

# Departmental Action Plan Template

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Academy Week (Var II): January 13-17, 2020

## Current situation or challenge you want to address:

Our current challenge we have is we are not measuring any analytics to determine if our lead sources are producing results. We need to create a process to track and analyze our current lead sources and determine if they are maximizing our rate of return. Sales staff not utilizing the CRM to it's potential.

## Overall Objective and Specific Desired Results:

We know that in February of 2020 we sold 35 used vehicles and 41 new vehicles for a total gross of around \$105000.00. That part of our KPI is a fact. What we don't know is what it took to get there. How many incoming phone calls, internet leads, or walk ins did we need to convert that amount of sales and gross? That is the question we are asking ourselves. For an easy example if we want to sell 70 used vehicles and 82 new vehicles with a total gross of \$210000.00 we would need to receive and convert 100% more leads.

## Describe your action plan in detail:

We need to gather and analyze the data to determine our ROI, rate of return, for all the below.

Autotrader.com - \$1650.00 per month

CarGurus - \$1825.00 per month

Dealer.com-\$4000.00-\$5000.00 per month

Commercial Truck Trader-\$2120.00 per month

GM Third Party Leads-\$1500.00-\$2000.00 per month

Work Truck Solution - \$699.00

We also need to audit Better Car People's and Contact at Once performance to make sure the process we have in place for them is beneficial to our goals. We use Better Car People program for after hours and on weekends to answer our incoming leads. We use Contact at Once for chat messenger on our website.

Better Car People - \$3000.00

Contact at Once - \$575.00

Make sure that the sales team uses the CRM to our benefit, putting in accurate information. After we are comfortable with the information that's entered into the CRM is accurate, we will monitor it closely to see if the CRM inside our DMS is working to our expectations. If not, we will look further for a CRM tool.

Set a process in place...Getting back to the basics.

Road to Sale:  
Meet and Greet  
Interview  
Pick a vehicle  
Demo a vehicle  
Quote  
Close  
Deliver  
Follow Up

Phone Up's:  
Listen to the customer  
Gather information  
Ask questions to determine their needs  
Set the appointment  
Road to Sale process

Internet Leads:  
Establish communication  
Gather information  
Prove your Worth  
Set the appointment  
Follow up  
Road to Sale process

### Timeline:

This timeline is going to take some time, we need to gather all of the information and complete an Excel spreadsheet for the past 6 months. We are in the process of pulling all sold deals and matching them with the monthly lead reports pulled out of our CRM. Then review with stakeholders to see where we are. From that point we need to figure out which lead source is working well for us and which ones are not.

We hired a new manager on February 10, 2020 after coming back from class his name is Gary.

We have started gathering the information, going through all sold deals and pulling reports of all

We have a meeting set for March 18, 2020 at 9:00 am to start the process of drilling down on all the information that we have gathered.

Leads to Appointment to Sales  
Sales to Finance Conversion to Gross  
Leads to Quote to Sale  
Sales to Service

## Meeting with Stakeholders (dealership personnel)

The processes above is a very general overview. Each step has a drill down that they are going over with the sales force and how to handle objections weekly. Gary and Vince are holding these meetings with the sales staff on Tuesday and Thursday of every week.

Management meeting once per week on Monday morning at 8:00 am to discuss prior week and the upcoming week of the direction we need to go and if there are changes that need to be made. That meeting consists of all three owners, Vince, Gary, Travis and myself.

## 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:



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