

# Departmental Action Plan Template Truck

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Academy Week (Var II):

Current situation or challenge you want to address in the following categories, please select one:

1. Sales Meeting Best Practices
2. Employee Retention
3. F&I
4. New Truck Inventory
5. Gross Profit Retention

# 6. New Truck Sales Process

- Overall Objective and Specific Desired Results:

Hold consistent weekly sales meetings with an average duration of 20 minutes or less. Include one training element, one positive from previous week, one item of inventory focus in each meeting, in addition to any important OEM or dealer updates.

We have not held sales meetings consistently, and when we do, they often turn in to marathon discussions that don't always provide positive results. We need to meet consistently and effectively. The addition of 2 outside customer appointments with the sales manager will provide significant one on one interactions between salesmen and manager. This should serve to provide more meaningful interactions as well as to minimize time spent in weekly group meeting.

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

Sales manager to provide written agenda via email to salesmen by Wednesday of each week for the sales meeting to be held on Friday morning.

The agenda shall include one training element, one positive from previous week, one item of inventory focus and any pertinent OEM or dealer group updates.

Salesmen to schedule 2 outside customer appointments with sales manager per month. This should be addressed via a calendar invite.

**The goal is to limit sales meetings to 20 minutes and have the opportunity for further one on one discussion during course of monthly appointment travel time.**

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

This is to commence immediately and will include all salesmen each week. We've got an inconsistent baseline to compare this to, so the priority is to make sure this happens each week period. The weekly meetings will also include an update on scheduled appointments for that month to keep everyone on track. Sales manager to review meeting attendance and previous agendas on a quarterly basis to verify consistency and quality. Potential to change meeting day/time to better accommodate based on input from attendees. The priority here is make sure we're all equally invested in this process so we can get the most out of it.

- **Meeting with Stakeholders (dealership personnel)**
    - o 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
  - Who: Entire sales department
  - What: Schedule for weekly sales meetings to be held every Friday at 9. Each salesman to schedule 2 outside customer appointments per month with sales manager.
  - By When: Friday 5/17 will be our first scheduled meeting. Each salesman will schedule one appointment each to be carried out by the end of May, then 2 per month after.
  - How: Weekly sales meetings to be held in our conference room.
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