

Departmental Action Plan Template

Student Name: Christine Monaco

Class & Student Number: N325 - 05

Academy Week (Var II)

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

In our BDC we are currently challenged with a low % of booked to leads ratio of 30%.

Overall Objective and Specific Desired Results:

Our overall objective is to see this number somewhere between the 40-45% range. On a typical month we have between 250-275 leads come through our BDC. If it's a month where we get 250 then a 30% booked to leads ratio yields 75 booked appts – if we get 40% booked to leads then we are booking 100 appts. 25 more booked appointments can make or break your month. On average we sit right between 73-78% showed to booked appts...that is a change right there to sell 19-20 more customers a month right with the leads we already have coming in!

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

My sales managers and BDC team (2 people) will be presented the above numbers in a clear charted format of current statistics and our “goal statistics” with a timeline. We will then review these numbers on a weekly basis. I currently am working with my BDC manager on phone scripts – making tweaks to follow the guideline of the phone training that we are finishing up. Starting in April our BDC reps will be incentivized to hit the 40% number monthly as well as be penalized for not hitting it. I am still working out the details on that bonus structure as I want to see how January and February play out before presenting the bonus in March.

Timeline:

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

Short term – weekly check ins. Offering the proper support to the staff to be hitting their numbers.

Long term – weekly check ins. Incentive bonus.

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

BDC needs to have full understanding of the opportunity we have when a lead comes through. Every single person we don't get into the building is a lost opportunity. Understanding that we are paying for

these leads. Looking for the ROI. Will need to monitor desired goals and if they are not reached what the next step would be.

- a. Who: Me,GSM, Sales Manager, BDC Manager, BDC Rep
- b. What: BDC Booked to Leads : 40%
- c. By When: April 1st
- d. How: Training, Accountability, Understanding the process of getting the customer into the door, Changing phone scripts.

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:

Do not need sponsor approval

~~Meeting was this morning (1/22). It was well received initially which I was somewhat surprised by. I also presented the breakdown of \$\$'s that we spend monthly to provide the 250-275 leads. I wanted to give them an understanding of how much a customer costs us before we even get them in the door & have that opportunity to sell them & make them a lifetime service and sales customer. I laid out the numbers clearly and we will see how week one goes. Next sales meeting is next Tuesday am so we will continue to track the % ratios weekly.~~