



# HOMWORK ACTION PLAN

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

Name Shane Shepherd Class # N432  
 Dealership Bill Wright Toyota Date 2/27/2024

Current Situation or Challenge to be Addressed:	Capitolize on the power of video in the Sales Department.		
Current Performance Level (include specific measure):	Currently there isn't any video integrated in the Sales Department.		
Goal (what do you want to achieve?)	Include video in our auto responder and our sales follow up process.		
Goal Performance Level (include specific measure)	Sales staff utilizing video in follow up process.		
Goal Start Date:	3/1/2024	Goal End Date:	6/30/2024
First Check-in Date:	3/15/2024	Performance Objective:	Review 3rd party vendors and choose best option for our dealership.
Second Check-in Date:	4/1/2024	Performance Objective:	All sales staff completion of training for utilization. CRM follow up process updated to include video.
Third Check-in Date:	5/1/2024	Performance Objective:	Management to review utilization on a weekly basis via CRM. Implement weekly contest and highlight winner in our weekly sales meetings.
Fourth Check-in Date:	6/30/2024	Performance Objective:	Ongoing: Verify utilization, training, and results.
How does your goal align with the dealers' vision?	Our dealership is committed to leveraging technology to continually enhance our customers' experiences, and integrating video is the next step in this endeavor. Video technology will provide an additional dimension to improve the overall customer journey.		

## HOMEWORK ACTION PLAN

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

What are the potential benefits of achieving your goal?	Increased customer engagement.
What are the potential consequences if you don't achieve your goal?	Less effective follow up reduces customer engagement. Potential lost sales.
Why is the goal important to you?	Improving transparency and engagement will improve customer satisfaction.
Potential Obstacles	Some sales associates may resist due to being uncomfortable.
Potential Solutions	Provide training at various levels based on staff members confidence.
<b>BOTTOM LINE!</b> Financial Impact of Achieving Your Goal (expressed in dollars)	Improved engagement will improve our customer's experience, which will improve our close rates. Improving our close ratio by 2.5% equates to an additional 30 units per month. 30 additional units would generate an additional \$139,410 of gross per month. \$1,672,920 annually!

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
Set up demo's with at least 2 video vendors.	Contact other dealers for recommendations	GSM	At least 2 demo's set up by 3/10/2024	3/1/2024-3/10/2024
Choose video vendor	Review vendor options.	GSM, Internet Director, and Sales Managers.	Sign agreement with video vendor.	3/15/2024
Integrate video in CRM follow up process.	CRM/Video vendor.	GSM and Internet Director.	Integration complete.	03/29/2024
Staff training. Written process in	Phones, CRM, and vendor portal.	Sales Managers and Internet	Staff fully trained.	03/29/2024

## HOMEWORK ACTION PLAN

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

SPECIFIC ACTION/STEP	NECESSARY RESOURCE(S)	ACCOUNTABLE PERSON(S)	EXPECTED RESULT	START, END, & CHECKPOINT DATES
place.		Director.		
Videos sent consistently to customers.	Phones, CRM, and vendor portal.	Sales Managers and Internet Director.	Weekly reports monitored by Managers/GSM	04/30/2024
Video process monitored weekly. Sales staff contest.	Phones, CRM, and vendor portal.	Sales Managers and Internet Director.	Consistent utilization with staff. Weekly winner determined	5/31/2024
Measure results of increased engagement.	CRM	GSM	Improvement in close ratios.	06/30/2024

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.

Written process in place for staff. Management will review weekly. Coach and train staff consistently. Monthly results reviewed by GM.

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

Once the vendor is identified, we will convene staff meetings to communicate the vision, training schedule, incentives, action plan, and expected outcomes.

Sponsor Signature: \_\_\_\_\_