

Departmental Action Plan Template

Student Name:

Class & Student Number:

Academy Week (Var II):

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

We have a major problem at our store with making appointments, and especially having our appointments show up. We do not have a process or script that our salespeople can follow in regards to scheduling appointments over the phone, and that must change as soon as possible. Our sales people average about 1-3 appointments a day at our store, and we need to make sure that we capitalize on these opportunities as much as we can. My plan is to actually train my sales staff with the guidelines laid out by Jennifer Suzuki in her training templates. I will have a number of training sessions with my sales staff and I will make sure that they follow a guideline/script that will be formatted based on Jennifer's training. We will follow the steps that are explained by her, and through this, we should be able to accomplish the goal of setting MORE and appointments, and making them count. Having a set script, and having solid steps to follow is extremely important especially for sales people that are new to the business. These training modules can make everything much easier for people who have been in the business long term, and for newer people as well.

Overall Objective and Specific Desired Results:

Our objective is to achieve more sit-down appointments in person that are scheduled over the phone. Our main way of achieving this will be through the phone call training that Jennifer has set out for us. We would like to accomplish the ultimate goal of selling more cars and being much more effective over the phone with the correct processes in place. We are aware that customers are extremely time sensitive, and through our training that we will provide to our sales staff, we will become more aware of this customer desire, and do everything we can to save them more time, and make the most out of our time on the phone with them. Moreover, we will make the most out of the actual

appointment when they come in the door by following the exact steps that Jennifer Suzuki describes. The explanation of step 10 will be emphasized.

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

Our sales staff average about 184 appointments per month, and when I asked them about how many show up, the average consensus was about half / 50 %. This number is too low, and a higher number of actual show ups is much more attainable through the right training and practices. During the month of November, we will hold a weekly training process for handling phone leads, abiding by the guidelines and routines that Jennifer sets out for us, and we will see how we improve during the month of December, which will be the month that we keep track of our leads and appointments. November will be only for training, and the real test will come during the month of December. Our goal is to have at least 65% of our phone appointments actually walk through the door, and I think this is a good realistic number. So, if we have another 180 appointments set, our goal is to have at least 117 of these show up for a sit down with a sales rep.

Timeline:

Describe specific short term and long term checkpoints to monitor progress

My timeline is mentioned in my action plan detail. We will use November as a training month, and during the month of December, we would like to achieve 117 appointments with customers for the month.

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: Our sales staff are going to require a full makeover of their phone sales and appointment making process. Our managers are going to need to become more aware of the training process, how to implement it and making sure that it is being implemented.
- b. What: The training process, our principals, and our processes will be rebuilt and reconditioned.
- c. By When: the end of December, we will be much improved.
- d. How: Through training and development of our skills.

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:
