

# Departmental Action Plan Template

Student Name: Geoff Locke

Class & Student Number: N321 46

Academy Week (Var II):5 New

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

Current situation or challenge:

I would like to increase the percentage of internet appointments booked per total leads.

My year to date (September) is at 751 leads to 255 appointments averaging 33.95%.

Month to date in September 73 leads 29 appointments 39.73%

The start goal is to average 50% booked appointments measured monthly and eventually reach over 65% ytd.

## Overall Objective and Specific Desired Results:

65% Appointment booking ratio.

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

Using Jenifer Suzuki out line on setting appointments. I will have a 10 minute daily training and role playing meeting every morning. Each Product Ambassador will be required to review the out line and be prepared to role play at each meeting.

Each BDC rep and PA will have the outbound internet Phone Call check list and be required to follow it.

I will have managers randomly sitting in to monitor phone calls. The check list will be used as the guide to getting more appointments.

YTD 33.95%, Current MTD 39.73% and Goal for first three months is 50% increasing to 60% after three month with top goal of 65%.

## Timeline:

Goal for first three months is 50% increasing to 60% after three month with top goal of 65%.

Measured Daily: Morning meeting will consist of each employee posting there daily percentage on a white board red marker for below goal and green for above the goal.

Measured Monthly: MTD goal will be recorded in the same manor.

## Meeting with Stakeholders (dealership personnel)

One huge behavior change will be that we will have to learn is to not sell cars on the phone instead present the value of doing business with us.

The stakeholders involved will be the Product Ambassadors and BDC reps as well as Sales managers and General Manager.

Training will start (immediately) with short video's, coaching and role playing meeting daily.

Managers will be responsible for holding those involved accountable and for training.

As said before the goal for the first three months will be 50% increasing to 60% for the second three months and after 6 months 65%.

If monthly goal is reached \$200.00 spiff will be given at the month end meeting.

## 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:

This will take some co-operation of our BDC manager do the fact that the BDC is 2 hours from the dealership.

I will start with my Product Ambassadors at the dealership and monitor and then meet with BDC manager to implement there.

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