



Variable Operations 2 (New) Action Plan

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CLASS 321 – STUDENT 39



1

There is no written policy in place for the handling of incoming calls.

2

Calls are handled differently by every Sales Consultant.

3

Less than 30% of incoming sales calls are being converted into appointments.

4

In a recent audit of calls, we found that in many cases, Sales Consultants do not ask for a customer name or for an appointment.

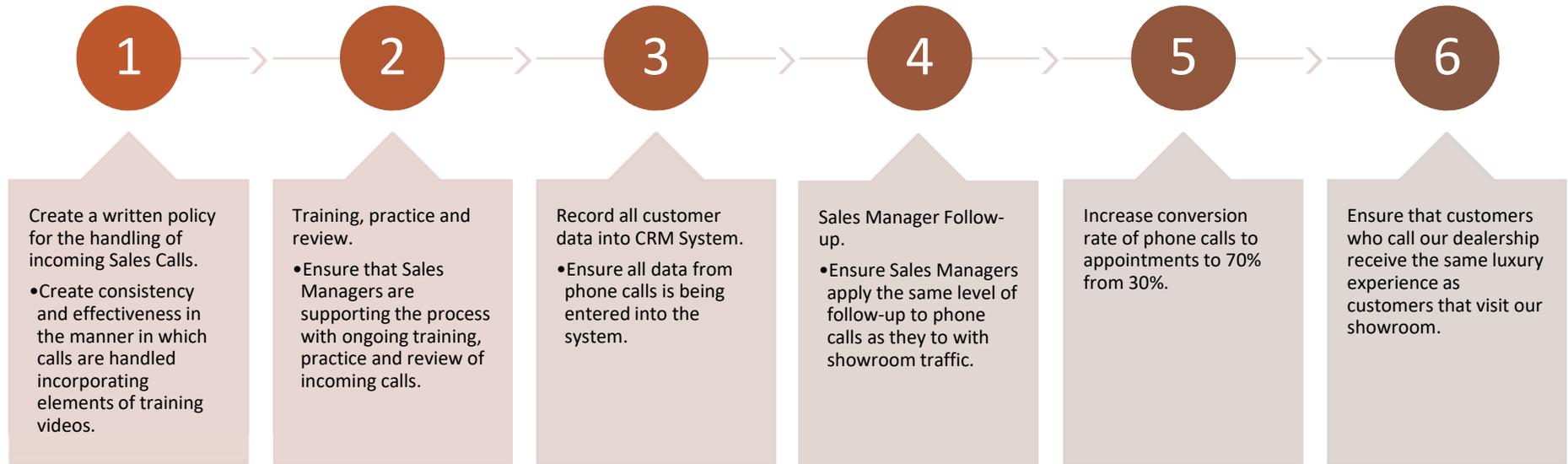
5

We have a system in place to record incoming calls but they are rarely played or reviewed by management.

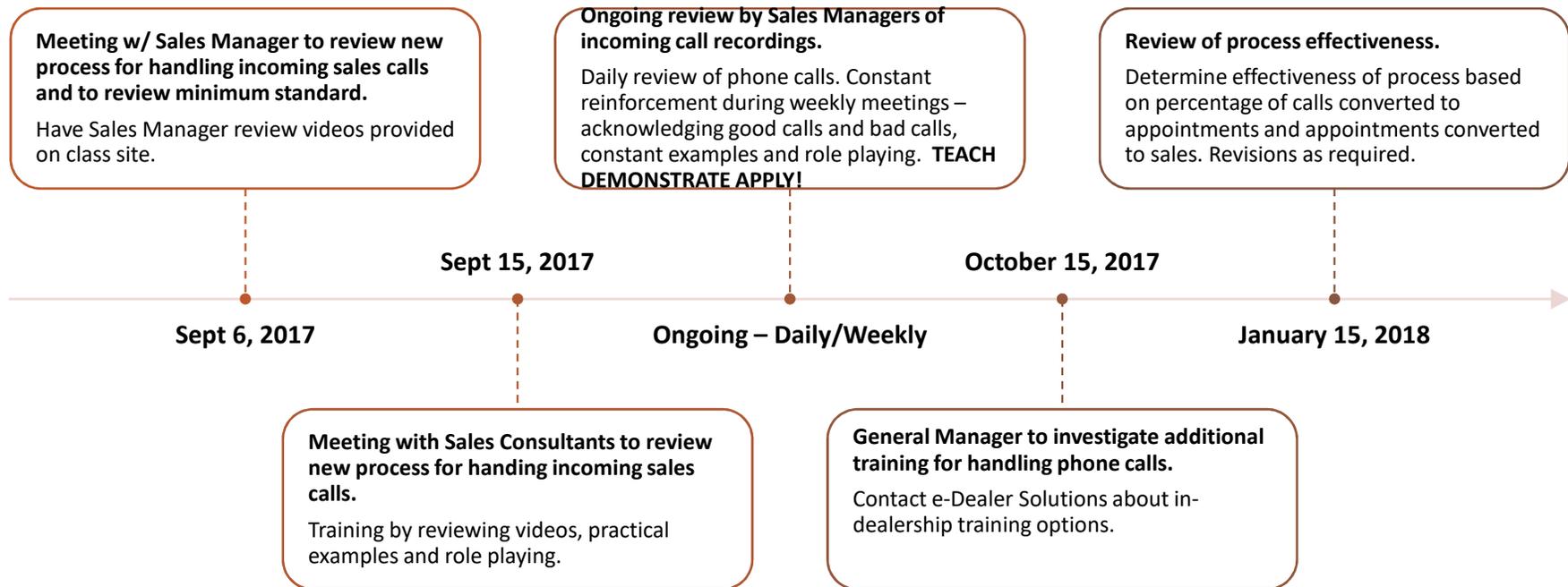
6

Customer information from sales calls is not being recorded into our CRM system. Managers cannot follow-up on status.

Current Situation



Overall Objective & Desired Results



Action Plan & Timeline

Sales Managers

Explain new process for handling incoming sales calls. Review videos and scripts presented on class site.

September 6, 2017

Sales Consultants

Training on new process. Review videos and scripts as well as examples and role playing.

September 15, 2017

Ongoing

Sales Managers to review recordings of incoming sales calls on a daily basis.

Review of recorded calls in weekly Sales Meetings noting best practices and examples.

General Manager

Investigate additional training available for the handling of phone calls.

October 15, 2017

Meeting w/ Stakeholders



Dealer Agreement

Approval is not required for implementation.

All parties are in agreement that we require a formal process. All points have either been implemented or are in process.