

Departmental Action Plan Template

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Class & Student Number: **NADA349 / Student 11**

Academy Week (Var II):

Current situation or challenge you want to address: (must be quantifiable)

Current Issue: Ability and preparedness handling inbound sales calls.

Overall Objective and **Specific** Desired Results:

The overall objective has 4 parts:

- 1. Create a “Bob Rohrman Subaru” inbound phone playbook for the sales department.**
- 2. Deliver structured training meeting to the sales department and sales BDC including current industry statistics.**
- 3. Apply playbook immediately with sales BDC.**
- 4. Select and create a specific team of phone specialists with a dedicated schedule within the sales department.**

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

Step 1: Use material from VO2 Class and Notes To Create the Playbook

Step 2: Create Kahoot and meeting material for roll out

Step 3: Hold training and roll out meetings

Step 4: Apply immediately with current sales BDC team of 3

Step 5: Work with leadership to create a team of 3 additional phone specialists with dedicated phone up station.

Expectations are to exceed 50 sales per month from phone only leads by January 2020. We are currently averaging 20 sales per month on phone only leads. We can measure based on averages that adding those 30 sales per month on the phones will create an additional \$100,000 in

dealership gross profit without adding any additional expense beyond commissions.

Timeline:

Describe specific short term and long term checkpoints to monitor progress

Play book Created 10-14/15:

Bob Rohrman Subaru Sales Call Play Book

The customer is vetting you.....are you ready?

Step 1. Solid Purposeful Introduction

Thank You so much for holding, this is <Your Name>, with whom do I have the pleasure of speaking?

-Are you researching both new and preowned, which model interests you?

-Where did you see this vehicle....online or in person? On which website?

-What caught your eye on this one? Model, Feature, Color

-Have you driven one yet? What are you driving now?

-Do you live locally? How did you hear about us?

<Customers Name> I am here to help and save you time! I've taken note of what you've shared with me because it's important to me that I work effectively for you. I want your business and I want to show you why more customers trust us at Bob Rohrman Subaru than anyone else.

Step 2. Selling the Value of You, Us, and our Brand

<Customers Name> I/We work by appointment so that I/we can make sure visiting our dealership is worth your time. I/We will have the vehicle ready as well as any other details you would need upon arrival.

I/we am/are familiar and certified on these vehicles so I/we can send you resources upfront via text and email....we find most of our customers on the phone prefer not to have to call back in once they've spoken to us. <Customers Name> is the number you called in on () - your cell? I am going to send you a text while we're on the line just so that I can make sure you receive it. How do you spell your last name?

- I/We can send you a walk-around video of the vehicle before you arrive if you would like...

- Our process is set up so that you will never deal with a distracted product specialist, we work as a team and have specific uninterrupted duties.....explain pre-arrival and post arrival duties in our dealership! STOP SAYING BDC TO THE CUSTOMER

-Start online with Rohrman Rapid Retail and Submit your credit application. We have 4 Finance managers that can start working for you before your appointment to have everything processed.

-Leadership is involved in preparing for every appointment in our dealership.

-On site appraiser at all times and with enough information we can start the evaluation process before you arrive.

-Inventory pricing of New and Pre-Owned Vehicles is completely based on market supply and adjusted daily so that we know we have the most fair and accurate pricing model of any dealership. Price is never a problem at Rohrman Subaru because we are priced to sell.

- #1 Volume Subaru Dealership for a reason....family owned and locally built! We are very proud to call Lafayette home to SIA...Outback, Legacy, Impreza, and Ascent ALL locally built.

- Safest cars on the road: symmetrical AWD, Eye-Sight, etc

I would like to share some information with you on our dealership/the brand/car/etc before you arrive....what's the best email address to send that information to?

Step 3. Review Notes and Expectations

<Customers Name> I/we want to deliver an EXTRAORDINARY experience, let's review what I have written down.

-Read back highlights of your notes that seem most important to the customer.

-Features on current vs vehicle of choice.

-Did I miss anything that you would expect that I know or need to be prepared for with your appointment?

Step 4. Tie Second Person to Meeting

For our meeting <Customer Name> I will have my (Appraiser, FI Manager, Sales Manager) or product specialist, prepared with all the details we have discussed so that your transition into the dealership is seamless! Like I stated earlier, our process at Rohrman Subaru values the customer which is why I was able to take the time to address everything important to you on the phone today. It also means that when you get here you will be in the driver's seat at the center of our attention!

-LIVE UP TO THESE WORDS!!! Give them a professional greeting, go on the test drive, stay off your cell phone, make eye contact, be sincere....don't drop the baton upon arrival.

Step 5. Set Appointment

--<Customers Name> can you make it in today or are you thinking sometime in the next couple days?

-A lot of customers that call are ready to come in....they just want to see if we are reasonable people first :)

-Multiple day and time options....offer on the quarter of the hour.

--<Customers Name> I've got you down on (date/time) , do you know exactly where we are located? (Give instructions and address if necessary)

-We will start your visit right out front in the delivery preparation row by the front entrance on the south end of the building. I will have your vehicle there clean and ready to go....that way if it is exactly what you want I can save us both some time.

Look for information via text and email prior to your appointment. Either I or (2nd person) will be reaching out to confirm the appointment. If anything on your end changes or if you have any additional questions either text me back or call me at () - . You will also have my email once I send you one to recap what we've discussed.

Thanks so much for calling, I am glad I was able to take your call today and I am even more excited to have everything put together for our appointment. See you soon.

Meeting Structure Created 10-15/16:

Sales Meeting 1 Agenda

Profitable Actions: Our business is changing, are you ready?

Cultural: Format Changes, Environment - Training with consistency

Monetary: Velocity Mindset

Service: Your best retention tool - Our investments

Desperation KILLS Vision -> Creating a playbook for your success!

Our first KAHOOT.....

20 SALES CALL SAMPLE

20 Calls

X _____ % average who will give a name/number/email

Equals: _____

X _____ % who will set an appointment if asked

Equals: _____

X _____ % who will show for the appointment

Equals: _____

X _____ % who will buy on the first visit

Equals: _____ Average Number of Phone Sales

What would this math do for you as a Product Specialist or Appointment Setter?

We don't rise to the occasion, we fall to our highest level of preparation!

Give yourself the opportunity you deserve! - Don't work for FREE

PHONE Playbook and Expectation Introduction

MOMENTUM IS EASIER TO STEER THAN TO START!!!!

Meetings Held on Material 10-17/18:

Expectations set during and after those meetings with sales BDC that the playbook be put into use.

Sales Phone Up Station 11-11/15

Sales team of 3 that will be handling calls to be announced 11/11 now that a station has been created. Schedule will be created over the course of the week and expectations of call entry into CRM will be set. We expect a full name, email, cell phone entry.

Data and Reports:

We have separated phone sale information and are tracking phone, internet, walk in, and referral traffic. We were able to attribute 29 sales to phone only leads in the month of October with just the implementation of the playbook with our sales BDC.

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

- a. Who: Myself, Sales BDC Manager, GSM
- b. What: To make all of this work we made some major changes to where several departments work stations were located. We moved our sales BDC up front into the showroom a central reception desk. We are setting up the phone up station at the sales desk. We also had to create space for a service BDC of 5 at the same time so aligning work stations in the closest proximity to each department made sense.
- c. By When: As dated prior, most of the early stages of this roll out are complete. I will closely monitor and continue to run playbook training sessions with the 6 people handling sales calls. I will monitor the data and reporting with my GSM and BDC manager to track our growth on the phones during November and December so that we can be certain we are on track for 50 sales in January 2020.
- d. How: I feel strongly that the greatest positive impact I can have with my team relative to culture and profit is to be the one that builds out training material and leads the charge in running meetings and coaching sessions on the material. The thought process is one we have taken relative to similar strategies we are implementing on the phones for follow up in our service

BDC. I believe it is my responsibility to provide the best quality employees possible to my leaders so that they can focus on directly profitable activities.

Dealer agreement:

If you need your sponsors support or approval to implement your plan, have it signed off before you start. If you can proceed on your own, present this action plan to your sponsor before next class.

Describe the meeting: I was able to implement this on my own but I did review the material with my sponsor. It was a solid meeting and our director of operations was able to endorse the material.
