

Departmental Action Plan Template  
Student Name: Amy Peer

Class & Student Number: 326 - 23

Academy Week (Var II): Week 5

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

Outbound Call- Controlling the call and setting the appointment.

Overall Objective and Specific Desired Results:

Set more appointments, have actual appointments show.

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

Currently all outbound leads are handled by the BDC. I have 2 BDR- Each will be trained on Jennifer Suzuki Keys to handling outbound calls, proceed with role play to have it become second natural. All outbound calls are recorded and will be used for training and recognition purposes.

Depending on the amount of internet leads received during the month, I am expecting to set at least half the leads as appointments. Taking in account fake leads and wrong information received in the CRM.

Timeline:

Describe specific short term and long term checkpoints to monitor progress

Training has already started with my BDR's, I have one BDR who has been with the dealership for 6 months setting 2 appointments a day, with 75% show. My desk in is the same room and I listen while she is on the phone, I continue to use her as an example with the new rep that was just hired. All calls inbound and outbound will be continually

reviewed on a weekly basis. Used for training, along with examples to our sales staff on how to control the call. Phones call will be monitored by myself along with my Ford and Chevy Sales Managers.

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:** BDM (myself) working along with sales mgrs to work with BDC and Salesman
- b. **What:** Control the phone calls and set appointments, sell more cars
- c. **By When:** This will be an ongoing process
- d. **How:** Training, along with rewarding the BDR on Shown appointments on a monthly pay plan. Giving bonuses after so many shows to encourage volume and success.

### 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:

**Approved by sponsored: Lud Druchniak**

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