

Departmental Action Plan Template

Student Name:

Class & Student Number: #323 / #12

Academy Week (Var II): 5

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

Out dated phone script and breaking old habits. The one thing that stuck with me and my team from Jennifer Suzuki's outline was the old word tracks were still using. I.E what information can I get you today? In case we get disconnected let me get you name and number upfront. We also have no rules to who can answer or making outgoing calls.

Overall Objective and Specific Desired Results:

Train managers and salesman to have a process on the phone. We also want a phone culture at the store and this comes from website placement, social media call to action to drive more phone calls. Outgoing calls will be more structured with certain campaigns in mind. I.E 18 Camry, Trade buy back and data mining.

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

1. Have a script for incoming calls.
2. Have a script for outgoing calls.
3. Train managers first and make sure they understand what is expected on phone handling.
4. All salesman must go through phone training and review phone calls with a manager.

Timeline:

Describe specific short term and long term checkpoints to monitor progress

Short term we will have daily manager one on ones for outgoing phone calls. We will also incorporate weekly phone training and roll playing with the new phone scripts. Long Term we just signed up with Interactivetel for phone recording and tracking. This service will tell us how much phone use each salesman makes per day and tracks how many incoming calls comes in to each salesman and it records every call through activetel app which is mandatory.

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

The behavior change starts with me because I can get better on the phones but the biggest thing is putting this behavior back on as a benchmark. We can't quit and forget any longer this will be a store culture going forward. Managers will discuss/track phone training every Monday morning. We also came up with an accountability sheet which every salesman will sign every month and this includes bonus money and reverse bonus money if they don't hit key KPI's for each individual team and person. Managers will go over all activities including the new phone standards in daily one on ones. December 1st will be the start of Interactivetel and at that point the guessing will be gone and real time data will be used. The salesman will know how long, how many calls made with contact, how they sound and track everything that goes with the phone system including CRM integration.

- a. **Who:** Pre-Owned Director James Spivey and New Car Director Shane Thornton
- b. **What:** Interactivetel

- c. **By When:** December 1st
- d. **How:** New phone system and scripts

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:

