



HOMEWORK ACTION PLAN

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

Name Peter Klein Class # 50

Dealership Lakeside International Date 5/13/2024

Current Situation or Challenge to be Addressed:	Daily activity of outside parts salespeople is not closely managed, significant opportunity exists to improve their sales by better managing their activity		
Current Performance Level (include specific measure):	We do not have centralized / robust sales call reporting currently. Anecdotally, we believe outside parts salespeople are making roughly 40-50 calls per week.		
Goal (what do you want to achieve?)	We want all calls to be logged so that we can have better visibility to what is going on in the market - but also so we can set performance standards for call volumes; which we know are correlated very tightly with sales.		
Goal Performance Level (include specific measure)	60 logged sales call per week per OSR using the soon to be rolled out mobile crm		
Goal Start Date:	7/1/2024	Goal End Date:	9/16/2024
First Check-in Date:	7/15/2024	Performance Objective:	Setting baseline; OSRs managed to be logging calls on new mobile app in real time, but we will not be managing to a particular number beyond compliance.
Second Check-in Date:	7/31/2024	Performance Objective:	Lakeside to average 55 calls per osr per week for two week period ahead of second check in date
Third Check-in Date:	8/15/2024	Performance Objective:	Lakeside to average 60 calls per osr per week for two week period ahead of third check in date
Fourth Check-in Date:	8/31/2024	Performance Objective:	by 4th check in date, lakeside to average 65 calls per osr per week for two week period ahead of fourth check in date. After this, EACH OSR will be at 65 calls, rather than a company average of 65 calls.
How does your goal align with the dealers' vision?	First and foremost, more activity means more sales. Second, these calls will all be logged in real time in the mobile CRM, which means that there will be significant benefits in terms of		

HOMEWORK ACTION PLAN

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

	communication. Managers will have a clearer idea of what their people are working on; truck sales and parts sales will also have shared visibility.
What are the potential benefits of achieving your goal?	More parts sales, we will also be able to figure out more quickly if OSRs are working sufficiently hard and if they are willing to work harder.
What are the potential consequences if you don't achieve your goal?	Complacency on call volume can inhibit the success of our parts department.
Why is the goal important to you?	I am passionate about the importance of managing sales activity and I know it leads to more sales.
Potential Obstacles	Organizational discomfort at holding people accountable who are perceived to be good employees.
Potential Solutions	Ongoing conversations about the fact that we expect our salespeople to do a very thorough job of representing us in their assigned territories.
BOTTOM LINE! Financial Impact of Achieving Your Goal (expressed in dollars)	My hypothesis is that if we increase our sales call volume by 20%, our OSR sales volume will increase by at least 15%, annualized, across our team, this would mean an additional \$5mm in incremental sales.

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
Finalize CRM Rollout	Support from arcadium	Peter Klein	All OSRs to have logins and training prior to 7/1/24	Due 7/1/24
Setup of weekly reports that are automatically generated and sent to GMs, parts managers and parts director	Support from arcadium	Peter Klein	Monday morning, relevant managers will receive automated call reports for their people	Ready by 7/1/2024

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
Weekly reviews with parts director and parts managers in weekly level ten meetings	n/a	General Managers	Each week, the stats will be reviewed by the appropriate managers	This will start weekly on 7/1 and continue, at a minimum, through the engagement period.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

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.

Reports will continue to be sent out weekly and these will become part of performance reviews

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

Have had quite a few planning meetings (and more to come) to ensure that the parts CRM rollout is effective and that CRM configuration meets the needs of parts salespeople. +

Sponsor Signature: _____