

Departmental Action Plan Template
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Class & Student Number: N335, #28

Academy Week (Var II):

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

The challenge is to engage our BDC personnel, sales people, and cashiers to the ideas and the phone skill philosophy that e-Dealer Solutions presented at the Academy.

(Homework modules assigned)

Overall Objective and Specific Desired Results:

The first day back to the dealership after the Variable Ops 2 Class, I did speak with the cashiers and the office manager on answering the phone; "Thank you for calling Rochester Toyota, this is _____, would you like service, parts or sales" The cashiers were very receptive, but as usual my office manager just rolled her eyes at me. But they all have been doing it. At least when I am in ear shot anyway.

My major objective is that the BDC who takes all of the incoming sales leads is trained to properly to handle all calls once they get to them. The desired result is that they take control of the calls, do not ask any open - ended questions and make more appointments all while treating the customer with respect and courteousness so they receive the same back.

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

This is where it gets a little complicated. My partner/sister had already hired Proactive Dealer Solutions to train the BDC. She, our new GSM and the BDC manager have been working on hiring 2 new reps (which we have done), move one of our current reps to the service side of the BDC to call and confirm service appointments, reschedule missed appointments, call from our customer base anyone who has not been in for a while, schedule customers who have open recalls etc... Where I am working on possibly changing website providers, hiring someone to take photos daily of fresh new and used inventory to get them on our site in a timely manner, and becoming more familiar with the digital side of things. I also forgot continued training with my used car manager and buyer to obtain the right inventory and price accordingly. I must let them take the phone training on. My sister/partner really wants to be the one to head this project. My plan is to start listening to the calls (I believe we have Call Revu or another like company) and see that they are being handled properly. Then I can meet with my sister to discuss how we feel the call/calls that did not result in an appointment could have been handled differently. Maybe we can even work as a team? I will most likely need to get more training from e-Dealer Solutions to increase my knowledge on phone skills. I do have almost 7 years on the sales floor and many more as a manager but may be a bit rusty.

Our goal is to set appointments for 60% of our phone leads, then 60% of the leads we set appointments for show, and lastly 60% of the customers who show, purchase from us.

From a phone up report for 10/01-10/30/2018, we had a total of 65 phone ups and set 31 appointments. 22 of the appointments set showed, and out of the 22 that showed 7 purchased from us.

1. Our actual #'s with 65 leads, 31 appts = 47.77% lead to appt set. Our goal of a 60% appt set would have increased our set appts to 39. Plus 8 !
2. Our goal of a 60% show ratio (lower than our actual of 71%) = 23.4 appts that show (60% of 39). If we could keep our show % at the 71%, we would have 27.69 appts that show. (71% of 39)
3. Our actual #'s with 22 appts that showed and sold only 7 at a disappointing 31.8%. At our goal #'s, even if only 60% of appts made showed, we would have doubled our sales, selling 14 ! (23.4 x60%). If somehow the appt show ratio stayed at 71%, 27.69 appts that show x 60% = 16.6 sales. 9-10 additional sales best case scenario, but still even at a 60% show we will have doubled our sales at a 60% selling 14.
4. Our average gross new and used combined was \$2167.00 includes F&I and holdback, does not include MCBP, which is the same dollar amount as the holdback.

At minimum 14 additional sales x \$2167.00 = and additional monthly income of \$30,338. If we could keep that up all year, we'd be up \$364,056 At best case scenario 16.6 additional sales x \$2167 = \$35972 additional monthly income, an additional annual income increase of \$431,664 !

If I had the know how, I would have put this all in a graph. Our show ratio has always been high. My belief is if we can increase our appt set percentage from our total phone leads, the appt show percentage will drop. I still believe it will be higher than 60%, but we will have to see.

Timeline:

Describe specific short term and long term checkpoints to monitor progress

After listening to the calls for 30 days, arrange a meeting with my sister and GSM on 12/01 to revue how things are going. Review some of the recorded calls that did not result in an appointment and make suggestions. Do this for another 30 days, and if we are not continuing to improve, possibly try e-Dealer Solutions to help with our training. That way we can start the new year fresh.

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

Since my partner, GSM and the BDC manager are already heavily vested and have recognized there is a major problem in our BDC. I can only listen to the calls and apply what I have learned and will continue my phone skill

training to best be able to coach and help all that are involved. The 47.7 appt set ratio that we are currently at is actually quite an improvement of where we were. My sister and GSM have really been working hard with our BDC manager and her staff to really change the culture in the BDC. Plus they recently moved to a much bigger office with actual windows with a view of the outside. We can now have the number of reps we need and increase that as we grow and our BDC manager can spend more time training/managing her staff instead of actually taking and following up on a big percentage of the phone calls, internet leads, chats, etc... Between the new reps, new workspace, training, there has been a vast improvement from where we were just a short time ago.

- a. Who: Partner, GSM, BDC Manager
- b. What: Meet in 30 days to review calls.
- c. By When: 12/01/18
- d. How: Meet in our conference room and discuss calls. I will give input on how to improve and compare notes with 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:
