

# Departmental Action Plan

Student Name: Jonathan Breton

Class & Student Number: N331 - 04

Academy Week: Week 5 – Variable Operations 2 (New Vehicles)

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

Mystery shop phone calls from Week 5 – Variable Operations 1, and the review of call recordings (inbound) at my dealership have proven that even some of our most experienced and successful salespeople do not handle calls well (in general). This will continue to be a focus of Sales Management for coaching and training using recordings.

However, we have been further developing our proactive portfolio management, led by our Business Development Specialist – Ciprian Leucuta. Although we have Ciprian contacting customers independently, each Audi Brand Specialist is responsible for regularly following-up with their customer database and are prompted to do so by our CRM (delivery anniversary, pre-maturity prompts etc.). They're best positioned to set up an appointment if properly executed. In conjunction with this, our Lease Loyalty figures are suffering (only 33.8% YTD through March as measured by Audi Finance) and are directly related to our efforts with our portfolio processes.

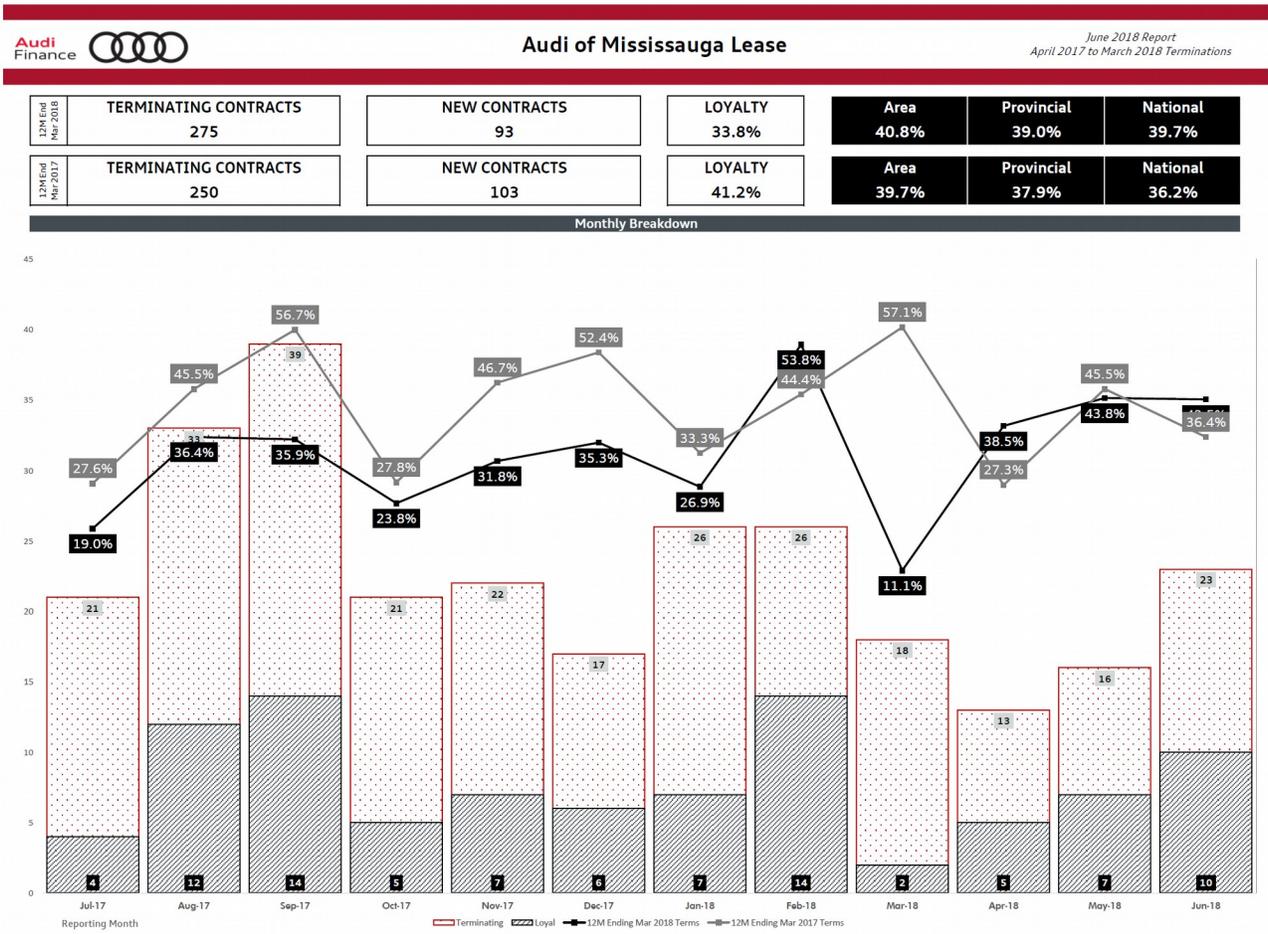
In addition to a focus on renewals (including retention of orphaned customers), we are starting a new strategy to conquest customers from our Service department. These are customers who purchased their vehicle from another location but do have a relationship with us. The challenge is to convert that into a Sales relationship at the next opportunity.

## **Overall Objective and Specific Desired Results:**

We need each Audi Brand Specialist to be engaged, but also have the tools and guides to approach their customers to create appointments and open up the discussion on renewals.

For Lease contract renewals, our goal would be to increase it from 33.8% March 2018 YTD, to 45.0% by the end of 2018, and above 50% in the first half of 2019. This will be measured both by loyalty reports provided by Audi Finance (example below), but also in our CRM (One Eighty) for individuals:

Audi Finance reports:



One Eighty reports\*:

Report on: Lease Maturities For Maturities plus 0 days Looking for customers: With Choose Behaviour

Calculate Results for: New/Demo Sold 9 mths prior to and 3 mths after Lease Mat. Filter: Show Lease Maturities for all LSPs New/Demo

Report by: Sales Rep

Lease Maturities - Sales Rep	Opportunities	Sold	%
(1) Adriel S	1	0	0%
(26) Alex F	26	5	19%
(13) Benjamin C	13	4	31%
(2) Ciprian L	2	0	0%
(6) Govind B	6	3	50%
(4) Haroon J	4	0	0%
(24) Joe C	20	8	40%
(12) Kenneth D	12	3	25%
(18) Luis M	16	5	31%
(7) Ozair N	7	0	0%
(1) Shane H	1	0	0%
(24) Shane K	23	3	13%
(21) Timothy O	20	4	20%
<b>Total: 159</b>	<b>151</b>	<b>35</b>	<b>23%</b>

\*One Eighty reports for our sister store (Audi Brampton) must be manually added into the Sales results for the calculations (for salespeople now at that store: Alex Fretes, Shane Kennedy, Ozair Naveed, Haroon Joseph, Colin Porter).

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

There will be four aspects of the successful implementation and execution of this action plan:

1. Develop and job aids.
2. Train Audi Brand Specialists.
3. Coach in 121 sessions.
4. Reporting for tracking progress.

We need to create user guides (point form, scripts) and track individual performance for the following:

- Outbound Lease and Finance contract maturity phone calls (Salesperson)
- Outbound orphaned customer calls (Business Development Specialist, Salesperson)
- Outbound Service conquest calls (Business Development Specialist, Salesperson)

Training can be conducted in a presentation manner with sharing current statistics. The use of a Kahoot! style quiz would be a fun way to convey information, similar to what we are currently doing with product knowledge quizzes.

121 meetings with each Audi Brand Specialist are already happening weekly. Ciprian (Business Development Specialist) is included in these meetings where he can be involved in discussions over what is/is not working.

Finally, Ciprian will develop and maintain further reporting to track re-assigned files and Service conquest customers, but vitally, our Lease and Loan renewals rates. This visibility keeps it top of mind but also creates an element of competition.

## **Timeline:** Describe specific short term and long term checkpoints to monitor progress

Short-Term:

- Weekly: (until end of August) General Manager to check progress on script development until completion.
- Weekly: (ongoing) Sales Managers to review at least 1 call per salesperson every two weeks (manageable volume) to provide general phone skills review and coaching.

Medium Term:

- September: Sales Managers to hold training meetings to review scripts and job aids. Each Audi Brand Specialist will attend.
- September: Business Development Specialist with check in with each Audi Brand Specialist (after training meetings) to discuss individual challenges/needs.

Long-Term:

- Monthly: Business Development Specialist to send out individuals renewals rate report (One Eighty) and total dealership report (Audi Finance). This will be sent to all Sales Managers, Audi Brand Specialists, and the General Manager.

## **Meeting with Stakeholders (dealership personnel)**

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

Who:

- Anthony Morrison: New Vehicle Sales Manager
- Norbert Schuldes: New Vehicle Sales Manager
- Ciprian Leucuta: Business Development Manager
- Jonathan Breton: General Manager

What:

- Sales Managers will review at least 1 call recording per salesperson every two weeks
- Sales Managers to lead training and follow-up 121s with Business Development Specialist after approving job aides
- Ciprian Leucuta will develop job aids and ensure the distribution of reporting

By When:

- Training and review will be delivered by mid-September
- Reporting will be sent out starting early September (for July YTD results)
- Weekly follow-up 121s will continue on the current schedule
- 45% Lease renewals is the target by the end of 2018

How:

- Training will be done with PowerPoint and quizzes with Kahoot!
- Call recordings will be reviewed using Call Catch Pro; individual phone numbers have been set up for the extensions to allow for quickly narrowing down who needs to be reviewed
- Reporting will be distributed by e-mail to the Sales team and General Manager

**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:

This is a process for which many of the components with the Lease and Loyalty renewals processes were already started. The topic is a natural evolution of the business case I started to create and hire someone for the Business Development Specialist role.

However, with several employees who moved from Audi Mississauga to Audi Brampton in September 2017 for the new store, we needed to bring these individuals on board as their portfolio made up roughly 45% of the annual maturities of the business.

After the Saturday Sales Meeting at Audi Brampton on August 4<sup>th</sup>, 2018, myself and the General Manager of Audi Brampton (and Dealer Principal of that location and Audi of Mississauga) Brad Johnston, met with the former Sales team members who had moved.

I presented the YTD renewals performance of the dealership, and showed everyone how to pull reports from our CRM on team and individual results, including how to drill down to see which specific customers/vehicles were renewed or not. I further covered the contact point strategy, content of messaging to existing customers.

In the meeting, Brad and I approached the topic as needing the help from the individuals in the room by both following the process, but especially including their notes in our CRM so that Ciprian (Business Development Specialist) was informed and on the same page for any customer contact but also reporting.

The meeting concluded with agreement and further questions and requests to make the process more easily measurable but also to minimize administrative work for them (i.e. notes in CRM that may exist elsewhere such as Auto Alert).

---