

Departmental Action Plan Template

Student Name: Jeremy Robson

Class & Student Number: 326 10

Academy Week (Var II):

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

Currently we have had a BDM that has been ineffective on holding sales people accountable for making calls asking for appointments and effectively tracking closing ratios on phone ups, internet leads and orphan customers.

Overall Objective and Specific Desired Results:

To increase production out of the BDC. Improving plus business in the service department, orphan calls, phone up appointment ratio and closing ratio.

Describe your action plan in detail

We replaced our BDM 3-1-18 . We have gave this person specific goals to meet for the BDC. We have changed scripts, email templates , and our new manager is very High Energy and has shown to be very capable of holding the sales people accountable so far. We want to increase our internet closing ratio from the current 7.5% to 12%. We want to phone up to go to 60% average closing ration from appointments and appointment ration to be above 60% previous month we were 43% . We have our new BDM actively listing to calls and coaching on what to say and not to say during phone ups to increase these percentages. We have our orphan leads being followed up on and we want to increase the production from these leads from last month of 15% appointment ratio. We have already increased here to 45% we are on the right track. Our new BDM will be

tasked with working with each individual sales person to role play with phone scripts on for each kind of calls.

Timeline:

Describe specific short term and long term checkpoints to monitor progress

I would like to see an immediate increase in all of these percentages. We have already increased in appointment ratios in phone ups and orphan calls. I would expect to have this increase on all levels in 2 months.

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: Jeremy Robson, Steve Dehart and Trevor Olson new BDM
All sales people to be able to effectively take and make phone calls
- b. What: TO increase our appointment and closing percentages in the BDC
- c. By When: May 2018
- d. How: working with each sales person roleplaying on phone calls. Letting the sales people listen to their calls so we can effectively coach each person and correct or praise them for each call.