

Departmental Action Plan Template

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Class & Student Number: 333-38

Academy Week (Var II): Aug 13-18, 2018

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

(Homework modules assigned)

Currently, no one in our business follows any sort of phone training, or script or plan when it comes to taking a phone call. Most people in the business have had phone training, but no one has followed or followed up on the training to lead to a better way of getting results from phone calls, nor has anyone measured results after phone training. I definitely think we need to re-visit this situation. Definitely believe we could benefit and see results if a training system was implemented and followed up on. My action plan will be to investigate some phone training companies, select the one that best fits our business. Implement the training, follow up on the training to ensure it is being integrated into our business and measure results as far as appointments and sales being made as a result of better phone skills.

Overall Objective and Specific Desired Results:

My overall objective is to raise the number of appointments being made as a result of phone training. An initial goal would be to gain one appointment per 5 phone calls to start and gradually get that up to 1 appointment per two phone calls. As a result, this should lead to more sales resulting from phone calls.

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

Currently we have no measurements for appointments being made as a result of phone calls. Based on some recorded phone calls and mystery shops I have heard I would hazard to guess the measurement would be about 1 appointment per 10 calls into the dealership. So first, I will start recording the measurement of appointments made as a result of a phone call to the sales dept, and sales made as a result of these appointments. Next, I will check into phone training companies and select one that fits our dealership's needs. After hiring a company and implementing their training, we will follow up daily for the first two weeks to ensure that the training is being used and that everything is consistent in the way they answer phones to get desired results. After that we will follow up weekly, and as situations arise. We will measure the results of the phone calls, by recording if an appointment was made or not during the phone call, and if a sale is made as a result of the appointment. We will start with a goal of 1 appointment per 5 phone calls and keep adjusting

that weekly with the desired result of at least 1 appointment per 2 sales lead phone calls. Training will also be provided for the rest of the staff in other departments so that we have consistency throughout the dealership

Timeline:

Describe specific short term and long term checkpoints to monitor progress

Sept. 24 – Oct. 6 – Measure appointments made as a result of a sales phone call lead. – ongoing weekly - SM

Sept 24 – Oct. 6 – Measure sales made as a result of sales phone call lead. – ongoing weekly - SM

Sept. 24 – Sept. 28 – Investigate phone call training companies. – SM and FOM

Sept. 28 – Hire company that best suits our business and schedule training. - Mangers and partners

TBD – Phone training – all staff

2 weeks following phone training – review daily and ensure training is being implemented – SM and FOM

Ongoing – continually monitor appointment and sales measurements – SM

Ongoing – weekly touch-ups for phone training and reminders – SM at weekly meeting

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: Sales manager and Fixed ops manager
- b. What: Phone training enforcement
- c. By When: Dec. 31. 2018
- d. How: implementing and enforcing a phone training plan

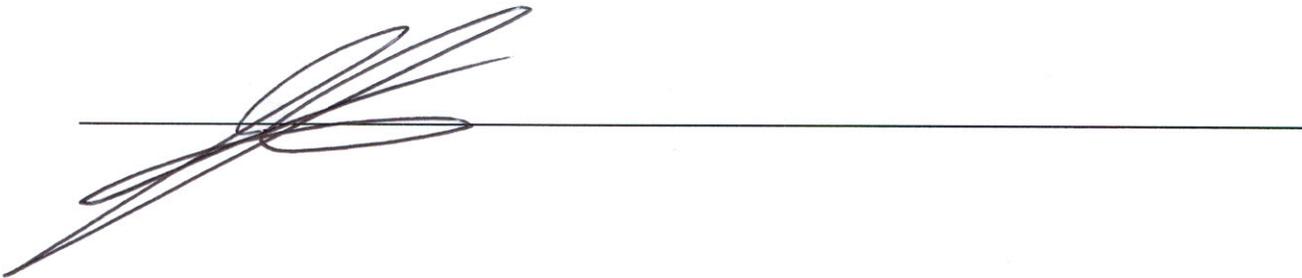
Basically, at this point we and our employees know that we have a problem with how phone calls are handled in all departments. There is no consistency and everyone has their own agenda and way of doing things. Everyone has acknowledged and accepted that we need to do phone training, but that doesn't always affect the desired result. We will be able to see by measurements if the phone training is being used, and with heavy monitoring in the first two weeks to set a habit we should see results. If the phone training is not being put into effect, we will have the employees redo training

modules until such a time as we see the desired results. This will be implemented by the sales manager and the fixed ops manager. After the initial two-week period, we will still follow up by measurement and by listening to how phone calls are handled to ensure the new system is being implemented. As a result of more appointments being made the result should be more sales from these appointments.

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:

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