

Departmental Action Plan Template

Student Name: John Phelan

Class & Student Number:

Academy Week (Var II):

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

-We experience a large call volume at this store. We do a good job of tracking the results of phone appointments that set and sell. Unfortunately many of our inbound phone calls are not claimed by the salesperson and therefore not picked up in the crm. This ends up giving us a skewed number on appointment set, show and sold ratios.

Overall Objective and Specific Desired Results:

The overall objective is to capture and measure all of our phone opportunities and maintain our current appointment set, show and sold percentages. We average 608 phone calls, 350 appointments set(57%),190 show(31%) and 89 sold(14%). We are looking for a 10% increase in phone calls that are actually recorded and placed in the crm while maintaining the current percentages. We are also going to track salespeople by the percentage of name, number and email they receive.

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

-Salespeople now have to check out with the bdc manager before their shift ends.

-This checkout will account for all phone calls that they took during their shift

-They will be required to list their calls, appointments set, name, phone numbers and emails attained.

-BDC manager will review checkout with the salesperson and review their phone calls and ensure that all incoming calls were claimed and entered in the CRM

Timeline:

Short Term – BDC manager will post daily peer board with every salesperson numbers. These will include set, show, sold, email, name and number percentages.

Long Term – We should be able to notice an uptick in our monthly totals. This should include higher call volume(logged) and hopefully better overall performance in the above mentioned metrics.

Long Term – The daily BDC checkout will allow us to better train our staff to support growth in the above metrics

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:** Mark Wimberly and Vinny Losasso
- b. **What:** Coaching sales staff and maintain peer boards
- c. **By When:** Daily (starting immediately)

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