



Class N333

Student # 013

Christopher Tokarz

Week 5 Variable OPs II

Action Plan

Departmental Action Plan Template

Student Name: Christopher Tokarz

Class & Student Number: N333 #013

Academy Week (Var II): Week 5

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

(Homework modules assigned)

- ❖ We had catastrophic failure on the Mystery Shop done in class. The call was bounced around from the reception desk to Sales, back to the reception desk, and ultimately dumped into a Sales BDR's voicemail. The Mystery Shop was performed on a \$140,000 GT Roadster. We have also done some other internal mystery shops and they have not gone well.
- ❖ We are also not handling Internet leads well.

Overall Objective and Specific Desired Results:

- ❖ We want to process our phone calls and Internet leads much more efficiently and effectively. We are closing at a very low rate and need it to improve ASAP. Our current (August) overall Internet lead closing ratio is 6.36%. We have averaged a 6.52% closing ratio Y-T-D, with a high of 8.21% in February and a low of 5.51% in March.

- ❖ Our GSM and BDC Sales Manager continue to review the inbound / outbound calls for the Sales staff and BDC. Coaching occurs daily. We review not only the number of calls, but also the duration. Calls are spot checked for content. Report for September 2018 is attached here.

Continued...

- ❖ Management will continuously review our appointments made / shown through Dealer Socket. Copy of September report attached here.

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

- ❖ We have hired two Internet Lead Specialists that will be equipped to handle the leads from start to finish, as neither has a book of business with us or will take live ups. Paul Corrigan was hired 06/25/18 from the banking field. He has been training and will begin handling his own leads 10/01/18. Nathan Frost was hired 09/12/18. He has been in automotive sales previously. He had his first delivery 09/29/18. We have removed the Internet leads from the 4-5 Sales team members that were handling them. Their follow up times were too slow, as they had their own client base to follow up with, and they were still taking ups. They have very high closing ratios with fresh ups, so we need them to focus on these clients.
- ❖ We have also promoted one of our Sales BDR's, who works in the BDC to be a "team captain" of sorts. She has a veteran presence and is a top performer. She will now also be paid on the team's appointment shows. We did have a nice uptick for September, so we our BDC Sales Manager will continue to monitor. Our BDC Director also put together a "Win a Pizza Party" contest for September for appointment shows for the BDC. Image attached here. We will have additional "fun" contests going forward.
- ❖ I am finalizing the call routing process with our IT Manager. Our BDC is off-site and we only have one receptionist at certain times of the day, so we need to manage this process better. It has been painfully obvious that we have too many gaps with inbound calls. All Sales Managers will be part of the routing process to eliminate any missed calls.
- ❖ We are evaluating and upgrading our front reception desk coverage. One, but possibly both, employees will be changed. We have engaged in coaching, off-site

training, and so on and we still have concerns. We need to deliver a luxury experience with every client, yet cannot seem to process the calls properly. One new candidate is going through the HR on-boarding process 10/01/18.

Timeline:

Describe specific short term and long term checkpoints to monitor progress

- ❖ We have an in-house marketing team, so we can track the Internet lead conversion rate weekly and monthly.
- ❖ We will track the leads and sold units for both Paul and Nathan daily. We have already celebrated Nathan's first delivery in one of our daily Sales meetings.
- ❖ We will continue to recruit Internet lead specialists from our own BDC and outside sources.
- ❖ We will continue to perform mystery shops to measure inbound call handling.

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:** GM and GSM
- b. **What:** Hire staff and monitor progress
- c. **By When:** October 2018 and beyond
- d. **How:** Recruiting. Create Road Maps for new employees to follow. Review metrics

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:

Joseph D. [Signature] 10/04/18

LET'S WIN A

PIZZA PARTY

Shown Appointments
month to date:

297

Shown Appointments
Goal for September:

370



Employee Summary Report

Template Name: BDC - MBNR



My Network Phone

Date Range: 9/1/2018 to 9/29/2018

Time Range: All

Call Duration: Seconds

Call Direction: All

Call Type: External - All

Call Status: All

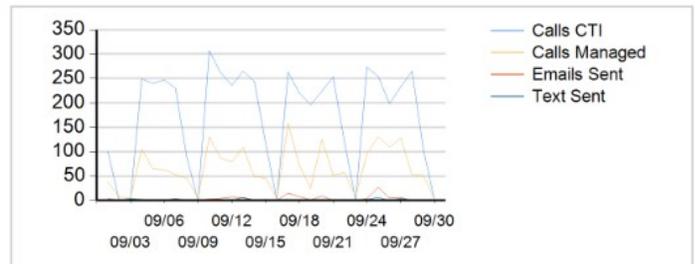
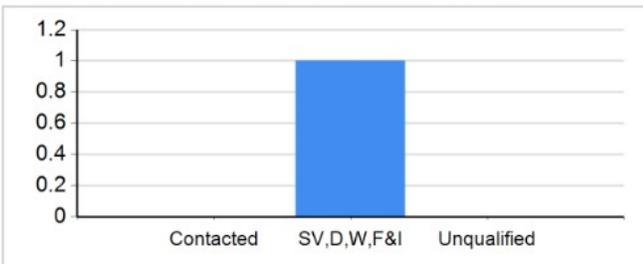
Sorted by: Name, Ascending

Name	Connected	Connected %	Voice Mail	Voice %	Missed	Missed %	Incoming	Outgoing	Total Calls	Total Time	Average
Abigail Gonzalez (262)	977	94.21 %	0	0.00 %	0	0.00 %	251	787	1037	15:13:37	00:00:53
Abigail Gonzalez (362)	11	64.71 %	6	35.29 %	0	0.00 %	17	0	17	00:33:22	00:01:58
Ivone Ruiz (265)	780	94.66 %	0	0.00 %	0	0.00 %	246	578	824	12:39:00	00:00:55
Ivone Ruiz (365)	16	55.17 %	10	35.71 %	2	7.14 %	28	1	29	00:45:17	00:01:34
Lissette Espinal (263)	1229	94.90 %	0	0.00 %	0	0.00 %	313	982	1295	19:19:13	00:00:54
Lissette Espinal (363)	25	78.13 %	7	21.88 %	0	0.00 %	32	0	32	01:11:49	00:02:15
TOTAL	3038	80.30 %	23	15.48 %	2	1.19 %	887	2348	3234	49:42:18	00:01:25

BDC Activity Report

Mercedes-Benz of New Rochelle

Date Range: 09/1/2018 - 09/30/2018

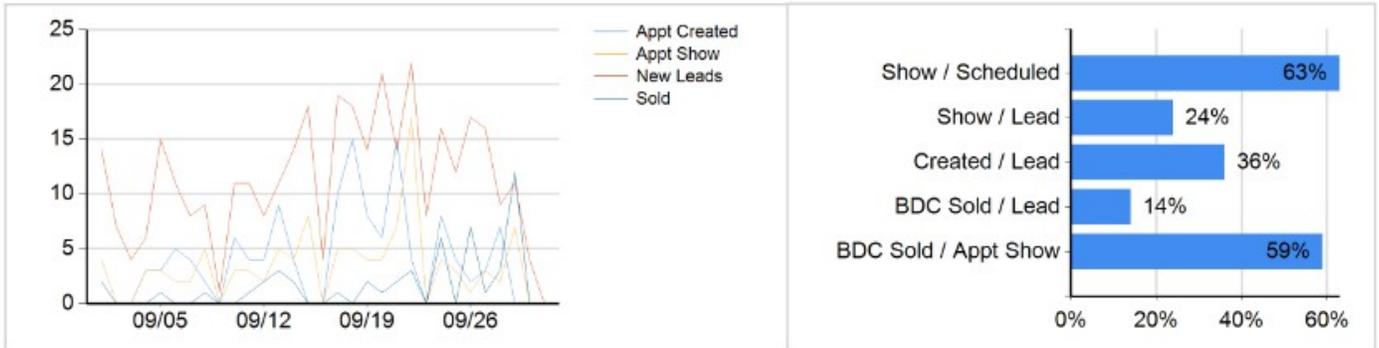


Rep	Open Events			BDC Activities								
	Unqualified	Contacted	SV, D, W, F&I	Response Time	Appt Created	Appt Confirmed	Call To Dos Managed	Calls CTI	Calls/ Appt Show	CTI Calls/ Appt Show	Emails Sent	Text Sent
Christian DePalma	0	0	1	0.00	4	2	327	153	327.00	153.00	0	6
David Garcia	0	0	0	0.00	17	1	444	204	63.00	29.00	10	25
Edward Szubzda	0	0	0	0.00	0	0	58	12	0.00	0.00	0	0
James Palmer	0	0	0	0.00	8	0	227	136	75.00	45.00	0	0
Jennifer Magnan	0	0	0	0.00	2	0	403	232	201.00	116.00	3	0
Renee Bianco	0	0	0	0.00	1	0	321	125	0.00	0.00	89	3
Shawn Martinez	0	0	0	0.00	9	1	184	102	61.00	34.00	0	2
Total	0	0	1	0.00	41	4	1964	964	45.44	23.56	102	36

BDC Performance Report

Mercedes-Benz of New Rochelle

Date Range: 9/1/2018 - 9/30/2018

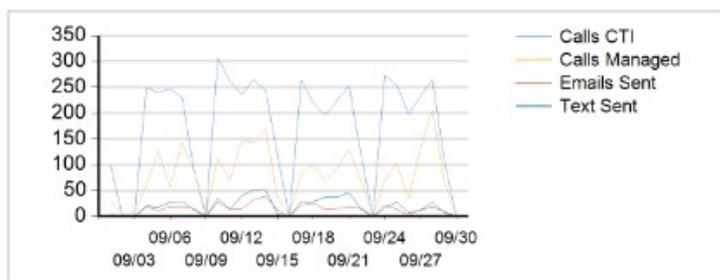
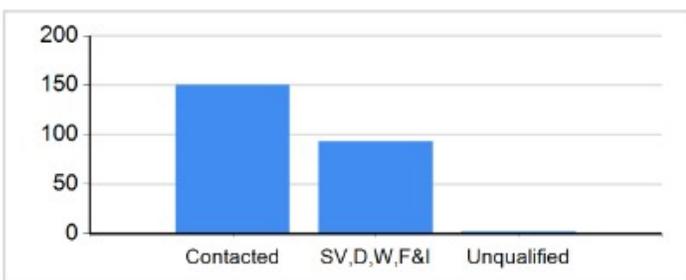


Rep	Lead Conversion			Appointment Conversion					Sales Conversion		
	Leads	Appt Created	Created /Lead	Appt Scheduled	Appt Show	Show/Scheduled	Appt No Show	Show/Lead	BDC Sold	BDC Sold / Appt Show	BDC Sold / Lead
Abigail Gonzalez	159	47	30%	53	30	57%	23	19%	20	67%	13%
Ivone Ruiz	83	35	42%	38	27	71%	11	33%	17	63%	20%
Lisette Espinal	111	44	40%	45	28	62%	16	25%	13	46%	12%
Total	353	126	36%	136	85	62%	50	24%	50	59%	14%
Total Fresh Up	82	22	27%	24	12	50%	12	15%	8	67%	10%
Total Internet	197	48	24%	50	28	56%	22	14%	18	64%	9%
Total Internet - Non Sales	3	0	0%	0	0	0%	0	0%	0	0%	0%
Total Phone Up	69	42	61%	47	37	79%	10	54%	16	43%	23%
Total RevenueRadar	2	14	700%	15	8	53%	6	400%	8	100%	400%

BDC Activity Report

Mercedes-Benz of New Rochelle

Date Range: 09/1/2018 - 09/30/2018

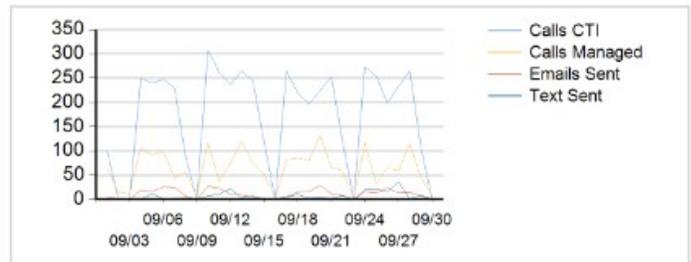
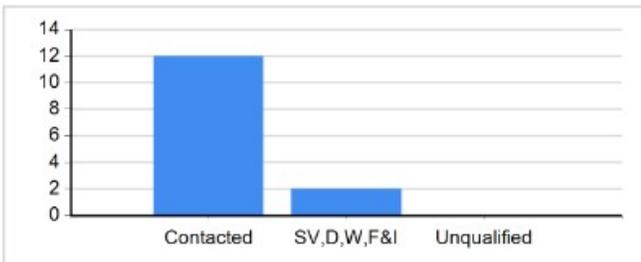


Rep	Open Events			BDC Activities								
	Unqualified	Contacted	SV, D, W, F&I	Response Time	Appt Created	Appt Confirmed	Call To Dos Managed	Calls CTI	Calls/ Appt Show	CTI Calls/ Appt Show	Emails Sent	Text Sent
Abigail Gonzalez	1	73	39	0.33	47	52	1179	0	39.00	0.00	171	263
Ivone Ruiz	1	30	32	0.35	35	33	849	0	31.00	0.00	86	139
Lissette Espinal	0	47	22	0.42	44	44	331	0	11.00	0.00	160	187
Total	2	150	93	1.10	126	129	2359	0	0.95	0	417	589

BDC Activity Report

Mercedes-Benz of New Rochelle

Date Range: 09/1/2018 - 09/30/2018



Rep	Open Events				BDC Activities							
	Unqualified	Contacted	SV, D, W, F&I	Response Time	Appt Created	Appt Confirmed	Call To Dos Managed	Calls CTI	Calls/ Appt Show	CTI Calls/ Appt Show	Emails Sent	Text Sent
Alexander Nikaj	0	0	0	0.00	4	3	685	119	228.00	39.00	77	185
Jeremie Rodriguez	0	0	0	0.00	3	0	245	114	122.00	57.00	40	5
Kevin Stephens	0	0	0	0.00	2	0	452	193	0.00	0.00	41	6
Martin Garcia	0	0	0	0.00	1	0	341	86	0.00	0.00	36	8
Nathan Frost	0	0	0	0.00	0	0	10	6	0.00	0.00	7	0
Paul Corrigan	0	12	2	0.50	1	2	188	0	0.00	0.00	148	1
Total	0	12	2	0.50	11	5	1921	518	70	19.2	349	205