

# Departmental Action Plan Template

Student Name: Emily Chapman

Class & Student Number: N336

Academy Week (Var II): 6

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

(Homework modules assigned)

Currently, we utilize a resource BMW has called TeleService. This is an alert system for the dealer that the customer purchased their new vehicle from to know when they have service that is due. It is a very easy way to capture appointments if utilized correctly. Currently, we have one person handling these outbound phone calls. We have a goal of 50 phone calls per day and 100 appointments per month.

Overall Objective and Specific Desired Results:

**The objective is to increase the number of daily phone calls and therefore overall appointments. We wish increase daily phone calls to 150-200 calls per day with a goal of 150 appointments per month.**

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

**In order to achieve the goals we have put in place, we need more manpower to make the number of dials needed in a day. We will be utilizing our service BDC and making part of their daily tasks 30 outbound teleservice phone calls. This will mean that the phone calls are happening at a different time frame than they are now as well.**

**Hopefully with this we will be able to see an increase in the number of appointments set.**

## Timeline:

Describe specific short term and long term checkpoints to monitor progress

Starting February 1<sup>st</sup> we are going to roll out this new setup. I will be monitoring the phone calls daily as keeping track of where we are. By the end of February we are going to asses our progress and since it's a short month, we will do the same thing through March. I am hoping by the end of March to have seen our average # of Teleservice appointments increase to +150.

## 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: Service BDC, Service Manager, Appt Coordinator
- b. What: adding daily outbound Teleservice goal of 35 calls with overall goal of 150 appts/month
- c. By When: March 31st
- d. How: Spreading workload over 4 people

## 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:

My sponsor is happy to try anything new if it means getting more appointments set.

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