

## **Departmental Action Plan**

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Academy Week (Var II)

### **Current situation needing to be addressed:**

- 1) The percentage of inbound phone calls converted to appointments.
- 2) Follow up with the customer that we don't set an appointment.
- 3) Improvement on the word tracks that are needed to get the customer to set and confirm an appointment. Refer to Jennifer Suzuki's training and examples.

After reviewing our number of inbound phone calls that got converted to a firm confirmable appointment and the process and or sense of urgency that the sales person or manager had with the non-appointment phone calls it is easy to see that we can and need to improve. Listening to the phone calls recorded in Vin Solutions made it obvious that we NEED phone training.

### **Overall Objective and Specific Desired Results:**

Currently we average 35-40% ratio of inbound phone calls to setting an appointment. We feel like 75-80% is where we would like to be averaging. We are a very high internet lead store with very few inbound phone calls therefore it is crucial that we captivate the opportunity immediately. Our follow up process for a customer that we didn't set an appointment has been the next day. We feel like it is imperative that we follow up with a manager call within an hour and try to set another appointment with the customer. Phone training like what Jennifer Suzuki did with

reviewing and listening to calls will make all of us better on the phone. As a result get more appointments!

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

The action plan is:

- 1) Conduct phone training using the current scripts that we have developed and integrate the TRUST / TIME SAVINGS / RESPECT aspect of the Jenifer Suzuki methods. Including reviewing recorded phone calls both good and bad for examples of what to do and not to do.
- 2) Use Vin Solutions to monitor our inbound calls verses the appointments set. Analyze the original inbound call numbers and the follow up success on setting the appointment. Use this information in order to improve our process. Currently we average 35-40% ratio of inbound phone calls to setting appointments. Our goal is to increase that percentage to 80% appointment rate on the original inbound call.
- 3) Change our follow up process that we use. Currently we set a reminder in Vin Solutions for the sales person to follow up on the customers that we didn't set and appointment with the following day. That will change to the manager following up with the customer approximately one hour later. Develop word tracts that will help the manager achieve the goal of setting the appointment that the original conversation didn't.

**Timeline:**

Check points (Immediately)

- 1) GSM to verify the phone training is being done on weekly basis with the early and late shift using a weekly calendar with the topics of discussion.
- 2) GSM is to turn in weekly report from Vin Solutions on the number of inbound phone calls and the number that got

converted to a confirmed appointment. Including the number of shown appointments. This will be reviewed by the GM, Director of Operations and GSM.

- 3) GSM will review progress and percentages with all sales managers Saturday morning before weekly sales meeting.
- 4) Long term we will monitor and report at the monthly dealership meeting along with all other numbers reviewed our appointment ratio numbers. This will allow us to monitor our success and keep it current in everyone's mind so that this process won't slide by the way side.

### **Meeting with Stakeholders (Dealership personnel):**

Everyone must understand the importance of the professionalism we use on the phone and the rewards that will be realized when we use it. The use of words and attitude is everything on the phone. People can feel you smiling on the other end of the phone or not. We do all kinds of training including product knowledge, sales training, and closing techniques. The phone training is often ignored. Phone training will help us in all aspects of our business. We are in a communication business. Weekly training with the support of upper management will make us better and all employees will recognize the importance of it. If it is our priority it will become their priority.

Who: GM, Director of Operations, GSM , Sales managers, and all sales personnel will attend kick off meeting. Everyone must see the importance of this process and the requirement of it for our success.

What: The constant awareness of our performance on the phones and the need for improvement and practice of our techniques just like a professional sports team.

By When: Immediate implementation of the monitoring and training. Review progress with everyone in the managers meeting. (Monthly)

How: Bring everyone in to the training/monitoring process. Listen and learn from everyone. We will Research different techniques and ideas. We then will apply them to our individual needs. Daily, weekly and monthly review will keep phone skills on our priority list.

**Dealer agreement:**

I met with my sponsor and received 100% support for this action plan. We are implementing this together and as a team. He definitely sees the importance of the phones and the accountability that we will hold all our sales managers and sales people to.