

Action Plan

Student Name: Amy Closter

Class: N319

Student Number: 04

Academy Week: Variable II

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

Currently we are not using any sort of script or outline on how our calls would be handled, I was hoping to get some ideas from the class to help build something for us. After listening to Jennifer I was able to take down lots of tips & suggestions. Now going back to the office I am going to structure together a guide for telephone calls.

Overall Objective and Specific Desired Results:

Our overall objectives for the new CRM and appointments are:

To get a better handle on how are calls are getting looked after and getting our team on the same structure on how they are to answer the phone & handle our calls. Ultimately get more appointments & close more deals.

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

Using my notes from class I built a guide for calls, while I believe the initial point of answering the phone needs to be scripted I like how Jennifer made multiple suggestions on responses to the customer. Giving them more than 1 option for responses will make a more "human" sound on the phone with the customer. Also going hand in hand & I offering up suggestions, such as: "how to handle a call for a vehicle online that is already sold" or "how to capture the customers details" or "sending a follow-up email". I am also taking it 1 step further & entering a script for their voicemail boxes, email out of office script & uniformed email signatures.

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

Short Term: creating the guide for all sales staff to use-complete. Created June 12th, reviewed with Sales Managers, June 15th, implemented in Sales Meeting Saturday June 17th.

Long Term: monitoring & making changes as well go along. I am sure as the sales team uses the guide we will find that we may need to make "tweaks" to it. We do record our calls so I will be insuring they are using the script & guide. Then I will monitor the customer's responses & see how implementing the call guide affects our telephone appointments.

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

This is something I can implement on my own, however I am going to bring it up in our weekly management meeting to download the other sales managers. Our weekly managers meeting is done with the other stores in our group so I hope to get this implemented across the board. Or at least get some ideas for suggestions on how this could work in our group.

To get started I will outline the guide.

From there I will have a meeting with the sale team to download the group

In the following weeks sales meeting I will be asking for feedback on their thoughts on the guides. I know there will be a few team members that are likely to push back on new process. However I will attempt to keep pressing on, if I do notice that some of the team members do not adapt (which I know I will have difficulties with) I will make the decision with the other managers whether or not to remove them from receiving telephone up's all together.

Who: Sales Team

What: Introduce Guide

By When: June 17 Sales Meeting

How: Present telephone guide & demonstrate how to use it & assist the team with applying it in their day/day operations

Created Guide:

Topic	Response
Answering the telephone	Thank you for holding this is, <i>your name</i> , speaking. Who do I have the pleasure of speaking with? <i>Or</i> Good Morning/Good Afternoon/Good evening, this is, <i>your name</i> , speaking. Whom am I speaking with today? <i>Or</i> Hello this is, <i>your name</i> , speaking. Whom am I speaking with today? *You can create your own word track for introduction however you

	<p>must follow these 3 steps:</p> <ul style="list-style-type: none"> • You introduce yourself immediately in a professional manner • Gain the customer's name immediately after providing yours. • DO NOT USE "Sales Department" or "Sales" in your initial introduction
Customer responds with name	<p>Hello, <i>customers name</i>, thank you for calling. How may I help you today? Or Good Morning/Good Afternoon/Good Evening, <i>customer's name</i>, how may I help you today? Or Hello, customers name, thank you for calling. Are you looking for new or pre-owned today?</p>
Customer Responds	<p>Great, I would be happy to help you with those details. Would you mind if I ask for your telephone number in case we get disconnected? Do you have an email you would like to share with us as well?</p>
New	<p>Which model interests you most? Where did you see this model? Was it online or in person? Online- On which website did you see the unit?</p>
Asking for the appointment	<p><i>Customer's name</i>, I have, <i>provide 2 dates & times</i>, available for appointments. Do either of these times work for you to come in & take a look at the unit?</p>

Subject	Tips & Suggestions
Do not rush	Do not rush to get off the phone with the customer. Remember the customer took the time to call in rather than send in an email. Meaning they are looking for immediate answers, be the one the stands out to get them in the door.
Customers with current RV's	Is there anything missing on your present unit that you absolutely must

	have on your new unit?
Customers looking at a unit that is no longer available & you are trying to steer them into a different model	<p>I am just pulling up that model right now. It looks like I have a few different options similar to the unit you are interested in. Are you open to other options as well?</p> <p>*Try to avoid saying “that unit is sold” or “our inventory is not correct”. Providing these answers to the customers will result in a quick end to your telephone conversation. Instead attempt to see if the client is open to other options. This will allow you to at least attempt to convert them to a different model then the one that is sold.</p>
Customer isn't sure what they are looking for	Tell me your search criteria for your new unit?
Appointments	<p>Always offer the customer 2 dates for appointments</p> <p>Always tier a 2nd person to your appointment. This creates value in the appointment.</p> <p>Insure the customer is aware on how to get to our store</p>
After getting the appointment	<p>Hi <i>Customers Name</i>,</p> <p>Thank you so much for contacting us today & spending time with me on the phone! I did take a lot of notes and understand what you are looking for. (Personalize : Include 1-3 Points you acquired during the phone call) This email is to confirm our appointment for <Day > @ time. < Dealership Name> is located at <dealership address></p> <p>We do value your time here so I am going I have entered you into my schedule. Before you arrive I am going to have, the <unit interested in> pulled out</p> <ul style="list-style-type: none"> • Pulled out • Setup • Furnace/AC running <p>I look forward to seeing you.</p>
When customer arrives for appointment	Have a folder ready for them with their

	<p>name on it. Inside the folder should include:</p> <ul style="list-style-type: none"> • Information about our dealership • Unit reviews • Comparisons • Vehicle details
BE IN CONTROL	<p>Always insure that you are the one guiding the phone conversation, not the customer. Know when to stop asking open ended questions & to start asking close ended questions.</p>
LISTEN	<p>Listen to what the customer is saying, take notes, and reradiate some of their points. This will help you get the customer to a close.</p>

Voicemail Script

Your voicemail box needs to be changed on a daily basis. Voicemail Script is as followed:

“You have reached the voicemail box for, *your name*. Today is Monday May 8th, I am in the office from XX to XX. I apologize I am not able to take your call at this time, I am currently away from my desk or assisting another customer. If you require immediate assistance please press 0 now and ask the receptionist to re-direct you. Otherwise please leave me your name, number & a detailed message after the tone and I will return your call at my earliest convenience”