Departmental Action Plan Template

Student Name: Kolten Saunders

Class & Student Number: N336

Academy Week (Var II): Week 5

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

(Homework modules assigned)

We are going to begin working on capturing the correct customer data and improving the quality of appointment setting with a large focus being on capturing text messaging approval from our potential customer because as we learned from Jennifer that creates a connection it makes the customer think we are sort of friends and they can text us with any questions they may have or think of later.

Overall Objective and Specific Desired Results:

My objective will be to gather the correct information and do it while also improving call quality and customer satisfaction by teaching our BDC and Sales people a solid process to follow as we learned in class. We will also be focusing on capturing emails & permission to text the customer (We plan to track how many people are approving texting and look at the results in 60 days)

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

- **BDC/Sales Reps Training – Customer Information Process Updated**
- **BDC Manager & Sales Manager – Work together to track progress and make edits to the process as needed. (Monthly reporting on leads/conversion ratios and if we are seeing an increase in texting approvals and if we feel that is leading to a better sold %.**

- **Focus heavily on capturing approval for text messaging approval – This gets us more personal with the customer and I truly believe it will increase our closing ratio on leads**
- **Monthly meeting with myself and BDC Department and managers (include sales manager)**
- **Minimum of every 30 days phone training/customer service training**
- **Making sure we are capturing all necessary customer data while we are on the phone with the customer (Track in CRM & have Manager send reports monthly to myself and sales manager) If BDC reps are missing information after 30/60 days coach bdc rep(s)**

Timeline:

Describe specific short term and long term checkpoints to monitor progress

60-90 days as stated above we will review this monthly with all management included

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: BDC Manager/Sales Manager
b. What: BDC Department & Sales Department Training and Tracking Progression
c. By When: March 2019
d. How: BDC Manager, Sales Manager and myself will be working together to make sure of the success of these new processes that we are implementing this week.

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:

Approved by dealer ✓