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Academy Week (Var II):

**Current Challenge:**

We are currently facing a few challenges related to phone calls. Our first challenge comes from our team not having the proper training or guidance when it comes to converting a phone sales call into an appointment or simply ensuring that the minimum required information is collected and documented into our CRM system so our management team can follow up.

**Objective and desired results:**

Our Objective with this action plan, will be to coach our sales consultants to collect the necessary information from each phone up to ensure that we can properly add them to our CRM for follow up. Furthermore we will be establishing guidelines and scripts that will be used when doing outbound or receiving inbound calls.

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

On March 4<sup>th</sup> during our sales meeting we discussed the minimum requirements of information to collect when a customer contacted our dealership via phone, each sales consultant was assigned the task to watch the Jennifer Suzuki best practices videos to be completed by March 11th.

Minimum Requirements for phone ups:

- Name
- Phone number
- Email
- Ask for Appointment

These will be tracked via our CRM and furthermore we will be utilizing mystery shoppers in the first few months to contact us, plus our main competitors and see how we handle phone calls and follow up after the calls in comparison to our competition. I will then hold a meeting with the team to highlight where we stand

in terms of handling phone calls, what opportunities we have based on our competitors way of handling phone calls and follow ups after the phone calls to be better and increase our chances of converting the call into an appointment which will be our main goal.

## **Timeline**

During the next 4-6weeks we will concentrate on training and providing guidance to our sales team. This will be done by having a best practices discussion during each of our sales meetings where the team will share with each other what they feel is working for them when taking or making phone calls.

During that time we will also have conducted the mystery shops and compiled the information about our competitors so I can show the team our areas of improvements and our opportunities vs our competition which will drive action and encourage the team to become better.

We hope that by April 30<sup>th</sup> we can have a team that is more engaged in converting phone ups or proactive phone outreach into appointments plus a sales managing team that can accurately track and conduct follow up with customers whom we reach to by phone.

## **Meeting with Stakeholders (dealership personnel)**

### **Who:**

In order for this action plan to have quantifiable success we will need to have buy in from our sales consultants into properly handling these calls, they will need to adopt the advice and training provided to them with an open mind. At the same time our sales management team will need to ensure that they are tracking and following up to identify gaps in the process or coaching opportunities to the team.

### **What:**

Our sales management team in conjunction with our general manager will need to develop a tracking and follow up routine with utilizing our CRM to keep track and identify

gaps in our process or coaching opportunities to the sales team when it comes to phone call handling.

**By When:** March will be our trial month, but by the end of April we will have a meeting and review our data to measure our performance. We are looking to see how many appointments are converted from the calls that come in.