

# Departmental Action Plan Template

Student Name:

Class & Student Number:

Academy Week (Var II):

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

The Challenge would be to make it mandatory for all our Sales reps. to send an e-mail confirmation on all phone leads. Unlike e-leads, this communication is normally done by our Sales reps by calling to set up an appointment when it comes to phone ups so changing the habit to also e-mail would be the task.

Overall Objective and Specific Desired Results:

**The objective is to make it mandatory to follow up with this step on all phone calls.**

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

Sales reps are encouraged to ask for customers e-mail address (on Phone calls) going forward to send info, pictures and to confirm appointments. All Phone calls are also tracked and recorded by our receptionist to make sure that nothing is missed on recording the Sales Calls to our CRM. Our Sales Managers will be checking daily on our CRM (DealerSocket) to measure the success rate of each Sales Rep. on capturing the e-mail addresses and their attempt to confirm

appointment by e-mails on our Phone Calls. We will provide support and training to make everyone comfortable and to make this process a habit.

## Timeline:

Describe specific short term and long term checkpoints to monitor progress

Our short-term to measure this new process is 60 days which we are hoping to capture at least 50% e-mails. We also know that it is not realistic to think that capturing a 100% would be a norm so our long-time goal would be to reach an 80% goal in this new process.

## 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

The behavior change needed is through training and encouragement until that habit is formed. It would be by involving our Managers in this new step to set examples through phone training to reach the desired results and showing our Sales reps that confirming their appointments by e-mail will result in better percentage in show ups. Once they see the results, they will be encouraged to implement it every time they are in touch on phone call leads.

- a. Who: Gillian Goldfarb and Wayne Hui (Sales Managers responsible for training and monitoring this new process)
- b. What: E-Mail Confirmation on Sales Calls

- c. By When: 60 Days reaching a minimum of 50% and 6 months reaching 80% or more
- d. How: Measuring our process through our CRM

### 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:

As mentioned previously our Dealer has been aware and supportive of all action plans and has agreed on implementing the changes required to better all departments.

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