

Turning Performance Data into Profitable Action

MORITZ
DEALERSHIPS

- 50-year-old family-owned auto group
- EFG client since 1991
- Brands: Chevrolet, Chrysler, Jeep, Dodge, Ram, Kia
- Locations: Fort Worth, Hurst, Alliance, TX

Executive Summary

Moritz Auto Group partners with EFG for a **deeply embedded engagement model** rooted in **data, accountability, and continuous improvement**. By leveraging detailed reporting, performance benchmarking, and hands-on dealership engagement, EFG helps Moritz make **informed, timely decisions that result in higher PRU, stronger product penetration, and a more efficient, customer-focused F&I process**.

The Challenge:

Improve PRU, Product Penetration, and Process Efficiency Through Earlier Customer Engagement

Despite being a high-performing, competitive dealer group, **EFG and Moritz identified several opportunities to further optimize F&I performance** across their stores:

✓ Inconsistent PRU and product penetration across stores

✓ Late F&I engagement in the customer journey

✓ Missed early needs-assessment opportunities

✓ Inconsistent customer discovery prior to the F&I office

The Solution:

Hands-On, Analytics-Led Dealership Engagement Built on Accountability and Collaboration

EFG's engagement model at Moritz is **highly hands-on, data-driven, and performance-focused**—designed to influence behavior at both the individual and store level.

- 1 F&I Development & Personnel Optimization**
- 2 Structured Accountability**
- 3 Cross-Department Collaboration**
- 4 Data-Led Performance Management**
- 5 Training, Coaching, & Objection Management**
- 6 Product Strategy & Revenue Optimization**

The Results:

Higher Penetration, Stronger PRU, and a More Disciplined F&I Operation

Moritz now operates with a **repeatable, scalable model** that uses real-time data and hands-on partnership to continuously elevate performance.

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|  10% Increased PRU |  Earlier, More Effective Customer Engagement |  Disciplined Culture of Accountability |
|  Increased Product Penetration |  Stronger Team Alignment: Sales, F&I, Management |  Improved Reinsurance Outcomes |



EFG is not satisfied with a one-size-fits-all approach, and neither are we. Their analysis and communication with all managers make a difference in income. We are constantly looking for ways to improve our reinsurance goals.

Jim Hardick, Managing Partner