

Departmental Action Plan Template

Student Name: Matthew Davis

Class & Student Number: N326 15

Academy Week (Var II): Week 5

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

Total volume of live conversations completed

Total appointments set from phone ups

Overall Objective and Specific Desired Results:

Complete a higher percentage of incoming calls leading to additional Appointments / Sales

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

Have a process that leads every incoming sales and service call to a manned desk. No call goes to a vacant seat unless requested by customer for a specific person. All calls initially answered by a Sales Manager if available. If no Sales Manager available, call routed to BDC. If no one is free to answer call, then to an available sales rep with call logged by receptionist for Manager follow up.

Current process has led to only 25% of calls being answered. New process will lead to a near 95% success ratio or better. In turn, more live conversations will turn to more appointments/sales

Timeline:

Describe specific short term and long term checkpoints to monitor progress

New program will have progress analyzed every two weeks to and/or make new plans where needed.

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: GM/GSM to monitor
- b. What: Proper Process being followed
- c. By When: Immediate implementation
- d. How: No change in initial incoming call routes

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:
