

Departmental Action Plan Template

Student Name: Clayton Ward

Class & Student Number: N336

Academy Week (Var II):

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

(Homework modules assigned)

I want to generate more appointments that SHOW! Our current 3 month average percentage of appointments that show is around 54%.

Overall Objective and Specific Desired Results:

I want to implement what Jennifer Suzuki taught us in order to get better appointments set that show. I want to get the appointment show percentage up from 54% to 65%!

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

I am going to start by getting everyone together for a training session. In this session we will go over the new word tracks and do a deep dive on the “why” we are making these changes. We need to implement things like building value in the BDC agent/internet sales consultant as well as the dealership on the phone call. Also, make sure to deliver on at least one promise, such as, send a customer vehicle specs while on the call with them. And then firm up our appointment setting by offering two specific dates and times for the consumer to pick from, continue to email appointment confirmations, tie a second person to the appointment (ie appraiser, team leader, etc) and also request that the

prospect call when they are on their way so we will be prepared. We will then roleplay these word tracks and different types of phone calls. And finally I will sit in on live phone calls as well as participate in live phone calls with them.

Timeline:

Describe specific short term and long term checkpoints to monitor progress

Feb 18-22nd: Roll play with BDC and internet team, teach new word tracks, sit in on live calls/perform live calls, provide them with new word track job aids.

March 18th: Pull reports to track appointments made vs appointments shown. Try to make any necessary adjustments and ask for feedback on the new process.

Moving forward: Continue to pull reports to track improvement. Hand off all training and implementing to BDC Manager Toulong.

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 Toulong, BDC Agents Caroline & Kim, Internet sales consultants Megan and Evan.
- b. What: Teach them new word tracks and building value.
- c. By When: Start when I get back from final class Feb 18th. Have new processes in place and responsibility handed off to BDC manager by April 1st.
- d. How: Hold multiple training sessions where we roleplay inbound and outbound phone calls. Sit in to help handle actual phone calls. Also, provide them with new word track guide to follow and have at their workstation.

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:
