

ACCOUNTANTS PROGRAMME		TECHNICAL			SELF DEVELOPMENT		MANAGEMENT		GREAT FINANCE LEADER		
Quarter	Month	Section of pendcheck/ work based learning	P&P/work based tasks	Active Training	Online/reading	Active Training	Work based	Active Training	Objective	Work based	Active training
1	May					Launch of Evoution Programme					
	June				"How to win friends and influence people" book	Developing Myself - Dale Carnegie					
	July	Cash & Bank	I	Kerridge for Accountants			Prepare a delegation plan for an element of your current role and execute this.				
2	Aug	Fixed Assets	Fixed asset and capex policy			"Raving Fans" book		As above (this will free your time to invest in the other elements of the evolution programme)		Understand Sales: know the steps in the Vertu Vehicle sales process and why these are important. Understand the importance of the showroom diary, appointments and opportunities to do business, understand ideal stock mix and impact of pricing. (Note F&I elements covered later in the course)	Assist in the dealership on a minimum of two weekend days following your active training - one to include the October event weekend
	Sep	Prepayments					As above				
	Oct	Accruals					As above				
3	Nov	Purchase ledger	Self audit of fuel process (IA) and payment process (IA)	Service Kerridge	"The one Minute Manager" book		As above		Understand Aftersales: know the D-1, VHC, workshop loading and R-Plan tools and why these drive performance in your dealership. Understand the importance of service plan and data capture on customer retention in your sites.	Work with DAD to ensure elements of aftersales are understood.	Active Parts Operations
	Dec	Debtors (sales ledger)	Debtor policy/ opening credit accounts								
	Jan	Debtors (F&I and bonus debt)	Annual credit limit review								
4	Feb	Parts and Labour Adjustments	Attend parts stock check						Understand F&I: Understand the products the Group sells, understand the key drivers of F&I performance and 'what to watch for' understand the Group's FCA process	Review service performance in your dealership and identify 1 area for improvement and present your findings to the Service Manager. Review a mystery shop video with the sales management team.	Business Manager Skills (short version for evolution) 2 days (week 3 March)
	Mar	VAT - (year end accounts focus)	Review vehicle admin and stock policies, Conduct a Vehicle admin audit with VS consultant			Pass FCA product knowledge tests on Litmus Heros					
	Apr	Used Vehicles (stock reconciliation)	Carry out month end vehicle stock check								

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5	May	Used Vehicles (profit reconciliation)		Basic Vehicle Admin	"Double your profits" book					Review F&I performance in your dealership and identify 1 area of improvement to target - present your findings to the BM/SM	
	Jun	New Vehicles	Demonstrate an understanding of the vehicle stocking and bonus arrangements and targets applicable to your franchise.				Work with a member of the dealership finance team to develop a personal development plan for that individual for the next 6 months	Developing my Team (Dale Carnegie)			
	Jul	Manufacturers bonus									
6	Aug	Completion of H1 Tax pack	Demonstrate and understanding of the reason for the requirement for analysis of certain costs as tax sensitive items		"A dealers guide to recovery and to Growth" Book				Understand Central Functions: Understand the key central functions such as Marketing, VVS, BDC, and other Vertu House Operations and how these impact on the dealership activities and profitability.		
	Sep	Completion of dealership estimate submission					Assess the progress on the personal development plan and use your coaching techniques to ensure that objectives are met.				Visit to Vertu House (Managers induction days 2/3) - where space within this quarter
	Oct	Payroll section	Understand the bonus and commission structures in operation and complete payroll submissions	Finance for non financial managers							HR module - To be Developed
7	Nov	Budget (including attendance at budget review meeting)	Understand the budget instructions and model and assist in the population of information into the budget model. As a min complete the depreciation and capex sections and review expenses for savings.	Presentation skills						Prepare a summary of the budget assumptions applied in each department and highlight the key barriers to the achievement of the plan in your dealership	
	Dec	Completion of dealership 15 day forecast and finalisation of accounts	Importance of forecast meeting to assess progress and use of data for completion of forecast.				Deliver the dealership team brief for the month				
	Jan	Prepare for and present at the dealership operations review	Expense analysis, comparison to composite and other dealerships	Attend Accountants Conference (end of Evolution programme)							
		Complete all required elements of the section, if already have experience of completion, coach can approve omission	Review and demonstrate understanding of policy to coach, review operation of process in dealership to confirm compliance. Work with Internal Audit team on areas where audits are in place (IA)	Demonstrate an understanding of the key elements of Kerridge required.							