



HOMEWORK ACTION PLAN

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

Name Jason Arvidson Class # N398
 Dealership Simpson Chevrolet of Garden Grove Date 12/1/2022

Current Situation or Challenge to be Addressed:	Do a better job of logging incoming sales calls and walk ins into the CRM. Improve closing percentages for both (Goals are 25% calls -- 30% walk ins).		
Current Performance Level (include specific measure):	Logged phone calls and walk ins have nearly doubled over the course of November. As a result, the closing percentages have dipped a bit when compared to YTD averages. YTD PHONES - 25% YTD WALK INS - 43% --- NOV PHONES - 13% NOV WALK INS - 24%		
Goal (what do you want to achieve?)	Accomplish the task of both logging more opportunities (phone and walk in) while maintaining a high closing percentage on both metrics.		
Goal Performance Level (include specific measure)	As a goal, we should be closing at 25% on phone calls and 30% on walk ins. We have accomplished the goal of logging more opportunities. Just need to close more now.		
Goal Start Date:	11/1/2022	Goal End Date:	Use Dropdown to enter a date.
First Check-in Date:	12/1/2022	Performance Objective:	2% increase in closing % per metric.
Second Check-in Date:	1/1/2023	Performance Objective:	2% increase in closing % per metric.
Third Check-in Date:	2/1/2023	Performance Objective:	2% increase in closing % per metric.
Fourth Check-in Date:	3/1/2023	Performance Objective:	2% increase in closing % per metric.
How does your goal align with the dealers' vision?	More sales = more customers for life.		
What are the potential benefits of achieving	More cars sold, more commissions paid, more to the bottom line.		

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your goal?	
What are the potential consequences if you don't achieve your goal?	Miss opportunities. Get out executed by our competition. Don't grow and improve.
Why is the goal important to you?	It is important that we set and achieve goals in order to grow year over year.
Potential Obstacles	A higher level of attention to this from management could be misconstrued as micro management.
Potential Solutions	Explain to the team the benefits of accomplishing this goal. Business is getting a little tougher and we have to be better than ever at the basics.
BOTTOM LINE! Financial Impact of Achieving Your Goal (expressed in dollars)	20 - 30 more units per month. At 6.000 PVR, could equal \$150k + in additional revenue.

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
Daily reconciliation of incoming call logs compared to what is logged in CRM.	Marchex, assistant sales managers.	Closers, desk managers, internet manager.	Increase logged calls monthly vs 2022 YTD monthly average of incoming calls.	First of the month each month as well as midmonth each month ongoing.
Daily reconciliation of logged walk ins.	Our management team.	Our management team.	Increase logged walk ins monthly vs 2022 YTD monthly average of logged walk ins.	First of the month each month as well as midmonth each month ongoing.
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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.

Data metrics to be reviewed by management weekly - number of logged prospects per sales person, individual closing percentages per sales person, etc.

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

We have already implemented these changes. It is now a matter of monitoring them and holding everyone involved accountable to achieve the goal.

Sponsor Signature: _____