

Departmental Action Plan Template

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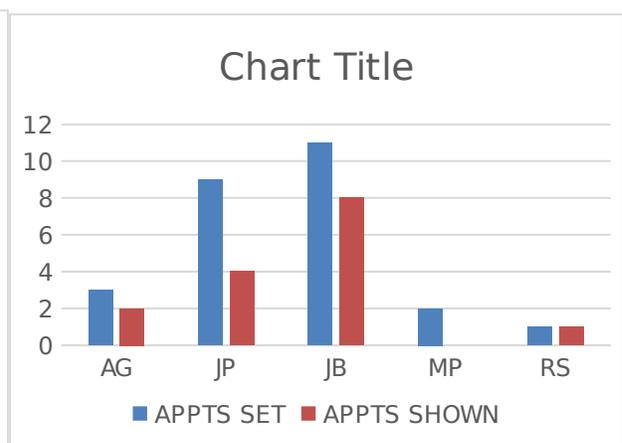
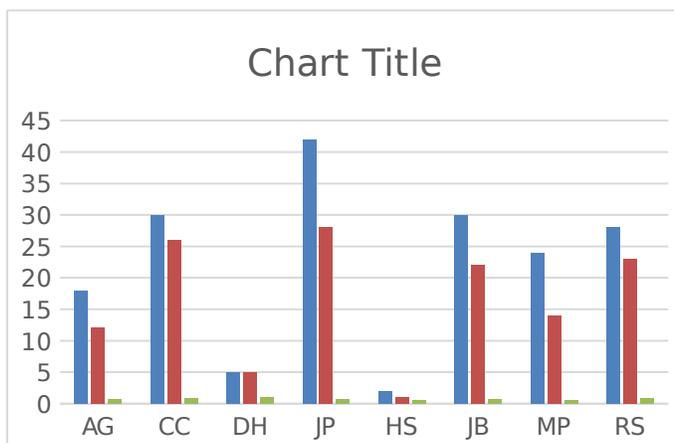
Academy Week (Var II):

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

We do have an issue with our phone traffic. We are not consistent with how we take the calls, what information we collect, and logging the traffic properly, and then keeping the appts.

	PHONEUPS	APPTS MADE	YTD
AG	18	12	67%
CC	30	26	87%
DH	5	5	100%
JP	42	28	67%
HS	2	1	50%
JB	30	22	73%
MP	24	14	58%
RS	28	23	82%

	APPTS SET	APPTS SHOWN	SEPT ONLY
AG	3	2	67%
JP	9	4	44%
JB	11	8	73%
MP	2	0	0%
RS	1	1	100%
	26	15	58%



Overall Objective and Specific Desired Results:

We have a new GM and a new Sales Manager that have the same objective:

1. Improve on the phone skills and how they talk to a customer
2. Record better data with the CRM so the Management can track the calls better
3. Increase appointments

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

The GM went thru his “ideal phone up”. It was very interesting that he said almost the same thing as Jennifer did. A few things they will be doing more of:

1. Pull the trilogy and other recorded calls to use as a teaching tool
2. Listen to the actual call going on, take notes and pull the sales person in for one on one training.
3. Monitor logs daily
4. On each phone we developed a sticker that we hope will be just a easy and a subtle reminder to do the three basics with any phone call:

**DID YOU
N
C
A
TODAY**

NAME, CONTACT INFORMTATION, APPT

MADE

Timeline:

Describe specific short term and long term checkpoints to monitor progress

This is both short term and long term. We will monitor it weekly with the CRM to make sure they are logging, following up, using the system tight. This process change will be put in place immediately and hopefully have a quick short term improvement that will also translate into a long term process change that everyone will easily remember and follow thru with.

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 Sales Manager and Sales Staff
- b. What: Phone call training, customer interaction training with customer.
- c. By When: Immediate implantation with no end. This will always be a subject in meetings and with new staff. This will always be improved upon as the sales staff get better at talking to customers.
- d. How: One on one meetings, group sales training, pulling the supporting data from CRM and recorded phone calls. Showing the sales staff what can actually happen when you do what you are trained to do. The benefit to them “\$\$”,

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:
