



HOMEWORK ACTION PLAN

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

Name Bob McVeighSeminar Class # Seminar
 Dealership Myers Kempville Chevrolet Buick GMC Date 3/13/2021

Current Situation or Challenge to be Addressed:	Poor lead management and follow up process. The process falls off after 7 days.		
Current Performance Level (include specific measure):	There is a CRM process in place but it seems to fall off after 7 days.		
Goal (what do you want to achieve?)	To hve the CRM process for follow up be 90 days and trackable by sales consultant.		
Goal Performance Level (include specific measure)	90 Day follow up		
Goal Start Date:	3/1/2021	Goal End Date:	12/31/2021
First Check-in Date:	3/8/2021	Performance Objective:	7 day process being followed
Second Check-in Date:	3/31/2021	Performance Objective:	30 day follow up ROI in the first 30 days based on an increase of 5 units and \$18642 in gross YOY.
Third Check-in Date:	4/30/2021	Performance Objective:	60 day follow up ROI in the first 60 days based on an increase of 10 units and \$37284 in gross YOY
Fourth Check-in Date:	5/31/2021	Performance Objective:	90 day follow up ROI in the first 90 days based on an increase of 15 units and \$55926 in gross YOY.
How does your goal align with the dealers'	Digital Marketing Performance		

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vision?	
What are the potential benefits of achieving your goal?	Increased sales and gross YOY in New and Used.
What are the potential consequences if you don't achieve your goal?	As the market trends continue towards digital marketing we will be left behind in our market. So we will lose market share.
Why is the goal important to you?	We are in a going community with increasing potential. We need to take full benefit of this potential to grow our business.
Potential Obstacles	Maintaining management tracking and follow up. Sales people not completing their tasks in CRM but checking them off. Sales people removing customers from the follow-up process in CRM.
Potential Solutions	Management tracking and follow-up with customers. Allowing only management to remove customers from the follow-up process. Weekly meetings with manager to inspect the tracking.
BOTTOM LINE! Financial Impact of Achieving Your Goal (expressed in dollars)	5 more units per month. New average PNVR - \$4255 Used average PUVR - \$3204 Average PVR - \$3728 Create Increase of \$18642/month or \$223710/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
Create tracking sheet	Excel template	Bob	Fillable template for tracking	Feb 27/21 Mar 1/21
Track all leads	Excel template CRM	Max/ Bob	Fill in dailly	Mar 1/21 May 1/21

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SPECIFIC ACTION/STEP	NECESSARY RESOURCE(S)	ACCOUNTABLE PERSON(S)	EXPECTED RESULT	START, END, & CHECKPOINT DATES
				Done at weekly meeting
Phone Training	Jennifer Suzuki Videos	Bob	Video training completion	Mar 1/21 May 1/21 Done at weekly sales meeting
Bomb Bomb Training	Bomb Bomb	Mak/ Bob	Videos sent with every lead	Mar 1/21 On-going Weekly sales meeting
Daily meetings with sales consultants	CRM	Max	Daily meetings with sales consultants	Mar 1/21 On-going Daily
Sales consultant lead report cards	Excel template Internet lead report card	Bob	Exceed base scores	Mar 1/21 On-going Monthly - Template Daily - Internet lead report card
Check ROI	CRM Reynolds Desking tool	Bob	ROI of \$18642 per month	April 1/21 Dec 31/21 End of every month

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.

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.

- 1 - Continue with Daily, weekly and monthly meetings
- 2 - Monitor the tracking report daily
- 3 - Provide a score card to sales consultants for each Lead and the activities required.

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

- 1 - Meant with the management team involved in the process changes. I gathered information and suggestions on the proper process.
- 2 - Adjusted the follow up process in CRM
- 3 - Management did a 4 hour training session to get a better understanding of CRM and how to use it.
- 4 - Meant with the sales consultants to go over the process and get any input.
- 5 - Develop a lead management tracking sheet.
- 6 - Adjusted the process and tracking based on input received from the staff.
- 7 - Meant with the team and rolled out the process and tracking.

Sponsor Signature: _____