



# HOMWORK – ACTION PLAN

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Dealership: Pugi of Chicagoland

**S** Specific

**M** Measurable

**A** Achievable

**R** Relevant

**T** Time-bound

What is your current situation and challenge you will address?

The challenge will be to get the BDC a little more involved with the prospect calls. Making it a bit more personal and lenthly. They are currently setting the appointments, setting expectations, and making some promises for value of time.

What is your goal? What do you want to achieve? From what metric? To what metric? By what date?  
Example: "I will decrease my 5K run time from 30 minutes to 21 minutes by June 15."

The goal is to get the BDC to set more appointments with more shows right away instead of handing some off to sales to get more involed.  
After doing some training. Start recordin in August-October. Reeevaluate #'s in Novemeber.  
Our appointment set % in June was 45% of the leads. Would like to improve that to 65% by November.

- How does this goal align with or support your dealer’s vision?
- What are the BENEFITS of achieving your goal? What are the CONSEQUENCES if you don’t?
- Why is this goal important to you?

All dealers goals are to set more appoinments. More appoinments leads to more conversions to sales.  
If we dont try to impove we will be missing out on additional sales.



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What specific actions or steps will you take to accomplish your goal? What will you do differently or improve? For each, be sure to include necessary resources, who is accountable, the measurable result, and dates.

SPECIFIC ACTION/STEP	NECESSARY RESOURCE(S)	ACCOUNTABLE PERSON(S)	EXPECTED RESULT	START, END, & CHECKPOINT DATES
Training	Videos/Management Training/Practice	BDC Manager	Increase in Lead to appointment %.	7/27-8/8
Put training and phone script or suggestions into action	Leads	BDC Manager	Increase in Lead to Appt Conversion. In Addition from Lead to Sale	8/1-10/31



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How will you track your progress? What specific metric(s) will you track? At what intervals will you check on the progress?

We use VIN Solutions reports to track all progress and actions of leads. All conversion rates by each BDC representative.

### Potential Obstacles?

Buy in and ease. Difficult to get people out of their comfort zones. Could have initial hiccups before people can change.

### Potential Solutions?

Keep training. keep practicing.

**BOTTOM LINE!** What is the financial impact (expressed in dollars) of achieving your goal?

I cannot answer this until I have at least an initial recording on performance change.



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Once you've accomplished your goal, added or adjusted policies, procedures, and behaviors, now what? How will you ensure you and your staff do not fall back into the previous habits that produced poor results? Be specific.

only way to accomplish is to keep watching reports and individual performance.

Describe any planning or implementation meetings conducted as part of development of your plan.

Initially a daily training will occur. After BDC manager feels everyone is ready will go down Friday meetings about performance and and training as a group necessary.

Sponsor Signature: \_\_\_\_\_