

Departmental Action Plan Template

Student Name: Karen Schoen

Class & Student Number: N331 - 25

Academy Week (Var II):

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

(Homework modules assigned)

- True North Chevrolet installed a new internet phone system in 2017.

Challenge: The set-up needs updating - automated greetings and phone tree, personal voicemail messages by sales staff, call forwarding protocol

- True North Chevrolet set up a Sales BDC in December 2017 (paid hourly and by appointments kept and appointments sold). Training was provided to the BDRs at set up, with some ongoing follow up. We have a CRM in our DMS (Contact Management in Reynolds & Reynolds)- BDRs are mining this data base and updating with each customer interaction. The process is for all sales calls (unless to a specific salesperson) to be answered first by the BDC. Results have continued to improve; July new unit sales was the best since 2006.

Challenge: The sales BDC is results focused and is enthusiastic about receiving further outbound phone training to continue to improve their customer interactions resulting in appointments and sales. An ongoing challenge includes getting sales staff to record interactions with prospect in CRM- so that BDC follow-up interactions can be informed and professional.

- True North Chevrolet hired and experienced Service BDC Manager, started June 4, 2018. Her experience on phone selling and enthusiasm for customer retention have resulted in a 100% increase in presold MPVIs in August 2018 over to date and CP ROs written increased by 18%.

Challenge: She is continually trying to improve her skills and welcomes further training. Her challenge includes many customer duplicates in the CRM-due to Sales creating duplicate customers and not detaching trade ins from customers-she is working on correcting these in order to have current info available to her so her interactions with customers are professional and informative- to facilitate increasing appointments and customer retention.

- Sales staff not putting all interactions into CRM
Challenge: Sales Managers to not desk deals without all prospect info in CRM

Overall Objective and Specific Desired Results:

Overall objective is to improve interactions with prospects and customers- to increase customer retention and sales.

Desired Results:

Phone system reviewed and updated- personal voicemail messages improved, automated

Messages improved, Receptionist greeting improved, all sales staff using call forwarding to

their mobiles so no calls are missed.

BDC- Sales and Service to receive phone training (starting with the Jennifer Suzuki videos and materials) on an ongoing basis.

Sales staff: to enter all interactions in CRM. Sales staff to receive outbound phone training - facilitated by trained BDRs- to set more quality appointments resulting in more sales.

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

- Customer Communication Focus Group formed- Sales and Service Sales BDC, Digital Marketing Manager, Vice President. Meets weekly- Review all aspects of phone system- now and set up improvements, phone training- videos and role playing for out bound calls
- Sales staff to receive outbound call training- by BDC and sales managers

Timeline:

Describe specific short term and long term checkpoints to monitor progress

Short term check points:

- weekly meeting with the Customer Communicaiton Focus group- discuss gains made, problems encountered- new/recurring. Training – role playing- for practice.
- Dealer, sales managers- update briefly before weekly sales meeting- engage their assistance as required.

Long Term Check points:

- Fall 2018 True North Chevrolet launch- new design to generate more traffic- leads. It will be crucial to have CRM updated consistently as required by sales staff- so BDC can professionally handle the increased traffic- to drive quality appointments and sales.
- As well, our 65-year-old Receptionist is retiring- opportunity to hire/train a Receptionist who will be actively engaging in customer retention and sales- outbound phone training will start immediately and be monitored by our Service BDC Manager (they sit adjacent to one another)

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: Customer Communication Focus Group-Sales and Service BDC, Digital Marketing Manager, Vice President
- b. What: Facilitate:
 - Outbound phone training-ongoing
 - CRM updates- Sales BDC now to sit at desk in Showroom and monitor floor traffic and be in constant communication with Sales staff (will assist with CRM updates as required)
 - Receptionist phone script training- both existing Receptionist and new Receptionist when hired in Fall 2018
 - Get assistance from Sales Managers/Dealer
 - Customer Communication Focus Group weekly meeting—brainstorm-discuss results-guests assistance as required as topics come up- meet with dealer to summarize
- c. By When:
 - Customer Communication Focus Group - June 2018-ongoing
 - Outbound phone training
 - Sales and Service BDC- June 2018-ongoing
 - Sales staff- October 2018
 - Receptionist - September-December 2018 -ongoing
 - CRM updates/duplicate correction-
 - BDC -July 2018-ongoing
 - Sales staff-August 2018- immediate-deals not desked without prospect info in CRM
- d. How:
 - BDC- using Jennifer Suzuki materials- video- role play-practice. All videos have been watched and discussed. Resource materials will be referenced for further improvement in emphasizing the value the salesperson/BDC provides to the customer- many time savings and promises result in respect from

the customer-which leads to quality appointments and more sales.

- Customer Communication Focus group to meet weekly-ongoing- Address ongoing/new issues as required.
- Sales Managers actively monitoring/coaching sales staff on importance of info- for BDC to make quality, professional calls
- Sales to Service Handoff- now Sales staff must introduce each customer to the Service BDC Manager at time of delivery- for OnStar enrollment- this will facilitate the Service BDC Manager to detach vehicle trade in (for accurate CRM info) and she will also check customer info for accuracy/duplicates.
- Service BDC Manager- has a list of all possible duplicates-daily, with the assistance of the Receptionist will be cleaning up the data base.
- Customer Communication Focus Group has detailed the existing phone system- automated messages-voicemail greetings- now designing improvements in all areas. Listened to all voicemail greetings- met with staff to make improvements-will be facilitating recordings- all to give a more professional appearance.

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:

Action plan presented to Dealer July 1st-after first Customer Communication Focus Group meeting. He supports the approach of a focus group that is ongoing by staff that are engaged and interested in improving outcomes. He realizes the importance of professional, timely communication with customers and has personally directed the sales process changes.
