



## HOMEWORK ACTION PLAN

S SPECIFIC    
 M MEASURABLE    
 A ACHIEVABLE    
 R RELEVANT    
 T TIME-BOUND

Name ALVIN SANTANA GM Class # A05

Dealership BILL ESTES CHRYSLER DODGE JEEP RAM (MY NEW STORE) Date 4/28/2022

Current Situation or Challenge to be Addressed:	Current Sales CSI is below for the month of April and Year to Date costing the store \$46200 in total CSI Payout from Stellantis		
Current Performance Level (include specific measure):	Currently at 901 and 898 for Year to Date		
Goal (what do you want to achieve?)	Monthly score of 965. This will give the store First Level for Stellantis Payout while providing a excellent guest centric experience.		
Goal Performance Level (include specific measure)	965 Customer First CSI score		
Goal Start Date:	5/1/2022	Goal End Date:	7/30/2022
First Check-in Date:	5/6/2022	Performance Objective:	925
Second Check-in Date:	5/20/2022	Performance Objective:	950
Third Check-in Date:	6/3/2022	Performance Objective:	965
Fourth Check-in Date:	6/10/2022	Performance Objective:	965
How does your goal align with the dealers' vision?	CSI is a priority to Asbury. It aligns with Asbury's North Star and Compass. To be the most guest centric automotive retailers.		
What are the potential benefits of achieving your goal?	Along with monthly payouts from Stellantis and meeting dealer / oem agreements set in place, our customers will feel valued while having more awariness of their needs.		
What are the potential consequences if you don't achieve your goal?	We will continue to have upset customers. Google reviews will hurt potential / future sales. Missed oppurtunity for Stellantis payouts will hurt bottom line of my store. Potential loss could be \$200k in a calender store.		
Why is the goal important to you?	We are in the people serving business. I strive to provided the ulitmate guest experience and this goal is just as important as selling the car. Great CSI results in customer retention for sales and service.		

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Potential Obstacles	We are implementing a process that will have more follow up and accountability. Is the "want" for my sales team going to be there? Also, being new to the store, I need my team to have the same passion for serving our guest as I do.
Potential Solutions	Need to have a written Sales Manager process for CSI follow up and continue to inspect what you expect from the sales advisor's follow up process for CSI. As the GM, I need to have a written implementation process without allowing any deviation.
<b>BOTTOM LINE!</b> Financial Impact of Achieving Your Goal (expressed in dollars)	The cost for not meeting our monthly CSI goal is \$350 per new car sold. We average 40- 50 new cars per month which equals \$14k - \$17500 per month. Additionally, the customers that are not satisfied with their visit and will not service their car with us. The retention piece is the most crucial.

What specific actions or steps will you take to accomplish your goal? What will you do differently or improve? For each, be sure to include necessary resources, who is accountable, the measurable result, and dates.

SPECIFIC ACTION/STEP	NECESSARY RESOURCE(S)	ACCOUNTABLE PERSON(S)	EXPECTED RESULT	START, END, & CHECKPOINT DATES
Day after sold follow up sales manager call	Previous days sold list from Elead	Andrew and Chris	Reach 100% of the sold customer's daily	5/1/22 then Daily in the morning and evening.  Checkpoint 6/1/22 and on Fridays for non responsive customers
Disposition list handout to sales team	Dealer Connect Access	Andrew and Alvin	Non responsive customer get a call to complete survey. List needs to be turned in every Thursday	5/1/22 Ongoing every Thursday.  Checkpoint on 6/15 and Tuesday every week.
Mandatory manager T.O from the Business office to the new car delivery area	Be available! Product knowledge	Alvin, Andrew, Chris	To ensure a clean handoff and confirm customer is happy. Also remind the customer about the survey	Immediately 5/1/22  6/1/22 Check point will be done via google docs Create a list of customers not T.O'd (100% of customers need to be in the Google Docs)



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5 day Sales Manager follow up call and We-owe completion confirmation.	We-owe list located at sales desk	Andrew and Chris	Expected to complete all we owes within 5 days.	5/1/22 start date with no end date. This will be a ongoing process. Monday checkpoint
CSI training On the second and last Monday of every month	CFSE training book from Asbury	All Sales staff - trainee Alvin, Andrew and Chris as the Trainer	Share bi-weekly results and go over CSI comments. Train on word tracks and situational role play	5/9/22 start 5/23/22 checkpoint on attendees (100% required) 7/30/22 end date
GM follow up on pre surveys coming back with issues / oppurtunities	Disposition Report	Only General Manager Alvin (this will be soley on me)	Make the customer happy before they get the survey from Stellantis	5/1/2022 start Check Point 6/1/2022 Ongoing Monday follow up with sales team on oppurtunities
Create Perfect for Delivery Hang Tag	Order hang tags in a bright green or yellow color	Andrew and Alvin	This will have a series of questions about the cleanliness of the car as it pertains to question #7 on the survery. This will help with "A Perfect for Delivery." This question is 160 points off if customer says the car is not in perfect condition at delivery.	5/1/22 start 6/1/22 check point to confirm all deals have a "PFD" in every deal jacket.  No end date as this will be a process we will keep

As you work toward your goal, it's important to have interim check points with specific, measurable objectives so your team can hold themselves accountable. If everyone knows the goal and objectives, you don't have to spend your valuable time micromanaging.



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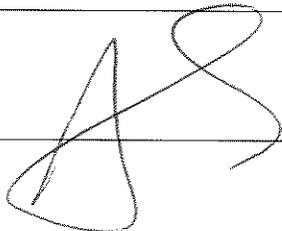
Once you've accomplished your goal, added or adjusted policies, procedures, and behaviors, now what? How will you ensure you and your staff do not fall back into the previous habits that produced poor results? Be specific.

As the GM, I need to constantly audit every deal and require weekly updates on training and daily updates on CSI from my managers. There is too much to lose including customers and bottom line money to the store. I NEED to be as proactive as possible.

Describe any planning or implementation meetings conducted as part of development of your plan.

I created a manager CSI process ( attached.) Also weekly meetings with staff will keep us on track to reach our 965 goal and keep us there.

Sponsor Signature:



# CSI Sales Manager Process

## 1. *Day after morning manager call*

- Morning manager not in training will gather previous day RDR sheets and call all deliveries.
- Time of completion for the follow up call is 11am

## 2. *Series of brief questions regarding their buying experience*

- Sales Consultants ability to meet customer's expectations
- Ability to understand customer's needs
- Delivery process
- Time spent with the Business Manager
- Staff's fulfillment of commitments made
- Overall satisfaction with Bill Estes CDJR
- Overall satisfaction with the Sales Consultant

## 3. *Do We-Owe anything to the customer?*

- If something promised in writing, Sales Manager will coordinate with Sales Professional
- Sales Manager will connect with Ethen in Service for appointment
- Sales Manager (along with Sales Consultant) will confirm appointment with customer

## 4. *Results of the CSI call*

- All calls will be documented in Elead with Click-to-Call ( If C2C is not used the call never happened)
- Detailed notes of conversation needs to be in Elead notes in customer profile

## 5. *Sales Manager T.O. to Sales Consultant*

- Sales Manager will follow up with Sales Consultant if #2 has any problems or concerns.
- Sales Manager will document that conversation in Elead for future follow up

## 6. *DealrConnect for CSI*

- All Sales Managers are responsible to review surveys in the DealerConnect Daily
- Surveys below District need to reviewed in Elead to confirm CSI process was used
- If survey is below district with no Sales Consultant follow up a coaching will be initiated

**This process is Daily and will insure we continue to provide a Guest Centric approach to selling cars.**

