Departmental Action Plan Template

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Academy Week (Var II):

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

Overall dealership traffic was down slightly in 2018. Call volume has also dropped from typical volume. This means that the number of opportunities we have available must be maximized in order that sales do not suffer. If I were to ask the Sales Manager the percentage of incoming phone calls to Sales that we are converting into actual appointments they wouldn't be able to tell me accurately. It comes down to how do improve something so vitally important to the dealership that we have no ability to measure. As there were no measurables I don't have data for this segment. See below for where we begin to measure, define and show improved performances.

Overall Objective and Specific Desired Results:

The overall objective is to define the number of incoming calls, and also quantify the performance of the Sales Department collectively, and salespeople individually, in their ability to convert incoming calls to appointments.

Once we have defined current rate of incoming calls and appointments the next big objective is to improve results. We know the more appointments there are, the large the number of vehicles sold.

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

The action plan is to take on a system that will measure incoming calls, and our effectiveness in converting these to appointments.

-Callrevue is the product that has been purchased. It measures and provide data on the following:

-the sheer number of incoming calls to our sales dept.

-it records the origin of each call source. Google, our dealership website, yellow pages, facebook, auto trader etc, etc.   this will enable us to see where we are getting the best return on invested marketing dollars.

-each call is transcribed for content.

-if an appointment is set this is recorded.

-if a call comes in and they are not effectively put in touch with the department or party to meet their need this is recorded and an alert is sent to all concerned so that it may be remedies.

-if a call is not picked up, and goes to dealership voicemail. It is recorded, and an alert is sent out.

More importantly callrevue allows us to sort data via all of these categories so that improvements can be made. Example. I can measure an individual salesperson's ability to convert a phone inquiry to an appointment. I can isolate the calls they have taken, listen to a recorded version, or view a transcript of each so that areas of improvement can be defined, and appropriate coaching can be implemented.

-Here is the data. The month of implementation measured a closing ration of call to appointment conversion of 17%. January it rose to 20%, and finally February achieved 23%. Hard data, and tangible results.

Timeline:
Describe specific short term and long term checkpoints to monitor progress

The timeline for full implementation has been 90 days. The process began in December. At this time with training completed and enough data collected within the last two months to measure, we have seen some real improvements in our phone processes. Training was one on 1 with our systems trainer, as well as online through Callrevue. There is customer assistance via phone 24/7.

Meeting with Stakeholders (dealership personnel)

I am using the past tense because this implementation is now complete.

The first step was to allow the system to collect data for a month to have an understanding of current need and create a baseline to work from. The major shock was that almost 50% of incoming calls were classified as "abandoned calls". This is defined as a caller who has not had their need met through their telephone contact. These calls ran the gamut from not being answered at reception, calls going directly to voicemail, dropped calls, salesperson not available, poor coverage at times on the reception counter, and sales floor. Take a poor rate of dealing with incoming calls and combine that with a poor closing ratio for appointments and you see the challenge before you.

-armed with the data we had collective meeting including all managers, receptionists, sales admins and salespeople to talk about the findings. They were just as shocked at the data, and immediately were able to agree there was a problem. The numbers don't lie. Our IT department improved some of the phone systems to deal with calls, the reception staff attended individual coaching sessions to improve call handling, and finally the sales staff attended group, and individual sessions measuring their performance. The system was launched in December, and by end of month February we were able to share the great news that dramatic improvements had taken place. First with a large increase of "abandoned calls", and second a 20% improvement in the rate of appointment conversion. There were individual bonuses awarded those with the highest rate of improvements.

This will be monitored on a monthly basis, and those figures and stats will be shared widely so that everyone knows the importance of the process. For key positions a permanent bonus structure has been created which will compare and measure individual performance monthly.

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:

The Callreveue was endorsed by our company at the beginning, and as results were relatively quick, and in the areas we targeted, it has become universal to the dealer group.

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