



HOMEWORK ACTION PLAN

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

Name Whitney Woods Class # Click or tap here to enter text.
 Dealership Yates Buick GMC Date 2/4/2021

Current Situation or Challenge to be Addressed:	To increase our CSI to above blended metric by improving our customer follow up after purchase.		
Current Performance Level (include specific measure):	Current metric is 69.3% with a response rate of 28%.		
Goal (what do you want to achieve?)	Increase customer responses and satisfaction, poll more happy customers by asking instead of only hearing from upset customers.		
Goal Performance Level (include specific measure)	To be above metric at 81.38% with a response rate of at least 35% (average is 29%)		
Goal Start Date:	2/3/2022	Goal End Date:	2/3/2023
First Check-in Date:	2/24/2022	Performance Objective:	Sales consultants show logs of "proof of ask and reminder" to customer
Second Check-in Date:	3/22/2022	Performance Objective:	continue to check sales logs for follow up and look at blended metric
Third Check-in Date:	8/16/2022	Performance Objective:	Look at metric and check sales peoples logs
Fourth Check-in Date:	1/23/2023	Performance Objective:	Look at logs and metric and see where we can improve
How does your goal align with the dealers' vision?	We want to purchase more stores and need our CSI to be perfect in order to do that. We also want happy customers who come back again and again because that is the whole point of our jobs here!		
What are the potential benefits of achieving your goal?	Making more gross, owning more stores, having a great reputation		
What are the potential	Our sales gross could be impacted and our reputation could be impacted,		

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consequences if you don't achieve your goal?	which will in turn affect sales and business in general
Why is the goal important to you?	Doing business the right way with happy customers is the entire reason my business is successful, a negative reputation is not only personal to me, but it will affect my bottom line.
Potential Obstacles	Lack of sales people dedication to follow up, lack of manager follow up over time
Potential Solutions	More training on successful practices to ask and receive
BOTTOM LINE! Financial Impact of Achieving Your Goal (expressed in dollars)	We will potentially increase gross by new vehicle purchases and turning sales customers into service customers and keep them coming back to the store again and again (hard to express exactly in dollars- but knowing we can keep a customer in service can bring significant dollar amounts over time)

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
Have sales people track their own survey returns and responses	Excel doc that is already made that will become their log of customer surveys	Each sales rep	Tracking helps sales person know who has returned survey and the result	2/3/2022-2/28/2022
Train sales people on using logging system and on how to ask for survey return	GSM/excel log	Sales rep GSM	Better return	2/3/2022-4/1/2022
Hold monthly spiffs for incentives for sales people getting back	Metric data and spiff	GSM	Incentive will improve response rate	4/1/2022-2/1/2023

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surveys and raising metric				
Track blended metric to make sure progress is being made	GM data	GSM	Improve metric #'s with tracking and monitoring	2/3/2022-2/1/2023
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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.

It is easy to fall into old habits, so this will need to be a sales meeting reminder every Friday.

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

We will need to initially train, then keep on training as time goes forward, weekly and specific to CSI

Sponsor Signature: _____