SANDIA BMW

Student Name: BARRY BOLIO

Class & Student Number: NADA 337 #16

Academy Week (Var II):

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

Appointment setting and getting the customer to show.

Overall Objective and Specific Desired Results:

Improving our appointment setting skills so that we can get a larger percentage of customers to actually show. In turn making more car deals, taking in more trades and growing our service/parts customers. Building relationships with these core fundamentals that build a solid foundation will only improve our business.

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

1. All sales staff to complete Jennifer's elearning course.
2. Role play weekly using the word tracks provided in the course.
3. Our CRM is equipped with many abilities we can load those word tracks into the system so that the sales staff may access those when reaching out to a customer.
4. We can hold them accountable by reviewing those phone calls with that employee as our phone calls inbound/outbound are recorded in our CRM.
5. Reviewing individually a salespersons dashboard in our CRM will allow for us to monitor daily/weekly appointments along with being able to confirm those appointments as mangers and show the seriousness of this action.
6. We have also set appointment goals for each and every sales person along with how many phone calls and emails are required daily and monthly.
7. Last but not least we have tied their pay plan to these goals and subsequently their use of the CRM so that we can monitor accordingly.

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

In the short term we will make sure everyone has completed the elearning course with a manger overseeing. Checking to make sure the basics are completed at a high level and the sales staff is confident in their introductions so that we can move to setting appointments and improving our show rate.

Long term we will role play weekly with the sales staff and monitor the improvement of each individuals skill set to best be able to see where our focus needs to be ie: where someone has a weakness that needs correction and where we can focus on someone's strengths. Our long term goal is to be able to move towards making more "QUALITY" appointments and ones that will actually show and convert to a sale.

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 Staff
b. What: Improving our appointment setting skills in return garnering a higher quality customer who will show and buy.
c. By When: ASAP
d. How: By implementing the above action plan set forth in this agreement.

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:

Meeting went great. Most of this we are already doing but have implemented some of the skills learned in the Jennifer Suzuki course.