

# Departmental Action Plan Template

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**Class & Student Number: N323 – Student # 19**

**Academy Week (Var II): Variable Operations 2 – New**

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

(Homework modules assigned)

Improve our outbound phone approach to generate more appointments, shows, and sales. Create new outbound phone call script for salesman to follow on incoming leads. Each salesman should use same script. TDA from managers and role play are integral to success.

## Overall Objective and Specific Desired Results:

The overall objective is to get our sales reps using a consistent outbound phone call script that will increase our conversion to appointments and actual showroom visits. In looking at about 500 leads a month, we want to increase our converted percentage by about 5% within 6 months. This will lead to about an additional 25 appointments scheduled. We think we can conservatively say that we should be able to generate an additional 6 deliveries a month if about half of the customers actually show up and half of those customers take delivery. With our current forecasted PVR statistics on the front and back, this would lead to an additional 15-20K in gross profit.

Other indirect benefits to this initiative would be an improved CSI rating because we are making the process quicker and easier for the customer. Over the course of time, this should be something that leads to great experiences for customers and larger customer base, therefore leading to happier sales staff and ideally more retention!

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

**Step 1.** Generate a new outbound phone call script. This is on the GSM's plate and we asked him to get it done by early December. What we found through this exercise was that there was more variety in the approach taking by sales staff than we would like. We have trained on this in the past as well, but have not done a good enough job reinforcing after the training and salesman have started to deviate from the older script. One thing we will try that is slightly different than what we learned in class is that our appointment confirmation will come from a manager. This is similar to the idea of making sure the customer knows you have an appraiser "scheduled" so that they are affecting more than one person by canceling. We feel the manager introduction occurring before the store visit is helpful and also lets the customer know that they have commitment from both a sales staff and a manager.

**Step 2.** After the GSM's script is approved by the GM, this will be the focus of 12/9/17 Saturday sales meeting. See meeting Agenda which is already drafted.

Handouts include: new outbound script, link to online video training, scheduled time with respective manager to have 1:1 15-30 minute with recap of what they learned and also role play practice

**Step 3.** GSM and Desk Manager will review 5 calls per staff in December to evaluate how effectively they are utilizing the new script and if we are having overall success with the new word track. This step will allow us to both evaluate each individual sales staff's performance, but also the overall success of the new word track. Additionally, it should be noted that it will be communicated that it will be the responsibility of the sales staff to role play with each other on a daily basis to perfect the word track and help improve their own skill set. For any struggling employee, another 1:1 meeting will be scheduled with a manager. Different manager will be used for second training.

**Step 4.** After 3 weeks of practice in December, we should be starting to feel more comfortable. Now we will introduce a once a week 5 minute with a manager. The manager will review 1 phone call from that week with staff. The manager will fill out a review sheet to give to staff with notes on where there can be improvement in the process. After feedback is provided on the actual call, a brief roleplay will be performed between manager and staff for reinforced practice. This process will carry throughout January and will taper down to bi-weekly 1:1's starting in mid-February.

We feel very confident with the new phone script and the planned TDA outlined above, we will see an immediate financial impact in the next 6 months. Some important things to note are that upward feedback will be highly encouraged. We are currently using David Lewis and Associates for sales and service training. We want to encourage them to take ideas that they have learned in those trainings

and see where we can improve the manager designed outbound phone call process. Additionally, the planned review of actual phone calls will help us pair up staff to practice with each other. It will be helpful to pair strong performers with those in need of more help so they can see how another team member is having success. One thing we are considering is cross department role play. For example, a sales staff will practice their outbound phone script with a service advisor instead of another staff to get a fresh perspective and different outlook to providing feedback.

**See below for quantitative impact we are hoping to make through this plan. We do not have 100% fixed absorption, so these are not all additional net profit. However, this additional operating income (gross outlined below less commissions, policy and delivery) will improve our net to sales %.**

**Measurements (Note: includes both front-end and back-end gross):**

**Month 1 (December 2017)**

Goal: 2 Additional Deliveries

2 Deliveries @ 2,335 = \$4,670 additional gross

**Month 2 (January 2018)**

Goal: 2 Additional Deliveries

2 Deliveries @ 2,635 = \$5,270 additional gross

**Month 3 (February 2018)**

Goal: 3 Additional Deliveries

3 Deliveries @ 2,781 = \$8,343 additional gross

**Month 4 (March 2018)**

Goal: 4 Additional Deliveries

4 Deliveries @ 3,492 = \$13,968 additional gross

**Month 5 (April 2018)**

Goal: 5 Additional Deliveries

5 Deliveries @ 2,789 = \$13,945 additional gross

**Month 6 (May 2018)**

Goal: 6 Additional Deliveries

6 Deliveries @ 3,489 = \$20,934 additional gross

## Timeline:

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

Accurate notes in the CRM will be the key to this being a successful program.

**1 Month** – Listen to a random sample of 5 outbound phone calls for each sales rep and determine if they are appropriately following new script per GSM judgement- This will also help identify staff that need more individual 1:1 TDA with managers

**3 Month** – Additional 3 deliveries from BOY forecasts due to improve phone skills – If failed, revisit training approach

**6 Month** – Additional 6 deliveries over BOY forecasts due to improved phone skills

This is a pretty key initiative. Improving our phone skills (and email) to make the customer experience more efficient and friendly is huge. Today's pace is so fast paced that the majority of our customer's really value efficient and effective communication to decrease the amount of time they need to spend in the store.

## 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:** Sales Representatives, Pre-Owned Manager, Sales Desk Manager, General Sales Manager, General Manager
- b. **What:** 5-6 % increase in converted appointments generating additional shows, sales, gross, net, employee retention, and CSI
- c. **By When:** May 31, 2017
- d. **How:** See Section "Describe Your Action Plan in Detail"

## 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:

Meant with the general manager of my store a couple of different times to discuss strategy for how to complete the desired goal. Described meeting with GM to sponsor who is a regional director for our organization. He is excited to see how this approach works for this particular store. He likes to see proactive planning as opposed to him forcing the issue on something.



*≤ 10 MINUTES*

### Holding Effective Sales Meetings

Sales Meeting #1	
Agenda: <hr/> <ul style="list-style-type: none"> <li>• <u>INTRODUCE NEW OUTBOUND / LEAD</u></li> <li>• <u>RESPONSE PHONE SCRIPT</u></li> <li>• <u>PROVIDE LINK TO VIDEO TRAINING</u></li> <li>• <u>PROVIDE STAFF TIME FOR THEIR 1:1 BREAKOUT WITH MANAGER</u></li> </ul>	Date <u>12/9/17</u> Day of Week <u>SATURDAY</u> Time <u>8 - 30 AM</u> Location <u>CONFERENCE ROOM</u> Notification Method <u>EMAIL</u> Guest Speaker (if any) <u>N/A</u> Checks / Spiffs <u>N/A</u>
Tip-of-the-Day: <u>VALUE IS DELIVERED WITH ACTION, NOT PROMISE!</u>	
Training / Announcements / General Topics / Food-for-thought, etc. (if any): <u>POINT TO GROUP MEETING IS TO INTRODUCE &amp; EMPHASIZE IMPORTANCE - EXPLAIN FINANCIAL IMPACT FOR STORE &amp; INDIVIDUAL AS WELL AS QUALITATIVE FACTORS</u>	
Recognition (if any):	
Other: <u>HANDOUT SCRIPT AS WELL AS VIDEO TRAINING GIVEN AS 30 MINUTE H/W ASSIGNMENT</u>	

Sales Meeting #2	
Agenda: <hr/> <hr/> <hr/> <hr/> <hr/>	Date ___/___/___ Day of Week _____ Time ___-___ Location _____ Notification Method _____ Guest Speaker (if any) _____ Checks / Spiffs _____
Tip-of-the-Day: <hr/>	
Training / Announcements / General Topics / Food-for-thought, etc. (if any): <hr/> <hr/>	
Recognition (if any):	
Other:	