

Departmental Action Plan Template

Student Name: Hank Carter

Class & Student Number: N327/23

Academy Week (Var II): Week 5

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

(Homework modules assigned)

The current situation that we need to address is that we have not accurately tracked our incoming sales calls; therefore, we are not able to effectively improve our sales performance. We have had an incoming phone script for sales previously; however, our emphasis was not heavy enough on setting the appointment. We are now changing our script, tracking, training, and monitoring of incoming sales calls.

Overall Objective and Specific Desired Results:

Our objective is to measure the incoming sales phone traffic, implement our new phone script, provide training, monitoring, and certification for improving appointments set and improve sales. Our process and script will include the outline of 1) Introduction and name swap 2) Provide value to the customer by explaining what the salesperson can do for the customer in order to make the buying process as easy as possible 3) set the appointment by giving either or suggestions and setting appointments on quarter hour times 4) Get the customer's phone number and request the best method of contact.

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

The detailed action plan begins with call tracking being measured daily by the reception desk. With that information, we will be able to hold salespeople accountable by gauging the individual performance for appointment shows and sales. Our phone script is designed to hit 4 marks 1) introduction and name swap, 2) provide value to the customer by describing how easy the salesperson will personally make the process easy for the customer 3) set a solid appointment 4) get the phone number and the best way to communicate and confirm the appointment. We have weekly phone training that each salesperson must complete to be certified on phones. We are using mystery shoppers that grade each salesperson on hitting each of the aforementioned marks. The salesperson must maintain a grade of at least 85% in order to be certified to take incoming phone leads. The trainer and GSM will also listen to calls periodically as well.

Timeline:

Describe specific short term and long term checkpoints to monitor progress

Short term is to collect data accurately and implement the phone process, training, and certification requirements. Long term is to maintain the certification requirements and analyze the data to inspect improved appointment show and sale percentages.

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

Track the data and monitor for goal achievement. Keep accountability with our certification requirements.

- a. Who: Salespersons, Sales Managers, Training Coordinator, GSM
- b. What: Incoming call tracking, monitoring, scoring for certification qualifications

- c. By When: Implemented by 4/1/18, daily tracking, weekly training and certification
- d. How: Calls tracked by reception desk. Measurements taken daily by sales managers. GSM/Trainer determine certification.

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:

~~The action has been presented to Jason Meador, and he is pleased with the plan. Let the execution begin.~~