

# **ACTION PLAN**

**What will you do differently as a result of what you learned in this section?**

F&I best practices: “Follow-up contact with all clients that did not purchase an F&I product. I will designate my highly motivated salesperson, Matthew Gormon, to initiate with an emailed video of the product not purchased and follow-up with a phone call on a designated day after the sale.

**What will be the benefits of making these changes? What will be the consequences if you don’t do anything differently?**

This will have a high impact on the bottom-line profit. My designated salesperson, with his great attitude, will promote himself to the next level of his career. This will be the foundation of his training in the finance department. Above and beyond the benefit of training, in our performance based business, this can and will capture lost gross. A consequence not initiating this process would result in “not being as profitable”

**What obstacles might you encounter and how can you overcome them?**

We may get pushback from the finance department managers, but that is OK, they may work harder on selling their products the first time.

**Identify your first few steps and the people who can help you with them.**

Kevin Smith (Finance Director will train Matthew Gormon on the finance product and word tracks that will help in facilitating a sale. Rachel Negri (Finance Manager), will make copies of all menus of un-sold clients and filed in a designated area. All clients will be communicated, by Mattew Gormon, with a video presentation provided by our finance partner. Within 3 days of the clients delivery Matthew will attempt to re-engage on the missed opportunities. This will be an ongoing training for his road to promotion while benefiting from a percentage of clients that will benefit from this second attempt.

**Start Date:** March 1, 2021

**Completion Date:** On-Going