



Departmental Action Plan Template

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Class & Student Number:

Academy Week (Var II): october 9-13 2017

Current situation or challenge you want to address based on the Jennifer Suzuki Outline:

-On incoming calls, we have a closing of 50% of success. It should go up to 75% closing.

-We must have a clear process to be effective and enable a more efficient and faster transfer of leads between the BDC and the sale persons.

-Currently, BDC people have their own way of doing things.

Overall Objective and Specific Desired Results:

-increase the closing on appointments to 75% and maintain the number of show at 90% and more.

-We need to tighten the processes to maximize each opportunity,

-Make sure the agents all have the same process.



Describe your action plan in detail

-We have a very sharp script, just confirm that all relevant information is listed on a check list as proposed by Jennifer. Make sure every morning to recover the work sheet and correct the agent immediately:

-Write a work sheet/check list for the transfer until the BDC and the sale person

1. Prospect name and e-mail or phone
 2. vehicule (model and options)
 3. Trade in
 4. Budget
 6. Specific demands
- Etc...

Must be completed by the BDC

On the same page on the bottom,

Time-saving benefit:

- 1.Car prepared in advance
- 2.Appraiser schedule
- 3.Teammate greeter
- 4.Credit history

5.Sophisticated customer ready to buy

Must be complete by the sale person



Timeline:

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

In early December we will begin training BDC people. Given the schedule it will be possible to finish this training at the end of December. We must take the time to transform their habits and make sure to develop reflexes.

At this point, we should reach 60% closing.

In January, we integrate advisors into processes. All should **be finished by the end of** January. The final target of 75% is expected to be reached on February 15th.

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

Who: BDC manager

BDC people

Sales people

What:

We need to transform people's habits on the ground. It involves risks and I am aware of that. However, we will have to change their way of thinking. People are not always open to change and we will have to work to change habits.

How

BDC manager:

- He must understand and apply the plan to the letter. He will have to change his daily routine and control the transfer sheets in the morning by starting. He will be responsible for training the BDC people and ensuring that the transfer is done as it should. It will have to train the people who want, if not apply the theory learned earlier to the NADA: TTR (train, retrain, replace ..)

BDC people:

Obviously the BDC people will be trained according to the standards. Greg Well will be involved in the training. I do not think we have any retribution, people believe in us and we will do it with them. The schedule is clear and people will comply with it I am not afraid.

Sale person

We have a team of advisors who are fortunate to benefit from BDC clients. This represents a lot of sales for them. They will have no choice but to follow the wave otherwise they will simply be expelled from this team.

Finally I believe that with the gang that is with me, I am sure that everything will be fine for this transformation. It will only be a transformation of their work habits. They are engaged and want the success of the company. .

Michel Lévesque