



HOMEWORK ACTION PLAN

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

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Dealership <u>Crevier BMW</u>	Date <u>5/23/2021</u>

Current Situation or Challenge to be Addressed:	Client advisors to make 25 CTI calls and 25 emails per day and sell 22 units per clinet advisor		
Current Performance Level (include specific measure):	10 CTI calls and 13 emaisl per day 17 units per month		
Goal (what do you want to achieve?)	Create relationship and schedule 1 appointment per day		
Goal Performance Level (include specific measure)	Minimum of 22 units sold per month per advisor		
Goal Start Date:	6/1/2022	Goal End Date:	On going
First Check-in Date:	6/13/2022	Performance Objective:	15 calls 15 emails per day
Second Check-in Date:	6/20/2022	Performance Objective:	20 calls 20 emails per day
Third Check-in Date:	6/27/2022	Performance Objective:	25 calls 25 email per day
Fourth Check-in Date:	7/4/2022	Performance Objective:	25 calls and 25 emails per day
How does your goal align with the dealers' vision?	To cultivate a culture of relation building as well as training the advisors to source customers via Dealer Socket and Master Mind.		
What are the potential benefits of achieving your goal?	By creating relationship and providing an expectional experience will help achieve monthly unit budget, gross and EBT goals, as well as employee satisfaction		
What are the potential consequences if you don't achieve your goal?	Disloyal customer base, unhappy emplyees, not meeting budget in untis sold, gross or EBT		
Why is the goal	This goal is important because if we don't build relationship we haven't		

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important to you?	earned the right to ask for their business and what happens is that the market drives our business instead of us driving the business.
Potential Obstacles	Advisors buying into the process and keeping them focused
Potential Solutions	Sale's managers to review CTI and Email at 2pm and follow up with employees below threshold daily
BOTTOM LINE! Financial Impact of Achieving Your Goal (expressed in dollars)	The additional 40 units would equate to \$124,000 GP

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
Have a team meeting and review the CTI /Email results and set goal of 25/25	DealerSocket	PreOwned Director Sales Managers Team Leads	Advisors to understand their current results and the importance of staying in touch with our guest	6/1 to 6/1
Review team's daily check out results at 2pm	DealerSocket	Team Leads	Team leads to help advisors stay on task	6/1 on going
Weekly meeting with under performs	DealerSocket	Sales Managers	Emphasize the expectation of 25/25 set guidelines and or disciplinary action if need be. i.e not able to take Next-up or internet leads until the prior day's task have	6/1 on going

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SPECIFIC ACTION/STEP	NECESSARY RESOURCE(S)	ACCOUNTABLE PERSON(S)	EXPECTED RESULT	START, END, & CHECKPOINT DATES
			been completed	
Monthly meeting with all client advisors	DealerSocket	Pre-Owned Director	thank and congratulate those who completed the task, hold accountable for those advisor who did not	7/1 on going
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Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

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.

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.

The process I put in place will have the management team reviewing daily, weekly and month progress to ensure we’re staying on task

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

As described we will have daily, weekly and monthly meeting

Sponsor Signature: _____

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