

Departmental Action Plan Template

Student Name: **Scott Tarwacki**

Class & Student Number: **N324-02**

Academy Week (Var II):

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

Currently we are setting new car outbound call appointments at 18.5% and want to increase that ratio. This is quantifiable and trackable through our CRM Leads reporting tools.

Overall Objective and Specific Desired Results:

Raise new car outbound phone appointments set ratio from 18.5% to 30%..

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

Follow the outbound phone up card 100% of the time. I also just hired CallRevu to record all phone calls for sales and service. This service has 100% CRM integration that transcribes the call and attaches the correct sales person to it in the system. In live time, it will send text alerts to the management staff with 28 different alerts (missed opportunities, non-connected calls, CSI calls, etc.). They also offer interactive training and DNI... dynamic number insertion. With this in place, we can easily monitor phone calls to assure the process is being followed.

Timeline:

Describe specific short term and long term checkpoints to monitor progress

The process will go in effect 1/1/18. The expectation is for managers to monitor and listen to the phone calls daily. Checkpoints for the appointment set ratio will be monitored weekly, monthly, and quarterly expecting to see progress in each step.

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: BDC reps & manager, sales consultants, GSM, GM**
- b. **What: Increase outbound phone appointments set to 30%**
- c. **By When: Starts 1/1/18 and achievement 3/31/18**
- d. **How: Follow outbound phone up card and use CallRevu to coach, train, and hold accountable.**

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:
