

Departmental Action Plan

Student Name: Alex Harrill

Class: N319

Student Number: 11

Academy Week: Variable II

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

At the moment we do not have any script or process of any kind for phone calls. That goes for incoming or outbound responding to leads. We just got our first crm.

Overall Objective and Specific Desired Results:

Our overall objectives for the new CRM and appointments are: To implement a script for all calls and to set appts in the crm. For the time being we are going to have a manager call on day of apt to confirm with the customer. We just got our first crm so do not know the in's and out's very well. Desired results will be all calls logged and maximize appts.

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: Like I said we just got a crm, so short term we are having the receptionist log all sales calls and which sales person answered them. These come in on a recorded line so we can go back and listen to them all. This will let us use these as training tools as well as who is doing a good job and who isn't. we are a month into our crm and we have restricted 2 sales people from taking sales calls and do phone training. The start of August they get to start taking them again. We will do the same as we did before. We will listen to the calls and determine if they are doing a good job. Having the sales manager call to confirm appts has been working well. It keeps the sales people from making appts just to have something in the crm. The show percentage has increased as well. We have our best 2 people answering all the email leads and in the last month our close percentage has raised from 8% prior month with all sales people on round robin to 17% in July with the 2 best getting them all. Also when an apt is confirmed with customer the manager makes sure the vehicle they are on is cleaned and pulled before the apt arrives.

Long Term: For long term, we will continue to listen to the calls and monitor the appts like we are doing currently. With the training and scripts, we have implemented I want to go back to all sales people in the round robin for incoming leads. We will monitor those as well to make sure we are doing a good job with

replying and setting appts. It really set a fire under those underperforming when we took sales calls and leads away till they can prove the deserve to work them. I believe in the long term with the things I learned about building and keeping trust with customer we will sell more cars and have happier customers. It has been a lot different than the ways we have done things in the past. It has been a good change with everyone coming around and liking the new process.

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: Dealer Principal, GM, sales manager, sales people.

What: It starts from the top and trickles down. The Dealer Principal listens to calls every week. Maybe not a lot but does listen to some every week. DP and GM both have read the scripts and know what to listen for in the calls. Both also check the crm to make sure the apt has been confirmed by the sales manager and hold the sales people responsible for good and bad.

By When: Every day. The sales manager is checking the leads and both incoming and outgoing calls. This also keeps the sales people on their toes knowing their work is being checked on a regular basis.

How: By having daily checklist every person has to ensure the whole job is getting done correctly. Like I said before it trickles down from the top and our DP is very hands on and she does her job to ensure everyone else is doing theirs to be a successful dealership.

Dealer agreement: