

Departmental Action Plan Template

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Academy Week (Var II): March 18-22, 2019

Current situation or challenge you want to address: (must be quantifiable)

We are not effectively managing our digital leads to drive sales growth in our new vehicle (and used vehicle) departments. If over 90% of our guests are starting their car-buying experience online, we need to promptly and effectively respond to digital leads.

Overall Objective and **Specific** Desired Results:

The objective is to increase our sold to lead percentages from 6% on internet leads to a target of 15%. This would result in an additional 50+ vehicle per month in sales in this store. The objective is also to increase our sold lead percentages from 26% to 30% on phone leads, which would result in another 10+ vehicle sales per month in this store.

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

We will develop a defined team structure for identifying what sales advisors will take digital leads in the store. We will set up our DealerSocket system to effectively distribute the leads with a clearly set sales advisor schedule, so no leads are distributed to team members who are off on any given day. We will identify a designated digital team leader to make sure no email leads remain untouched for more than 9 minutes.

We will develop the following tools for us in effectively responding to guests:

- *phone guides for new and used vehicle leads

- *email templates for a set response cadence beginning on day 1 and over a period of 30 days, for persistent follow up

*daily key performance indicator (KPI) measurements by digital sales advisor and by store so we can measure improvement and where we have the most opportunity

*daily 1:1 meetings with digital sales advisor and team leader to review KPIs and provide individual coaching for improvement

*provide refresher digital training with a chosen third-party vendor

*work with our Dealersocket representative to create effective home pages and KPI tracking reports for each sales advisor to manage leads and measure individual progress

The specific key performance indicators we will measure daily will include the following:

1-1's per Sales Advisor per day	1
Prospects called per SA per day	20 minimum
Incoming Phone Calls	
% Appts. Set from Phone Calls	60%
% Appts Confirmed By Team Leader	100%
% Appts. Shown from Phone Calls	80%
% Appts. Sold from Phone Calls	50%
Overall Closing Ratio on Phone Leads	30%
Internet leads	
Response time to Internet Leads	9 min.
% Appts. Set from Internet Leads	30%
% Appts Confirmed By Team Leader	100%
% Appts. Shown from Internet Leads	80%
% Appts. Sold from Internet Leads	50%
Overall Closing Ratio on Internet Leads	15%

Timeline:

Describe specific short term and long term checkpoints to monitor progress

KPIs are available in Dealersocket and will be measured daily starting now. Sales advisor and team leader structure are in place, and we are continuing to improve on coaching and training. Third-party digital training will be provided across the entire organization on a monthly basis. Overall closing ratio will be tracked daily and measured for improvement month over month.

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: Owner/Dealer, GM of store, digital team leader and digital sales advisors.
- b. What: All parties must be aligned that digital sales is a priority. KPIs must be reviewed daily and coached for improvement. Data must be accurately and consistently entered in the CRM. Digital sales advisors will be removed from the digital team if they are not timely and effective in responding to leads. Digital team leader must have a digital-first focus. Online inventory must be merchandised and displayed effectively to continue to drive digital leads to the store.
- c. By When: Effective immediately for the implementation. Ongoing training and coaching will take time.
- d. How: We already have agreement for team structure and KPIs. Daily huddles, 1:1s and daily checkouts are in place.

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 alignment is there from the sponsor/owner. The digital discussion has been ongoing and there was initially some hesitation about the necessity for digital focus and the understanding that this is how our guests want to experience car-buying. We have made significant progress in moving strategically to a digital mind-set. The team is excited, and we have effective KPIs to set expectations and coach for improvement.

