

# Departmental Action Plan Template

Student Name: Matt Stewart

Class & Student Number: 343-21

Academy Week (Var II):

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

At the moment we don't have any proper phone training in our store and we are not using any types of scripts. I don't have a BDC or specially trained sales people answering my sales calls. All 4 sales consultants have the ability to take sales calls in my store. After listening to Jennifer Suzuki and seeing the importance of really trying to break the ice with customers on the phone before making the appointment. It has made me realize that we need to do a much better job on the phone. This is an area that can be overlooked and without hearing her first hand, I may not have thought this was an issue. Once we made the calls into our stores is when it hit me that everything is not as good as I thought it was. My sales person got a name and phone number however didn't proceed to make an appointment. I can hear my sales team speak with clients all the time. We are always very friendly and do a good job however I know with better training we can get more appointments to show up at the store. As we know, the appointment is everything on a sales call and just having confidence in my staff.

Overall Objective and **Specific** Desired Results:

Overall objective would be to have all my sales staff re-trained on the phone. I am writing my own sales call scripts to give a baseline of information of what I want to be said during the call. My desired results would be to have about 80% to 90% of people calling show up for an appointment. I know not every call will result in someone coming in to the store however I would like to at least have my sales team have the same approach each time asking for the appointment.

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

First thing is to complete my scripts for all sales calls. I've gathered some resources from Jennifer Suzuki's online videos. This will help me figure out the basic structure of a sales call.

Second is book phone training skills with an outsourced company. We have done this in the past however it's been over 15 years since we did any phone training. We are currently going thru the phone training with the company. Seems to be going well.

Next is roll playing with my staff on a continual basis to make sure they know roughly what to say and how to say it.

Final and ongoing step will be doing more calls into my store like we did in class to see if they are following the scripts that I have made up. This will help me see if we need to keep training or not.

### **Timeline:**

Describe specific short term and long term checkpoints to monitor progress

I have training ongoing at the moment (July 2019) with a company called Applied Concepts. This company calls my employees and go's over scripts with them for about a half hour a week. Until training is complete.

Biggest checkpoint thru out the next couple months will be me making calls into the store and checking to see if they're following the scripts.

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:** General Manager
- b. **What:** Phone Training/ New Scripts

- c. **By When:** End of July 2019
- d. **How:** Applied Concepts will train staff/ new Scripts / roll playing in dealership to keep training

## 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:

I'm able to do this on my own. I had a meeting with my dad (owner) and brother (GM). Spoke to them about what I wanted to do, they agreed right away that phone training would be a priority this year. I told them about some companies that do these types of training. Also went thru some of my scripts to make sure they agree with what I want to be said.

They both gave me the go ahead!

Thank you very much my favorite week by far!

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