

Departmental Action Plan Template

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Class & Student Number: ATD 050 - 12

Academy Week (Var II): Five

Current situation or challenge you want to address:

Currently, our dealer group has a little-known mission and a disconnect between our sales department and the rest of the dealership's departments. It is my goal to address both of these issues through the creation and team work required to come up with a statement and the future team work required to maintain that vision.

Overall Objective and **Specific Desired Results:**

My goal is to begin the process of bringing everyone together to review, revise, and create a new mission statement. One that will lend its hand to our more modern and younger workforce. Ideally this new statement will be something that can be considered "timeless".

The collaboration needed for this statement will also foster communication between fixed operations/accounting with the variable side of our dealership. The specific goal is to have all departments pulling in the same direction instead of the current communication/philosophy gap that plagues our stores and often has the sales department alienated and doing business with little communication or foresight to other departments. This would include but not be limited to: actively attending and participating in bi-weekly account manager meetings to discuss former, current, and prospective customers; better understanding of each departments operation, the goals set for each, and the value of collaboration to achieve those goals; and a more stable workforce that has less stress and turnover with greater collaboration as a result of knowing what the big picture is... One TransEdge!!!

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

My plan is to begin with a "sales" style meeting like the ones we discussed and practiced in class. My goal is to have a quick, 15-minute, meeting to begin the process of collaboration and top-down leadership. I will plan the meeting to have our VP's, Controller, HR Manager, and Ownership available to attend. In this meeting, like the meeting Randy and I held in our class, I will discuss our mission and legacy and ask that everyone thinks about both to some degree before the meeting in relation to a personal and professional legacy. The goal will be to make it personal for everyone in the room and get the attention of attendees quickly. I will include specific examples from my life, a former executive team member, as well as the lives of some of the executive team members who will be attending. I will then ask each member to write down 1-3 individual words that describe what they think legacy "means" to them. We will discuss these words and

watch a brief video about legacy. At the conclusion of that I will ask the team what they want from their own legacy and for our dealer group. I will task them each with thinking about their “legacy” words and coming up with a mission statement for our next meeting.

During our second meeting, which I would prefer to be off sight, we will open with those legacy words and review each of their mission statements. We will write them on a whiteboard and collaboratively come up with one for our dealer group based off the teams’ created statements. This should hopefully begin to foster buy-in as well as begin the long and intentional task of collaboration and communication between senior leadership and differing departments. Following the creation of the statement, we will watch Simon Sinek’s video about “Trusting Teams”. I will task everyone with deciding on one thing they will intentionally do everyday to begin building trusting teams. We will set timelines for these items and have periodic check-ins to ensure progress.

Our third meeting will again be off sight to avoid distractions. I would like to open with the “100 game” to stress the importance of process in collaborative teams. I would then like to watch a video based on the “Toyota Way” to begin to get people thinking about our process and how different departments cross training with reflection on current processes could potentially set us up for further success. The idea behind this is making others aware of the difficulties, struggles, and successes of other departments and bring fresh eyes to known issues as well as unknown ones. The goal of this meeting will be to establish a schedule of cross training and achieve buy in from the team.

The fourth meeting will focus on the previous meetings and how they all tie into a culture of accountability. I would like to begin the meeting by talking about how cross training has been going as well as touching on all the previous topics. We will discuss our new mission statement and the impact that it is garnering on our everyday operations. Emphasis will be placed on focusing our efforts on our legacy/mission. We will discuss how trusting teams do not have overbearing or fear inducing leaders. They do not have “dicks”. Leadership has 3 major components:

1. Don’t be a D
2. Be a servant
3. Culture of accountability

These were taken from Zach Conaway in ATD050 and really hit home for me in the manner that Zach presented them. He started with #3 and worked his way back to #1. He mentioned how there are no “dicks” when the culture of accountability is in place. Typically, in weak culture systems, you think of the leaders who hold accountability as the “dick”. When the culture holds accountability, there are no “dicks”. I will elaborate on this in the meeting. Following this discussion, I would like to talk about our strategy for cascading this culture down from executive leadership.

Our fifth meeting will once again go back to 10-15 minutes and be very similar to the first with quick touch points and continuous training on previous topics as well as bringing light on new topics. We will begin to hold these meetings weekly with the intention of having it all become our culture and showing how much can be done in a short meeting with the right planning and purpose.

Timeline:

Describe specific short term and long-term checkpoints to monitor progress

Our timeline in the beginning will be to hold the first meeting sometime during the week of June 17th. This is due to executive leadership's availability during the summer vacation schedules. Our second meeting will have to be after July's graduation as that is the next time everyone is available and back in the office together without PTO or business travel. The remaining meetings will be scheduled from there but need to remain within 3 weeks of the previous meeting until we get to the point of a quick weekly discussion.

We will be able to monitor the progress of these meetings:

- Based on attendance. Do we have buy-ins from each department or are one or two not putting the effort in and not attending?
- Based on turnover rate and exit interviews of those that leave. Do we have a high percentage of voluntary separations or do we begin to see the numbers dwindle.
- Based on reprimand usage and types. Do we continue to see reprimands that represent a struggling culture or are we seeing less with better productivity from all departments.
- Customer Service based surveys. Do our numbers increase on our CSI scores?

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:** Executive Leadership Team
- b. **What:** Our goal is to have a well-known mission statement that induces a culture of collaboration and accountability. Teamwork will be a key component of this shift for our dealer groups.
- c. **By When:** By year end 2024 we should be well on our way to trusting that each department is working in the best interests of the other departments. This will be fostered by our collaboration and continuous and intentional activities to achieve this.
- d. **How:** By getting buy in from the top. An initiative of this caliber cannot be passively discussed and implemented. This must be consistent and intentional.

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:
