

Departmental Action Plan

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Class & Student Number: N333 - 22

Academy Week: 5

Current situation or challenge you want to address:

- 1) BDC and sales team are not asking for the customer's name and contact info up-front every time.
- 2) When the BDC and sales team do not handle the call properly and they don't control the conversation they never achieve a "firm" appointment.

Our company utilizes a company called Measure-Up to track and grade incoming calls. I have identified these concerns with the following report and by listening to these calls. Although we are consistently the top performing store on this report in our group, we have never achieved an above 70% score on Appointment set. I feel that is a direct result of not controlling the conversation from the beginning.

Measure-UP! GROUP

Dashboard Composite
9/1/2018 - 10/1/2018

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
<u>SFF</u>	78	77 98.7 %	61 78.2 %	60 76.9 %	60 76.9 %	60 76.9 %	81.5 %	60 76.9 %	51 65.4 %
<u>SI</u>	44	44 100.0 %	35 79.5 %	32 72.7 %	26 59.1 %	12 27.3 %	67.7 %	25 56.8 %	27 61.4 %
<u>SV</u>	14	14 100.0 %	14 100.0 %	14 100.0 %	7 50.0 %	5 35.7 %	77.1 %	7 50.0 %	8 57.1 %
<u>SIOH</u>	50	50 100.0 %	50 100.0 %	40 80.0 %	39 78.0 %	33 66.0 %	84.8 %	38 76.0 %	24 48.0 %
<u>SFSH</u>	97	95 97.9 %	91 93.8 %	74 76.3 %	68 70.1 %	67 69.1 %	81.4 %	66 68.0 %	46 47.4 %
<u>SBSF</u>	91	87 95.6 %	84 92.3 %	87 95.6 %	60 65.9 %	50 54.9 %	80.9 %	59 64.8 %	43 47.3 %
<u>SCDJRT</u>	73	68 93.2 %	65 89.0 %	65 89.0 %	48 65.8 %	44 60.3 %	79.5 %	45 61.6 %	34 46.6 %
<u>SFW</u>	43	37 86.0 %	25 58.1 %	34 79.1 %	25 58.1 %	7 16.3 %	59.5 %	22 51.2 %	20 46.5 %
<u>SII</u>	187	184 98.4 %	182 97.3 %	176 94.1 %	147 78.6 %	156 83.4 %	90.4 %	141 75.4 %	82 43.9 %
<u>SIOI</u>	49	48 98.0 %	48 98.0 %	37 75.5 %	33 67.3 %	31 63.3 %	80.4 %	28 57.1 %	21 42.9 %
<u>MBAA</u>	35	35 100.0 %	33 94.3 %	31 88.6 %	31 88.6 %	22 62.9 %	86.9 %	30 85.7 %	15 42.9 %
<u>SCDJRGC</u>	75	75 100.0 %	68 90.7 %	59 78.7 %	47 62.7 %	21 28.0 %	72.0 %	35 46.7 %	31 41.3 %
<u>SCT</u>	99	99 100.0 %	97 98.0 %	97 98.0 %	88 88.9 %	79 79.8 %	92.9 %	84 84.8 %	40 40.4 %

Overall Objective and Specific Desired Results:

We would like to increase our appointment set percentage by using a method similar to Jennifer's 10 step process. We would like our BDC to be more confident in call handling skills.

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

The action plan is as follows:

- 1) Have the BDC agent watch Jennifer's videos.
- 2) BDC manager will log in daily to measure up dashboard and review the Callers name up-front score, caller contact info score, and appointment set percentages for each BDC agent. She will then listen to the calls and coach the individual BDC agent.

Before and after measurements include improving:

Callers Name Up-Front from: 78% -> 90%+

Callers Contact Info from: 76% -> 90%+

Appointment Set from: 65.4% -> 70%+

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

- **Checkpoint #1** = BDC manager to make sure all agents are continuing to receive the proper support and training necessary to ensure our performance goals are met.
- **Checkpoint #2** = GM to meet weekly with Sarah BDC manager with an emphasis on Jennifer's 10 steps to setting the appointment.
- **Checkpoint #3** = GM 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 Appointment Set % at or above 70% by October 31st.

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:



SPONSOR: David Fischer Jr.