



# HOMWORK ACTION PLAN

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

Name Jen Overturf Bronner Class # 393

Dealership Overturf Volkswagen Kia Date 7/26/2022

Current Situation or Challenge to be Addressed:	Appointment Rate Needs to be Improved		
Current Performance Level (include specific measure):	Currently our sales team doesn't use the appointment tool in the CRM the way it should be used. Our appointment rate is usually 0-2% compared to our region which is typically around 15-18%		
Goal (what do you want to achieve?)	Start using the appointment tool and get to a 15% appointment rate. I believe if you have better discipline on this, then it will directly impact the number of appointments that show up and therefore your closing rate.		
Goal Performance Level (include specific measure)	15% appointment rate		
Goal Start Date:	7/30/2022	Goal End Date:	8/31/2022
First Check-in Date:	8/6/2022	Performance Objective:	Pull CRM appointment report. Spiff Salesman of the Week who had the most appointments scheduled in the CRM and show.
Second Check-in Date:	8/13/2022	Performance Objective:	Pull CRM appointment report. Spiff Salesman of the Week who had the most appointments scheduled in the CRM and show.
Third Check-in Date:	8/20/2022	Performance Objective:	Pull CRM appointment report. Spiff Salesman of the Week who had the most appointments scheduled in the CRM and sold.
Fourth Check-in Date:	8/27/2022	Performance	Pull CRM appointment

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		Objective:	report. Spiff Salesman of the Week who had the most appointments scheduled in the CRM and sold.  What is the appointment rate for the store MTD? Goal 15% What is the close rate for the store? Did it improve?
How does your goal align with the dealers' vision?	We are a small family owned store focused on customer service. The appointment tool aligns with that vision to give the customer clear communication on a set appointment time plus reminder email.		
What are the potential benefits of achieving your goal?	Better customer service, improved close rates, fewer no-show appointment		
What are the potential consequences if you don't achieve your goal?	Lose sales to other dealers, poor customer service/communication, customers forget about set appointments and salesman misses another sales opportunity/commission.		
Why is the goal important to you?	Adds structure and improves the sales process. Helps gain control in the sales process. Adds a professional approach to the sales process.		
Potential Obstacles	Sales team prefer to use personal calendars for scheduling appointments. Sales consultant is not prepared for a set appointment.		
Potential Solutions	Help set notifications for appointments on their CRM app on their phone. Make sure the appointment is confirmed and that everything is prepped for the customer.		
<b>BOTTOM LINE!</b> Financial Impact of Achieving Your Goal (expressed in dollars)	If we are able to bump our closing rate by 2% adding this process and structure, we will see an increase of approximately 4 more car deals per month. At \$3,800 PVR YTD, that would add \$15,200 of GP monthly, and \$182,000 GP annually.		

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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
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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.

Click or tap here to enter text.

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

Click or tap here to enter text.



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Sponsor Signature: \_\_\_\_\_