

# Departmental Action Plan Template

Student Name: CHASE COYLE

Class & Student Number: 325-37

Academy Week (Var II):

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

Current situation I would like to address would be the way we book our appointments created in our BDC. Currently we book appointments and don't gather all of the "yes" we need to create urgency during the sales visit. If we had a solid sales process used in our BDC than the customers would come in prepared to purchase and they would also show up for their appointments.

Overall Objective and Specific Desired Results:

The Objective here would be to train our BDC Staff on gather all the information, create the urgency and confirm a purchase with the right questions / responses prior to customers coming in for their appointments. The result of this would be more qualified appointments and in turn more sales.

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

Training our current BDC Staff would be the staple of the action plan along with bringing on more qualified employees to handle these incoming calls. We would have weekly sales training with each employee in the BDC and work on their

specific needs for development. We will track all the employees training and improvements on a newly created spreadsheet. We will reevaluate their growth with appointment reports within our DMS. If our BDC Agents aren't growing and developing after this training, we will consider bringing on new staff with more experience in sales.

## Timeline:

Describe specific short term and long term checkpoints to monitor progress

Short term time line will be within 30-day increments, we will monitor their growth and development after the ongoing training every 30 days to see what changes need to be made. We will use our DMS to monitor this progress along with the training spreadsheet.

Long term time line will be over the next 6 month we will determine if the weekly training has made an impact on sales and is being reflected on the DMS reports over a 6 months average. If we haven't seen significant growth than we will reconsider the employees, we are training and if we need to find more qualified employees.

## 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: Dealer, General Sales Manager, BDC Manager
- b. What: Sales and phone training along with a new tracking method.
- c. By When: Starting with training and tracking immediately and reevaluating every 30 days.
- d. How: Tracking every 30 days. When progress is not being made after 6 months of ongoing training we will reconsider the employees in that department.

## 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.

