

Departmental Action Plan Template

Student Name: -- **Mark Henderson**

Class & Student Number: -- **N321-34**

Academy Week (Var II): -- **8/7-11/17**

Current situation or challenge you want to address based on the Jennifer Suzuki Outline:

- Our current BDC set-up handles all of our inbound Sales calls. The target concern for our dealership is to GET and SET appointments more accurately and definitively for an increased and improved customer experience, leading to improved closing sales ratio.
- Highlighting Jennifer Suzuki's training courses and tactics, we will train our BDC representatives to establish more credible appointments through cleaner phone call handling, by making strides in setting and appointment and making sure our staff is prepared for each interaction.
- Additionally, once this has been implemented in the Sales BDC process, we will train our Service BDC agents to Jennifer's guidelines as well.

Overall Objective and Specific Desired Results:

- Our goal is to increase our on-site dealer visits (appointments) through a cleaner process of handling each contact as a true sale opportunity. Our vendor to monitor and help track the "Close Rate" is Vin Solutions.
- We will use this program with the training modules from Jennifer Suzuki to work toward a 30% Close Ratio in comparison to our current 18.5% Close Ratio from a phone or email lead
- Currently we average 12 units from BDC inbound sales leads at a front/back GP of \$2,476/copy. Based on a more focused appointment setting system, we anticipate an increase of 8 units / month (20 units/month average). There will be no additional costs to the dealership, as Jennifer has provided the details of how to improve the process.

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

- Our training will include interactive Kahoot's to drive home the specifics outlined in the training modules. This will not only make the learning/training fun, it will also make it much more interactive, which leads to a greater retention of the process to follow.

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

- Initial training module presentation to BDC and GSM was 8/29/17 to discuss process
- 9/6/17 - First module showing early morning breakfast. Discussed the overall goal, reasoning and desired results.
- 9/6-30/17 - Monitor process and train individually through each day to help deeper understanding
- 10/9-13/17 - Evaluate and share results from first month of implementation
- 12/31/17 - Compile a report for GM to show three-months results and progress to 30% Closing Ratio goal
- Provide Daily, Weekly, Monthly spreadsheet / charts to track each BDC representatives productivity and the department's overall success. This will quantify the actions we have taken to achieve the desired business/financial results.

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:** - The BDC Manager, Dee Reynolds, will be responsible for training from the Module's in Jennifer's presentation. Jeff Thomas, GSM, will also be involved with the weekly meetings to drive home the importance of following the Appointment Process.
 - **What:** - Daily/Weekly/Monthly Monitoring - Visual (Charts - Spreadsheets - Kahoots)
 - **By When:** -- This Action Plan has begun and will be evaluated by 12/31/17
 - **How:** - Weekly breakfast meeting with staff, BDC Manager and GSM (GM every third)

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:
