Departmental Action Plan

Student Name: <u>Jason Aufiero</u>   Class & Student Number: <u>N-325-27</u>

Academy Week Variable New

Current situation or challenge you want to address: (must be quantifiable)

(Possible impact areas: Sales, Gross, Expenses, Net Profit, CSI)

When we did the Mystery Shop in class, asking about a specific, aged new vehicle, our BDC representative fell short with the greeting (taking control of the call) and asking the questions necessary to secure the appointment.

Overall Objective and Specific Desired Results:

Increase incoming sales phone call to appointment conversion to 40%. Currently, we are at 25%. Give a better overall experience over the phone, we are also looking to build a relationship with the customer instead of just leading with price. We are looking to ultimately set an appointment with the customer, have them show and buy the vehicle. If can't set the appointment we need to set up and action with the customer like a follow up call and also we will send email recaps after all calls.

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

We have implemented many of the incoming phone call strategies presented to us by Jennifer Suzuki in the Variable II class. Before making any changes, it was common to for a BDC Representative to end his or her greeting with "How may I help you?", and focus only on the specific vehicle the customer had referenced.

Now, instead of asking, "How may I help you?", we are saying, "Thank you so much for holding, this is _____ and who am a speaking with?" Then continue to guide the phone call by: Reviewing the vehicle of interest; using "yes-no" questions, discovering hot buttons, deal breakers and would-likes; introducing multiple vehicle options. We have also changed the greeting to "Thank you for calling Boch Toyota my name is (blank) and with him do I have the pleasure of speaking?

Training our BDC employees on this one segment of Jennifer Suzuki's process has helped us to increase our incoming phone calls to appointment conversion from 25% to 40% MTD (measured through Call Revu and our CRM).

Timeline: Describe specific short term and long term checkpoints to monitor progress

> The BCD Director will monitor incoming phone calls and appointments daily. The GM will review the progress and results with the BDC Director weekly. We will also be sending good calls out so entire team can hear them and bad calls will be sent to the individual with BDC Director and GM on the email. We will then review the call with the individual and correct the behavior.

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: The BDC Director will listen to recorded phone calls daily, looking for opportunities to train the BDC Representative. The GM will randomly listen to recorded calls to make sure the process is being followed.
> b. What: Implement new word tracks for the greeting and questions to direct the phone call. Examples: "Are you calling for the new or pre-owned department?", "Did you see the vehicle online or in person?", "What are you driving now?", "There is an all-wheel drive and a front wheel drive option. Are you open to both?", etc.
> c. By When: January 30th
> d. How: The BDC Director and BDC Trainer will continuously train each BDC employee on this process, coaching, motivating and making recommendations/adjustments daily. The BDC director and Trainer will play back and evaluate recorded phone calls with the employee, making sure to include good ones along with some that need improvement.

Dealer agreement:

Describe the meeting:

Our COO was very responsive, and has no reservation implementing a process similar to the one presented by Jennifer Suzuki in class. It became very clear after listening to a few of the incoming calls with him that there was a definite opportunity for improvement.