

Departmental Action Plan Template

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Class & Student Number: Class # 321 Student # 45

Academy Week (Var II): New Vehicles

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

My current challenge is the percentage of confirmed and shown appointments in relation to the total amount of sales calls we receive. We currently have a poor internal process for specifically training for inbound calls. Too much time is spent talking about the vehicle and not enough attempts are made at asking for a solid appointment. It is hard to estimate exactly what the percentage has been from poor CRM data entry however moving forward we would like to increase appointment ratios to 40% confirmed appointments. Our closing ratio on appointments is over 50% so this will help us increase our overall volume, and with proper word tracks it shouldn't affect our gross profit averages as we will not be discounting to get appointments but just asking for them tenaciously.

Overall Objective and Specific Desired Results:

Increase ratio of confirmed appointments to 40% of all incoming sales calls. This will be the target to strive for, even though it seems initially aggressive I believe it is a respectable number to shoot for. Due to the set expectations, the desired results are the sales team using a structured approach to incoming sales calls where the main objective is to get the appointment, not to sell the vehicle over the phone.

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

The action plan involved first determining the current phone process that we currently have and what results it yields. Secondly, we decided to get our entire team properly trained on how to handle incoming sales calls and set an objective to achieve for both conversion ratios and purpose. We started a contract with a company called applied concepts out of Florida, this training process is one on one comprehensive coaching on

phone skills. This program is a substantial investment so our team is fully committed to this training even to the degree that it is tied into certain components of their pay plan.

Timeline:

Describe specific short term and long term checkpoints to monitor progress

Short term timeline is to get everyone registered for training, and make it a habitual weekly task. Long term check points are to change the way we input leads into our CRM tool to ensure that we can get good metrics as to how many contacts we have were from the phone, and from their how many appointments showed.

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 Principal, Sales Managers, Sales staff and outside trainers. The trainers will facilitate the actual coaching, the Sales Managers will be holding the sales staff accountable for completing training and monitoring the metrics, and the Dealer Principal will keep the Sales Managers accountable so as the store realizes its maximum return on investment.
- b. What:
- c. By When: The training program lasts for 4 months so our sample period to measure results will be from September to December.
- d. How: The desired result is consistent phone calls that yield a solid appointment. We have developed a spiff program where we review a random selected recorded call either a live call or a mystery training call and spiff \$20 per time the sales person asks for the appointment. No ask, no money. We ideally want to see 3 attempts. This is also contingent on them completing

their weekly module training. If they do not complete the training they are not eligible for any spiffs.

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:

My sponsor was involved in the actual development of this initiate, the meeting was filled with consensus on where we need to be as far as training goes. We have a rock solid sales process when the customers are in the store, but realized that our phone training not as strong, we spent too much time talking about the vehicles on the phone and never getting the prospect in the door, where we can really shine.
