

Departmental Action Plan Template

Student Name:

Class & Student Number:

Academy Week (Var II):

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

(Homework modules assigned)

1. Setting appts
2. Setting for specific date and time
3. Appt show ratio
4. Appt sold Ratio

Overall Objective and Specific Desired Results:

Improve appt set ratio, appt show ratio, and appt sold ratio

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

- 1. Improve the effectiveness of our out bound phone calls. We will have training and provide some scripting to all our sales and BDC Staff to ensure they can handle objectives over the phone. We will role-play to ensure we are confident with these scripts when speaking to a customer. This will improve our Appt set and show rate. (current appt set ratio: 25% Goal 15% Appt show ratio: 7% goal 17%)**
- 2. Making sure we are presenting and providing a time saving experience by offering a specific date and time for appts and having everything ready for the customer when they come in. We will get together a check list of what needs to be ready when a customer comes in. (Vehicle clean and pulled around, An appraisal**

manager ready if needed, Vehicle gassed up, ect). This will improve our Appt sold Ratio. (current Appt sold ratio 10% Goal 20%)

Timeline:

Describe specific short term and long term checkpoints to monitor progress

Short term: Feb 1, 2018 – March 1, 2018

- 1.** Tracking current appt set, show, sold ration to compare after training
- 2.** Phone Training for all sales and staff member
- 3.** Creating Pre-Appt Check list

Long term: March 1, 2018 to May 1, 2018

1. Mystery shopping our own sales and BDC staff. Making sure they are using the tools and scripts we provided for them to succeed
2. Have managers sign off on Pre-Appt Check list
3. Track Sales appt set, show and sold to compare ratio to what it was before training.

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: Sales and BDC
- b.** What: Being more commutable on the phone. Being able to handle the hard objectives in a positive way and not just giving up
- c.** By When: April 30th 2018
- d.** How: Script training, Setting individual goals for sales and BDC to holding them personally responsible for their own failure and success. If they do not improve their appt set, show and sold ratio they will receive less new leads. Whitney will track progress by looking at the number of new leads they have

received and the amount of appts they have set, that has showed up and have sold from those new leads. We will compare to the week previous to determine if there is any improvement.

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:
