

Departmental Action Plan Template

Student Name: Kellyanne Patterson

Class & Student Number: N320

Academy Week (Var II): Week 5, June 18-23

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

(Homework modules assigned)

In June 2017, Sloan Ford opened a customer care call center. 2 weeks of training for newly hired employees, and July 1 the Customer Care Center (C3) was opened. These 2 young, inexperienced employees will be trained in house with visiting CDK/Ford personnel for the 'usual' BDC department. The challenge is to provide continual training that is thorough, but not overwhelming. New employee skill sets need to be developed, and a professional confidence needs to be nurtured. At this time, the sales department is complementing the OEM/CDK training. No scope and sequence is formulated or published.

Overall Objective and Specific Desired Results:

Goal: At Sloan Ford, a developing BDC will respond to all customer sales leads.

- Improve dealership communications and lead management
- Consistent and effective customer communication
- Improve customer retention
- Increase profitability

Objective: To improve rapport with i-lead customers using new C3 and its 2 new employees. Ford training, CDK training. Metrics: 100% response, response time within 15 minutes during open hours, baseline appt. set at 5-10%, using CDK and FordDirect Lead Management

Objectives: To effectively set appointments for new, used and CPO vehicle sales, meeting metrics within a 3 month time frame. Ford training, CDK training. Metrics: 100% response, 15-30 minute response time, 15% appointment

Objective: To impact effectiveness of C3 with intern presentation (Kellyanne Patterson) of training modules as outlined by Jen Suzuki, following Module 8, then Module 5. KPIs : customers reached, appointments set, appt. show, sale.

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

Working with Ford rep. and CDK trainer, Kellyanne and sales manager (SM) will advance, along with the new hires, in the learning of this new process to customer service at Sloan Ford. SM and Kellyanne will work daily to define best practices for call center and customer response templates. After familiarity with basic skills, Kellyanne will utilize training from NADA and integrate Modules 4-8 into C3 employee development.

Timeline: During the month of September, I will move into BDC/C3 center and work with 2 employees, replying to i-leads and phone ups. After second week, I will introduce Suzuki training module starting with Outbound Internet Module 8. While working with team and assessing skills, module 5 will be introduced and practiced. At end of September, the team will master all inbound phone sales leads. Metrics as prescribed by Ford through FMCDEALER, FordDirect .

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:** Dealer Principal- approval and anticipation of effective C3 : Managers and intern to learn new process; Trainers to educate; Salespeople-to accept the new department as helpful and complementary to Sloan Ford sales process and success: To accept C3 as a financial boost to sales persons
- b. **What:** Shift in mental mode needed for sales team to accept C3 as valuable
- c. **By When:** ASAP
- d. **How:** Shift a result of dealer/manager support, likeability of new employees in C3, effectiveness of C3 as measured by metrics of appts. Set, cars sold, customers reached.

Week 1 (jul 31 Aug1-5)			Week 2 (Aug 6-12)		
#	%	+/-	#	%	+/-
26	100%	0%	58	100%	0%
3	12%	-22%	12	21%	-13%
3	100%	41%	9	75%	16%
1	33%	-10%	2	22%	-21%
3.8%	3.8%	-4.7%	3.4%	3.4%	-5.1%

GOAL	MTD #	MTD %
100%	84	100%
33%	15	18%
59%	12	80%
43%	3	25%
8.6%	3.6%	3.6%

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:

Dealer is eager for me to share in the responsibilities of C3, and to share the information I learned at NADA. He is confident in my ability to train with enthusiasm. He is also comfortable knowing the new employees with work with me, another skill set at presenting, sharing and learning.
