

Departmental Action Plan Template

Student Name:

Class & Student Number: Kyle Zoon N32126

Academy Week (Var II):321

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

(Homework modules assigned)

Currently, many appointments do not show. The sales reps are not setting strong appointments and the work and investment required to generate an opportunity are being wasted.

Overall Objective and Specific Desired Results:

Higher percentage of filled appointments. Historically, this metric has not been accurately tracked; however, management and upper management have collaborated and have a sense that filled-appointments are approximately 70%. We want to introduce Jennifer Suzuki's methods and track appointment fill rates with the intention of increasing the appointment fill rate to 85%+.

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

As per above, we are beginning this experiment and initiative with a baseline of 70% for sales appointment fill-rate. We endeavor to increase the fill rate to 85%+.

- 1. Management will introduce concepts and training resources that reinforce Jennifer Suzuki's guiding principles. This training will occur weekly and over a period of two months so that it becomes second nature to our team.**
- 2. Management will track appointments over a period of 3 months for their respective departments.**
- 3. Management will present results to upper management on appointments the second and fourth Fridays of each month.**
- 4. The three departments in our dealership (BMW New Car, BMW Used Car, and MINI New/Used) will have a competition on a monthly basis based on appointment fill-rates.**
- 5. We will review monthly with the teams on the progress, challenges, successes, and rewards of using and developing these skills.**

Timeline:

Describe specific short term and long term checkpoints to monitor progress

See Above. In summary, the initiative program will last three months so we obtain a good sample of data in terms of development and results. The first two months will be devoted to continued education and reinforcing principles of Jennifer's.

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

Much of the stakeholder involvement has been described above.

a. Who:

1. Management - coaching, follow-up, tracking results, presenting findings to Upper Management
2. Upper Management - encouraging managers to implement Best Practices and create a competitive environment for each department to maximize appointment fill-rates
3. Three teams - embrace principles, commit to developing skills, share experiences with management, report opportunities and data, and improve appointment fill-rates
4. Customers - ask for feedback (by management to get soft skill feedback)

b. What:

1. Two-month training program of Jennifer Suzuki's appointment setting principles
 2. Three-month competition for appointment fill-rate
 3. Three-month+ of accurately tracking appointments to improve our closing ratio and generate greater opportunities and sales
 4. Monthly prizes given to teams with highest appointment fill-rates
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