

Departmental Action Plan Template

Student Name: Terry Coulter

Class & Student Number: 325-23

Academy Week (Var II):

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

(Homework modules assigned)

: Overall closing ratio

Overall Objective and Specific Desired Results:

Train sales consultants using the TDA method so that the total closing ratio increases by having a higher percentage of quality appointments leading to increased sales, and demonstrate that we are respecting the client's time.

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

Using Jennifer Suzuki's training resources that were provided, we will have the consultants complete the Out bound call, Appointment setting, confirmation email processes.

We will use the TDA method to show the consultants the processes and also use a Kahoot.it to help keep it interesting.

We will be spending additional time with our two weakest consultants, (TRR!).

Current closing ratio for our two lowest consultants is below 28% where our top closers are close to 40%

Timeline:

Training start: Feb 5/18

Weekly Review conducted ongoing to monitor the call quality and appointment show ratio/closing ratio.

Meeting with Stakeholders (dealership personnel)

. Include timelines / Accountability / Monitoring process

- a. Who: All sales consultants/sales manager/GM**
- b. What: Increased call quality, leading to increased closing %**
- c. By When: Feb 5/18 kick off then weekly monitoring**
- d. How: Using the TDA method and Kahoot.it Using our call/e-lead monitoring system to track results**
- e. Accountability: Growth from weakest consultants must be evident within 90 days or removal of perks will include: changes in demo, shift assignment or possible dismissal if no growth occurs. Subject to Sales managers discretion**

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:

Meeting with Dealer Principal/GM was positive, feedback included: opening the training to all consultants so that it would not single out the weakest and put them into a negative state of mind. I had originally thought I would focus on the weakest. His comments also included that this training being delivered from a fixed op guy (me), might not be received positively. He suggested that I frame this to the consultants as, "I need help with my NADA assignment" in this way they may look at this as a way to help "me".

