

Departmental Action Plan Template

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Class & Student Number: N335 & 03

Academy Week (Var II): Week 5

Current situation or challenge you want to address based on the Jennifer Suzuki Outline:

The biggest challenge we have within our BDC is appointment set rate on incoming phone calls. We currently have an appointment set rate for incoming sales calls of 31%. Our biggest challenge is giving the customer too much information and trying to sell the car over the phone instead of selling the appointment. As a result, we're closing 74% of shown appointments which is also telling me we're pre-qualifying too many customers before they arrive.

Overall Objective and Specific Desired Results:

Our overall objective is to increase our current appointment set rate on incoming calls from 31% to 50%. This number I feel is very attainable by adding structure and accountability around how the incoming calls are being handled. Our stretch goal is 60% which I also feel confident will be achieved over time.

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

We will achieve the goal of 50% appointment set rate on incoming sales calls beginning with providing additional training from Blueprint (BDC business partner) on how to generate an appointment from an incoming call. We will utilize their specific structure of gathering information, asking the right questions and ask for the appointment at the right time.

We will utilize Blueprint's Call Rater technology to measure the effectiveness of the BDC Associate. Based on the data in Call Rater, we're constantly asking for the appointment 97% of the time, however, we don't appear to be persistent with asking for the appointment, which is resulting in our low set rate. We will also take the time to listen to incoming phone calls with the BDC associate present to coach them on their effectiveness and help them to improve. Training, coaching and consistency with accountability will be the key to our success.

We will continue to monitor our close rate on shown appointments as well. We do anticipate that number will come down from the 74% where we're currently performing. This number should drop once we stop pre-qualifying customers and focus on selling the appointment instead of trying to sell the car.

Timeline:

The timeline of expectations regarding our appointment set rate are as follows:

35% by 12/31/2018

40% by 01/31/2019

45% by 02/28/2019

50% by 04/15/2019

Stretch goal:

60% by 06/30/2019

Meeting with Stakeholders (dealership personnel)

The BDC Manager will be meeting with each BDC associate (6 total associates) monthly to discuss their progress with appointment set rate for all incoming sales calls. Each coaching session will be scheduled for 30 minutes. During these coaching sessions, the BDC Manager will review the associates progress by sharing with them their current set % and how far they are from their individual goal.

The BDC Manager will also review their Call Rater scores and they will review two phone calls. The first call will be one where the associate performed well. The second call will be where the associate had an opportunity for improvement.

The BDC Manager will set clear expectations on the departmental goal and how their individual goals play a part in the departments overall success. The BDC Manager will continue to monitor each BDC Associates success and will performance manage them if they're unable to achieve these goals.

The timeline for each BDC Associate's goals will mirror the timeline of the department's goals for appointment set rate on all incoming sales calls.

The BDC Manager will meet with the General Sales Manager bi-weekly to share the department's progress.

Dealer agreement:

Jim Dunn and I met to discuss the action plan for the BDC and he is 100% supportive. He feels this action plan, if executed properly will generate more traffic to the dealership and in turn, will generate more sales. He will do periodic check-ins to help monitor progress.
