

ACTION PLAN

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

Train FiI manager to use the CRM system. FiI Be more involved with both Service & Sales dept.

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

Benefit of an extra set of "eyes" on our system. Look for expiring warranties and lease renewals. If nothing actioned, loss of extended warranty revenue and lease buyout/renewal income.

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

"Buy in" from FiI manager could be one obstacle. Over come by showing the extra income potential. Also the spin off of "good will" between the desk manager, service manager towards FiI office. TEAM!

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

Involve FiI manager with training from outside CRM source or involve sales manager to help with training. GM to "trust" but also "verify" this happening.

Start Date: March 1st/2021 Completion Date: March 21st/2021