

# Departmental Action Plan Template Truck

Student Name: Keith Sheeley

Class & Student Number: 040 / 002

Academy Week (Var II): Week 5 New Truck

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:**

**Increase lease or finance penetration in the new and used truck department.**

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

**All truck deals need to be turned over the Finance Manager during the first visit to the dealership. We offer more products than most dealerships and we provide tax, title and tag services in three states. Offering one stop shopping experience. Finance and Sales Managers need to control the deals to gain more profit in all departments.**

**Measurement will be controlled by the Finance Manager with a log of all turnovers provided by salespeople. This log will be cross checked with all the Buyers Orders signed by the Sales Managers on a weekly basis. Any missing customer turnovers will be contacted immediately by Finance and offered all services we provide. The salesperson will forfeit any Finance Bonus earned on that deal. Repeated offences will be reviewed with both managers and written warnings will be issued up to and including termination.**

**Both managers will review the finance penetration numbers and track progress on a monthly basis. Cooperation of these two departments should result in additional sales and gross profit for both departments.**

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

**This review process will start on 07/01/19 and continue as new policy for the dealership. Weekly and monthly check points will be done to monitor the progress of this new action plan/policy.**

- **Meeting with Stakeholders (dealership personnel)**
  - Describe what behavior change is needed to support desired goal. Address required coaching, training and/or consequences (PINO, Gain, and Pain). Include timelines / Accountability / Monitoring process
- Who: Finance Manager, Sales Managers and Salespeople
- What: All deals must be TO'd to Finance no exceptions. Costing all of departments money.
- By When: 07/01/2019 and ongoing
- How: Commitment by all involved in a meeting June 4<sup>th</sup>. We are working through the process this month without any penalties starting July 1<sup>st</sup> full program takes effect.

Keith Sheeley New Truck Sales Manager



Tim Berkley Used Truck Sales Manager



Kim Smith Finance Manager



Conrad Martin Sales



Mike Wile Sales



Wesley Moats Sales

