

Departmental Action Plan Template

Student Name: Timothy Slavish

Class & Student Number: N325-41

Academy Week (Var II): Week 5 - Variable II

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

(Homework modules assigned)

Rather than addressing a challenge that was part of the Jennifer Suzuki outline, I would like to develop a plan for my Sales Representatives and F&I Managers around annual goal setting and more regular feedback from their managers. This seemed like a natural problem to tackle given the time of year. We have always asked Sales Representatives at the beginning of the year to make a goal for themselves around how many units they wanted to sell in the next year; however there were a number of problems with this: i) they rarely told their managers what the number was; ii) managers would not check in with them on progress towards the number, hold them accountable for meeting that number, or work with them on setting a plan for meeting that number; iii) it was just a single quantitative goal and no other qualitative or developmental goals were made as part of the process, etc.

Overall Objective and Specific Desired Results:

I would like to institute an annual goal setting process for our Sales Representatives and F&I Managers that includes quantitative goals that they can be measured against periodically throughout the year as well as qualitative goals. This is a good way to help employees reach their goals because goals that are recorded are more likely to be achieved than those that have not been recorded. Furthermore, this can serve as a tool that managers can use to have discussions with employees who are not performing against their own expectations and our own expectations.

The process would start by preparing a goal setting document for each Sales Representative and F&I Manager which includes some of their main performance metrics for 2017 – for a Sales Representative, this would be unit deliveries by month and Customer Viewpoint scores (CVP) and for F&I Managers, this would be Gross Per Vehicle Retailed (PVR) and primary product penetrations. We would then review the prior year performance with each employee and then ask them to set quantitative goals for each category. The goal worksheet will also include Qualitative Goals and Action Steps Required to Meet Goals. This will require employees to think about other areas that they would like to work on for the coming year – this can include from increasing F&I turnovers to improving their deal paperwork. The goal worksheet has areas to the right of each Qualitative Goal and Action Step for a manager to make comments.

Once the goal sheet is completed it is reviewed with the employee and manager with both signing the bottom. The intention is for this document to be a living document throughout the year and updated on a monthly basis with vehicle deliveries (Sales Representatives) and PVRs (F&I Managers) by each employee's manager. On a quarterly basis, or more frequently if needed, the employee and manager would spend some time to review progress against goals.

A copy of a Sales Representative and F&I Manager Goal Template have been attached to this document.

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

As mentioned above, each January our Sales Representatives were asked to think about how many units they wanted to sell in the upcoming year. This was never something that was formally recorded or really visited at any point during the year. Creating a process to have employees set goals that would be tracked and that they would be held accountable for was definitely something that I wanted to do heading in to 2018.

During the course of having conversations with each of our Sales Representatives and F&I Managers, the overwhelming majority viewed this as a very positive step towards helping them approach their overall objectives for the year. They like the idea of a formalized process which forces them to think about what they want to achieve for the year and more importantly the idea of managers actively helping them work towards those goals during the year.

Now that all Sales Representatives and F&I Managers have submitted goals, I have made an excel spreadsheet with 2017 sales numbers, 2018 goals and 2018 actual sales numbers. We will expose this data to the entire sales organization on a monthly basis so that everyone can see how each team member is doing against their goals and how the dealership is doing against the aggregate of all of the Sales Representatives goals. Furthermore, if certain Sales Representatives are straying from their goals, managers will be able to have one on one conversations with them to try to help them and see what can be done to improve performance.

Overall, this has been viewed as a positive change on the sales team and everyone has been very focused on the goals that they set for themselves one month in to the year.

Timeline:

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

The initial phase of this project was getting the goal setting templates built, having discussions with individual employees and having the templates filled out and returned. This was completed during the early part of January. Each of our Sales Managers was assigned Sales Representatives that they are responsible for. Those Sales Managers keep a file with the completed goal worksheet so they can update monthly numbers and have check in discussions as appropriate.

We have now entered the phase of monitoring progress against goals on an ongoing basis. As stated above, we will present progress against the aggregate dealership goals and individual employee goals during sales meetings. Managers will also have individual conversations regarding performance and goals periodically and at least quarterly.

The final phase of this project will happen at the end of the year where we will create an employee self evaluation process where they will review their actual performance against goals. The overall plan is to have a much more robust process in place around employee development in the sales organization by the end of this year.

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:

This process was developed by me after having discussions with our current General Manager about why goal setting had not really worked well in the past. The real reason came down to lack of a formalized process and holding Sales Managers accountable for helping with coaching Sales Representatives towards meeting their goals.

I developed the goal worksheet as a way to build more structure around the process and made sure that I was in each meeting with all Sales Representatives and F&I Managers so that I could reiterate how important this process is and how we intended to follow-up on the goals developed throughout the year. Now that all goal worksheets have been completed, I will ensure that our Sales Managers are having follow-up discussions with Sales Representatives as needed.

All completed goal worksheets were reviewed by the Dealer and he was very happy with the outcome of the process.



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2018 Sales Representative Goals Template

NAME: **Jim Bufalino**

DATE: **January 2018**

Units Delivered:

Enter your sales goals by month in the '2018G Row' below and subtotal by quarter.

	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	Jul	Aug	Sep	Q3	Oct	Nov	Dec	Q4	Tot
2017A	21	22	15	58	16	18	18	52	17	21	14	52	12	17	17	46	208
2018G																	
2018A																	
+/- '17A																	
+/- '18G																	

Customer Viewpoint:

Enter your Customer Viewpoint goal for the year in the 2018G box below

2017A	2018G	+/- '17A
95.1%		

Qualitative Goals:

Enter up to three additional goals in the boxes below (i.e., improve customer follow-up, F&I turnovers, product knowledge).

Goals	Manager Comments

Action Steps Required to Achieve Goals:

Enter up to three steps you can take to meet your quantitative goals listed.

Action Steps	Manager Comments

Other Notes:

Enter any notes regarding your goals.

Commitment:

This document reflects my professional goals for 2018 and I will make a personal commitment to follow through on all items listed throughout the course of the year.

Sales Representative Signature

Manager Signature



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2018 F&I Manager Goals Template

NAME: **Dave Russell**

DATE: **January 2018**

Gross PVR:

Enter your gross PVR goals by month.

	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	Jul	Aug	Sep	Q3	Oct	Nov	Dec	Q4	Tot
2017A	-	-	-	-	-	290	290	290	478	499	526	499	519	562	557	546	477
2018G																	
2018A																	
+/- '17A																	
+/- '18G																	

Primary Product Penetration:

Enter your ESP and Tire & Wheel Penetration goals in the 2018G box below.

ESP		
2017A	2018G	+/- '17A
10%		

Tire & Wheel		
2017A	2018G	+/- '17A
22%		

Qualitative Goals:

Enter up to three additional goals in the boxes below (i.e., streamline delivery process, improve deal breakdowns).

Goals	Manager Comments

Action Steps Required to Achieve Goals:

Enter up to three steps you can take to meet your quantitative goals listed.

Action Steps	Manager Comments

Other Notes:

Enter any notes regarding your goals.

Commitment:

This document reflects my professional goals for 2018 and I will make a personal commitment to follow through on all items listed throughout the course of the year.

F&I Manager Signature

Manager Signature