

Departmental Action Plan Template

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Class & Student Number: Class 331, Student number 33

Academy Week (Var II): June 2018

Current situation or challenge you want to address based on the Jennifer Suzuki Outline: (must be quantifiable)

- The challenge that I would like to address is the lack of appointments being booked on a daily basis. Our sales consultants tend to rely on the walk-in traffic, which is not really a strong source as a majority of our traffic is comprised of internet leads or referrals.
- It has become acceptable for our sales consultants to not have any appointments booked for the day, which means that they do not make any sales if it is a quiet day; such as the Friday before a long weekend.
- Based on our CRM and our manual traffic log, for the month of July: 27 appointments were made, and 397 customers were logged.

Overall Objective and Specific Desired Results:

- Moving forward, I would like each sales consultant to have at least one appointment per day.
- In the future, I would like to transform our dealership into mostly appointments- we would of course still encourage walk in traffic, but by booking mostly appointments- we could properly gauge sales and increase sales without having to wait for a Saturday or a busy week day.

Describe your action plan in detail (be specific and include before and after measurements)

- Based on last month's numbers, our sales consultants booked 27 appointments and spoke to or contacted 397 prospects. If you average that number out between our 8 sales consultants, that is 3 appointments per sales consultant.

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| Step 1 | Speak to the sales consultants so that they are aware of the changes that we would like to make, as well as a schedule of the training that we are going to be doing on a weekly basis. |
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| Step2 | Complete phone training on a weekly basis. We will cover inbound and outbound phone calls based on Jennifer Suzuki's modules. Each section will be broken down in to individual stages so that we do not overwhelm the sales consultants, and so that they are able to grasp each topic and put it into practice. |
| Step 3 | With regards to the internet, response time can dramatically impact not only how the customer views the dealership, but also the impression that a sales consultant gives of themselves. It is important to choose only those sales consultants that will positively reflect the dealership. Those consultants would be Tim, Tung, Craig, and Helgi. |
| Step 4 | Have a conversation with those sales consultants so that they are aware of our expectations, which include a 15 minute response time. If they are not able to respond within that time frame, I will pass on that prospect to another sales consultant. |
| Step 5 | Our CRM reminds the sales consultants to follow up with their customers. It is important to be at the front of the customer's mind when it comes to purchasing a vehicle. By following up with customers, the sales consultant will build rapport with that customer and encourage them to the come to our dealership to purchase their next vehicle. During their follow up, they will also be able to tell if the customer is ready to trade in their vehicle or look at some of the newer models. This follow up gives the sales consultant a reason to call and then potentially book an appointment to have that customer trade in their vehicle earlier than anticipated. |
| Step 6 | Making calls is the best way to reach customers. By using the training that we are going to be doing on a weekly basis, sales consultants will find that their phone calls are much more efficient and effective, meaning that they can make more calls with a positive outcome – such as an appointment. |

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| Step 7 | As effective as it is to make calls and speak to customers in person, it is also important to guarantee that the customer has the sales consultant's contact information. The sales consultants must learn to hand out their contact information in the form of either a digital or physical business card. |
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Timeline:

Describe specific short term and long term checkpoints to monitor progress

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| Step 1 | Conversation with sales consultants: July 5th, 2018. |
| Step 2 | Training: starting July 5 th , 2018 weekly. |
| Step 3 | Conversation with sales consultants: July 12 th , 2018. |
| Step 4 | Rapid response conversation: July 12 th , 2018. |
| Step 5 | Monitoring CRM follow up: July 5 th , 2018 |

- It is important to give our sales consultants time to adapt to the changes, so after our discussion on July 5th, we will give them one week to start booking one appointment per day.
- By January 1st, 2019; I expect each sales consultant to have an appointment to walk in ratio of 8:2, meaning 80% will be appointments and 20% will be walk in traffic.

Meeting with Stakeholders (dealership personnel)

Describe what behavior change is needed to support desired goal. Address required coaching, training and/or consequences (PINO, Gain, Pain). Include timelines / Accountability / Monitoring process

- a. Who: Sales consultants
- b. What: The entire outlook to making phone calls is going to need to change – this will be done through ongoing training on a weekly basis.
- c. By When: I expect that all training will be completed by the end of the year; this may seem like a long time – but it will take time to adjust and I expect by the end of the year, phone call training will not be needed on a weekly basis.

- d. How: Training is going to be the key to transforming phone calls and booking phone calls.
- a. Who: Management
- b. What: They are going to need to come up with repercussions if appointments are not being made.
- c. By When: After the meeting on July 5th, the Sales Managers will need to decide what will happen if appointments are not being booked.
- d. How: A conversation is going to need to be had between the management team and the dealer principal so that everyone is on the same page.

Dealer agreement:

If you need your sponsors support or approval to implement your plan, have it signed off before you start. If you can proceed on your own, present this action plan to your sponsor before next class.

Describe the meeting:
