

## Departmental Action Plan

Student Name: Bren Nicolas

Class: N319

Student Number: 49

Academy Week: Variable II

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

**We currently are not accurately tracking our incoming sales calls. This makes it impossible to monitor proper follow up and proper Apt scheduling.**

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

Our overall objectives for the new CRM and appointments are: To track our incoming sales call using Whoscalling and matching these numbers up to the CRM tools to make sure all of our incoming sales calls are properly put into the system and therefore receive the proper follow up.

**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: By matching up our incoming sales calls on who's calling we can make sure that all our incoming sales calls are logged and followed up on. Another benefit of utilizing who's calling to match up our log is that we can review our sales calls to make sure the sales staff is using the proper phone protocol and working to set the appointment. After first week check number of incoming calls tracked compared to logged on a daily basis. After the first week, we will check on a weekly basis to make sure our log is being maintained accurately.

Long Term: By tracking the sales calls and reviewing the phone protocol daily our goal is to set habits and processes in place that will make proper phone protocol and logging our customers part of our culture. This will increase the follow up and should increase phone sales and closing percentages.

### **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: The sales manager's will listen to who's calling every day for the first week, after that our internet manager will listen daily to insure the process is maintained

What: Track phone log and who's calling

By When: Starting the week of July 1, with a goal of being fully functional by the end of the Month

How: By tracking the sales calls and reviewing the phone protocol daily our goal is to set habits and processes in place that will make proper phone protocol and logging our customers part of our culture. This will increase the follow up and should increase phone sales and closing percentages.

**Dealer agreement:**