



HOMEWORK ACTION PLAN

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

Name Dianna Freeman Class # 373

Dealership Freeman Toyota Date 6/30/2021

Current Situation or Challenge to be Addressed:	More effective management of the floor traffic through a more comprehensive implementation of our CRM.		
Current Performance Level (include specific measure):	Currently we are tracking a 90% demo, 82% write up, and 40% closing rate. These inflated metrics suggest only guest being written up are being logged, and there is massive leakage of floor traffic not being logged into the CRM and resulting in lost sales.		
Goal (what do you want to achieve?)	To log all guest (name, cell phone, and email) into the CRM leaving the sales people with a comprehensive daily work plan and to retrieve the lost sales resulting from the leakage.		
Goal Performance Level (include specific measure)	We would like to be with 100% of guest logged at an 80% demo, 50% write up and 20%-25% closing ratio.		
Goal Start Date:	7/1/2021	Goal End Date:	8/31/2021
First Check-in Date:	7/9/2021	Performance Objective:	100% of floor traffic logged with name, email, and cell phone. Daily work plan completed daily
Second Check-in Date:	7/16/2021	Performance Objective:	100% of floor traffic logged with name, email, and cell phone. Daily work plan completed daily
Third Check-in Date:	7/23/2021	Performance Objective:	100% of floor traffic logged with name, email, and cell phone. Daily work plan completed daily
Fourth Check-in Date:	7/30/2021	Performance Objective:	100% of floor traffic logged with name, email, and cell phone. Daily work plan completed daily
How does your goal align with the dealers' vision?	our shared vision is to maximize the floor traffic we are paying for through advertising to get guest into the store and convert them into sales.		
What are the potential benefits of achieving your goal?	The benefits will be many. More sales, a more effective penetration into our own PMA. It will lead to better service retention. We will have more productive happier sales people.		

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	Higher sales will also lead to earning more cars giving us a competitive advantage in terms of inventory.
What are the potential consequences if you don't achieve your goal?	The consequences of doing nothing would be to never maximize the ROI of the sales dept., to offer fewer customers to our service dept., and concede market share in our own PMA.
Why is the goal important to you?	It's the difference between professional and amateur. Also Pride and a pay increase.
Potential Obstacles	Making sure all staff involved are trained and confident on the CRM system we expect them to use. 2nd, changing habits and culture.
Potential Solutions	Invest all the time and energy necessary to train each salesperson and sales manager to the level that they're confident with the CRM system. You overcome habits and culture through accountability, constant gentle pressure, and tenacity until new habits are established and improvement becomes contagious.
BOTTOM LINE! Financial Impact of Achieving Your Goal (expressed in dollars)	We are leaving deals on the table. We are currently \$4200 a copy on new and slightly higher on used (front and back). Therefore every 24 cars we add is approx 100k. Lets see where we can take this.

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
Create the process that sales managers will hold sales people accountable too regarding CRM	Access to CRM and a pen	GM and GSM	To have a process to introduce to sales managers and sales people to log all floor traffic	07/01
Get by in from Sales managers		GM and GSM	Share the process that sales managers will hold sales people accountable too.	07/02
Sales managers get a by in from sales people	Click or tap here to enter text.	GSM and sales managers	Sales people being held accountable logging 100% of guest.	07/03

