Departmental Action Plan

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Class: N319

Student Number: 01

Academy Week: Variable II

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

Our store is having challenges with response time to our customers. Our mgmt team is short staffed and we are taking hrs and sometimes overnight to return an internet or phone customers request for numbers. Customers are disgruntled and our BDC sold percentage is 28%

Overall Objective and Specific Desired Results:

While we would love and strive for 100% conversion rate, that obviously is not feasible. Instead, we aim for a 50% conversion rate from apts set to kept to sold. Diligent CRM notes, BDC training in our DMS and holding our sales mgrs accountable will move us towards our 50% goal.

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

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

Short Term: BDC reps tracking time taken to receive back numbers and reporting each customers time on a spread sheet and handing in to the BDC mgr each night before leaving. BDC mgr monitoring each customer in CRM to make sure diligent notes are taken. Also, listening to all phone calls from previous day in the AM to ensure proper information is being communicated to the prospective customers.

Long Term: Training our BDC mgr to navigate our DMS and generate quotes for our BDC staff, eventually grooming an assistant mgr to handle and excess work load. This will free up sales mgrs to focus on in store customers and create a defined structure and pipeline from BDC to Sales team.

Meeting with Stakeholders (dealership personnel)

After meeting with GM, Owner Operator, President of the Group, and the CFO, the short terms goal were received favorably and immediately put into action. We've seen an improvement in turnaround time… still waiting to see sold % creep up towards 50%.

Long term goals were met with hesitation from the "stake holders" the idea of having BDC handle everything in house and getting back to customer without talking to a sales mgr gave them pause. I explained this would be something developed over an extended period of time and not implemented until we felt very comfortable with whomever was quoting numbers. We want to avoid mistakes and misquotes as much as possible.

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: BDC reps/Sales mgrs.

What: **Avg response with #'s under 1 hour**

By When: Immediately

How: Diligence and consistency will be needed from both our BDC reps and sales mgrs. We must treat all leads the same and not brush them aside. BDC reps must be able to get all relevant information up front so as to avoid lags in response and multiple back and forth emails from sales mgr to bdc rep. They must also track time accurately so as to have good information put into the system so that we correct issues where needed. Time, Vehicle, Buy or Lease, Sales mgr, and BDC rep should be included on tracking sheet.

Pain will be putting in the extra effort to implement, monitor and enforce policies.

Gain will be increased sales and lead conversion, happier customers and happier employees, business breeds business.

Dealer agreement: