

Departmental Action Plan Template

Student Name: Lindsay Neuville

Class & Student Number: N321-32

Academy Week (Var II): August 7-11, 2017

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

(Homework modules assigned)

Currently we struggle with tracking who is getting phone calls and the results from them. I would like to see a baseline metric created about who takes phone ups and their generated outcome.

Overall Objective and Specific Desired Results:

I would like to see a baseline metric created about who takes phone ups and their generated outcome. Once we have a baseline we can look at staff who has problems closing and begin to listen into their calls to see what we can implement from Jennifer's programming.

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

My current initiative is to have full and complete adoption of our CRM system throughout our sales staff. From there we can start to track appointments and success rates after that. Based on trends we see (high appointment setting - low closing; low appointment setting - high closing) we can analyze what is going right and wrong on the calls and approach techniques based on what we are hearing on phone recordings.

Currently we have no baseline to know our appointment setting or showing ratios.

Timeline:

Describe specific short term and long term checkpoints to monitor progress

Major short term goal is to introduce and implement the CRM system to those salesmen not currently using it. I would like to have this completed by the end of the year – 12/31/2017. Ideally it would be sooner, but I have to not only find time to personally train our sales managers but then they will have to go out and implement to the sales staff afterwards.

Once we have enough data to begin analyzing behaviors, we will start digging into phone calls, appointments and closing ratios. I expect this will take about a month to get a good sense of what is going on with each individual. Date 1/31/2017

Once the analysis is completed, we can identify the worst contenders and begin to listen to phone calls and see where their issues lie on the phone. After we have this list completed, we can begin to train using the Jennifer Suzuki method on their specific problem areas – whether it's getting a name, engaging the customer or others. This will be on-going and lead by our sales managers in the daily sales meetings after the key board overview. Progress will be monitored by reviewing phone calls for our worst performing sales staff and training based on where they are lacking. I would expect that the sales managers would use live role playing, and review of good phone calls to train on specifics. No guaranteed end date for this as I expect it will take a very long time to retrain the thought processes of the dealership – but hopefully within one complete year of training and re-training, the guys will catch on! If we could complete the CRM and the updated phone training by end of 2018, I would be very happy (we happen to be dealing with a sales staff who's youngest tenure is about 10 years-they're very stubborn!).

Finally, in order to not revert to old habits, I would expect one meeting weekly would review some phone appointment related item. This would be an on-going reminder to all staff.

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

- a. Who: Sales managers and sales staff
- b. What: Sales managers need to train sales staff on how to utilize the CRM properly and will do so at daily sales meetings in small incremental learning moments. Once this is implemented, we will need to start reviewing the reports for how the leads came

in and break down appointments set by incoming phone calls to find our sales staff who has the most issues with setting appointments by phone

- c. By When: Want CRM fully functioning in one month no exceptions to any resistant staff. Once it's up and running managers and me will review the reporting capabilities and begin to narrow down into phone calls and trouble areas which we will do after one full month of data is collected
- d. How: Once we can review habits, we will begin to hold people accountable for their closing ratios on the phone especially (but we will also look at email leads as well). Training will be implemented using the tools downloaded from Jennifer Suzuki and progress will be tracked monthly.

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:

Approved - 9/26 Timothy Neuville,
President/Owner
