



Financial Management Objective Homework

**Student
Class #**

Caroline Chapman

Name:

323

Academy

***I plan to accomplish the following objective
our next class on:***

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by

**Provide the relevant
composite data**

Department	Mont h	Page	Colum n
Sales	Feb	A	2

Action plan for achieving objective
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What is the area of focus?

The area of focus is the sales process and how salespeople are trained to follow that process.

What is the proposed plan? How will you achieve it?

My plan is to implement a sales process that is cohesive throughout the dealership. The process will include everything from how to greet the customer, to how to input them into the CRM, how to introduce the manager, introduce to finance, and the final delivery. I plan on achieving this by making sure each salesperson is trained by their managers thoroughly, making sure each salesperson knows what is expected of them and which steps to follow. I also plan on holding the sales managers accountable for the performance of the salespeople on their team.

How will you track your progress? What measurements, KPI's? How often will you track?

I will check the progress by checking in with the sales managers every day, along with delivery coordinators and finance managers. Overall CSI scores and sales will be tracked weekly once the process is fully implemented.

Who are the employees that will be involved, or impacted? Will they

require training or assistance?

The main employees involved will be the sales staff and their managers. Finance managers and delivery coordinators will also be involved to ensure the process runs smoothly. All these employees will require training, but the bulk of the training will be for the salespeople.

Is there a cost, or estimated cost for implementation?

There is technically no cost for this training. However, the longer the staff is in training, the fewer customers they see. This can cost the store in a negative way at first, but the outcome will increase sales and overall CSI.

Projected date of completion?

The projected date of completion is roughly one month from the start date. 3/31

Jan.	Feb.	March	April	May	June
July	Aug.	Sept.	Oct.	Nov.	Dec.