

Departmental Action Plan Template

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Class & Student Number: N337 / 15

Academy Week (Var II): 5

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

Our organization acquired a new store and we fumbled tremendously with BDC growing too fast. We feel there has been a lack of proper training on incoming and outbound calls by the BDC. Our culture & turnover have continued to go in the wrong direction and quality has dropped as a direct result. We have a very well performing service BDC with little turnover and great culture. The individual who was running our service BDC is now going to add sales to his responsibility. We aren't getting a high enough appointment set conversion or show percentage. We currently have under 15% appointments set and less than 50% shown.

Overall Objective and Specific Desired Results:

- **Improve closing percentage of raw leads to 10%+ (so they can't be manipulated from bad leads, dups, etc.). We are currently range between 4-6%**
- **Improve appointment set ratio to 30%+**
- **Improve shown appointment percentage to above 60%. We currently range between 40%-50%**

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

Meet with the BDC Manager and review the staff necessary to meet targeted goal. Set a specific process to handle incoming leads and incoming/outbound phone calls. Leads clock to be stopped immediately or within 15 minutes and to be responded with a genuine email within 30 minutes. All incoming calls to be responded to the first time with no calls bouncing back to operator. If so, have a system in place to acquire contact information with cell number and email. Once all processes are in place, use resources available such as David Lewis BDC required for BDC agents. Understanding the process is important, but correct training will be crucial to our success. Set a standard by utilizing the TDA (Teach, Demonstrate and Apply method) to create complete buy in. Train on the 3 aspects to convey when communicating. 1) Trust- earn

customers trust. 2) Time-Savings -Explain the time savings and the customer experience you offer. 3) Respect - Develop respect during the sales process.

Set a focus on the outbound call process by learning how to improve our greeting with a goal of generating more appointments and sales. Teach the staff how to actively manage the call from the beginning, avoid price and availability questions and establish ourselves as a helpful representative instead just another car sales person. Continue with 5 additional steps of training. 1) Confirm who you are speaking with, from the very beginning. 2) Identify who you are and use a title or an affiliate. 3) Identify who you are calling. 4) Confirm vehicle of interest. 5) Transition with one-answer response questions. 6) Establish some sort of personal connection.

Measure where we are and where we would like to be and set a timeline for increments of improvement. The matrix of information that will be required to monitor improvements are the following: Total monthly internet leads count, total appointments set, total appointments shown, and total sold numbers for the given month.

Timeline:

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

Short Term: Establish teams, integrate processes, set a training schedule and utilize resources such as David Lewis. Meet with entire staff to set expectations. Provide clear and descriptive instructions. Set a schedule to meet with Bob, our new BDC internet manager, once per week to review progress and provide a financial support plan to include additional personnel, paid for lead providers, digital marketing resources such as Cars.com, Car Guru, Craigslist, etc. Assist to create a culture change to include state of the art customer service, highly trained long-term staff, and a profit center that performs at a consistent and growing level.

Long Term: Review results at the end of the quarter June 2019. Establish a quarterly training refresher with David Lewis via video and in house. Review pay structures and bonus plans both monitorial and non-monitorial to make sure we reward the top performers in the department to create motivation. Grow the department from within allowing employees to gain opportunity and create a career minded department.

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: Bob Calabrese (new BDC manager) & Megan Walters (asst BDC manager)**
- b. **What: Establish processes. Policies and proper training while adding a personal touch to every contact**
- c. **By When: April 1, 2019 performance improvement, started implementation March 1,2019**
- d. **How: Add a personal touch to every contact (similar as the Zappos approach). Besides improving leadership, we are switching training to David Lewis BDC training (the main approach is to catch the clients "Pleasantly off guard". Bob Calabrese will be required to monitor all forms of contact to measure quality and coach accordingly. Explain the investment of training that the company will offer for the employees to achieve at a high level. Ultimately get everyone to buy-in at the start of the action plan.**

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:

We will start diving into the current performance and where it once was before growing so rapidly. The first action is to game plan on how to get buy-in from EVERYONE so we can get valuable input on what steps are necessary to achieve objectives and how to implement successfully. The next steps will be laying out actions, timeline, discussing resources, measurement, communication and discipline to keep our plan intact.
