

Departmental Action Plan Template

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Class & Student Number: N337

Academy Week (Var II): Week 5

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

Improve the way we answer and handle all calls, particularly sales calls. Currently we do not always ask for the customers name until the very end of the conversation. The conversation is focused on price too much of the time. We do not take control of the conversation and do not build enough trust or value in the sales person or the store.

Our appointment setting percentage for last month (February) is 34%. According to CallRevu, a service we use to record phone calls, the “best of best” are setting appointments at 63%. I would like to increase our appointment setting percentage to 55% at the end of 30 days of implementing this training.

Our percentage numbers reflecting customer information received is only 38%. I would like to increase this percentage to 65% after 30 days of implementing this training. The “best of best” percentage is 71%.

At the end of the first 30 day period we will look at the data and readjust as need to get closer to the desired “best of best” percentages.

Overall Objective and Specific Desired Results:

Using Jennifer Suzuki's 3 aspects to improve sales calls, I want to implement a better process that sales people can utilize to see better results from phone calls by building trust, showing a time saving aspect, earning respect. Doing these things will help sales people take control of the phone call and guide the customer through the sales process and set an appointment.

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

Dedicate weekly training meetings to implementing phone skills training

- Focus on training sales people to come up with word tracks to differentiate their initial greeting on the phone.
- Ask for the customers name right away and use it at least 3 times throughout the conversation.
- Focus on owning and taking control of the conversation steering the conversation away from price.
- Emphasize asking open-ended questions about their needs and wants to pull the right car.
- Promise to do something for the customer (i.e. send pictures/video of the car, send follow up email with contact info, promise to have car pulled up washed and gassed for when they come in.
- Offer time saving proposition (i.e. preparing paperwork, valuing trade in, etc.)
- Set the appointment, give them two options for times that work and restate what you have promised to do.
- Follow through with what it is you promised to do.

Sales people will be trained to do these things with the ability to be flexible and adaptable to the customer and situation.

Timeline:

Describe specific short term and long-term checkpoints to monitor progress

- We will train each week in training meetings for 3-4 weeks.

-Phone calls will be monitored and feedback will be given to each sales person to help them improve for several months following.

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/Service employees, and training manager
- b. **What:** Changing our phone process and improving our skills using Jennifer Suzuki's 3 aspects.
- c. **By When:** Short term- Over the next 3-4 weeks, beginning of April
Long term- over the next several months with monitoring phone calls and follow up/feedback training
- d. **How:** Weekly training meetings and one on one training as needed with follow up.

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:
