

# A Performance Multiplier: Training That Pays Off

**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 has long prioritized performance and **customer-centric selling** across its dealerships. By fully embracing **EFG's comprehensive training, compliance, and account management resources**, Moritz has elevated its F&I effectiveness, strengthened team accountability, and delivered substantial year-over-year financial growth. Through structured training, hands-on coaching, and disciplined performance management, **Moritz achieved a 23% increase in annual F&I profit year over year.**

# 23% Increase *In Annual F&I Profit*

## The Challenge:

Scaling performance, accountability, and compliance across a competitive dealer group

Like many high-performing dealer groups, **Moritz Dealerships operate in a competitive environment** where incremental improvement drives success.

Moritz needed a partner that could **go beyond products and provide training and structure**—while protecting compliance and long-term profitability.

### Continued Growth Required:

- ✓ Consistent, Scalable F&I Training
- ✓ Stronger Individual Accountability
- ✓ Clear, Compliant Communication of Product Value to Customers
- ✓ Ongoing Reinforcement of Best Practices

# The Solution:

A comprehensive, hands-on training partnership built for real results.

## F&I Classroom Training

Structured training to **establish consistent fundamentals**, best practices and expectations

## In-Store 1:1 Coaching

Led by EFG, **hands-on, individualized training** to reinforce skills and drive immediate application

## Road to the Sale Training

Recurring, quarterly sessions to **sharpen selling techniques**, process discipline, and customer engagement

## Menu & Talk Track Training

EFG coached F&I team on **customer-centric product presentation** with easy to consumer value messaging

## Compliance Training

The Moritz team participates in **EFG compliance training** to ensure sales practices align with regulatory standards

## Recruitment Support

The EFG recruitment team helps place the **right talent in the right roles** to support long-term performance and stability



- “All Hands on Deck” EFG Engagement
- Weekly Action Sheets for Each Employee
- Eagle Award Reinforcement
- The Moritz Promise built on EFG’s Drive Forever Worry Free Limited Lifetime Powertrain Protection

# The Results:

More profit. Stronger culture.

## Year-Over-Year Performance Snapshot

Higher PRU + Higher Volume = Exponential Impact



**10%**  
Average PRU  
Increase



**ANNUAL F&I  
PROFIT**  
**23%**  
Increase

*With EFG’s training, I have confidence in my ability to meet F&I performance goals. Their individual action plans help me better support my customers and put more cash in my pocket!*

*Rino Joseph, Finance Director*

*EFG’s training got my team out of their offices and onto the floor with their sales colleagues. Our penetration has improved, and customers feel we truly support their needs.*

*Matt Ducote, GM*