

Departmental Action Plan Template

Student Name: Brian Guerrero

Class & Student Number:N322

Academy Week (Var II):Week 6 New Car

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

Being the Collision Center Director, I see our biggest area of opportunity in using Jennifer Suzuki methods is in our "closing percentage". We currently do a great job in getting customer to our door, but have an opportunity to close more jobs by doing a better job in following up on the estimates written, and setting up expectations for call backs.

In our estimating software (CCC1) were able to track our closing percentage by estimator as to how many estimates they wrote and how many actually turned into jobs (closing percentage).

We also have the technology that I can review the follow up phones to insure that we did a terrific job in explain the "time saving" benefits of using O'Rielly and that were properly asking for the opportunity to fix their vehicle.

Overall Objective and Specific Desired Results:

The goal would be to have each estimator closing at least 75% of estimates written. Currently were at 54%:

Estimator	Opportunities	Opportunity Estimate \$	Converted to RO	RO Estimate \$	Captured %(by Count)	Captured %(by Amount)
	59	\$ 85,638.42	7	17943.39	12%	0.21
Albert Carrillo	460	\$ 1,222,353.40	345	940934.98	75%	0.77
Brian Guerrero	101	\$ 145,302.61	6	7979.44	6%	0.055
Chris Taiafi	8	\$ 14,994.63	0	0	0%	0
Dan Watson	71	\$ 137,201.88	19	36148.89	27%	0.263
Hank Andrade	234	\$ 392,500.38	51	106662.94	22%	0.272
Henry Carrillo	79	\$ 54,801.14	2	11105.25	3%	0.203
John Destrini	103	\$ 244,700.95	48	113023.48	47%	0.462
J R Gaskins	148	\$ 552,724.44	61	189680.21	41%	0.343
Lynn Ruter	638	\$ 1,827,896.97	463	1470363.03	73%	0.804
Paul Casillas	389	\$ 842,059.27	211	485285.52	54%	0.576
Walter Gaskins	326	\$ 1,021,450.24	201	691629.06	62%	0.677
Total	2616	\$ 6,541,624.33	1,414	\$ 4,070,756.19	54%	62

If we could have closed 75% as a team it would have generated \$835,462 in additional revenue or approxemently. 33 more vehicles each month.

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

1. I need to be consistent in holding weekly meeting with every estimator that is below the goal of 75% closing ratio. These meetings will be held every Thursday at 9:00am to 10am. We will go over every estimate that was not closed and either contact the customer then or come up with a game plan on how to close that customer. I will be also be offer coaching advise during the phone calls to make sure that we 1. Making the proper intro 2. Selling the benefits of using O’Rielly 3. Offering to handle all the details in order to make it a seamless repair process. 4. Ask for the sale 5. Deliver on promises.
2. Scoreboard: Every week I’ll be sending out the scoreboard of where every estimator is at for the past 45 days. In order to get the motivation going will be offering contest for the highest closer and for everyone over 75%. Prizes to be offered
3. Once a month I’ll review 2 phones with each estimator to identify areas of opportunity where we could have applied some of Mrs. Suzuki methods.
4. Our estimator Paul Cassis pay plan will change to reflect his closing percentage. This has already went into effect

Timeline:

Describe specific short term and long term checkpoints to monitor progress

Every week on Thursday will check the status of each estimator to see who's hitting the goal of closing 75%. This will be reviewed at our monthly check in and awards will be handed out at that time to recognize top performers. This plan will be part of how we run our everyday business indefinitely.

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:** Collision Director, estimators.
- b. **What:** Hit goal of closing 75% of estimates written.
- c. **By When:** Every month moving forward.
- d. **How:** Thursday meetings, weekly status updates, review of phone calls, monthly review and awards

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:
