

# 2018 ASPEN User Conference Course Descriptions

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## Session One – Financial Management & Roundtables

**Who should attend:** CFOs, Controllers and Accounting Managers

**Why attend:** Financial Managers work with the Business Management System data from end to end. They start during the software implementation and use the system's output as reports on the other end. It's up to the Financial Managers to help management understand business problems by pinpointing the source and determine whether it's a management, process or configuration issue.

**This track covers how all the data from each department feeds through ASPEN, how to understand enterprise-wide metrics and measure them.**

**Opening Session:** In this session, Anne Salemo, CEO of Charter Software, will present a summary of ASPEN enhancements since the last user conference, ASPEN's immediate roadmap, tips for getting the most out of the conference and introduce Charter's staff.

**Accounting Panel Discussion:** Join other Accounting professionals to share your challenges, ideas and best practices. Past attendees have called these "well laid out and facilitated". Don't miss this discussion!

**Department Processes Drive Accounting Results:** Learn best practices for processes in every department and help accounting streamline their work. Get a recap of what feeds from where. Have an open discussion on driving change in other department processes.

**Financial Trends & Analysis (Sections I and II):** Learn important enterprise and departmental metrics and how to calculate them using ASPEN. If the metrics are not meeting benchmarks, learn how to understand if it's a management problem, process problem or configuration issue.

**Become a Data Detective:** Accurate financials drive good business decisions. Learn how to use advanced searches, different selection screens, reports and more to track down discrepancies and make corrections.

**The Art of Balancing:** Reconciliation ensures accuracy. Discover ways to streamline reconciliations and refine month end processes, Discuss effective balancing techniques.

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## Session One – Parts Management Classes & Roundtables

**Who should attend:** Dealer Principals, General Managers, Parts Manager

**Why attend:** The Parts Department is an integral part of the business. It drives aftermarket sales and service revenue and has to balance being able to respond quickly to customers and the shop while efficiently managing inventory. It's all about the having the right parts at the right time at the right price.

**Online sales are the biggest threat to the Parts Department, which is why attending this session is so important. Learn strategies for battling online parts sales, find customers no longer buying and re-engage them to drive revenue. Additionally, learn how to use metrics to improve your parts performance.**

**Opening Session:** In this session, Anne Salemo, CEO of Charter Software, will present a summary of ASPEN enhancements since the last user conference, ASPEN's immediate roadmap, tips for getting the most out of the conference and introduce Charter's staff.

**Parts Panel Discussion:** This facilitated classroom discussion with other Parts specialists provides an opportunity to share what you want to accomplish at the User's Conference and talk about challenges and solutions that pertain to your current operations.

**Decoding Parts Metrics (Sections I & II):** Understand which metrics are important, define them and learn how to measure them so you can determine if your department meets industry benchmarks. Gain a better understanding of how processes can impact the reporting of certain metrics. Learn how to fix underperforming metrics through either process or management changes.

**Campaigning for Parts Revenue:** Learn strategies for upselling and increasing revenue in the Parts Department. Discover how to create a plan and craft messaging that works.

**Margin Magic:** Learn to use parts matrices to generate margin and sales volume. Uncover how to use pricing grids to maximize margin where the opportunity exists and drive sales volume on competitive parts. Create a game plan for preferred customer pricing programs and how to implement new pricing strategies.

**Parts Sleuthing:** Sometimes metrics pinpoint process problems or discrepancies in parts. Learn about ASPEN's new Parts Audit report to track down discrepancies and fix the processes causing the problems in the first place. Track down pricing and costing problems and learn ways to reduce errors.

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## Session Two – Sales/Rental Management & Roundtables

**Who should attend:** Dealer Principals, General Managers, Sales Managers, Unit Managers, Rental Managers

**Why attend:** Sales drives the bottom line, but OEMs continue to emphasize the importance of market share. Dealerships must balance increasing sales while maintaining profit margins.

**It's not enough to manage sales, successful dealerships also need to optimize unit inventory to achieve market leadership. And when it comes to Rental, the biggest challenge is balancing capacity and utilization. Learn about departmental metrics as well as individual salesperson metrics and how they can drive increased sales and margins.**

**Opening Session:** In this session, Anne Salemo, CEO of Charter Software, will present a summary of ASPEN enhancements since the last user conference, ASPEN's immediate roadmap, tips for getting the most out of the conference and introduce Charter's staff.

**Sales/Rental Panel Discussion:** Hear how others in your industry find solutions to similar challenges and discuss different business approaches. This has been a favorite among past attendees.

**Sales and Units Benchmarks (Sections I & II):** For Sales, ASPEN's data accessibility allows you to measure performance from the enterprise level to individual sales person. Use your dealership's data to focus on what's driving revenue and margin and what's not.

**Show Me the Money:** Online sales are both a threat and an opportunity. Learn how to increase your online presence to reach new customers and maintain your competitive edge. There's power in your sales history – learn how to use ASPEN to discover buying trends, identify at-risk customers, uncover opportunities and develop a growth plan.

**Rental KPIs:** Discuss various Rental key performance indicators that drive decisions on the makeup of your rental fleet. Pinpoint growth opportunities and determine when to purchase and replace units.

**Rental System Optimization:** Understand how to optimize the Rental configuration to generate reports and better analyze fleet performance. Learn to use cost groups to manage rental financial utilization. Review rental pricing strategies and determine whether preferential customer pricing can influence sales and utilization.

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## Session Two - Service Management & Roundtables

**Who should attend:** Dealer Principals, General Managers, Service Managers

**Why attend:** The Service department has the highest potential profit margin and in most cases, has opportunities for incremental sales and improved efficiencies. Profitable Service Departments understand how to fill their finite inventory of hours, maximize technicians' efficiency and velocity of work through the shop and find new service opportunities.

**The shop is even more important to the dealership now with the threat of online parts sales – the dealerships need to maximize the value-added benefit of having a high performing Service Department. Learn how to improve your service metrics, create service revenue opportunities and better manage the peaks and valleys of on and off season.**

**Opening Session:** In this session, Anne Salemo, CEO of Charter Software, will present a summary of ASPEN enhancements since the last user conference, ASPEN's immediate roadmap, tips for getting the most out of the conference and introduce Charter's staff.

**Service Panel Discussion:** This facilitated discussion is a must for sharing Service department challenges, ideas and best practices. Hear how other dealerships overcome obstacles and get takeaways to improve business practices.

**Actionable Service Metrics:** Understand which metrics are important, what they mean and how to measure them. Learn how to benchmark your metrics against industry standards and how to fix underperforming metrics through either process or management changes. Discover how processes can impact the reporting of certain metrics.

**Master the Work Order Zone:** Now that you know how to measure performance, find ways to streamline the creation and management of work orders to maximize technician efficiency and Service Department throughput. Revitalize your shop by learning to use ASPEN to its full potential.

**Boost Service Revenue:** Learn strategies for upselling and increasing revenue in the Service Department. Discover how to create a plan and craft messaging that works.

**Don't Leave Dollars on the Table:** Learn how setting shop supplies, maximums, labor rates by types of equipment and mobile pricing can increase your margins. Evaluate your processes to maximize profitability.

**Time is Money:** Discuss managing your technicians to maximize billable time. Discuss setup considerations and getting started with scheduling.

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## Networking Reception

**Tuesday Evening, July 17<sup>th</sup>**

Join the Charter staff and other conference attendees for appetizers, drinks and conversation. This is a great opportunity to meet your favorite Charter employees and peers, especially if you're not staying for both sessions. Dive deeper into topics of interest, pick someone's brain about a problem you're trying to solve in your business and stretch your legs.

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## Roundtables

**Wednesday, July 18<sup>th</sup>**

Wednesday is comprised of **industry-specific and multi-location roundtables**. Charter Software's development and management teams will host. Topics will come from the Panel Discussions, current trends impacting your business and topics submitted in advance. The discussion will focus on your needs and ASPEN's use and functionality.

### Choose to attend the following Roundtables:

Multi-Location  
Accounting  
Service  
Sales

Parts  
Golf Car  
Ag/OPE/Construction  
Rental

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**Be sure to visit the ASPEN Lab to get answers to specific questions or one on one time. The Lab is open every day from 7:30 to 5:30.**

If you have questions about the ASPEN User Conference, call or email us and we'll be happy to help you. Call 303.932.6875 ext. 200 or email Barb Harwell at [barb.harwell@chartersoftware.com](mailto:barb.harwell@chartersoftware.com).

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