

Departmental Action Plan Template

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Class & Student Number: N323—06

Academy Week (Var II)

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

Our current situation is that we are closing phone ups at around 13%. We have not implemented a consistent phone training program for our sales staff.

(Homework modules assigned)

Overall Objective and Specific Desired Results:

Our objective is to have all salespeople trained to take inbound phone calls as proficiently as an experienced BDC representative. They should be able to effectively handle objections and schedule appointments.

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

We have implemented a client care center (bcc) to handle all inbound calls. We invested the money with the company BLUEPRINT. We are training all client care reps to answer phones properly, handle objections and set appointments. This has only been in place for 30 days and it is a work in progress but it has been successful so far. Our closing ratio for phone ups has gone from 13% to 21% in the short period of time. The goal is now to have all new hire salespeople begin working in the client care center before going on the sales floor. We feel that slowly transitioning them through this process will help effectively train them on the necessary phone skills they will need to be successful.

Timeline:

Describe specific short term and long term checkpoints to monitor progress

We are monitoring the closing percentages and the appointments set per call to gauge the success of this project. We are seeing great results. Hiring and attracting the right people is the biggest obstacle so far. The long term goal is to have a solid team of people in the client care center and to be able to easily promote and transition them onto the sales floor in a more seamless process.

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: CLIENT CARE MANAGER AND GENERAL MANAGER
- b. WHAT: HIRING AND TRAINING THE STAFF PROPERLY
- c.
- d. What: IMPLEMENTING THE CLIENT CARE CENTER
- e. By When: WE HAVE ALREADY STARTED

- f. How: WE HAVE HIRED 8 CLIENT CARE REPS AND A CLIENT CARE MANAGER ALONG WITH AN OUTSIDE COMPANY TO HELP FACILITATE

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:
