

# Departmental Action Plan Template

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Class & Student Number: N352

Academy Week (Var II):

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

Turnover within the new sales staff we hire is essentially 100%. We have a group of core sales personnel who have all been with us for 5+ years and the remainder of the staff we hire last around 6 months or less. We currently have no sales personnel who have been with us for between 2-5 years. We would like to decrease our turnover within the sales department and create a more structures career track for them.

Overall Objective and **Specific** Desired Results:

Review our current sales training on boarding process (ok we don't have one) and create a better onboarding process to reduce turnover and create more empowered and driven sales personnel. This should lead to higher sales and closing ratios (stats we closely monitor) along with creating greater employee satisfaction. We would like to create a larger core of sales personnel as we know some will age out and the risk of always losing one is there and we currently are not in a position to replace 2-3 key sales personnel in the event of departure.

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

Create a specific onboarding process for all new sales personnel along with a more defined career path within the sales department at the dealership. Our current process is essentially a throw them to the wolves and it has resulted in very high turnover by the employee choice or by dismissal due to employees not hitting tracked metrics that we deem unsustainable for the business.

Namely:

Day 1 - Mandatory employment paperwork along with a scavenger hunt that was created so they learn the various departments and where they are located.

Day 2-5 - Mandatory manufacturer online training that must be completed prior to them enrolling on IN. We he created a room for them to take these in that is monitored but makes them easily accessible so our employees can see them.

First 3 months of employment -

The new employees work within our BDC to get them accustomed to speaking with customers and setting appointments. They are treated and paid like a BDC personnel with the expectation that they are not meant to stay within the BDC long term. This will help with BDC staffing along with allow us to monitor their calls and customer interactions from a more safe space as their first few weeks they are to follow up on old leads. For any appointments set, they are able to introduce themselves to the customer and pass them on to a product specialist (what our BDC refers to our sales staff as). This allows management to see them interact with customers, properly log customers in the CRM, and determine how they are progressing. Our BDC manager who monitors their calls provides weekly reports on their stats and how she sees them progressing.

3-12 months - Delivery Specialist

After the employee is deemed to be ready to move out of the BDC, we are going to move them to delivery specialist. This will allow them to become very familiar with all the cars along with further interacting with customers. This also frees up are sales consultants who are able to assist other customers in the purchasing process. We are aware of potential hand off issues which we will carefully monitor.

When deemed ready by management - Moved to a Product Specialist. This is a full sales person in our traditional sense with potential to move to Senior Product Specialist based on current requirements.

## Timeline:

Describe specific short term and long term checkpoints to monitor progress

This plan will be monitored on an ongoing basis as new sales personnel are hired but the plan was implemented upon our first 2 new hires in January. They are currently still within our BDC but we have seen an increase in satisfaction among our other sales personnel as they see the value in these employees. We will monitor how they progress, the timelines for which we think they are ready by evaluating their employee reviews and their satisfaction with the process. The long term will be to see if we are able to retain sales personnel on a long-term basis which will take at least one year to see but likely longer.

## 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: GM and Dealer Principal
- b. What: Meeting
- c. By When: Has Occurred
- d. How: By detailing the plan for sales personnel.

## 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 do not need approval to implement the plan, however all parties have been very receptive due to the knowledge that our current sales onboarding is not going to work for today's workforce. They are pleased with the plan in place and look forward to seeing it in action.

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