

Departmental Action Plan Template

Student Name: Joe Serock

Class & Student Number: 041

Academy Week (Var II): Week 5

Current situation or challenge you want to address:

With the softening Class 8 Market in CY2020, I want to ensure we are focusing dealer sales efforts on retaining key business & growing market share for our designated aor.

Overall Objective and **Specific** Desired Results:

I want to focus the dealer sales team's efforts on growing their Regional Haul (RH) & Conventional Straight Truck (CST) market shares by a minimum 1.0% each for 2020 CY.

Describe your action plan in detail:

I will perform a deep-dive of historical Polk data over the last 5-7 years to review segment performance and analysis of customer purchase activity. I will also utilize Fleetseek & RigDig to obtain an accurate snapshot of all Class accounts by zip code, and organize by each salesperson's specific territory. I will then conduct a sales meeting to share results of initial analysis, and discuss plan going forward. I will meet with each salesperson individually to conduct deep-dive of their specific data & aor, and establish action plan we bot mutually agree to. We will identify key retention & conquest business we will target, and establish timeframe & expectations per quarter. We will review status and updates during weekly sales meeting in order to maintain focus & expectations, as well as share

success & challenges each person has throughout the year. We will also map out plan for an immediate sales blitz as well as dealer open house in late Q2, to include factory & onsite training reps. We will also confirm expected customer attendance for 2020 ConExpo/ConAgg, and ensure sales team attendees have visits and social functions established with accounts while at the show. We will also initiate targeted spiff programs throughout the year to maintain sales team focus & engagement. I will work to put a factory visit and demo event together, to allow key & conquest accounts to evaluate new product offerings, and chance to connect with industry peers. I will ensure sales managers are attending ride-alongs with their sales staff for key customer meetings, to also include stops/cold-calls while traveling, to be done at least once/month with each salesperson. We will also maintain participation of key industry events, and explore potential of others we are not currently participating in. We just concluded our 2020 kick-off meeting at the Mack Customer Center, and employee engagement was very positive and strong. It renewed sense of need to make greater effort to include customers for factory and facility visits to demonstrate strengths and capabilities.

Timeline:

We expect month-to-month fluctuation with order intake & deliveries, due to cyclical nature of these segments. We will review polk rdn performance on a monthly basis as part of the regular sales meeting. Emphasis will be place on year-end review, but we should be able to achieve at least 1.0% gain within this year.

Meeting with Stakeholders (dealership personnel):

The primary behavior change for us to be successful would be a renewed sense of focus. We will include factory rep training/refresh as ongoing basis within our sales meeting, but we have a good sense of current product knowledge within our team. What we need to do better is provide each sales person with a more in-depth analysis of what their individual performance has been over last few years, and help use this as guide to areas of opportunities we can focus on for 2020 (and beyond). It's critical that we communicate the goal, and why we are doing so - so that we are all mutually aligned in our efforts. By conducting regular performance

reviews on a monthly basis, we will help ensure that everyone remains on point and dedicated to the objective. Sales managers will be accountable for their team's performance. One challenge will be to ensure we target earned share vs overall share via Polk. We know that there are regular pump-ins and pump-outs, and cannot afford to waste resources on business we do not truly have access to.

Dealer agreement:

We reviewed gameplan with sponsoring dealer during their recent 2020 kickoff meeting, and mutually agreed to focused efforts on these segments going into new year. We will revisit progress and strategy on a quarterly basis during our dealer reviews.
