

# Proven knowledge that drives results.

## Ally Training Catalog

**ally** do it right.



# Helping you drive your bottom line drives us.

At Ally Academy, the difference is in the details and our unwavering commitment to helping you power your performance. We're dedicated to understanding your unique needs and delivering a custom-tailored training solution to help you drive the results you desire.

From on-demand, to virtual, to in-dealership and off-site classes, we offer a full range of learning opportunities and subjects for every level of your operation. We invite you to browse this catalog of course options and let us help train your team, so you can take care of your business.

For more information, contact your Ally Account Executive, email [allyacademy@ally.com](mailto:allyacademy@ally.com) or visit [allyacademy.com](http://allyacademy.com).

**ally** do it right.

ALLY ACADEMY

## Our training courses.

### TABLE OF CONTENTS

#### COMPLIANCE & RISK AWARENESS:

FRAUD AWARENESS ● ● P. 4

LEGAL AWARENESS WITH ECOA CERTIFICATION ● ● P. 4

#### F&I:

CUSTOMIZED F&I MANAGEMENT ● P. 6

F&I FOUNDATIONS ● ● ● P. 6

F&I MANAGEMENT 2-DAY ● ● P. 6

F&I MANAGEMENT 3-DAY VIRTUAL ● P. 6

UNDERSTANDING THE UNDERWRITERS' SIDE ● ● ● P. 7

#### FIXED OPERATIONS:

SERVICE DRIVE CONSULTATION ● P. 9

SERVICE MANAGEMENT TRAINING ● ● ● P. 9

FINANCIAL STATEMENT ANALYSIS ● ● P. 9

WARRANTY REIMBURSEMENT REVIEW ● ● P. 10

WARRANTY CONSULTATION ● ● P. 10

#### DEALERSHIP MANAGEMENT:

DEALER EXPERTISE ASSESSMENT ● ● P. 12

EXPENSE MANAGEMENT ● ● P. 12

MANAGING FIXED OPERATIONS (MFO) ● ● ● P. 12

MANAGING RETAIL OPERATIONS (MRO) ● ● ● P. 12

#### LEADERSHIP:

5 DYSFUNCTIONS OF A TEAM ● ● P. 14

CRUCIAL CONVERSATIONS ● ● P. 14

EMOTIONAL INTELLIGENCE™ - TALENTSMART ● ● P. 14

SITUATIONAL LEADERSHIP II® ● ● P. 15

#### SALES TRAINING:

A-Z CORE ELEMENTS (ACE) ● ● P. 17

A-Z SALES PROCESS – ALPHA TO OMEGA SEMINAR ● ● P. 17

ADAPTABLE SALES PROCESS (ASP) ● ● P. 17

BUSINESS DEVELOPMENT CENTER (BDC) TRAINING ● ● P. 17

EYE ON SMARTLEASE® WEBINAR ● P. 18

LEASING ESSENTIALS ● ● ● P. 18

LOCATION: ● IN-DEALERSHIP ● OFF-SITE ● ON-DEMAND ● VIRTUAL

# Compliance & risk awareness.



## Fraud awareness.

IN-DEALERSHIP, VIRTUAL | 3 HOURS

DEALERSHIP ROLE: Salespeople, Sales/Desk Managers, Internet Sales Managers, Finance Managers, Finance Directors, GM's/GSM's

The news is reporting more and more about fraud happening throughout various types of transactions. In this course, you will learn about some of the types of fraud Ally is seeing in the retail automotive space and ways dealerships can help protect themselves.

## Legal awareness with ECOA certification.

IN-DEALERSHIP, VIRTUAL | 3.5 HOURS

DEALERSHIP ROLE: Salespeople, Sales/Desk Managers, Internet Sales Managers, Finance Managers, Finance Directors, Service Managers, GM's/GSM's

Laws and regulations change faster than the technology in new cars. That's why it's so important for dealership personnel to stay current. Through Legal Awareness with ECOA Certification, Ally Academy offers an explanation of some of the laws affecting the industry and penalties for violation in a thought-provoking and easy-to-understand instructor-led class. Learners are alerted to the importance of assessing their own job-specific risks and will be able to immediately apply what they learned.

*"The single biggest contribution that Ally has made to our business probably comes down to profitability, but the single most impactful contribution that Ally has made to our business is training."*

**Natasha del Barrio** – CEO  
Bert Ogden & Fiesta Auto Group

# F&I.



## Customized F&I management.

IN-DEALERSHIP | VARIES

DEALERSHIP ROLE: General Sales Managers, Sales/Desk Managers, F&I Directors, F&I Managers

Our customized training provides a dealership specific approach to F&I management training. Conducted in your dealership, our trainers evaluate your dealership variable operations processes on-site and conduct needs specific training to maximize areas of growth and opportunity. This training strategy is often utilized soon after a dealership employee has completed either the 2-day F&I management course or the 3-day virtual F&I management course. Subjects of focus include but are not limited to conducting an effective sales to F&I turnover, proper customer interviewing techniques, menu presentation, and resolving customer concerns all designed to increase profitability in an easy to understand process.

## F&I foundations.

IN-DEALERSHIP, OFF-SITE, VIRTUAL | 4 HOURS

DEALERSHIP ROLE: New F&I Managers, Salespeople transitioning to F&I

This course helps new F&I Managers or those transitioning to an F&I role. It provides foundational skills to help your employees become more effective F&I Managers.

## F&I management 2-day.

IN-DEALERSHIP, OFF-SITE | 2 DAYS

DEALERSHIP ROLE: Salespeople, Sales/Desktop Managers, Internet Sales Managers, Finance Managers, Finance Directors

This 2-day 15.5 hour session is designed to provide high-level training for those that need a better understanding or a refresher of the overall F&I management process. You can expect to walk away from this course with a general or renewed understanding of F&I management fundamentals.

## F&I management 3-day virtual.

VIRTUAL | 3 DAYS

DEALERSHIP ROLE: Salespeople, Sales/Desktop Managers, Internet Sales Managers, Finance Managers, Finance Directors

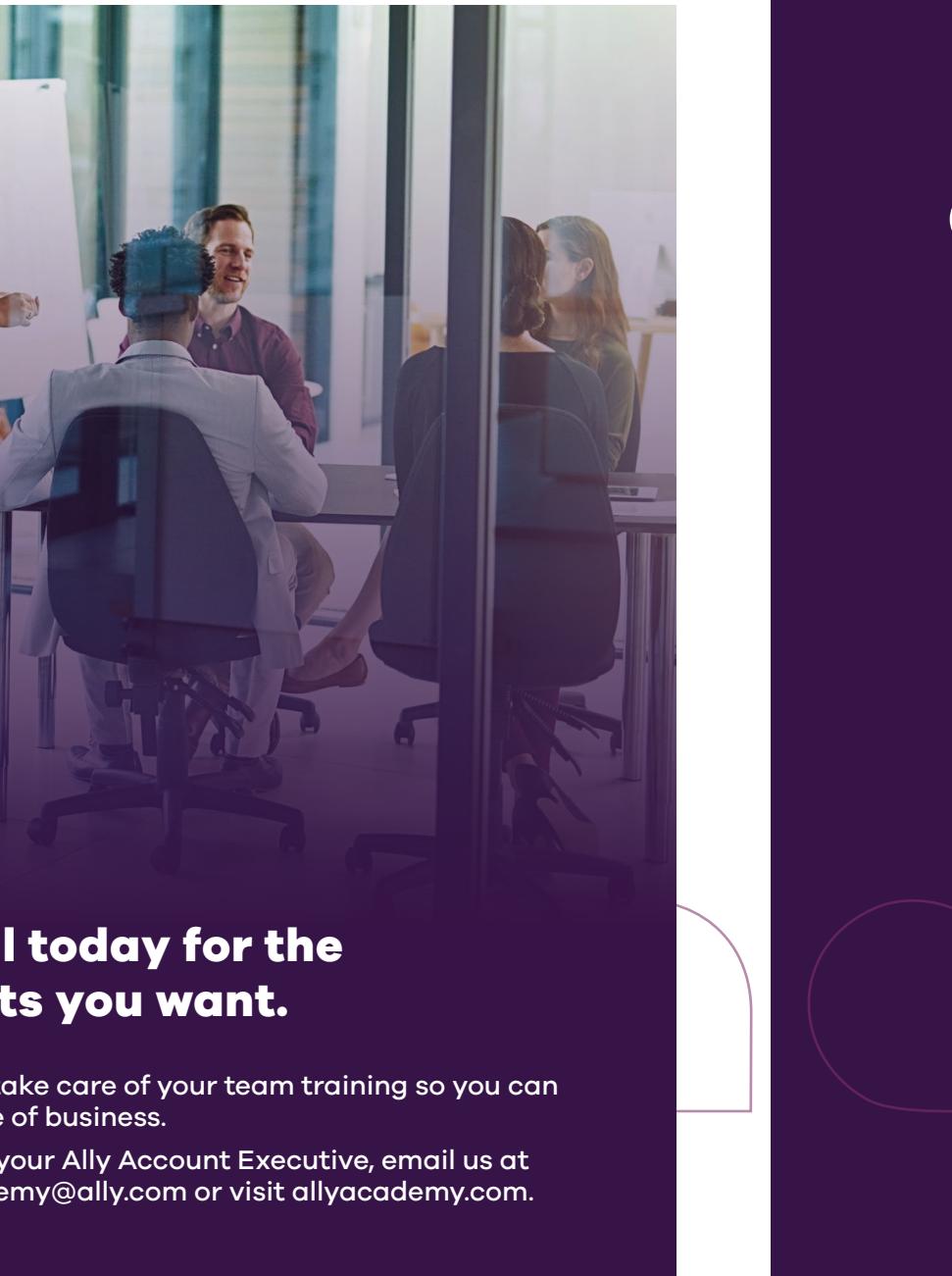
We've taken our traditional instructor-led F&I management curriculum and reimagined it to deliver virtually. Over 10.5 hours, learners will explore how to help make the customer transition from Sales to F&I seamless, conduct a more effective customer interview and maximize each sales opportunity, plus so much more.

## Understanding the underwriters' side.

IN-DEALERSHIP, OFF-SITE, VIRTUAL | 2-3 HOURS

DEALERSHIP ROLE: Owners, Dealer Principals, Variable Directors, F&I Managers, Sales Managers, GM's/GSM's

Ever wonder how the finance source decides to approve or decline a deal? Take the opportunity to experience a deal from an Ally credit buyer's perspective. Gain insights that can help you communicate and collaborate more effectively with Ally.



**Enroll today for the results you want.**

We help take care of your team training so you can take care of business.

Contact your Ally Account Executive, email us at [allyacademy@ally.com](mailto:allyacademy@ally.com) or visit [allyacademy.com](http://allyacademy.com).

## Fixed operations.



## Service drive consultation.

IN-DEALERSHIP | VARIES

DEALERSHIP ROLE: Salespeople, Service Advisors, Service Managers, GM's/GSM's

### Part 1 – Assess

Our Fixed Operations Consultants will perform an initial Service Drive Assessment to identify your unique needs and work closely with your management team to develop a personalized plan of action. We'll analyze your DMS reports and financial statement to identify opportunities to increase departmental performance in areas such as:

- Income development/profitability
- Menu presentations/recommendations
- Selling skills/overcoming objections
- Customer satisfaction/retention
- KPI/measuring performance
- Service drive process development

### Part 2 – Report: Performance Tracking and Goal Setting

A customized written service drive process utilizing industry standards and Ally best practices will be implemented, complete with baseline metrics for customer pay hours per repair order, effective labor rate, dollars per RO and CSI. Continuous evaluation and written progress reports will be provided through scheduled dealer visits to gauge compliance with new processes and review of established metrics.

### Part 3 – Engage: Process Training, Role-Play, Coaching and Feedback

Ongoing classroom style and live-on-the-drive training conducted in the following areas:

- Exceptional customer experience/relationship building
- Service drive process training covering the initial meet and greet, vehicle walk-arounds, menu presentations, repair order write-up, customer communication process, and active delivery
- Proper phone skills and appointment setting for shop loading
- And much more!

## Service management training.

IN-DEALERSHIP, OFF-SITE, VIRTUAL | VARIES

DEALERSHIP ROLE: Salespeople, Service Advisors, Service Managers, GM's/GSM's

Our Fixed Operations Consultants will work with your management team to elevate your service department to the next level. It begins with focusing on providing your customers with an exceptional customer service experience. We will demonstrate ways to optimize processes, develop your personnel and analyze KPIs that will drive business and keep customers coming back. We will work with your team to build action plans around exceptional service, evaluate and measure performance, establish departmental goals and increase compliance. Learn how to empower your employees to be their best by using individual benchmarks and accountability, create a foundation for customer service success by installing proven processes, reviewing pay plans, and working on pricing strategies.

## Financial statement analysis.

IN-DEALERSHIP, VIRTUAL | VARIES

DEALERSHIP ROLE: Salespeople, Service Managers, GM's/GSM's

Our Fixed Operations Consultants will perform an in-depth year-over-year trend analysis of your service department financial statement and make recommendations to increase profitability or reduce expenses based upon industry trends and best practices. A detailed breakdown of sales, gross profit, and expense accounts, as well as an evaluation for proper account mapping, unapplied labor and pay plan structure will be included with this analysis.

## Warranty reimbursement review.

IN-DEALERSHIP, VIRTUAL | VARIES

DEALERSHIP ROLE: Salespeople, Service Managers, GM's/GSM's

Our Fixed Operations Consultants will conduct a Warranty Reimbursement Review (WRR) to identify customer pay repair orders with "warranty-like repairs" to submit for a warranty labor rate and/or parts markup adjustment. A proforma can be provided to show the projection of the potential warranty labor and/or parts markup adjustment based on the dealer's warranty payment receivables and effective customer pay rates. Each repair order is analyzed to ensure accuracy and to provide the best possible results. If a reimbursement rate is considered, our team will work with the dealer to help prepare the required documentation for the dealer submission to the manufacturer.

**For more information, contact an ally fixed operations consultant today.**  
**1-833-304-2559 | [fixedops@ally.com](mailto:fixedops@ally.com)**  
**[allyfixedops.com](http://allyfixedops.com)**

## Warranty consultation.

IN-DEALERSHIP, VIRTUAL | VARIES

DEALERSHIP ROLE: Salespeople, Service Advisors, Service Managers, GM's/GSM's

Our Fixed Operations Consultants will analyze your warranty expense reports to identify drivers in high-expense areas, review warranty repair orders for non-compliance with the manufacturer policy and procedure guidelines, and possible missed revenue opportunities.

During the Warranty Consultation process, our team will work with your Service Manager, Warranty Administrator, Service Advisors and Technicians to improve their knowledge and understanding in the following areas:

- Proper repair order write-up and customer concern documentation
- Repair order review including, how to comply with manufacturer policies & procedures, plus unrealized revenue
- Manufacturer warranty expense report analysis to identify repair trends and/or high-frequency repairs
- Requirements to properly document repair orders including management documentation and best practices
- Warranty claims payment receivable schedule review

After the Warranty Consultation has been performed, our team will provide a detailed assessment identifying the potential debits and areas for improvement.

# Dealership management.

*"The MRO class was one of the most incredible things I have done in my professional career. The ability to see cause and effect across departments in a simulated environment is invaluable."*

**Andrew Haller** – President  
Sellers Auto Group



## Dealer expertise assessment.

OFF-SITE, VIRTUAL | 2-3 DAYS

DEALERSHIP ROLE: Sales/Desk Managers, Internet Sales Managers, Finance Managers, Finance Directors, GM's/GSM's

When it comes to running your dealership effectively, how do you rate yourself? This exciting competency-based training can help assess where you stand by putting you through a rigorous "day in the life" of a dealer simulation to evaluate you on the Business/Management, Interpersonal, Leadership and Personal Attribute skills you'll need to run your store.

## Expense management.

IN-DEALERSHIP, VIRTUAL | VARIES

DEALERSHIP ROLE: Dealer Principals, GM's, Office Managers

As margin compression creates challenges for dealers, it's more important than ever to be able to understand every expense for each department. Even more important is the ability to dive deeper than the operating report to reveal exactly what your expenses are comprised of, and where you might be able to trim some fat. Our Expense Management training will teach dealers to regularly review and examine expenses to help identify where they might be spending too much, or maybe too little in certain areas. Learners will be able to implement a plan to constantly monitor and track expenses to help facilitate effective, responsible spending for the long run.

## Managing fixed operations (MFO).

IN-DEALERSHIP, OFF-SITE, VIRTUAL | 2.5 DAYS

DEALERSHIP ROLE: Dealer Principals, GM's, Fixed Operations Directors, Service Managers, Parts Managers

This immersive training simulation will put learners in charge of a struggling dealership as part of the new fixed operations management team, reporting to the group's executive management team. Participants will compete in a virtual dealership group environment and make three consecutive months of leadership, process and financial decisions to drive improvement of multiple service & parts metrics and overall dealership health. Learners will also take a deep dive into a dealership operating report to dissect and understand the meaning behind fixed operations performance metrics and demonstrate what it takes to drive those metrics in the right direction.

## Managing retail operations (MRO).

IN-DEALERSHIP, OFF-SITE, VIRTUAL | 3.5 DAYS

DEALERSHIP ROLE: All dealership management staff and individuals looking to become managers, including owners and dealer principals.

We take four months in the life of a dealership and show you how to maximize its sales and profits. This realistic simulation is an application-based training program based on real-world experience. Locate problems, identify possible solutions, develop opportunities for improvement and maximize the interdependent relationship between all departments. The class provides a chance to immerse yourself in a dealership operating report to identify and analyze dealership needs and market opportunities.

# Leadership.



## 5 dysfunctions of a team.

IN-DEALERSHIP, OFF-SITE | 8 HOURS

DEALERSHIP ROLE: Salepeople, Sales/Desktop Managers, Internet Sales Managers, Finance Managers, Finance Directors, Service Advisors, Service Managers, GM's/GSM's

Teamwork doesn't require great intelligence insights or masterful tactics. More than anything else, it comes down to courage and persistence. This workshop is very practical, moves quickly and yields specific, immediate results that can help improve your team's performance. Patrick Lencioni, founder and author of *The 5 Dysfunctions of a Team*, outlines a powerful model and actionable steps that can be used to help overcome hurdles and build cohesive, effective teams.

## Crucial conversations.

IN-DEALERSHIP, OFF-SITE | 2 DAYS

DEALERSHIP ROLE: Dealers, GM's/GSM's, Sales Managers, F&I Managers, Service Managers, Controllers, Etc.

A crucial conversation is a discussion between two or more people where the stakes are high, opinions vary, and emotions run strong. When conversations turn crucial, people tend to follow one of two ineffective paths: they either speak directly and abrasively to get the results they want but harm relationships, or they remain silent with the hope of preserving relationships only to sacrifice results. Crucial Conversations gives people the skills to step into disagreement – rather than over or around it – and turn disagreement into dialogue for improved relationships and results.

## Emotional intelligence™ – TalentSmart.

IN-DEALERSHIP, OFF-SITE | 8 HOURS

DEALERSHIP ROLE: Salespeople, Sales/Desktop Managers, Internet Sales Managers, Finance Managers, Finance Directors, Service Advisors, Service Managers, GM's/GSM's

Emotional intelligence (EQ) is the other kind of smart. When emotional intelligence first appeared to the masses in 1995, it served as the missing link in a peculiar finding: People with average IQs outperform those with the highest IQs 70% of the time. This anomaly threw a massive wrench into the assumption many people always had, that IQ was the sole source of success. Decades of research now point to EQ as the critical factor that sets star performers apart from the rest of the pack. Emotional intelligence is the "something" in each of us that is a bit intangible. It affects how we manage behavior, navigate social complexities and make personal decisions that achieve positive results. Emotional intelligence is made up of four core skills that pair up under two primary competencies: personal competence and social competence. Learn tips for maximizing your EQ with this course.

**At Ally Academy we help take care of your team training so you can take care of business.**

## Situational leadership II®.

IN-DEALERSHIP, OFF-SITE | 8 HOURS

DEALERSHIP ROLE: Salespeople, Sales/Desk Managers, Internet Sales Managers, Finance Managers, Finance Directors, Service Advisors, Service Managers, GM's/GSM's

Situational Leadership® II (SLII) is recognized as both a business language and a framework for employee development that transcends cultural, linguistic and geographical boundaries. It teaches leaders to diagnose the needs of an individual or a team, and then uses the appropriate leadership style to respond to those needs. Leveraging the award-winning learning design from The SLII Experience, Situational Leadership® II has become the world's most taught leadership training model. It uses game-changing techniques that immerse learners in SLII quickly, deeply and effectively.

---

*"How have Ally's products helped me improve penetration? Well it's simple... training and vision. They sit you down, they ask you what your goals are as a dealer, and then ask those same questions of the staff and put the two together."*

**Martin Herr** – President  
Kia of Murfreesboro

---



**Experience the difference.  
Enroll today.**

We offer a full range of learning opportunities on a variety of subjects you can leverage to build or supplement your dealership's in-house training.

To get started, contact your Ally Account Executive, email us at [allyacademy@ally.com](mailto:allyacademy@ally.com) or visit [allyacademy.com](http://allyacademy.com).

## Sales training.



## A-Z core elements (ACE).

IN-DEALERSHIP, VIRTUAL | VARIES

DEALERSHIP ROLE: Dealer Principals, GM's/GSM's, Sales Managers, Sales Associates

The A-Z sales process training teaches a simple and seamless purchase experience for dealership customers. The A-Z model empowers sales consultants to take the customer through the sales process from the meet-and-greet to delivery of the vehicle including the presentation and sale of F&I products. Ally's ACE training provides an outline so dealerships can develop an A-Z sales process within their store. We'll train your teams on effective communication, building rapport, presenting a first pencil and product menu all the way to vehicle delivery. Our comprehensive single day training class will instill processes that can improve response times and deliver a consistently great customer experience.

## A-Z sales process – Alpha to Omega seminar.

IN-DEALERSHIP, OFF-SITE | 2 DAYS

DEALERSHIP ROLE: Dealer Principals, GM's/GSM's, Sales Managers, Sales Associates

Ally's Alpha to Omega Seminar provides high level training so dealerships can develop an A-Z sales process within their store. The A-Z sales process training teaches a simple and seamless purchase experience for dealership customers. Our seminar will instill processes that can improve response times and deliver a consistently great customer experience. After course completion, participants will be able to confidently take the customer through the sales process from the meet-and-greet to delivery of the vehicle including the presentation and sale of F&I products.

## Adaptable sales process (ASP).

IN-DEALERSHIP, VIRTUAL | VARIES

DEALERSHIP ROLE: Dealer Principals, GM's/GSM's, Sales Managers, F&I Managers

Traditionally, dealerships put a lot of weight in the execution of the in-person sales process. They valued the importance of getting the customer in the store and in a vehicle for the test drive. But the world around us is changing rapidly, so we must examine the way we go-to-business and interact with our customers to ensure we are still hitting the proper targets. The Ally approach to the Adaptable Sales Process (ASP) is designed to fit into your dealership's existing business model. The Ally ASP is structured so dealers can review the existing process for success opportunities from initial customer contact, through negotiation, financing, and vehicle delivery.

## Business development center (BDC) training.

IN-DEALERSHIP, VIRTUAL | 2.5 HOURS

DEALERSHIP ROLE: Internet Sales, Sales Consultants

Our BDC training consists of ways to increase phone, chat, and Internet leads for dealerships looking to improve their show ratio and show-to-sale ratios. We focus on optimizing inbound leads and how to turn those into appointments. Learners can expect to take away suggested word tracks and a better understanding of the potential benefits behind effective early engagement with customers.

## Eye on smartlease® webinar.

VIRTUAL | 1 HOUR

DEALERSHIP ROLE: Salespeople, Sales/Desk Managers, Finance Managers, Finance Directors, GM's/GSM's

You already know that leasing helps lead to loyal, repeat customers who refer their friends and family, so let's get you up to speed on the Ally SmartLease. After registering, you'll receive an email invitation to this webinar that will show you everything you need to know to get your customers on the road. Upon course completion, you will:

- Be able to demonstrate resources and offer options to your customers
- Calculate lease payments accurately
- Understand and be able to describe lease agreement terms

*I've been doing this for 44 years... Things are constantly evolving and changing and we all need to adapt and change and grow and develop with it. And Ally's a big part of it. Their training programs really are excellent.*

**Ralph Mahalak Jr.,** – Owner  
Monroe Dodge Chrysler Jeep Superstore





**ally** do it right.

[allyacademy@ally.com](mailto:allyacademy@ally.com)

**ALLY ACADEMY**

[allyacademy.com](http://allyacademy.com)