

SHORELINE

PERFORMANCE ADVISORY

PERFORMANCE DIAGNOSTIC & 90-DAY PERFORMANCE PLAN

Practical Performance Improvement. Measurable Commercial Outcomes.

Client / Business

Location

Diagnostic Date

Lead Consultant

Matthew Barry

Purpose

A structured review of the leadership, customer, sales, finance, operational and performance disciplines that drive sustainable commercial outcomes. The diagnostic identifies strengths, performance gaps and priority actions, then converts those findings into a focused 90-day improvement plan.

1. Diagnostic Methodology

The Shoreline Performance Diagnostic is designed for automotive dealerships, dealer groups, OEM operations, truck and commercial vehicle businesses, marine businesses and adjacent customer-facing operations. It combines leadership interviews, process observation, pipeline and KPI review, customer-journey assessment and frontline capability evaluation.

DIAGNOSE → PRIORITISE → IMPLEMENT → MEASURE

Scoring scale

1 - Reactive	2 - Inconsistent	3 - Defined	4 - Embedded	5 - Leading
Little structure; performance relies on individuals.	Some process exists but execution varies materially.	Clear standards and routines are in place.	Consistent execution, coaching and accountability.	Best-practice discipline with continuous improvement.

Overall Shoreline Performance Score

Each of the eight pillars is scored out of 5. The weighted result is converted to a score out of 100. The score is a management tool, not an end in itself: the value is in identifying the few interventions most likely to improve commercial performance.

85-100	Leading - strong disciplines; focus on optimisation and scale.
70-84	Performing - sound foundations with targeted improvement opportunities.
50-69	Developing - material inconsistency is constraining performance.
Below 50	Priority - fundamental execution or leadership gaps require intervention.

2. Eight-Pillar Diagnostic Scorecard

Use the evidence prompts below during leadership interviews, observation and KPI review. Record evidence, assign a 1-5 score and identify the priority intervention.

1. Leadership & Direction | Weight 15%

Diagnostic question / evidence prompt	Evidence / observations	Score 1-5	Priority action
Is the commercial strategy understood at department and frontline level?			
Are performance expectations translated into clear daily and weekly behaviours?			
Do leaders coach performance, or primarily report results?			
Are accountability, meeting rhythms and management intervention consistent?			
Is there a visible growth mindset and willingness to challenge established practice?			
Pillar score: ____ / 5 Weighted contribution: ____ Priority: High / Medium / Low			

2. Customer Journey | Weight 10%

Diagnostic question / evidence prompt	Evidence / observations	Score 1-5	Priority action
Is there a defined end-to-end customer journey across sales, finance and aftersales?			
Are qualification, demonstration, follow-up and handover standards consistently executed?			
Where does friction, duplication or unnecessary waiting occur?			
Are customer feedback and CSI/NPS insights converted into action?			
Does the experience support retention and future replacement opportunity?			
Pillar score: ____ / 5 Weighted contribution: ____ Priority: High / Medium / Low			

3. Sales Execution | Weight 15%

Diagnostic question / evidence prompt	Evidence / observations	Score 1-5	Priority action
Is customer qualification needs-based rather than transaction-led?			
Are demonstrations and presentations tailored to customer priorities?			
Are managers involved at the right points in the sales process?			
Are objections handled consistently and confidently?			
Are conversion ratios understood by salesperson, source and stage?			
Pillar score: ____ / 5 Weighted contribution: ____ Priority: High / Medium / Low			

4. Purchase Options & Finance | Weight 15%

Diagnostic question / evidence prompt	Evidence / observations	Score 1-5	Priority action
Are purchase options introduced early enough in the customer journey?			
Is GFV positioned as a customer ownership/replacement solution rather than a late finance product?			
Are sales and finance operating as one customer journey?			
Are finance opportunities visible and actively managed before delivery?			
Are penetration, conversion, retention and quality measures reviewed together?			
Pillar score: ____ / 5 Weighted contribution: ____ Priority: High / Medium / Low			

5. Pipeline & Conversion | Weight 10%

Diagnostic question / evidence prompt	Evidence / observations	Score 1-5	Priority action
Is CRM/pipeline data accurate enough to manage the business?			
Does every live opportunity have a clear status, next action and owner?			

Are lead response, follow-up cadence and lost-sale disciplines defined?

Do managers conduct meaningful pipeline reviews rather than administrative checks?

Are digital and showroom leads managed to common standards?

Pillar score: ____ / 5 Weighted contribution: ____ Priority: High / Medium / Low

6. People & Coaching | Weight 10%

Diagnostic question / evidence prompt	Evidence / observations	Score 1-5	Priority action
Do managers have a structured coaching rhythm?			
Are capability gaps identified at individual and team level?			
Is coaching based on observed behaviour and real opportunities?			
Are new standards reinforced after training?			
Do recognition and accountability support the desired culture?			

Pillar score: ____ / 5 Weighted contribution: ____ Priority: High / Medium / Low

7. Operational Performance | Weight 15%

Diagnostic question / evidence prompt	Evidence / observations	Score 1-5	Priority action
Are inventory levels, ageing and turn aligned to commercial objectives?			
Are sales, parts, service and finance operating as connected departments?			
Are workshop productivity, efficiency and utilisation understood and actively managed?			
Are bottlenecks and hand-offs affecting customer or financial outcomes?			
Does the operating model support profitable growth rather than activity alone?			

Pillar score: ____ / 5 Weighted contribution: ____ Priority: High / Medium / Low

8. Data & Continuous Improvement | Weight 10%

Diagnostic question / evidence prompt	Evidence / observations	Score 1-5	Priority action
Does the leadership team have a concise set of actionable KPIs?			
Are leading indicators reviewed alongside monthly outcomes?			
Can leaders explain why performance changed, not simply what changed?			
Are actions assigned, tracked and closed?			
Is continuous improvement embedded into the management rhythm?			

Pillar score: ____ / 5 Weighted contribution: ____ Priority: High / Medium / Low

3. Executive Findings Summary

Performance pillar	Weight	Score / 5	Weighted score	Priority
Leadership & Direction	15%			
Customer Journey	10%			
Sales Execution	15%			
Purchase Options & Finance	15%			
Pipeline & Conversion	10%			
People & Coaching	10%			
Operational Performance	15%			
Data & Continuous Improvement	10%			

OVERALL SHORELINE PERFORMANCE SCORE: _____ / 100

Executive observations

Top 3 strengths

Top 3 performance constraints

Immediate commercial opportunities

Leadership priorities

Risks if no action is taken

4. 90-Day Performance Improvement Plan

The 90-day plan should concentrate effort on the small number of changes most likely to improve performance. Every initiative must have an owner, measurable outcome, review cadence and completion date.

PHASE 1 - ALIGN | Days 1-30

Objective: Establish clarity, standards and baseline performance.

Priority action	Owner	Measure / KPI	Due	Status
Confirm the 3-5 priority performance outcomes.				
Set baseline KPIs and leading indicators.				
Clarify sales, finance, pipeline and leadership standards.				
Brief managers and frontline teams on expectations.				
Commence targeted observation and coaching rhythm.				

PHASE 2 - EXECUTE | Days 31-60

Objective: Embed new behaviours and management disciplines.

Priority action	Owner	Measure / KPI	Due	Status
Coach priority behaviours using live opportunities.				
Run structured weekly pipeline and performance reviews.				
Track finance/purchase-option and conversion opportunities.				
Remove operational bottlenecks identified in the diagnostic.				
Recognise strong execution and address non-compliance quickly.				

PHASE 3 - EMBED & MEASURE | Days 61-90

Objective: Make improvement repeatable and quantify impact.

Priority action	Owner	Measure / KPI	Due	Status
-----------------	-------	---------------	-----	--------

Compare results and leading indicators to baseline.

Re-score priority diagnostic pillars.

Identify remaining capability or process gaps.

Lock successful routines into standard operating rhythm.

Agree the next 90-day improvement agenda.

5. Weekly Performance Rhythm

Cadence	Purpose	Participants	Output
Daily / 10 min	Immediate priorities, live opportunities and blockers	Frontline leader + team	Clear next actions
Weekly / 45 min	Pipeline, conversion, finance opportunities and leading indicators	Sales/finance leaders	Recovery actions and coaching priorities
Fortnightly / 60 min	Capability coaching and process observation	Managers + selected team members	Behaviour improvement actions
Monthly / 90 min	Commercial performance review across departments	Dealer Principal / GM + leaders	Decisions, ownership and resource priorities
Day 45 & Day 90	Formal Shoreline progress review	Executive sponsor + Shoreline	Progress report and next-stage recommendations

Recommended engagement pathway

Performance Conversation → Diagnostic → Executive Findings → 90-Day Plan → Implementation & Coaching → Ongoing Advisory

Commercial use

This diagnostic can be used as a stand-alone advisory engagement or as the entry point to a broader performance improvement program. Scope, on-site time, executive reporting, implementation support and coaching should be quoted according to the complexity and scale of the client operation. Shoreline's day and online-session rates can remain internal pricing tools rather than public website rate-card items.

Confidentiality

Information collected during a diagnostic should be treated as confidential and used only for the agreed advisory purpose. Any client data, performance measures or case-study outcomes should not be published without appropriate client approval.