



# HOMWORK ACTION PLAN

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

Name Matthew Golling Class # 382  
 Dealership Golling CDJR of Roseville Date 10/18/2021

Current Situation or Challenge to be Addressed:	Lack of CRM Usage		
Current Performance Level (include specific measure):	Number of activities logged in the system, appointments created, and showroom visites opened		
Goal (what do you want to achieve?)	Want sales people to use the CRM system to click to call, set appointmetns and open showroom visits		
Goal Performance Level (include specific measure)	Outbound phone calls, texts, emails.		
Goal Start Date:	10/25/2021	Goal End Date:	11/15/2021
First Check-in Date:	11/1/2021	Performance Objective:	CRM Activity Usage
Second Check-in Date:	11/8/2021	Performance Objective:	Appointments Created
Third Check-in Date:	11/15/2021	Performance Objective:	Showroom Visits Opened
Fourth Check-in Date:	11/22/2021	Performance Objective:	Cumulative data on the three working together through sales process
How does your goal align with the dealers' vision?	We want to be the most trusted dealership in the metro area. This will better have a culture of trust and accountability.		
What are the potential benefits of achieving your goal?	Benefits of achieving this goal will be to better identify strenghts or break downs of our interations with customers and leads.		
What are the potential consequences if you don't achieve your goal?	Consequences of not achieving our goal will be the continuation of not being able to measure our interations with customers, therefore not understanding the activities leading to sales.		

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Why is the goal important to you?	The goal is important to me, not only because we invest a lot of money on our CRM tool, but to get the maximum data and mining information for our sales staffs/ stores.
Potential Obstacles	Obstacles will be sales people not wanting to use the tool, also sales managers who do not want to enforce the usage.
Potential Solutions	Solutions will be to show the benefits early and often of using the system to its full potential.
<b>BOTTOM LINE!</b> Financial Impact of Achieving Your Goal (expressed in dollars)	If we can move our closing percentage from 24% to 35%; store would gain \$264,000 in additional gross.

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
Make Click to Call/ Text Mandatory	Demonstration of both function on mobile and desktop	Sales people	For sales to use our system for customer communication	10/25/2021, managed daily, shared weekly
Make Appointments mandatory	Show how to create appointment, and build value in process	Sales staff and managers	Appointments to be created, then confirmed by manager	11/1, managed daily, Shared weekly
Make opening showroom visits mandatory	Show how to do in system	Sales people/ Managers	When customers reach the store, to open show room visit to track activity, most importantly desk log.	Started 11/8, Managed Daily
Make mobile lot capture	Show how to use app/ camera to	Sales people	Sales people to use camera and	11/8, Managed Weekly

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mandatory	quickly take picture of license to capture customer info.		the app to quickly add customer to CRM system. Save time.	
Use the now collected data to analyze sales performance	CRM- Vins Insights	Sales Managers	Understand Strengths and weaknesses of team, create goals and trainging to imrove weaknesses/ opportunities	11/15, weekly review
Develop sales follow ups	Vins Insights/ Process Creator	Sales Managers	Custom sales follow ups based on where customer and sales person left off in process	11/15, daily
Data Mine Customers	Vins Target Pro	Sales people/ Managers	Mining not only current customer base but also customers that bought elsewhere and customers that service with us but didn't buy from us.	11/15, monthly programs/ strategy

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.

To ensure we do not fall back, we will do monthly performance reviews with our sales managers and also use our vins rep as a resource to keep our staff learning about the system, help train

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new hires, and go over KPIs we have determined.

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

Planning meetings would be to get the buy in of our management team. This plan will not be successful if the sales managers do not expect this from their teams and see the benefits to them and the store.

Sponsor Signature: \_\_\_\_\_