

## Departmental Action Plan

Student Name: Chase & Ashley Barton

Class: N318

Student Number: 48 & 49

Academy Week: Variable II

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

### **Overall Objective and Specific Desired Results:**

Our overall objectives are 100% CRM use by all sales employees and making a BDC in our store. The situation with our BDC was in disarray. We were sharing it with 4 other sister stores and the quality of people and turnover was off the charts. So in June we decided to appoint one of our best salespeople to the position of internet manager. He assumed the role on July 1<sup>st</sup> and is off to a terrific start. In addition we pulled all of our third party phone numbers back to the store as well. We discussed our strategy with the entire sales team and told them that as of July 1<sup>st</sup> it would be mandatory that all leads be put in the CRM before they would be worked at the desk. Also we plan for phone training with the team since they will now have a heavier load by taking the inbound calls. And we are working on training for the CRM to allow us to be as effective as possible. Once we can get everybody on board and some additional training we should have a much stronger core.

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

### **Timeline:**

Short Term: Implement internet manager and 100% CRM input by sales department July 1<sup>st</sup> and monitor progress on a daily basis. Deal by deal check on CRM input by sales managers on a deal by deal basis. Do some one on one phone training and CRM Training with all sales consultants and sales managers.

Long Term: Track progress and meet monthly on where we are, how we are doing and where we are going from there. Continue training on CRM and phone skills on a monthly basis as well or more frequent if needed. Keep the internet manager focused on internet leads and add additional staff if needed.

### **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: Entire sales team, sales managers, internet manager

What: 100% CRM use, in house internet manager and phone and CRM training

By When: Begin July 1, 2017. Monitor progress as outlined earlier.

How: As noted in proceeding outline

**Dealer agreement:**

Lori Davis, our dealer principal, agreed with our action plan. We all feel that if we can execute this action plan that our dealership foundation will be much stronger. Therefore we should be able to focus more on our customers once our processes are in place and be far more profitable in the long run.