On a scale of 1 – 10 how well does their department's **production** contribute to the store: _____
 5. On a scale of 1 – 10 how well do they maximize the **profitability** of their department: _____
 6. On a scale of 1 – 10 how well & often do they **communicate** with their team members: _____
 7. On a scale of 1 – 10 how well do they maximize their team through **training** and **coaching**: _____
 8. On a scale of 1 – 10 how well & often do they perform **recruiting** and on-**boarding**: _____
 9. On a scale of 1 – 10 how well do they **track, follow up** with, **measure & monitor** their goals: _____
 10. On a scale of 1 – 10 how well do they **handle** stressful employee or customer situations: _____
- Total the score of each category and create an action plan based on the total score:** _____

86+ = look for ways to give a raise or recognition
71-85 = look for ways to encourage them
61-70 = provide more training
51-60 = provide accountability
50 or less = consider replacing

Management's version

Name: _____ Years of experience: _____ Time with company: _____

1. Current level of leadership I have with my Dealer / GM: _____ (pick a number 1-5)
2. My #1 dominant skill: _____ (pick my strongest skill from the list)
3. My 2nd best developed: _____ (pick my 2nd strongest skill from the list)
4. Primary phase of focus: _____ (select the phase I am most focused on)
5. My top 2 core needs: _____ & _____ (select 2 of the 6)
6. My top 2 languages of appreciation: _____ & _____ (select 2 of the 5)
7. Last year's average income: \$ _____ / month average & \$ _____ / total last year
8. Highest I have ever earned income: \$ _____ / in a month, \$ _____ / in a year (ever)
9. Minimum income to meet my basic bills: \$ _____ / month (to cover my lifestyle)
10. Income goal range for the year: Minimum desired \$ _____ up to \$ _____
11. Primary wish/goal for this year to achieve/accomplish/acquire: _____

Process, Performance, Personality, Production & Profitability Rating

11. On a scale of 1 – 10 how well do I **understand** my department job duties & tasks: _____
 12. On a scale of 1 – 10 how well do I **perform** the daily duties & tasks required of me: _____
 13. On a scale of 1 – 10 how well does my **personality** contribute to the store's culture: _____
 14. On a scale of 1 – 10 how well does my department's **production** contribute to the store: _____
 15. On a scale of 1 – 10 how well do I maximize the **profitability** of my department: _____
 16. On a scale of 1 – 10 how well & often do I **communicate** with my members: _____
 17. On a scale of 1 – 10 how well do I maximize my team through **training** and **coaching**: _____
 18. On a scale of 1 – 10 how well & often do I perform **recruiting** and **on-boarding**: _____
 19. On a scale of 1 – 10 how well do I **track, follow up** with, **measure** & **monitor** my goals: _____
 20. On a scale of 1 – 10 how well do I **handle** stressful employee or customer situations: _____
- Total the score of each category and create an action plan based on the total score:** _____

86+ = ask for opportunities to get a raise or promotion

71-85 = look for ways to get encouragement feedback

61-70 = ask for more training and support

51-60 = ask for increased accountability

50 or less = consider finding a new role or job

Dealer / GM's Version

Action plan and Goal setting / tracking

Name: _____ Date: ____/____/____ Leader: _____

Area of opportunity: _____

Specific goal: _____

Why this goal is important to them: _____

Who is directly involved: 1: _____ 2: _____

3: _____ 4: _____

Indirectly involved: 1: _____ 2: _____

3: _____ 4: _____

When will they accomplish the phases by:

1: _____ by ____/____/____

2: _____ by ____/____/____

3: _____ by ____/____/____

4: _____ by ____/____/____

How will they accomplish this goal:

Signed by: _____ - Leader

Signed by: _____ - Salesperson

Management's version

Action plan and Goal setting / tracking

Name: _____ Date: ____/____/____ Leader: _____

Area of opportunity: _____

Specific goal: _____

Why this goal is important to me: _____

Who is directly involved: 1: _____ 2: _____

3: _____ 4: _____

Indirectly involved: 1: _____ 2: _____

3: _____ 4: _____

When will I accomplish the phases by:

1: _____ by ____/____/____

2: _____ by ____/____/____

3: _____ by ____/____/____

4: _____ by ____/____/____

How will I accomplish this goal:

Signed by: _____ - Leader

Signed by: _____ - Salesperson