

Management Action Plan – VO1

Specific – Measurable – Achievable – Relevant – Timely

Student Name: Marie Forbes

Dealership: Key Ford of York

Class & Student Number: N355-06

Current situation or challenge you want to address (narrow your focus):

Current BOC process is clearly not working.

We are currently closing 4% of internet leads YTD.

We need to manage the entire process and make needed improvements.

Overall objective (goal) and specific desired results:

Ideal results would include 50% contacted rate or above.

Of the contacted customers 60% set appointments.

Of the ones who set appointments 50% of them show.

Of the ones who show 40-50% close.

Translating to 12-15% close rate of total opportunities.

Describe your action plan in detail (including before and after measurements):

New process: BOC lead comes in BOC sends initial response addressing customers initial questions/concerns. She then pages sales to call BOC. The available salesperson calls to get the opportunity. The salesperson then goes out and takes a walkaround video in a staged area. The video emphasizes stand out features and condition. The video gets uploaded to the new YouTube channel and is sent out through our CRM.

Timeline: What is your implementation date? Describe specific short-term and long-term checkpoints to monitor progress.

March 1st is the implementation date. At first we will monitor weekly then monthly once results are improved.

Meeting with Stakeholders (dealership personnel):

Describe what behavior change is needed to support desired goal. Address required coaching, training and/or consequences, including timelines / accountability / process monitoring activity.

1. Who: we are meeting with the salesman Saturday 2/21/20
2. What: to explain the new process. Only those who are
3. By When: willing to do the videos will be involved with leads.
4. How: In the sales meeting the manager will demonstrate how to do the video and what the expectations are. This is the new process effective March 1st and will be monitored

Dealer agreement: weekly at first then monthly

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:

We met and outlined the new process. He is onboard 100%
It is all of our goal to increase the close rate on leads.

Signed by:

Maurice [Signature]