

# Departmental Action Plan

Student Name: Ben Heer

Class & Student Number: N333 - 23

Academy Week: 5

Current situation or challenge you want to address:

- 1) BDC and sales team are not asking for the appointment every time.
- 2) BDC and sales team are not controlling the conversation to earn the right to ask for the appointment

Our company utilizes a company called Measure-Up to track and grade incoming calls.

We have identified these concerns with the following report and by listening to these calls

After listening to several calls we didn't ask for an appointment, it was clear we didn't establish control and didn't ask for the appointment.



Dashboard Composite  
9/1/2018 - 9/23/2018

Sales New and Pre-Owned

General Grading			Captured Email or Text			Appointment Set			
< 65%	65 - 74.9%	75% >	< 50%	50 - 69.9%	70% >	< 20%	20 - 39.9%	40% >	
Store	# of Calls	Greeting	Callers Name (Up Front)	Caller Contact Info	Associate Info	Ask For Appt. (with Options)	Score	Captured Email or Text	Appointment Set
ST	33	33 100.0%	28 84.8%	25 75.8%	19 57.6%	27.3%	69.1%	18 54.5%	24 72.7%
SFE	60	59 98.3%	45 75.0%	45 75.0%	45 75.0%	47 78.3%	80.3%	45 75.0%	37 61.7%
SW	14	14 100.0%	14 100.0%	14 100.0%	7 50.0%	5 35.7%	77.1%	7 50.0%	8 57.1%
SEW	30	26 86.7%	20 66.7%	24 80.0%	16 53.3%	7 23.3%	62.0%	14 46.7%	16 53.3%
SI0N	36	36 100.0%	36 100.0%	31 86.1%	29 80.6%	24 66.7%	86.7%	29 80.6%	18 50.0%
SBOF	82	78 95.1%	78 95.1%	79 96.3%	56 68.3%	46 56.1%	82.2%	55 67.1%	40 48.8%
STI	131	128 97.7%	126 96.2%	124 94.7%	103 78.6%	111 84.7%	90.4%	99 75.6%	57 43.5%
SI0I	35	35 100.0%	35 100.0%	30 85.7%	25 71.4%	24 68.6%	85.1%	23 65.7%	15 42.9%
SESH	59	58 98.3%	58 98.3%	44 74.6%	42 71.2%	41 69.5%	87.1%	40 67.8%	25 42.4%
SCDRT	57	54 94.7%	53 93.0%	52 91.2%	40 70.2%	34 59.6%	81.8%	37 64.9%	24 42.1%

## Overall Objective and Specific Desired Results:

We would like to increase our appointments using Jennifer's 10 step method. We would like to train our BDC on a process like Jennifer's that allows them to gain control and be more confident when asking for the appointment.

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

The action plan is as follows:

- 1) Contact David Kain with our current BDC training company to set up a meeting to review our current percentage of asking for the appointments and develop training to increase it. Introduce Jennifer's Ten steps to setting the appointment to the team.

- 2) BDC manager will log in daily to measure up dashboard and review asked for appointment percentages for each BDC rep. She will then listen to the calls and coach the individual bdc rep.
- 3) BDC rep must maintain a percentage in the green or they will be removed from the incoming call queue until further training is completed and the BDC manager is confident they are ready.

**Before and after measurements include improving:**

Asking for the appointment from: 59% -> 70%+

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

- **Checkpoint #1** = GSM to ensure David Kain is contacted and training is set up with the BDC manager. With an emphasis on Jennifer's 10 steps to setting the appointment.
- **Checkpoint #2** = GSM to follow up with the BDC manager to make sure the training was provided and the results are being measured daily.
- **Checkpoint #3** = GSM to review Measure Up results weekly to ensure the scores are improving.

**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:** GM, GSM, and BDC manager must be on the same page to ensure accountability.

**WHAT:** Constant review of results and coaching. Do we have the right people?

**BY WHEN:** Measure up Scores are to all be in the green by October 31<sup>st</sup>.

**HOW:** Share the results with the team. Share with the team what we are expecting and how we expect to get there. Additional training. Review and coach daily. Make sure we have the right team members in place.

**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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**SPONSOR: David Fischer Jr. (President and COO)**