

Departmental Action Plan Template

Student Name: Jason Ferreira

Class & Student Number: 333-11

Academy Week (Var II): August 13-17

Current situation or challenge you want to address based on the Jennifer Suzuki Outline:

To increase our service to sales process through outbound phone calls.

Overall Objective and Specific Desired Results:

Our overall objective is to increase new and used car sales directly related to service customers.

With the process outlined below we intend on selling an additional 30 units per month without increasing advertising expense.

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

Currently BDC calls all service customers the night prior to their service appointment to see if they have any interest in having a free trade appraisal performed while they are here for service. We are currently selling 15 units per month directly related to service.

On 9/18-9/20 Jerry L from JLT came to the store for a 3-day outbound call training. He solely focused on customers who recently serviced with our store.

From this training and Jennifer Suzuki's we have implemented the following:

- Service advisors will verify all customer info upon arrival (phone numbers, email address, physical address and mailing address).
- When the customer cashes out the cashier will reconfirm all personal information and make a copy of the Repair Order
- Managers will review all RO's and assign the ones with upgrade potential to team members.
- Based off motivation and phone skills a 5 sales consultant SWAT team will be created. Only the top consultants will have access to these leads.
- Each of the 5 team members will conduct 1 hour of calls to service customers with RO in hand per day.
- To remain on the SWAT team all consultants will be required to schedule 2 appointments per working day.
- We will focus on all 2-year-old vehicles or older offering a credit in the amount of what they spent while here in service at their recent visit. As well as inform them of addition loyalty incentives and the ability to pay over market value for their trade.

Timeline:

Describe specific short term and long term checkpoints to monitor progress

We will monitor appointments scheduled daily. Ensuring each consultant schedules a minimum of 2 each.

With 50 appointments scheduled per week and 80% show rate we should see 40 ups per week.

At a minimum of 20% sold ratio = 8 sold per week x 4.2 weeks per month = 33 additional deals per month.

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:
Service advisors, cashier, sales managers, sales consultants, Jerry (trainer)
- b. What:
Jerry will continue to coach and train through December 30th 2018. All others will follow plan presented in detailed action plan section.
- c. By When:
Appointments will be verified by Jerry on a daily basis. Managers will review Appointments, shown and sold numbers each Friday at 9:00am.
- d. How:
By working phone scripts provided by JLT as well as Jennifer Suzuki, Reviewing numbers daily and coaching while calling.

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:

Meeting went great. DP agreed to hire JLT to coach and train staff for 90 days and will transfer the training to other stores in the group if successful.
