

Departmental Action Plan

Student Name: Rui Moreira

Class: N319

Student Number: 29

Academy Week: Variable II

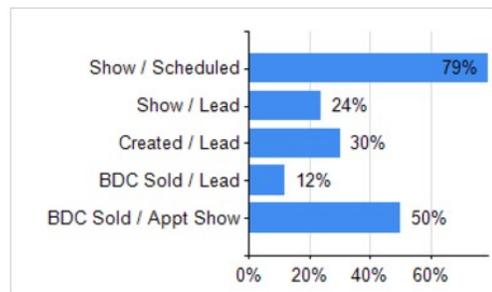
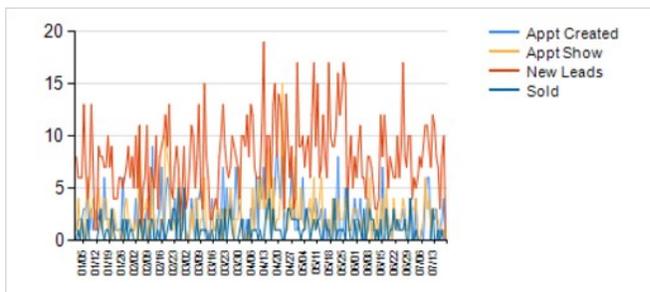
Current situation or challenge you want to address based on the Jennifer Suzuki Outline: (must be quantifiable)

The current situation for the ICL auto group is as follows. Year to date leads are 1598 with 480 (30%) appointments created. A total of 487 appointments have been created with 386 (79%) appointments shown. This leaves us with a total of 74 No Show appointments and a total of 193 Sold units from the appointments shown or 12% of all out leads being converted to sales.

BDC Performance Report

Porsche Audi of Stratham

Date Range: 1/1/2017 - 7/18/2017



	Rep	Lead Conversion			Appointment Conversion					Sales Conversion		
		Leads	Appt Created	Created/Lead	Appt Scheduled	Appt Show	Show/Scheduled	Appt No Show	Show/Lead	BDC Sold	BDC Sold / Appt Show	BDC Sold / Lead
☐	David Poulin	301	161	53%	165	147	89%	16	49%	56	38%	19%
☐	Jenna Parolisi	759	196	26%	196	137	70%	47	18%	73	53%	10%
☐	Kevin Majeskey	538	123	23%	126	102	81%	11	19%	64	63%	12%
	Total	1598	480	30%	487	386	79%	74	24%	193	50%	12%

Overall Objective and Specific Desired Results:

Our overall objectives for the new CRM and appointments are: Our overall objectives for our staff and new CRM appointments is to increase the number of appointments made out of leads (70% opportunity) and increase out BDC sold from 12% to 15% by end of third quarter.

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: I will have the three members of the BDC team sit through Jennifer’s training online and doing the quiz. I will have the BDC manager role play with them Every Monday morning to check for understanding and to provide feedback. “Inspect what you expect” on a weekly basis.

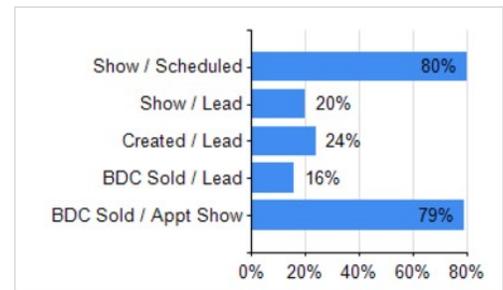
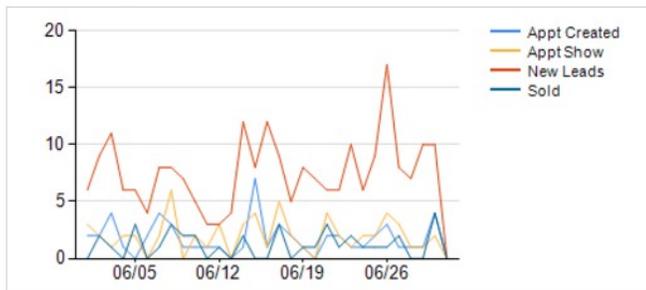
Long Term: Long term is a different situation we need to continue to focus on training, development and empowering of all employees. We will make bonuses and incentives based on a monthly basis and focused on raising the bar to a minimum of 15% sold of all shown appointments. The reaffirmation of offering the customers two tentative times and clarification on what we will do for them and the steps of the process seem to be very effective and setting up the customer for a smooth transaction.

Please see the results for the month of June with some minor adjustments and some initial focus and training. Appointments shown increased by 1% and BCD sold leads increased form 12% to 16% (+4%). The key is and will continue to be growing the sold units and the making the most out of every lead that is available to us.

BDC Performance Report

Porsche Audi of Stratham

Date Range: 6/1/2017 - 6/30/2017



	Rep	Lead Conversion			Appointment Conversion					Sales Conversion		
		Leads	Appt Created	Created/Lead	Appt Scheduled	Appt Show	Show/Scheduled	Appt No Show	Show/Lead	BDC Sold	BDC Sold / Appt Show	BDC Sold / Lead
☐	David Poulin	0	0	0%	3	2	67%	1	0%	0	0%	0%
☐	Jenna Parolisi	158	36	23%	38	31	82%	5	20%	24	77%	15%
☐	Kevin Majeskey	72	19	26%	18	14	78%	1	19%	13	93%	18%
	Total	230	55	24%	59	47	80%	7	20%	37	79%	16%

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

Who: Rui, Markus (BDC Manager), BDC team members and sales staff.

What: Training will start on a weekly basis between the BDC staff and Markus and Rui. Role playing will continue to be key in creating a smooth flow in the conversation process. Building rapport with the customer and prioritizing their time and needs will be the focus. Mystery shops have been scheduled to start in August and carry over into September.

By When: Training has started and will be ongoing every Monday with no completion date in mind. Training will be the focus until we achieve the desired results and it becomes more of a culture and less of a chore.

How: Training, development, and accountability will be key to getting the results we are looking for. The mystery shops will get us third party results and will be based on key metrics that we will provide the BDC feedback for.

Dealer agreement:

I spoke with my CEO and he is onboard with the plan. I will have to update him monthly on results and any changes that we have to make as we continue on the process.