

# Departmental Action Plan Template

Student Name: Johnson King

Class & Student Number: N325-07

Academy Week (Var II):

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

Lack of enthusiasm and urgency on the phone leading to fewer appointments made via sales calls

To increase our percentage of sales phone call appointments from the current average of 45% to 50% or above.

Overall Objective and Specific Desired Results:

**We would like our average to be over 50% of sales call appointments.**

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

**We hired a BDC person to handle overflow of incoming phone calls and to make follow up calls after the customer has left. We noticed that this person was able to increase our appointments made (before and after customer visited dealership) by 8 percentage points. This data is compiled and managed by Dealersocket and CallRevu**

Timeline:

Describe specific short term and long term checkpoints to monitor progress

**This is an ongoing process that will never be finished. We have found that making phone training part of our process we tend to do much better. Also I personally monitor the calls daily and the salespeople know that so that alone makes a big difference. Also, at month end we do a review with everyone and dive into each of their percentages so that encourages everyone to put their best foot forward (so to speak) on the phone.**

## 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: George Saad
- b. What: Phone Calls
- c. By When: Current and ongoing
- d. How: Weekly training, daily review of phone calls and month end meeting with all personnel to review the previous months appointment setting percentages AND units sold from those appointments

## 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:

The meeting went well. This was long overdue. A lot of managers don't use the data that our various CRM tools can provide. This always frustrated George because we pay a lot of money for these tools and they tend to get over looked.

---