

Departmental Action Plan Template

Student Name: John Foglio

Class & Student Number: 323-44

Academy Week (Var II):

Current situation or challenge you want to address based on the Jennifer Suzuki Outline: (must be quantifiable) Currently have an average of 781 internet opportunities and 271 phone opportunities that my BDC department handles up until an appointment is set then the lead is assigned to a salesperson. Our appointment set ratio for phone opportunities averages around 31% on any given month and my internet closing ratio hovers around 12% month to month. My staff in the BDC is new and the store culture has not evolved yet to show support.

(Homework modules assigned)

Overall Objective and Specific Desired Results: My objective for this store is to successfully maintain a 50% appointment set ratio for phone opportunities and a closing ratio of 30-40% for shown appointments. My objective for internet opportunities is to increase my closing ratio to 15% (increase by 3%). By achieving this goal I should be able to gain approximately 33 sales just from phone opportunities and 24 additional sales from internet. This increase will result into \$114000 variable net on a monthly basis.

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

We will have a very in-depth conversation with all management, sales and BDC staff, going over each step in our process in how to handle these customers when they set an appointment or reach out to us for numbers. I will make sure that every part of our team fully understands what the other one's role is and how we all need to work together. The management team will be trained fully on making confirmation calls and texting. We currently do a decent job of this but I know that when it reaches 100% we will increase our show ratio even more. I will then work with my BDM, management staff and sales teams on the importance of being prepared and impressing the guest when they arrive. We will make sure everyone is very clear on making sure the vehicle is pulled up front and ready. From here we will put a mandatory TO process in place, meaning every single guest that comes in will receive a TO from management.

I have set up reporting systems within our CRM to ensure that all of this is followed. This is something I will inspect daily. From here more training will be conducted when needed until we are 100%. I know that following these steps and checks and balances will give me my goals and objectives.

Timeline:

Describe specific short term and long term checkpoints to monitor progress

November 30th- Appt. set ratio 40%, internet closing at 13%

December 31st- Appt. set ratio 45%, internet closing at 14%

January 30th- Appt. set ratio 50%, internet closing at 15%

End of every month to measure success.

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: sales teams and management
- b. What: Will need to be held accountable to our process in how we treat our VIP appointment guests
- c. By When: 12/1/2017
- d. How: This will be done by training from our BDM and management team. Once the training is completed it will be constantly monitored through daily actions and will be able to be measured in our CRM as well.

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: The meeting was excellent! My sponsor is very excited about the direction we are going. We will be setting up BDC departments in all of our locations in 2018.
