

Departmental Action Plan Template

Student Name: Nathan Fredricks

Class & Student Number: N322 Student # 43

Academy Week (Var II): September 18th - September 22nd

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

Our current Challenge is to more effectively set internet lead appointments. Year to date we have 1596 total internet leads and have set 328 appointment for an appointment setting percentage of 20.55%. Further, of the appointments set 242 showed or 73.78% of the appointments set and 165 closed for an overall close percentage of 10.34% based on the 1596 total leads and a shown appointment close percentage of 68%. Our close percentage is respectable but I would like it to be in 12-15% range and our appointment set to show percentage at 73.78% is fairly strong. The area we have the greatest opportunity to improve and the area I'll be focusing on for this assignment is our appointments set as a percentage of total internet leads.

Overall Objective and Specific Desired Results:

My objective is to increase our appointments set as percentage of internet leads from 20.55% to 35%. If we do so based on the above percentages we will set 168 additional appointments. If we maintain our appointment show percentage we will have an additional 124 shown appointments. If we maintain our close percentage on shown appointments of 68% this will result in an additional 84 sales year to date.

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

My action plan is very simple. I plan to implement Jennifer Suzuki's process for outbound phone calls starting with the five step greeting process, continuing with the demonstration of time saving process and concluding with ten steps to setting an appointment. I will conduct this training along with my internet director and GSM team. The measurable is very simple and was just described, that is, increasing our appointments set as a percentage of internet lead from the current level 20.55% to 35%.

Timeline:

Describe specific short term and long term checkpoints to monitor progress

This Initiative will begin on November 1st and will involve a Monday and Friday Training Schedule complete with role playing and listening to recorded calls. We will begin to measure progress immediately and continue to do so on a daily, weekly and monthly basis. I hope to see immediate improvement and to reach our goal of 35% appointment set as a percentage of total internet leads by January 1st 2018.

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:** Myself, Nate Summeron (Internet Director GSM Team) and Brandon Clay (New Vehicle Manager/GSM Team) will need to discipline ourselves to maintain a regular Monday/Friday training schedule. Further, we will need to manage results which each member of our six person internet team as individuals and as a whole to reach our goal. One consequence of not getting to at least 30% appointments set as a percentage of total internet leads for individual member of our internet team will be forfeiting a position on the Internet Team.
- b. **What:** Attain our goal of 35% appointments set as a percentage of total internet leads
- c. **By When:** January 1st 2018
- d. **How:** By implementing the Jennifer Suzuki outbound phone call process, training our team and measuring and holding them accountable to the desired result.

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:

I can proceed with this initiative on my own. Further, I and my team meet with Mike Anderson and Scott Heaton, our Dealer Principle and COO, on a regular basis and both are aware of our initiative and fully approve of our efforts.

