



Variable Operations 1 (Pre-owned) Action Plan

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Current Situation

We have an increasing amount of internet leads from various different sources and we are lacking a consistent process to ensure leads are answered in a timely and professional manner.

- Currently all leads are funneled into a generic email address and then it is the responsibility of the Sales Manager to distribute leads to Sales Consultants.
- Leads are being missed even by managers and customers are not receiving responses.
- Sales Consultant are supposed to answer leads and make notes in our CRM system but this is only being done by a few individuals.
- Pre-owned Sales Manager quite resistant to technology so pre-owned Sales Team is not using the CRM system correctly.
- Sales Managers are supposed to follow-up with Sales Consultant but this is not consistent due in inconsistent entry into CRM system.
- Leads are answered differently by every Sales Consultant.
- Responses are not dealer branded and not professional in appearance.
- Multiple spelling and grammatical errors (!!) made by Sales Consultants in their responses.

Overall Objective & Desired Results

Current Situation

- ❖ Response times average 4-6 hours with additional delays when dealership (weekends) is closed, resulting in some response times up to 3 days!
- ❖ Responses are inconsistent and contain many errors
- ❖ Follow-up information is not being entered into the CRM system
- ❖ Follow-up by Sales Managers is inconsistent
- ❖ Appointment and closing ratio of internet leads is not currently being tracked

Desired Results

- ❖ Unautomated response within 20 minutes of receipt (automated response outside of business hours to be immediate)
- ❖ Initial responses to be made by same individual using approved templates
- ❖ Follow-up information would be automatically transferred into the CRM system by the Lead Management System
- ❖ Sales Managers would be obligated to follow-up outstanding leads daily and track lost sales and report results to the General Manager on a weekly basis
- ❖ Track closing ratio and aim for a minimum of 35% appointment generation 25% closing ratio of appointments to be reported on a weekly basis

Action Plan & Timeline

July 3, 2017

Hire a dedicated Portfolio Manager who will handle all incoming internet leads for new vehicles (Jaguar and Land Rover) in addition to the Lease Renewal Process

July 14, 2017

Retain a Lead Management Company with proven software (Rapid! Response) to filter leads for all departments and communicate with our CRM system

July 17, 2017

Training of relevant staff to include Portfolio Manager, Sales Consultants and Sales Managers

Ongoing

Sales Managers to monitor response times, appointment generation and closing ratios of internet leads

Weekly reports to be supplied to the General Manager

New Car Sales Manager
Hire a dedicated Portfolio Manager by
July 3, 2017

Jaguar and Land Rover Sales Team
Meeting to remove responsibility for
Lead Management by July 3, 2017

Pre-owned Sales Manager &
Pre-owned Sales Team
Training on new Lead Management
Software by July 17, 2017.

Bentley and Aston Martin Sales Team
Training on new Lead Management
Software by July 17, 2017

Ongoing - Review of Lead Management
by Pre-owned Sales Team and Bentley
and Aston Martin Sales Team by
October 17, 2017. If leads are not
being handled correctly,
responsibilities will be transferred to
the Portfolio Manager.

Meeting w/
Stakeholders

Dealer Agreement

Approval is not required for implementation.

All parties are in agreement that we require a formal process. All points have either been implemented or are in process.

