Departmental Action Plan Template

Student Name: **Brittany Wilson**

Class & Student Number: **N320-03**

Academy Week (Var II): **Original class week was June 12-June 17, but I had to make up the class with N321 from August 7-August 11.**

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

(Homework modules assigned)

In regards to outbound sales calls, we are currently not setting firm appointments & I am not sure that the salespeople fully understand why it is so important to set the appointment. The customer currently has full control over the situation because we are just telling them that we are here from bell to bell & to come in wherever it is convenient for them. Having them come in whenever in fact is not convenient for the customer because salespeople are telling multiple customers the same things & who knows when they will arrive. Leaving no time to prepare for the customer or even devote the proper amount of time to the customer. This results in poor customer experience from the start. First impressions are everything. The challenge that we want to address is how our salespeople are getting the customers in the door. We want them to book firm appointments every day & understand why it is important and how it can benefit them as well as the customer. Setting a solid appointment and dedicating specific time frame to the customer will ultimately increase CSI, therefore we want to track the number of appointments made daily.

Overall Objective and Specific Desired Results:

Overall we want to give our customers the best dealership experience possible. In order to do that, we must re-train on how to properly make outbound phone calls to secure a solid appointment. The overall objective is for each salesperson to set at least one firm appointment per day & keep track of their show & purchase ratio. For internet leads, we would like to be at 25% of leads to be shown appointments. We also want to see an increase in our CSI scores, which will be a direct reflection of taking care of our customers & being prepared during their set appointment time.

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

Before putting this plan of action together, we were not booking solid appointment 95% percent of the time. It just was not happening. With that said, our plan of action is as followed:

1. Create an overall training program for outbound phone calls for existing employees and new hires.
    a. This will include:
        i. A training manual that the salesperson can refer back to at any time (role play activities, scripts, how to overcome rejection, rebuttals, explanation of why it is so important to set the appointment, time saving benefits for the customers, how to sell themselves & the dealership, and how to properly log and mark appointments in the CRM, etc.)
        ii. Salesperson phone training with our Internet/Phone Manager a couple times a month (some individual, some as a team)
        iii. Weekly meeting with focus on certain steps of the outbound call. They will follow teach, demonstrate, apply & will include goals, key points, a handout, and relevant activities.
2. Create a standard for outbound calls, setting solid appointments, and proper CRM logging
    a. Anyone who is not setting solid appointments, not showing progress, or not properly logging information into the CRM will not be allowed to take inbound phone leads and if you are on the internet team you will be removed. If you cannot make appointments on the outbound calls, then you lose your inbound and internet phone lead privileges. Once this standard is in place, everyone will need to sign off on the new process.
3. Create a process for completing the outbound call based off of what we learned from Jennifer Suzuki. We are going to have a heavy focus on setting solid appointments, but in order to do that we cannot skip the first four steps that Jennifer Suzuki came up with as best practices, which are below:
    a. Introduction (distinguish yourself over competition and take leadership of the call)
    b. Present value in you and the car buying experience (how we save them time)
    c. Review vehicle (any flexibility, deal breakers, or must haves)
    d. Tie 2nd person to the appointment to increase commitment
4. Once the first four steps are down, we are going to train hard on the process of securing a firm appointment by following the ten steps that Jennifer Suzuki laid out for us in the module we watched (which are below) & structure continuous engaging meetings & role play around each one:

a. Offer an exclusive and pre-booked appointment
b. Offer two dates and two times (15s & 45s)
c. Explain your appointment confirmation by email
d. Confirm the customer's email address
e. Offer directions to the dealership
f. Request their cell phone number after giving them yours
g. Ask for permission to text
h. Review the actions that you will take to prepare for the appointment to save time. Examples include:
    i. Car prepared in advance (washed & gassed up)
    ii. If need, have the appraiser scheduled
i. Request to have the customer call you when you they are on their way
j. Offer the customer to let you know via phone when they are on the property & meet them at the vehicle that you have already having running with the AC or heat turned on.

5. In order to stay in front of the customer, we are going to request that all salespeople confirm appointments with customer through email, text, or calendar reminder/invite. With that said, we will train on how to send, create, and what to say in these communications.
6. Once everyone is trained, we are going to begin monitoring recorded calls every week & have one on ones with the salespeople based on the calls.
7. During the morning sales meetings to hold everyone accountable, we will have an appointment board where each salesperson will keep track of their confirmed appointments, shown appointments, and how many they sold based off of these appointments. They will label them in red, yellow, or green based on performance. Whoever has the best overall performance based off this each month will be recognized & rewarded. This will also help mangers monitor who needs additional training & it is an opportunity to get explanations on any no show appointments and how we are going to get them re-scheduled.

We have not yet started this, but the preparation is in progress. Would like training to start the first week in September and we would like to start tracking progress by the fourth quarter.

Timeline:

Describe specific short term and long term checkpoints to monitor progress

1. Create training manual and processes with the Sales Manager & Internet/Phone Manager
    a. Complete by August 28, 2017
2. Work with our Sales Manager & Internet/Phone Manager on a way to track and report the appointments & outcomes per salesperson
    a. Complete by August 28, 2017
3. Meet with our Executive Team and Sales Managers to go over the plan of action for increasing solid appointments
    a. Complete by August 30, 2017
4. Launch meeting with the sales team to go over our goals and how we are going to achieve them.
    a. Complete by August 31, 2017
5. Begin training sessions with Managers & salespeople
    a. This will be ongoing, but will need to start by September 1, 2017
6. Implementation of the new outbound call process and setting the appointment will start ASAP, but we will start tracking progress in the fourth quarter.
7. Weekly Sales meetings are already taking place, but on September 1st we are going to add in this element to the agendas.
8. Listening to recorded phone calls weekly will start ASAP. These will be used as a training tool.
9. Part of the outbound call standard will include a "pain" if they do not set solid appointments &/or log them properly in the CRM. They basically lose phone lead privileges for inbound and internet. ***This is something that we have started testing out and it is working well. It really wakes them up when they realize they can no longer take the internet lead or grab an inbound phone lead.***

In order to monitor progress, we are going to track and review reports weekly, monthly, and yearly. We will look at year over year reporting. We are going to manage, track results, and hold everyone accountable. The internet/phone Manager will be tracking daily and the General Manager and Sales Manager will be making sure their sales teams are following the processes and setting solid appointments. Weekly meetings and one on ones will help identify if someone needs more training and if there are any trends occurring regarding reasons of missed appointments. We will better be able to figure out where the break down is & how we can reschedule.

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: Salespeople
- What: They will be focused on setting a solid appointment & creating a great, easy dealership experience for the customer.
- By When: September 1, 2017 and ongoing
- How: The salespeople need to have change in their behavior in the sense that they are going to be focused on setting a solid appointment. They need to take leadership of the call, & sell themselves & the dealership. They will need to follow the steps laid out by Jennifer Suzuki and be engaged in the training that we are going to provide. They are going to need to be 100% accurate with their appointment logging because they could lose some phone privileges and eventually it may start to affect their pay plans down the road.

- Who: Sales Manager & Internet/Phone Manager
- What: They will be monitoring progress of appointments, conducting training sessions, and holding the salespeople accountable.
- By When: September 1, 2017 and ongoing
- How: In general, the Sales Manager needs to pay more attention to the phone calls and appointments. In order to monitor the progress, they will be having their salespeople record their appointments on a white board for tracking & accountability purposes. They will also be listening to recorded phone calls and conducting training according along with their initial training sessions. If anyone is falling behind on the processes and not setting solid appointment, they will lose phone privileges of inbound calls & if they are on the internet team, they will lose those leads as well. They will need to monitor this and know if they need to pull this privilege from anyone. Regarding another consequence, if a salesperson is consistently not following the process, verbal and written warning will begin per our company policy. Managers will need to ensure that each month salespeople are also recognized and rewarded for changing their behavior by setting solid appointments and taking the best possible care of the customer.

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:

This will be presented at one of our weekly Executive Team meetings on August 30, 2017. This is most likely something that we will implement at all locations, but we will start with our Preston Ford locations for now.

CFO 8/17/17

The Outbound Phone Call Steps and Steps to Setting an Appointment mentioned in steps three and four of the Action Plan are credited to Jennifer Suzuki. We want to take what she taught us (in class & through the modules) and what she provided us & make it work in our dealership