

Departmental Action Plan Template

Student Name: Mike Miller

Class & Student Number: N321-01

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)

Following my variable 2 week, I discovered that my store had some areas of opportunity and places that needed attention in the new vehicle department. Utilizing Jennifer Suzuki's material, one of the items that I realized we need work on is our appointment setting skills. Our store does a terrible job at setting appointments. We not only do not know how to ask for the appointment, but when we do we inconsistently log them in our CRM, which reduces not only our amount of appointments, but no way to track the amount we scheduled in a certain timeframe. I have seen our staff use incorrect conversation tools that could be enhanced to better convert leads into appointments.

Overall Objective and Specific Desired Results:

My overall objective includes several results.

One, I recently hired a BDC representative after a vast amount of pushback and hesitation to change. I want our store to "buy-in" to this experienced BDC reps ability to assist the sales staff in properly scheduling appointments and overall conversation with customers.

Two, I want our very tenured sales staff to be open and receptive to enhance their phone skills and increase our appointment ratio based on leads and close/delivery rate overall based on total leads.

Finally, I want our team to effectively use our CRM to input conversation notes, contact info, appointments, and utilize all of the mediums available to connect

with the leads. We need accurate data in to be able to see if the education and work has made an impact.

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

Related to the BDC rep, I hired him in August and made everyone aware of his capabilities and to what he will be doing to “help” the sales staff. I have worked with our BDC rep to listen to his phone skills, which are very refined and he is doing a great job. So the next step is to show the direct impact he is having with our leads. For instance, we average in the high 600 leads per month, usually around 675-700 approximately. In June and July, we saw only 46 appointments made on 674 leads (6.8%) and 60 appointments made on 692 leads (8.6%). And with our new BDC rep working only half of August we increased our leads to 96 appointments on 684 leads (14%) and he is directly attributed to that increase providing over 70 of the appointments himself. Therefore, I want to continue monitoring our progress with leads and appointment ratios and ultimately the show rate & delivery rate. As well, we have a report that allows us to see how often our staff is using certain mediums with customers. I want to see our BDC rep to have high numbers in everything such as phone, text, email, video.

Related to our educational training, I would like to include weekly training with role play and informative insight on some of the techniques Jennifer mentioned in her videos. I do not necessarily have a measurement for this, but I want to see a change in our sales meetings to include practice of our sales staff asking for the appointment or offering directions and building value in yourself and the dealership etc... This practice will allow our staff to improve our throughput on our current amount of leads and hopefully overcome other objections effectively.

Finally, as of the beginning of the month, I have mandated that people complete their daily workplan. We used to have sales people that never looked at it, therefore, not following up with leads and/or trying to set additional appointments. I want our team to acquire all the information Jennifer said is a priority (email, request text, name, address, phone #) in order to be able to connect with the leads over time. As well, when we have conducted a phone call

using our enhanced phone skills I asked our staff to make any pertinent notes about the call to remind them and sales managers of what transpired so that they know what is next in the process. Measurements will include similar to the BDC rep with the effectiveness of the mediums used along with the amount of scheduled appointments per the amount of leads each salesperson receives.

Timeline:

Describe specific short term and long-term checkpoints to monitor progress

Over the next quarter I want to see consistent improvement in the number of appointments as a % of total leads. We hit 14% in August and I would like to be in the 15-20% range by the end of Q4.

Another timeline specific item is to continually work with staff and management to educate and role play the steps to setting an appointment (using Jennifer's methodologies) . I don't have a end timeframe as I want this to be perpetual, but implemented as of now.

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: Dealer, GM, Sales Managers
- b. What: Emphasis on phone skills and monitoring of activity logs and appointment logs
- c. By When: end of Q4 to hit a higher appointment ratio
- d. How: Well defined process, tracking your activity and leads, continual training

Overall, we need to work as a cohesive unit to make every sale possible and focus on our appointment setting process and overall communication with the customer. It is easy to go spend more money to get more leads, but you may not close more people. So we will work internally to become more efficient in our communication to maximize sales from the same level of leads. Keeping our sales team focused on the process, educating consistently and effectively communicating with our potential customers by setting appointments and using all mediums to reach them will hopefully result in more deliveries.

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:

John Miller
