

Departmental Action Plan Template

Student Name: Jared Neuffer

Class & Student Number: 333-24

Academy Week (Var II):

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

(Homework modules assigned)

We feel getting a good outbound call process together designed to target AutoAlert leads.

Overall Objective and Specific Desired Results:

Our overall objective is to design a written process that all sales employees can use to generate appointments, have confidence in themselves and see results. We would like to be able to generate 20 additional appointments a month per sales person.

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

We will use the transcript Jennifer suggested. This transcript will be in front of each person while they are making the calls. The leads will be generated from AutoAlert using the equity mining tool. We will split the staff into teams and those teams will rotate along with a manager and gather each day, in one location to begin the calls. The set up will be round table. One salesperson will take a lead, dial the customers phone number and put the call on speaker, but muted. As the salesperson

goes through the transcript, all other sales people in the room will be able to hear the conversation. If the sales person making the phone call runs into trouble, the rest of the staff is there to help. It also allows them to make adjustments and build confidence on the phone. The overall goal is to set as many appointments as possible. Once an appointment is set, it will be entered into the CRM for tracking purposes. A sales manager will call to confirm the appointment the night before and give directions to the dealership.

Timeline:

Describe specific short term and long term checkpoints to monitor progress

This action plan is something that can be implemented immediately. There is actually a written template that will be designed and printed off for a guide for the salesperson to use. Once appointments are set, they will be verified by a manager who will call the customer and offer directions to the dealership once the appointment is confirmed.

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: All managers (desk, internet and all sales employees).
- b. What: Make sure the process is followed and executed.
- c. By When: The beginning of October
- d. How: By holding the staff accountable. There will also be a different manager in the room each day making call with the staff.

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:
