PROFITEDGE WORKSHEET · OPERATIONS

New Line Readiness Worksheet

An equipment line brings four departments with it. Settle who owns each one, how it's set up and what gets measured before the first season, or use this to look back at a season that didn't go to plan.

Line or brand _____ **First season** _____

Completed by _____ **Date** _____

1 The four departments

Each one needs its own setup, its own measure and someone responsible for it.

Machines

BRINGS PEOPLE IN

- ☐ Manufacturer's pricing rules understood and on file
- ☐ Floorplan terms and due dates on file
- ☐ Setup and delivery steps written down
- ☐ Who can approve a discount, and how much

Measure: margin per unit after setup, delivery and discount

Owner _____

Reviewed how often _____

Parts

WHERE THE MARGIN IS

- ☐ Stocking list decided: which numbers, how many
- ☐ Who decides what gets added to stock
- ☐ Markup rules written for parts, not the store's
- ☐ What happens to special orders nobody picks up

Measure: parts margin, and stock with no sale in a year

Owner _____

Reviewed how often _____

Service

SELLING LABOR

- ☐ Cost of a technician hour worked out
- ☐ Labor rate set from your own costs
- ☐ Who decides which job goes next
- ☐ Parts for common jobs kept in stock

Measure: hours billed against hours paid; jobs waiting and why

Owner _____

Reviewed how often _____

Warranty

MONEY THAT EXPIRES

- ☐ Someone owns claims, co-op and rebates
- ☐ Claim rules and deadlines on file
- ☐ Rejected claims get resubmitted
- ☐ Money owed is recorded when it's earned

Measure: claims filed, paid, rejected and still open

Owner _____

Reviewed how often _____

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2 Can each department be measured on its own?

Blended into a store-wide margin, an equipment department can underperform for years without anything looking wrong.

DEPARTMENT	SEPARATE SALES AND COST IN THE SYSTEM?	WHO REVIEWS IT	HOW OFTEN
Machines	☐ Yes ☐ Not yet		
Parts	☐ Yes ☐ Not yet		
Service	☐ Yes ☐ Not yet		
Warranty	☐ Yes ☐ Not yet		

3 Questions to settle before the first season

QUESTION	YOUR ANSWER
Who owns buying, parts pricing, warranty claims and how the department performs?	
How will purchasing, receiving, parts, service and the sales floor work together on one job?	
Setup: can each department be measured on its own, not lost in the store total?	
Review: which numbers get looked at, by whom, and how often?	

4 Already carrying the line?

The same questions apply. Answer them with last season's numbers.

WHAT WENT WRONG LAST SEASON	WHICH DEPARTMENT	WHAT TO CHANGE	OWNER

The cheapest time to set it up properly is before the first season. The next cheapest is now.

WANT A SECOND SET OF EYES?

Start a conversation at profitedgesystems.com about setting up an equipment line.

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