



## HOMEWORK ACTION PLAN

S SPECIFIC   
 M MEASURABLE   
 A ACHIEVABLE   
 R RELEVANT   
 T TIME-BOUND

Name Patti LaPaglia Class # ATD 043

Dealership Conway Beam Truck Group Date 1/25/2021

Current Situation or Challenge to be Addressed:	1 New Truck Salesman at branch who averages 2 truck sales per month		
Current Performance Level (include specific measure):	Dec 1st 2020: 21 units sold. \$3,448,733.00 in sales. Average \$164,225.38 sales dollars per truck. Total GP \$167,562.00. Average GP \$7979.14 per truck		
Goal (what do you want to achieve?)	Provide salesman with a monthly sales goal of 3 units per month.		
Goal Performance Level (include specific measure)	36 units sold per year instead of 24. \$5,915,443.68 in sales per year. Extra \$164,225.38 per month in sales dollars. Extra \$7979.14 per month GP		
Goal Start Date:	2/1/2021	Goal End Date:	7/31/2021
First Check-in Date:	3/1/2021	Performance Objective:	Goal of 3 units is met
Second Check-in Date:	4/1/2021	Performance Objective:	Goal of 6 total units is met
Third Check-in Date:	5/3/2021	Performance Objective:	Goal of 9 total units is met
Fourth Check-in Date:	6/1/2021	Performance Objective:	Goal of 12 total units is met
How does your goal align with the dealers' vision?	yes		
What are the potential benefits of achieving your goal?	More units sold, more net profit for the dealership, bigger commission for salesman, faster rotation of stock units		
What are the potential consequences if you don't achieve your goal?	Too many unsold units, too much paid out on floor plan		
Why is the goal important to you?	Salesman has never had a set goal		
Potential Obstacles	Salesman has been doing this for 25 years and is set in his ways, lack of inventory, build dates are too far behind,		



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Potential Solutions	Work with the salesman, allocate inventory from different branches, allocate inventory from different dealership groups
BOTTOM LINE! Financial Impact of Achieving Your Goal (expressed in dollars)	\$2,466,710.68 in sales per year. \$95,749.68 GP per year

What specific actions or steps will you take to accomplish your goal? What will you do differently or improve? For each, be sure to include necessary resources, who is accountable, the measurable result, and dates.

SPECIFIC ACTION/STEP	NECESSARY RESOURCE(S)	ACCOUNTABLE PERSON(S)	EXPECTED RESULT	START, END, & CHECKPOINT DATES
Write out sales plan	Written out plan, customer list, trucks in inventory	GM	A concise plan written out for salesman	January 26,2021
Meet with salesman about new process	A place to meet,	New truck salesman and GM	Salesman listens and understands the goal	Feb 1, 2021 to July 31,2021
Meet with title clerk	A place to meet	GM and title clerk	Title clerk understand role in plan	Feb 1,2021 to July 31,2021
Sales ads sent to potential customers	Marketing brochures, ads, list of potential customers	GM, marketing manager, new truck salesman	Sales leads	January 26, 2021 to July 31, 2021 and beyond
Cold call customers, reach out on leads	Phone, car, email, customer list	New truck salesman	Sales leads and new truck sales	Feb 1, 2021 to July 31, 2021 and beyond
Meet with service about pre-delivery time frames	PDI lists, mechanic to perform PDI, space in shop	Service manager, technician	New units are brought into the shop and processed in a timely fashion	Feb 1, 2021 to July 31, 2021 and beyond
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As you work toward your goal, it’s important to have interim check points with specific, measurable objectives so your team can hold themselves accountable. If everyone knows the goal and objectives, you don’t have to spend your valuable time micromanaging.

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Once you've accomplished your goal, added or adjusted policies, procedures, and behaviors, now what? How will you ensure you and your staff do not fall back into the previous habits that produced poor results? Be specific.

Add new policy to the monthly managers meeting agenda, provide a time-frame per unit to be processed by the shop and title clerk

Describe any planning or implementation meetings conducted as part of development of your plan.

Meetings with the salesperson to explain change in goal of units per month from 2 to 3. Work with salesman to make list of customers that he has quoted or spoken with. Meeting with service manager for PDI time frames once truck is sold. Meeting with title clerk to time DMV paperwork accordingly with completion of PDI and extra shop work per customer's needs. Meetings with marketing personnel for ads, flyers, etc.

Sponsor Signature:

*Chelsea Covey*