

Departmental Action Plan

Student Name: Wesley Pope

Class: N320

Student Number: 06

Academy Week: Variable II

Current situation or challenge you want to address based on the Jennifer Suzuki Outline: (must be quantifiable)

We want to increase our phone up appointment set and show ratios. We currently track this through our CRM.

Overall Objective and Specific Desired Results:

Year to date our appointment set ratio is at 27% and we would like to improve this metric to over 40% over the next two months.

Our overall objectives for the new CRM and appointments are:

40% + for appointment set

50% + for appointment show

50% + for appointment sold

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

1. Establish a training and certification process for all sale professionals as a requirement to handle phone ups into the dealership.
2. Designate the phone up desk and schedule for certified sales professionals.
3. Institute real time phone up reviews during and after all phone calls. Using Who's calling to review all phone calls after the call is completed and reviewed by management.
4. Install weekly phone up training and call review with sales professionals.

Timeline: Describe specific short term and long term checkpoints to monitor progress

Short Term: Daily reconciliation of phone log to crm and who's calling. Making sure all calls are logged into the CRM. Review CRM every morning to check performance and metrics of all phone calls and also performance of all certified sales pros who handle phone ups.

Long Term: Monthly reviews, of CRM data for phone up performance. Make personnel decisions based on performance metrics.

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

Who: Sales Manager and Sale Professionals that handle phone ups

What: Review phone up performance based on metric goals (phone up apt set , show, sold). Complete required training of phone up scripts and expectations. Managers must complete the same training requirements and hold weekly phone call training. Must review daily phone up performance against store goals. Appt set 40%+, show 50%=, and sold 50%+

By When: Within this month.

How: Complete all manufacturer product training requirements. Complete all cardone on demand phone handling courses and maintain over 12 sold unit 3 month average.

Dealer agreement:

Dealer has agreed to this change in process. This is being implemented in conjunction with us eliminating the sales BDC department. All phone were previously sent to BDC now they must be handled and tracked by the frontend managers and sales pros.