



## HOMEWORK ACTION PLAN

S SPECIFIC   
 M MEASURABLE   
 A ACHIEVABLE   
 R RELEVANT   
 T TIME-BOUND

Name Bill Palomba Class # 431  
 Dealership Loehmann Blasius Chevrolet Cadillac Date 2/12/2024

Current Situation or Challenge to be Addressed:	As discussed in class, videos are a great way to increase engagement with customers, both in Sales and Service. We currently utilize them in Sales to a limited degree and that is what I'd like to focus on here (Service is a higher mountain than I am prepared to climb at this point).		
Current Performance Level (include specific measure):	Currently our Internet Sales staff is sending out introductory videos for less than 15% of all first quality responses (FQRs) as measured through the CRM.		
Goal (what do you want to achieve?)	The goal is to increase the percentage of FQRs with the expected result of improved customer engagement. This should enable an increase in scheduled appointments, ultimately resulting in an increase in sales.		
Goal Performance Level (include specific measure)	While our ultimate goal would be to increase video FQRs to 100%, I recognize the likelihood that this may be unrealistic. I am therefore setting a goal of an increase to 80%, as measured by data from our CRM.		
Goal Start Date:	3/1/2024	Goal End Date:	4/30/2024
First Check-in Date:	3/15/2024	Performance Objective:	Increase video participation to 25%
Second Check-in Date:	3/29/2024	Performance Objective:	Increase video participation to 40%
Third Check-in Date:	4/15/2024	Performance Objective:	Increase video participation to 60%
Fourth Check-in Date:	4/30/2024	Performance Objective:	Increase video participation to 80%
How does your goal align with the dealers' vision?	The dealer's vision includes the existence of an efficient and professional customer engagement. Customer ease-of-use and an enhanced experience is top of mind and this goal is in line with that vision.		
What are the potential benefits of achieving your goal?	The benefits I see as most obvious are a heightened level of customer engagement. This should naturally lead to an increase in scheduled appointments which, again, should result in more sales and, hopefully, greater net profit.		

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What are the potential consequences if you don't achieve your goal?	While sales are relatively healthy, the potential consequences include the risk of becoming stagnant in our approach to customer engagement. With the addition of some newer faces in our Sales Department, it is important to establish good practices and updated methods for reaching out to and engaging with customers.
Why is the goal important to you?	This has long been a goal for the Internet Sales Unit in particular. To date, we have never been able to develop the proper structure to implement this process. Now is the time!
Potential Obstacles	As always, a new way of doing business is bound to be met with resistance, particularly by our longer tenured staff members.
Potential Solutions	Staff members need to be shown the proof that this new way of engagement in fact produces better results. There is plenty of data in the automotive arena that backs this up. Continued training and oversight of this initiative will be crucial in demonstrating the value to both the dealership and the individual salesperson.
<b>BOTTOM LINE!</b> Financial Impact of Achieving Your Goal (expressed in dollars)	Difficult to accurately pinpoint, but successful implementation of this process could result in unlimited potential for increased financial gain. We would expect at a minimum to initially increase the bottom line profit in the Sales Department by 10%.

What specific actions or steps will you take to accomplish your goal? What will you do differently or improve? For each, be sure to include necessary resources, who is accountable, the measurable result, and dates.

SPECIFIC ACTION/STEP	NECESSARY RESOURCE(S)	ACCOUNTABLE PERSON(S)	EXPECTED RESULT	START, END, & CHECKPOINT DATES
First step is to set up meetings with all Sales and BDC staff to lay out the goals of the program	Management staff	General Manager/Sales Managers	100% understanding among sales staff as to the rationale and goals of the program	Starting at the onset of the process and revisited in weekly sales meetings
Provide training on the proper way to create videos	Marketing Director, Social Media Marketing Specialist (already retained by the dealership), Director of Employee Training and Development.	Marketing Director, Director of Employee Training and Development, Sales Managers and Internet Sales Manager	Improved video-making skills for entire sales staff	Start date - week of March 1st. Progress checks weekly until the end of program's initial phase

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Monitor the CRM to determine the extent to which staff are incorporating videos into the FQR to customers.	The CRM	Internet Sales Manager	Increased use of the videos documented in the system.	Throughout the duration of the program
Tally the success rate of videos as a percentage of total customer engagement.	Largely the CRM, with use of management oversight	Internet Sales Manager, Floor Sales Managers	80% video usage	Throughout the duration
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As you work toward your goal, it's important to have interim check points with specific, measurable objectives so your team can hold themselves accountable. If everyone knows the goal and objectives, you don't have to spend your valuable time micromanaging.

Once you've accomplished your goal, added or adjusted policies, procedures, and behaviors, now what? How will you ensure you and your staff do not fall back into the previous habits that produced poor results? Be specific.

This goal requires the consistent participation of all of the Sales Department - from Sales staff to Sales managers. It will also require the constant monitoring of the CRM throughout the process and beyond. Behaviors of all staff will need to be assessed and monitored going forward into the future to ensure the success of the endeavor. In short, this needs to be standard protocol that, in essence, becomes second nature to all involved.

Describe any planning or implementation meetings conducted as part of development of your plan.

I held several meetings, the first of which was with the owner and GM to assess their level of acceptance (they were fully supportive). Next I met with the three Sales Managers and one Internet Sales Manager to discuss the goals and process for implementation. Finally, I met with our Director of Education and Development to discuss the role he will play in fine tuning the process and ensuring existing and new staff remain/become trained.



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Sponsor Signature:

*Fred W. Blum*

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