

Departmental Action Plan Template

Student Name: Tyler Tourelle

Class & Student Number: N335-10

Academy Week (Var II):

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

- We implemented a one hour phone call rotation daily where salesman go in the BDC and call all of their sold customers, make follow up calls with internet manager and sales managers on hot leads, call businesses to prospect fleet business, and call customers on manifest lists and AutoAlert. We track this by the CRM and create weekly spiffs based on phone calls made and shown appointments. Using the tips from Jennifer Suzuki, it will allow for us to set more quality appointments and have more impactful phone conversations with consumers

Overall Objective and Specific Desired Results:

- Overall objective is to have each sales rep make 40 calls per day and set one appointment daily.

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

- The measurements are new as this is something I started earlier this month. We are moving our appointment setting in the right direction however. We have 17 sales consultants and more than 80% of them have had an appointment daily for the past week

Timeline:

Describe specific short term and long term checkpoints to monitor progress

- Short term checkpoints include calls made daily, set appointments, shown appointments and closing ratio
- Doing the process with the sales manager and internet manager allows more empowerment to the sales consultant knowing one of the managers is always around as well as holding the sales consultants more accountable then telling them to go to their desk and make 40 calls today. It creates competition when there are 4 groups of 4-5 going in and out of the BDC daily.

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: Sales managers, Interent and sales reps
- b. What: get better at inbound and outbound phone calls and setting effective appointments
- c. By When: January 1, 2019
- d. How: daily training and constant monitoring

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:

NA
