

Departmental Action Plan

Student Name: Danielle Brisson

Class: N319

Student Number: 35

Academy Week: [Variable II](#)

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

Our Current situation is that we have never used a script for incoming phone calls. With the phone call exercise we did in Variable 2, which was far from being satisfactory in our case, and Jennifer Suzuki`s training, it confirms the seriousness of implementing new processes for inbound calls.

Our current data shows:

20% closing on appointments (email/phone leads combined)

46% out of that 20% show up for the appointment

9% appointment rate on over all leads.

Overall Objective and Specific Desired Results:

Our overall objectives for the new CRM and appointments are:

- Increase conversion of phone calls to appointments to at least 15 to 20%
- Set high standards to our approach of a phone call and change the status quo
- Eliminate inconsistencies
- Increase customer engagement
- Increase sales: If we increase our conversion rate to at least 20%, this would represent an additional 3 to 4 cars a month, which would generate approximately 8000\$ in additional revenue or more...
- Stand out from the competition

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:

1. Evaluate our tracking methods. I think there is an opportunity here to improve our call management solution. I suspect that the data that we are working with may not be accurate in the sense that not all calls are reported.

2. Create a structured call process using Jennifer Suzuki`s tools
3. Translate to French
4. Introduce new process to staff
5. Start coaching sessions

Long Term:

- Measure progress in terms of before and after results on weekly basis
- Evaluate the process to make sure it is efficient and consistent thought out the staff
- If needed hire outside expertise to do in house training (am presently looking into this)
- If needed change CRM solution to support this 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

All staff must believe that this new process will generate more sales, increase customer engagement to the appointment and set the table for a wow factor for the customer, which should make the purchase process quite easier for the sales staff and customers.

We have concentrated a lot, in the last year, with internet leads and the quality of response but phone skills have never been refreshed to reflect the standards that we aim for. This will be a very good opportunity to do so.

I`m expecting that this new process will, like all new processes, entail some pain&gain, regular training and maybe external help but I will start with the following steps to start off with and hope the time lines can be respected.

GM:

1. Evaluate tracking methodsIn progress
2. Create processby end of august or sooner
3. Translation of process.....by end of august or sooner
4. Once process is in place, monitor progress with SMOn going.....
5. Spot check weekly phone calls

SM/Sales staff

1. Introduce new process to sales staff.....by August 31st
2. Start coaching, role playing.....Week of Sept 4th
3. Apply phone process.....Sept 11th
4. Monitor progress and results on a weekly basis

Dealer agreement:

Dealer is not available to sign, but as in the past, I have full authority to bring changes in the processes in place. This change will benefit us in more than one aspect and I'm looking forward to put this in place.