



REQUIREMENTS & GUIDELINES

- ☐ Work 5 days per week (50-55 hours per week once your area stabilizes). Need to work weekends if not performing on weekends (80%+ of stores meeting spread objectives, staffing objectives). Needs of the business dictate calendar planning.
- ☐ Block out key personal commitments first (birthdays, anniversaries, children's events, important personal events, etc.).
- ☐ Plan for 2 site visits daily, grouping them by geography to save drive time. Consistent use of the AD site visit tool.
- ☐ Ensure schedules are added to "Working Locations" in Google Calendar to keep everyone in sync.
- ☐ Review reports each morning ahead of scheduled visits (Tableau, JazzHR, pipelining, Maintain X, KPIs, etc.) Ensure a "Know Before You Go" awareness of the businesses you are visiting.
- ☐ Mix up your days with a combination of morning and afternoon visits, openings and closings, & weekends.
- ☐ Allow for flexibility by scheduling 80% of your time and leaving 20% open. Use open flex time for follow-up on outstanding issues.
- ☐ Plan time for unannounced visits to experience real customer interactions and address unexpected issues.
- ☐ Block out 1 full day per week for business development requirements (as directed by your RD). This time can also be split into two ½ days. Be sure to plan for schedule reviews & monthly business review.
- ☐ Always have at least a 1-month calendar planned in advance, complete with locations identified where possible for visit scheduling. Note which multi-unit manager (AD, RD, RVP) will attend. Focus on your pipeline. Visit people as a priority not sites.
- ☐ Respond to emails within 24 hours & if no response after 24 hours, send follow-up email. If still no reply, call to address. Escalate when necessary.
- ☐ Schedule conference calls only when necessary, ensuring an agenda is approved beforehand.

AD CALENDAR PLANNING

This is a guide to intentionally manage our time. The goal is to create space for what matters most: developing our people & strengthening our teams every single week.

1

BUILD & RETAIN A BENCH OF "A-LEVEL" LEADERS

DAILY

- JazzHR - Review three times daily & communicate with all candidates
- 2 day - 2 week - 2 month check ins with all new hires
- Shoulder to shoulder team development time

WEEKLY

- Update the Pipeline Planning Tool
- Partner with the Recruiter for job posting updates
- Conduct a minimum of 4 interviews per week
- Conduct final interviews with a peer before offering a position

MONTHLY

- Lead an area meeting to discuss performance and bench/succession plans.
- Revisit and revise SMART goals for each GM and SM.

QUARTERLY

- Conduct quarterly performance discussions and any annual reviews.

ONGOING

- Develop managers, recruiting, candidate screens and interviews

2

PROTECT TRAINING SYSTEMS & VALIDATE TRAINING

ONGOING

- Cascade all training needs (scheduling, staffing, systems, KPIs) and new initiatives.
- Maintain operational standards. (Open/Close checklists, Manager & AD Site visits)
- Perform onboarding, training, and development. All trainings are completed within timelines.
- Conduct progressive validations to completion and promotion readiness for all SL, SM, & GMs.
- Roughly 30-40% of time per week spent developing GMs/SMs through site visits and 1:1s

3

VALIDATE OPERATIONAL STANDARDS & SYSTEMS

DAILY

- Check MaintainX for each site as you start each day
- Perform AD Site Visit at each site to validate operational standards and recognize progress.
- Review previous visit reports to ensure progress.
- Follow up on leadership summaries, checklists, etc.

WEEKLY

- MaintainX - ticket coordination.
- Reduce aging tickets by partnership with techs/lead techs. Escalate concerns where needed.

MONTHLY

- Ensure GMs are completing safety audits at least once per month

QUARTERLY

- Perform Preventative Maintenance Walks with facilities teammate.
- Develop an action plan and follow up within the quarter.

4

ENSURE A 5 STAR CUSTOMER & EMPLOYEE EXPERIENCE

DAILY

- Perform a daily business review by reviewing Leadership Summaries & Tableau.
- Call 2 to 3 locations daily to recognize positive results & coach the team to impact the day.
- Follow up on missing time punches and make necessary corrections.

WEEKLY

- Validate and adjust Sales Forecasts, Manager Schedules, Skills/Availability.
- Perform schedule reviews of the coming week and previous week.
- Ensure each schedule is posted in a timely manner.

QUARTERLY

- Validate Training Initiatives

5

ACHIEVE BUDGETED REVENUE & E.B.I.T.D.A. GOALS

WEEKLY

- Perform business review on Mondays (or another day if directed by your RD).
- Perform end-of-week review, and examine if goals were met.

MONTHLY

- Perform Monthly Business Review (MBR) with your RD and each GM, reviewing the previous month and agreeing on an action plan and SMART goals to move forward.

ONGOING

- Support marketing and promotion execution.
- Plan and support new openings.

DAILY TASKS

Complete these tasks each morning to stay on top of your area's performance.

DAILY METRICS REVIEW

- ☐ Check daily revenue vs. forecast
- ☐ Review car counts by location
- ☐ Verify ARM upsell performance
- ☐ Check membership sales/cancellations

LOCATION CALLS

- ☐ Conduct Morning Hit Calls & follow up with Call 2-3 locations
- ☐ GM/SM touchpoints
- ☐ Follow up on yesterday's issues

TIME & ATTENDANCE

- ☐ Review time punch exceptions
- ☐ Check overtime alerts
- ☐ Verify schedule compliance
- ☐ Active Employees
- ☐ OT Tracker

OPERATIONS CHECK

- ☐ Review open MaintainX tickets
- ☐ Check Operations Alerts
- ☐ Address any safety issues
- ☐ Vehicle Incident Report Review
- ☐ Review Over/Shorts

PIPELINE & TEAM

- ☐ Check trainee progress
- ☐ JazzHR Interview follow-ups 3x daily
- ☐ Address retention concerns
- ☐ Review DIP Requests

METRICS FOCUS

- ☐ Monitor Conversion Rate Trends & Spread
- ☐ Check Google review responses
- ☐ Review labor efficiency (CPLH)
- ☐ Fleet Performance and Site Initiatives

HOW TO SPEND YOUR BUSINESS DEVELOPMENT DAY

These times are estimates and should not replace your own judgement.

Jazz HR/ Recruiting (1 - 2 Hrs)

- Review all open posts.
- Determine if we need to add, remove or boost any posts
- Complete any Staffing needs request forms based on your findings
- Review any candidates for posts in which you are the hiring manager
- Conduct phone interviews/ schedule in persons with potential hires
- Conduct video interviews to support your team's hiring needs

Customer Incidents (30 Min)

- Review any non resolved claims for your stores
 - Are we contacting customers in a timely manner?
 - Do any locations stand out?

Deputy Scheduling (1 Hr)

- Review trends and weather forecast to determine if any adjustments need to be made to currently posted schedule
- Review and publish schedule 2 weeks out or reply to management with recommended changes
- Review performance vs current labor % budget MTD & scheduled vs actual reporting
- Communicate with outlier sites

AD Calendar Planning (30 Min)

- Review created schedule for any adjustments that need to be made based on recent performance or market needs
- Create your schedule for 3-4 weeks out from the current date

Maintain X (30 Min - 1 Hr)

- Review open tickets for all your sites
 - Looking for traction on repairs and when the last update was given
 - Are there any tickets that operations are capable of solving themselves?
- Create your Top 5 Hotlist to communicate to the Facilities Lead
- Are there any current Capex projects for your stores that need updates

Pipeline Planning & Training (2 Hr)

- Identify any new GM or SM openings & update planning pipeline tool
- TalentLMS review
- Update individual stores with any new relevant information
- Discuss hiring needs with the team
- Review Site Terminations
- Development Tracker Review
 - Was there progress made since last week?
 - Any new or time sensitive training that needs to be completed?
- Monthly Safety Training Videos
 - How are stores progressing towards the month end deadline?
- PIP or PDP Review
 - Review progress on any active PDP vs PIP
 - Prepare notes for weekly catch up meetings
- SMART Goals
 - Review progress on SMART goals created for management

Form/Process Completion (1 Hr)

- Opening and Closing Checklists
- Preventative Maintenance
- Manager Site Standards
- Safety Walks
- Deposits (if applicable)
- Divvy Transactions
- Lightyear Invoices
- Incompletes for AD and Sites
- Mile IQ-AD Review

Financial Performance (1 Hr)

- Review Tableau for performance data
 - Any trends to recognize?
 - Outlying stores on Key Metrics
- Fleet Sales
- Promo Performance
- Upcoming On-Demand Opportunities
- Confirm Fleet Payments / RD Dashboard

RD Dashboard (30 Min)

- Check Ops Alerts Tab
 - Wash Qualities
 - PM Checklists
 - AD Site Visit Routine Last Completed
 - Safety Walks
 - Tool Audit
 - AD Site Visits
 - Manager Site Standards
 - Closing/Opening
- Forms Completion Tab
 - Closing/ Opening checklists