

Departmental Action Plan – Increase Internet Closing Percentage

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Academy Week (Var II):

Current situation or challenge to be addressed:

We want to be the disruption, but where should we begin? The front line! With 92% of all customers starting their research online we need to make sure our BDC department is structured and trained in a way that makes Heiser stand out from our competition. You only get one chance to make a first impression, the first interaction needs to be the strongest. With a team effort and full management involvement we can develop trust, show respect and help the customers see that we value their time.

Currently our appointment set percentage from overall quality leads contacted is consistently under 30% while our goal as a company is 50%. This shows that something we are doing within the first couple interactions is not working efficiently. We need to focus as a team to raise this percentage and maintain a strong sales sold percentage greater than 12% overall.

Overall Objective and Desired Results:

The overall objective is to raise the percentage of appointments set in contrast to contacted leads from below 30% to above 50%. Through updated phone scripts, pinpointed training, and a refined follow up processes on internet leads we can improve our appointment set percentage and increase sales. The information below shows our current percentage for December 2019, verses our actual benchmark moving forward. It is evident that the area we have the greatest room for growth is the exact area we are going to focus on, appointments set!

	Toyota		Projected
Total Qualified Leads	748		748
CONTACTED GOAL = 60%		57.09%	
Leads Contacted	427		449
APPT SET GOAL= 50%		29.74%	
Appointments Set	127		224
APPT SHOWN GOAL= 70%		74.02%	
Appointments Shown	94		157
SOLD GOAL= 60%		80.85%	
Internet Leads SOLD	76		94
		(3 Truecar Trade)	
INT LEAD CLOSING %		10.16%	
GOAL = 12%			

Action Plan:

To help achieve our goal of 50% appointments shown in comparison to leads contacted the following actions will be taken. Many of these actions are already in the process of being implemented and by February 29, 2020 we will have an idea on what is and is not working.

1. Revise and update all phone and e-mail scripts for the BDC department
2. Schedule group training focusing on handling phone calls, overcoming objections and setting appointments with the BDC Director, BDC Agents and General Managers.
3. Schedule long term one-on-one training sessions and goal setting with BDC Director and BDC Agents
4. Revised sales to management process on all “hot” leads to help bring in additional customers that are close to making the next step in the buying process:
 - a. BDC to “hot lead” customers in their opportunities bucket to identify who to discuss with management.
 - b. Talk about customers objections that BDC were unable to overcome
 - c. Identify any customers who received figures with price, payment or trade but have not responded back.
 - d. Any circumstance where the customer seems close but have not yet made an appointment
 - e. Any customer that may require numbers/follow up from the weekend, overnight and early AM
5. Daily morning meetings will now include dedicated time spent with the BDC agents and all scheduled sales managers to review the above “hot leads” and work as a team to get more appointments set. They will also use this time to review all showroom visits that were not sold and what can be done between BDC and management to make the sale.

Timeline:

What:	When:	Who:
Revise/Update phone & email scripts	Already revised and tracking efficiency	Director of Business Development
Group training on new scripts and objection handling.	No later than January 31, 2020.	Director of Business Development, General Manager, BDC Agents
One-on-one training and progress review.	To be scheduled monthly for the first six months, then quarterly if goals are achieved.	BDC Agents, Director, GM, Sales Managers
Sales to Manager Follow up Process	February 1, 2020	BDC, Sales Managers, Sales Associates, GM
Progress Review	Monthly (Beginning February 29, 2020)	Director of Business Development, General Manager
