30-DAY PERFORMANCE DIAGNOSTIC

Findings and action plan

Two-location dealership group | Used-vehicle operations | Review: 30 Sep 2026

Illustrative report. All figures and findings are fictional.

THE OPERATING PICTURE

180

Retail deliveries

192 in the prior 90 days; down 6.3%.

$36,000

Advertising spend

$30,000 in the prior period; up 20%.

68 / 240

Vehicles over 90 days old

28.3% of stock at the review date.

MANAGEMENT PRIORITY

Act on confirmed execution gaps while reconciling the sales baseline.

Store B holds 74% of the group's aged units despite carrying half its stock. Four active promotions direct customers to unavailable vehicles or offers. Address these conditions now, while reconciling sales records and verifying opportunity follow-up. The review does not establish the cause of the sales decline or support a broad advertising increase.

THREE DECISIONS TO TAKE FORWARD

01 **Correct the active promotions within two days.** Repair the four affected offers or destinations and introduce a recurring availability check.

02 **Focus inventory action at Store B.** Assign an owner, approved next step, and date to all 68 aged units within seven days, starting with its 50 units.

03 **Resolve the reporting and follow-up exceptions in parallel.** Reconcile the sales counts within seven days and verify the 26 opportunity exceptions within five.

Review basis: Sales and spend: 3 Jul–30 Sep 2026 versus 4 Apr–2 Jul 2026, both 90 days. Stock and active promotions: 30 Sep. Review samples: 30 aged vehicles and 80 open opportunities; selection is documented on page 4. Unit economics and conversion validation remain open. No revenue uplift is forecast.

EVIDENCE AND IMPLICATIONS

Confirmed findings

What the records establish, the decision each finding supports, and what remains uncertain.

F-01

Inventory exposure is concentrated at Store B.

Confirmed | High confidence | Inventory + operations | E01, E02

Evidence: Store A has 18 of 120 vehicles over 90 days old (15.0%); Store B has 50 of 120 (41.7%). Of 30 selected aged units, 19 lack a documented pricing or merchandising review in the previous 14 days.

Decision: Start with Store B. Rank the aged units by exposure, validate landed cost and current comparables, and choose a unit-level action: improve presentation, reprice, transfer, or exit.

Limit: The selected sample does not establish overall review compliance. Stock mix, demand, and vehicle economics need validation.

F-02

Four active promotions lead to unavailable inventory.

Confirmed | High confidence | Marketing + customer journey | E03

Evidence: All 10 active paid promotions were checked. Four link to a sold vehicle or an offer with no eligible stock available on the review date.

Decision: Correct the affected destinations and offers. Require an inventory and offer check before launch, then review active campaigns weekly against availability and the agreed retail priorities.

Limit: The destination mismatch is confirmed. Its effect on inquiries, sales, and total advertising performance has not been measured.

F-03

Follow-up ownership is not consistently visible.

Confirmed | High confidence | Sales execution + CRM | E04

Evidence: Of the 80 oldest open opportunities reviewed, 26 lack a named owner and/or a dated next action: eight of 40 at Store A and 18 of 40 at Store B.

Decision: Managers verify the records against contact history, resolve ownership, and schedule the next appropriate action. Review exceptions in the existing sales meeting.

Limit: This is a targeted record review. Verify contact history before inferring that follow-up did not occur or generalizing to the full pipeline.

F-04

The CRM win count includes pending deliveries and duplicates.

Confirmed | High confidence | Measurement and reporting | E05, E06

Evidence: The same 90-day window contains 194 CRM records marked won and 180 delivered retail vehicles. The 14-record difference includes nine scheduled deliveries, three duplicates, and two unresolved records.

Decision: Finance and sales reconcile by deal identifier and delivery date. Publish separate measures for orders, delivered sales, and cancellations, with a named reporting owner.

Limit: Two records remain unresolved. Conversion and cost-per-sale conclusions stay provisional until the counts and attribution basis agree.

OWNERSHIP AND FOLLOW-THROUGH

The first 30 days

Timing starts after the findings review. Leadership confirms owners, capacity, and calendar dates.

WHEN	ACCOUNTABLE OWNER	REQUIRED ACTION	EVIDENCE OF COMPLETION
Days 1–2	**Marketing manager** **F-02**	Correct the four affected offers or destinations. Assign an availability check and review date to each active promotion.	All 10 destinations verified against eligible stock. Recheck weekly and before each launch.
Days 1–7	**Controller** **F-04**	Explain all 14 record differences, including the two unresolved cases. Approve separate rules for orders and delivered sales.	A signed reconciliation and agreed delivery baseline. Each difference has a documented disposition.
Days 1–7	**Inventory manager** **F-01**	Assign an owner, approved next step, and review date to all 68 aged units. Start with Store B and validate unit economics.	68 of 68 units have an action and owner. Price, transfer, and exit decisions require financial approval.
Days 1–5	**Store sales managers** **F-03**	Verify all 26 opportunity exceptions against contact history. Assign ownership and a dated next action, or substantiate closure.	26 of 26 exceptions reviewed and resolved or assigned. Retain the evidence behind each disposition.

WEEKLY MANAGEMENT REVIEW

The general manager chairs a 30-minute review of completed actions, overdue decisions, and unresolved inputs. Track the starting 68-unit aged cohort separately from new vehicles crossing 90 days, by store. Review actual sales and realized gross alongside campaign availability and opportunity exceptions.

DAY 30 / THE NEXT DECISION

Repeat the same 80-record opportunity selection and check every active promotion. Compare recurring exceptions, remaining aged units, new aged-stock inflow, sales pace, and realized gross. If actions are complete but these measures show no improvement, revisit demand, stock mix, pricing, and sales execution before adding spend.

A limited advertising test requires available eligible stock, validated conversion definitions, and agreed margin and measurement rules. Record its spend cap, owner, stop date, and success criterion before launch. Improved records alone do not justify a budget increase.

SUPPORTING RECORDS

Evidence and validation

Record coverage, outstanding checks, and how they affect the next management decision.

EVIDENCE REGISTER

E01	**Inventory snapshot**	240 in-stock used vehicles across two stores on 30 Sep 2026.
E02	**Review and activity log**	15 oldest aged units per store; activity checked for 17–30 Sep.
E03	**Promotion review**	All 10 active paid promotions; destination and stock check on 30 Sep.
E04	**Open-opportunity export**	40 oldest open records per store as of 30 Sep; 80 records total.
E05	**CRM wins export**	194 won records for 3 Jul–30 Sep, checked against delivery IDs.
E06	**Retail delivery register**	180 deliveries versus 192; excludes wholesale and unwound deals.
E07	**Advertising invoice ledger**	$36,000 versus $30,000 for the two 90-day windows on page 1.

DATA GAPS / VALIDATION NEEDED

Complete these checks alongside the immediate actions. They constrain pricing and spending decisions; they do not prevent correction of the confirmed promotion and record defects.

V-01 **Validate conversion definitions** | Needs follow-up

Owner: Marketing manager and controller. **Due:** Day 7.
Event definitions, successful-submission tests, and matched lead receipts were outside the reviewed inputs. Test live conversion actions and reconcile them to accepted CRM inquiries. Keep campaign conversions and accepted leads separate until the definitions and counts agree.

V-02 **Approve unit-level economics** | Needs follow-up

Owner: Inventory manager and controller. **Due:** Day 7.
Unit-level costs, margin requirements, and current market comparables were not available in the review. Add them to the vehicle action register. Approve repricing, transfer, or exit against each unit's economics; record blocked decisions and the information needed to release them.

Working handoff: assessment, reconciled baseline, vehicle action register, campaign check log, opportunity exception list, and review calendar. Supporting worksheets are outside this excerpt.