

HOMEWORK – ACTION PLAN

Name _____ Class # _____

Dealership _____ Date _____

- S **Specific**
 M **Measurable**
 A **Achievable**
 R **Relevant**
 T **Time-bound**

Current Situation or Challenge to be Addressed:			
Current Performance Level (include specific measure):			
Goal (what do you want to achieve?)			
Goal Performance Level (include specific measure)			
Goal Start Date:		Goal End Date:	
First Check-in Date:		Performance Objective:	
Second Check-in Date:		Performance Objective:	
Third Check-in Date:		Performance Objective:	
Fourth Check-in Date:		Performance Objective:	

HOMEWORK – ACTION PLAN

How does your goal align with the dealers' vision?	
What are the potential benefits of achieving your goal?	
What are the potential consequences if you don't achieve your goal?	
Why is the goal important to you?	
Potential Obstacles	
Potential Solutions	
BOTTOM LINE! Financial Impact of Achieving Your Goal (expressed in dollars)	

HOMEWORK – ACTION PLAN

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 a few mystery calls and time the wait time.	A Telephone	Me and whichever manager is interested in joining	An accurate representation of the time and an identification of the problem	Start: 1/27/2022 Checkpoints: See Above End: 4/1/2022
Write out all current processes with answering calls	Whiteboard or other writing medium	Sales Manager BDC Manager	A map created for everyone to see and to possibly identify weaknesses	Start: 1/28/2022 Checkpoints: N/A End: 1/28/2022
Review current processes to find weaknesses	Written out map of current processes	Anyone who answers customer calls	An identification of weaknesses	Start: 1/28/2022 Checkpoints: N/A End: 2/4/2022
Find and implement solutions to current process weaknesses	Whiteboard or other writing medium	All managers over people who answer phones and phone employees	Better processes	Start: 1/28/2022 Checkpoints: N/A End: 2/4/2022
Identify training opportunities to sure up weaknesses	Internal and 3rd Party Phone Training Programs	Managers over people who answer phones	Better, and more timely phone calls with customers	Start: 1/28/2022 Checkpoints: Feb 4,18 End: 3/4/2022
Work with IT to sure up phone technology	Access to all phones	All people with phones and the IT Department	Confidence that all people with phones are connected	Start: 1/28/2022 Checkpoints: Feb 4,18 End: 3/4/2022
Print out all processes, benefits, and reminders	Paper	Managers over people with phones	More success in long term maintenance	Start: 2/4/2022 Checkpoints: N/A End: 2/18/2022

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.

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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.

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

Meetings haven't been conducted yet, but the majority of these goals are centered around sales meetings. In addition to these meetings, we will need to plan a meeting that puts all people together who answer phones regardless of the position they hold (receptionists, salespeople, advisors, BDC, etc...). These meetings of course would be separated so that we can make sure we have people on the phones!

Planning these meetings will need to include things such as research (timing mystery calls) and techniques to implement. By bringing the problem and solutions to the table, we can show our employees that we are dedicated to helping them succeed and will work with them through this issue.

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