

Departmental Action Plan Template

Student Name: JB Burnett

Class & Student Number: 332 - 24

Academy Week (Var II): Var 2

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

Overall number of inbound phone calls that convert to appointments. Prior to Week 6 we were not tracking inbound calls at all, and especially not tracking the appointments off of them.

Overall Objective and Specific Desired Results:

Would like to increase results of appointments set from inbound sales calls to 50% and track the calls and appointments daily.

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

First have our BDC track all inbound sales calls and send nightly reports on salesperson who took the call, what vehicle, and customer name if they can get it.

Cross check those reports with the CRM and make sure we are getting 100% into the system and review notes to check for status and appointment made.

Monitor appointments daily and compare sold appointments with phone calls and track those results.

Timeline:

Describe specific short term and long term checkpoints to monitor progress

August 10th the BDC began tracking all inbound sales calls and sending a daily report. Every morning that report is reconciled with the previous days new added customers and the sales manager has been addressing any that are not entered. As we have tracked this daily it is giving us the ability to identify which customers had shown appointments, and allowed daily manager follow – up on customers that appointments were not set. We are also holding weekly sales training meetings and incorporating Jennifer Suzuki's information and videos to assist in the training as well as role playing. We will also be looking back monthly to track total monthly results on appointments made from inbound calls.

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: BDC – Sales People – Sales Management**
- b. What: New processes on inbound calls and monitoring the performance of those calls.**
- c. By When: Aug 10th**
- d. How: Kick off meeting with BDC and Sales so everyone knows what the new process will be and that everything is being tracked and graded.
Sales management separate meeting to discuss the Daily monitoring and tracking of the data provided as well as proper feedback to BDC and sales people.**

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:

He was fully supportive of further tracking of the customers reaching out to us at the store, and is looking forward to seeing what results we find out and then watching us tweak those processes and training to increase those results!