

Departmental Action Plan Template

Student Name: Chris Matthews

Class & Student Number: N323-24

Academy Week (Var II): Variable II Week 5

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

My current situation is the department lacking the ability to maintain confidence during the sales call and maintaining the course/script necessary to set the appointment

Overall Objective and Specific Desired Results:

Increase the confidence of all team members, set more appointments and increase the number of sales that is associated with the leads coming in to the department.

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

First, I will pull all reports necessary to show numbers and percentages from our CRM(E-leads) so we will have a gauge of how the department is currently performing. Secondly, implement weekly training and role playing to ensure the knowledge that the team needs is available. We are currently working with E-dealer Solutions to schedule training beginning in January 2018. I have also signed up to be able to listen to and monitor all incoming phone calls so I will know how effective the training is working and will also use this tool for the team to have the opportunity to critique themselves, identifying points where they need the most improvement. After training and the team feels that they are confident to handle the task to perfection, we will start to measure the improvement against the previous 90 days by a side by side comparison looking at numbers of leads v/s appointments set/confirmed/shown, and compare that to the number of sales generated out of that department. This will tell us how the department is performing. We will then compare those same comparisons to individual production. This will tell us who is and who is not performing up to par. That will let us know who requires additional training. If that doesn't help, then we will have no choice but to replace. This training process will be ongoing and continuous to keep the department at its best!

Timeline:

Describe specific short term and long term checkpoints to monitor progress:

The short term checkpoint will be to monitor the phone calls and get the number of appointments set/shown/sold up against the number of leads coming in. The long term check point will be to measure and see a continuous rise on the chart of percentages month after month. It will take a minimum of 4 months to gauge true success because we know that we are going to have those months that could go either way, no matter how hard we work!

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:
- b. What:
- c. By When:
- d. How:

The first thing that has to change is the attitudes of the entire department. They have to know that they are in control of the conversation and maintain the level of confidence that they need to set that appointment. This is a direct reflection of their training. Each team member will be monitored on their training and will have to role play directly with the General Manager to show that their training is one, being completed, and two, that the team member is improving. Each team member will be graded on his or her performance. I am aware that this will take some time to get under their belt, so the first grading will take place two weeks after the training begins. They will be given advice on where they need to improve and will be required to re-train in those areas immediately! If the team member is found to not be proficient in the role paly they will be taken off of the phones for one week until the re-train period is completed. After re-train is complete, the team member will again role play with the General Manager to show their ability to handle the call and set the appointment. If it is found again that the team member is no up to standards, we will have no choice but to separate employment, or at least in that capacity!

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:

No need for sponsor approval to proceed. I have spoken with my sponsor and he is aware of the performance and concerns that we are currently facing in the BDC. After speaking with him, we are handling all sales calls at the sales desk until we feel the department is ready to proceed!
