



HOMWORK ACTION PLAN

S SPECIFIC **M** MEASURABLE **A** ACHIEVABLE **R** RELEVANT **T** TIME-BOUND

Name CLARK CHRISTIE Class # N373
 Dealership MCLARTY DANIEL FORD/LINCOLN Date 6/23/2021

Current Situation or Challenge to be Addressed:	Scheduling 1st service appointment on new vehicles sold		
Current Performance Level (include specific measure):	We are currently only doing this at a rate of approximately 60% of the time. It is also not being tracked appropriately.		
Goal (what do you want to achieve?)	Schedule a 1st Service Appointment on every new vehicle sold at a rate of 95% or higher		
Goal Performance Level (include specific measure)	Implement a new process with appropriate departments to insure we hit our goal.		
Goal Start Date:	8/2/2021	Goal End Date:	8/31/2021
First Check-in Date:	8/9/2021	Performance Objective:	Review every new car deal sold to insure the 1st service appointment was scheduled. If it wasn't, find out why and correct it. Understand that there will be a few "out of area" deals that will not schedule the 1st appointment with you.
Second Check-in Date:	8/16/2021	Performance Objective:	Review every new car deal sold to insure the 1st service appointment was scheduled. If it wasn't, find out why and correct it. Understand that there will be a few "out of area" deals that will not schedule the 1st appointment with you.
Third Check-in Date:	8/23/2021	Performance Objective:	Review every new car deal sold to insure the 1st

HOMEWORK ACTION PLAN

S SPECIFIC
M MEASURABLE
A ACHIEVABLE
R RELEVANT
T TIME-BOUND

			service appointment was scheduled. If it wasn't, find out why and correct it. Understand that there will be a few "out of area" deals that will not schedule the 1st appointment with you.
Fourth Check-in Date:	8/30/2021	Performance Objective:	Review every new car deal sold to insure the 1st service appointment was scheduled. If it wasn't, find out why and correct it. Understand that there will be a few "out of area" deals that will not schedule the 1st appointment with you.
How does your goal align with the dealers' vision?	This goal aligns perfectly with our vision as a dealer.		
What are the potential benefits of achieving your goal?	<p>Making sure we are servicing the cars we sell and we're not losing this business.</p> <p>Getting future opportunities to sell new cars out of our Service Department.</p> <p>Increasing overall customer satisfaction</p>		
What are the potential consequences if you don't achieve your goal?	<p>Potentially losing out of gross dollars in our Service Department.</p> <p>Losing future New car deals due to customers purchasing at other dealerships where they have established a good relationship with that Service Department.</p> <p>Decreasing overall customer satisfaction</p>		
Why is the goal important to you?	Very simple, It increases customer satisfaction and puts more money on the bottom of the financial.		
Potential Obstacles	<p>Sales Consultants not following the process.</p> <p>Website/Internet being down not allowing to schedule appointment.</p>		

HOMEWORK ACTION PLAN

S SPECIFIC
 M MEASURABLE
 A ACHIEVABLE
 R RELEVANT
 T TIME-BOUND

Potential Solutions	.Implementing such a strong process that doesn't allow for it not to happen.
BOTTOM LINE! Financial Impact of Achieving Your Goal (expressed in dollars)	This could potentially impact the bottom line financially in the amount of thousands of dollars as it touches all three Departments of the dealership, not just new cars.

What specific actions or steps will you take to accomplish your goal? What will you do differently or improve? For each, be sure to include necessary resources, who is accountable, the measurable result, and dates.

SPECIFIC ACTION/STEP	NECESSARY RESOURCE(S)	ACCOUNTABLE PERSON(S)	EXPECTED RESULT	START, END, & CHECKPOINT DATES
Once the deal is finalized, Sales Consultant will go to our website and schedule 1st service appointment from our scheduling tool.	Computer	Sales Consultant	1st service appointment is scheduled	Start on August 2nd End on August 31st Checkpoint dates will be every Monday in August
Once the 1st service appointment is scheduled , Sales Consultant will print out confirmation page and lay in tray on Customer Relations Managers desk daily.	Computer, Printer, Tray	Sales Consultant, Customer Relations Manager.	That 95% + of the new vehicles sold have a confirmation sheet given to CRM.	Start on August 2nd End on August 31st Checkpoint dates will be every Monday in August
Customer Relations Manager will match up confirmations with the previous	Computer, Eleads	Customer Relations Manager	Making sure each deal "if applicable" is accounted for with 1st scheduled service	Start on August 2nd End on August 31st Checkpoint dates

HOMEWORK ACTION PLAN

S SPECIFIC
 M MEASURABLE
 A ACHIEVABLE
 R RELEVANT
 T TIME-BOUND

SPECIFIC ACTION/STEP	NECESSARY RESOURCE(S)	ACCOUNTABLE PERSON(S)	EXPECTED RESULT	START, END, & CHECKPOINT DATES
days business and make sure we aren't missing any scheduled appointments.			appointment.	will be every Monday in August
Customer Relations Manager will then give the confirmations directly to the Service Manager to verify the appointments are showing in our XTIME system.	Computer, XTIME	Customer Relations Manager, Service Manager	That 100% of the scheduled appointments are visible in XTIME.	Start on August 2nd End on August 31st Checkpoint dates will be every Monday in August
A report will be created and given to GM every Monday	Computer	Customer Relations Manager, GM	That the report is sent every Monday with results of progress.	Start on August 2nd End on August 31st Checkpoint dates will be every Monday in August
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

As you work toward your goal, it's important to have interim check points with specific, measurable objectives so your team can hold themselves accountable. If everyone knows the goal and objectives, you don't have to spend your valuable time micromanaging.

Once you've accomplished your goal, added or adjusted policies, procedures, and behaviors, now what? How will you ensure you and your staff do not fall back into the previous habits that produced poor results? Be specific.

We will carry this process over moving forward for future months. Will we implement this



HOMEWORK ACTION PLAN

S SPECIFIC **M** MEASURABLE **A** ACHIEVABLE **R** RELEVANT **T** TIME-BOUND

behavior into the Sales pay plans and insure the Sales Consultants are required to be above 95% completion to qualify for any bonuses.

Describe any planning or implementation meetings conducted as part of development of your plan.

There will be a meeting conducted with Sales Managers, Sales Consultants, Customer Relations Manager, Service Manager, and General Manager explaining the new process and how it will flow on July 30th.

Sponsor Signature: _____