

STRONG DEAL ONLY ■

F&I; Manager — 52-Week Professional Development Playbook

Mission: Build repeatable excellence in compliant menu presentation, lender communication, funding quality, documentation and customer trust.

Operating rule: protect the customer relationship and the dealership's long-term reputation while pursuing profitable, accurate, well-documented deals.

Weekly method

Study the topic, perform a realistic drill, document the result, review one real situation, and choose one behavior to improve. Track one KPI every week. At weeks 13, 26, 39 and 52, complete a formal review.

Week 1: Standards & role mission

Field assignment: Apply *Standards & role mission* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 2: Daily rhythm

Field assignment: Apply *Daily rhythm* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 3: Needs discovery

Field assignment: Apply *Needs discovery* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 4: Question quality

Field assignment: Apply *Question quality* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 5: Listening

Field assignment: Apply *Listening* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 6: Product/process mastery

Field assignment: Apply *Product/process mastery* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 7: Value presentation

Field assignment: Apply *Value presentation* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 8: Walk-around / demonstration

Field assignment: Apply *Walk-around / demonstration* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 9: Appointment control

Field assignment: Apply *Appointment control* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 10: Follow-up

Field assignment: Apply *Follow-up* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 11: CRM discipline

Field assignment: Apply *CRM discipline* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 12: Objection diagnosis

Field assignment: Apply *Objection diagnosis* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 13: Price conversations

Field assignment: Apply *Price conversations* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 14: Payment conversations

Field assignment: Apply *Payment conversations* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 15: Trade conversations

Field assignment: Apply *Trade conversations* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one

role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 16: T.O. mastery

Field assignment: Apply *T.O. mastery* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 17: First-pencil clarity

Field assignment: Apply *First-pencil clarity* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 18: Negotiation fundamentals

Field assignment: Apply *Negotiation fundamentals* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 19: Gross protection

Field assignment: Apply *Gross protection* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 20: Deal structure

Field assignment: Apply *Deal structure* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 21: Compliance checkpoints

Field assignment: Apply *Compliance checkpoints* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 22: Time management

Field assignment: Apply *Time management* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 23: Pipeline math

Field assignment: Apply *Pipeline math* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 24: Lead-source measurement

Field assignment: Apply *Lead-source measurement* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 25: Appointment show rate

Field assignment: Apply *Appointment show rate* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 26: Unsold recovery

Field assignment: Apply *Unsold recovery* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 27: Referral systems

Field assignment: Apply *Referral systems* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 28: Social video fundamentals

Field assignment: Apply *Social video fundamentals* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 29: Hooks & CTAs

Field assignment: Apply *Hooks & CTAs* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 30: Personal brand

Field assignment: Apply *Personal brand* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 31: Inventory awareness

Field assignment: Apply *Inventory awareness* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 32: Aged-unit action

Field assignment: Apply *Aged-unit action* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 33: Market awareness

Field assignment: Apply *Market awareness* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 34: KPI diagnosis

Field assignment: Apply *KPI diagnosis* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 35: Coaching

Field assignment: Apply *Coaching* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 36: Feedback

Field assignment: Apply *Feedback* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 37: Role-play lab

Field assignment: Apply *Role-play lab* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 38: Difficult customer scenarios

Field assignment: Apply *Difficult customer scenarios* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 39: Ethical persuasion

Field assignment: Apply *Ethical persuasion* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 40: Stress management

Field assignment: Apply *Stress management* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 41: Retention

Field assignment: Apply *Retention* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 42: Process audit

Field assignment: Apply *Process audit* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 43: Error-proofing

Field assignment: Apply *Error-proofing* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 44: Team communication

Field assignment: Apply *Team communication* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 45: Advanced scenario lab

Field assignment: Apply *Advanced scenario lab* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 46: Measurement

Field assignment: Apply *Measurement* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 47: Bottleneck analysis

Field assignment: Apply *Bottleneck analysis* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 48: Process redesign

Field assignment: Apply *Process redesign* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 49: Leadership

Field assignment: Apply *Leadership* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a

partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 50: Profitability review

Field assignment: Apply *Profitability review* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 51: Capstone

Field assignment: Apply *Capstone* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Week 52: Certification preparation

Field assignment: Apply *Certification preparation* directly to f&i; manager work. Write the facts, the customer's stated goal, the options you presented, the outcome, what you would repeat, and what you would change. Perform at least one role-play with a partner. Do not use deception, hidden fees, false urgency, discriminatory practices, or promises you cannot verify.

Field Word Tracks

"Before we change a number, let me make sure I understand the part of the deal that matters most to you."

"Let's look at the complete structure together so there are no surprises."

"If that's the concern, let's solve that concern directly instead of changing something unrelated."

"I won't promise something I don't control. I can show you what we know and what the next step is."

Compliance note: these are training examples, not legal advice. Follow current federal/state requirements, lender rules, approved forms and dealership policy.