

Departmental Action Plan Template

Student Name: Miro Garaj

Class & Student Number: Class 327 – Student 32

Academy Week (Var II):

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

(Homework modules assigned)

Current Situation: We are doing an average job of logging phone ups into our CRM. With the information at hand last 3 months we logged 167 phone ups and set 43 Appt. Our Appt. Set ratio is very low at 25.7% this year. Our sales to phone ups ratio is at 27% this year. Our sales staff is not using phone scripts nor do we have a phone recording established.

Overall Objective and Specific Desired Results:

We would like to Increase Appointment's Set. We believe an achievable goal is 50%. Our Desired goal will be 60% Appt Set Ratio.

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

- 1. We will start recording phone calls. We are changing our phone number on the website so we will be able to record inbound phone calls. (We can not change something that we can't measure)*
- 2. We are looking into hiring a phone tracking company to record all the phone calls.*
- 3. We will make sure all the phone ups are logged into our CRM (Thanks to phone recording)*
- 4. Sales Manager will Review phone calls – and start training.*
- 5. Sales Manager one-on-one training, and group training.*
- 6. We are currently enrolled with David Lewis & Associates Sales Training. We will ask our trainer to focus on Phone Training during our next session at no additional cost. (We'll evaluate course effectiveness)*
- 7. Give our staff the right tools (phone scripts that they can practice with)*
- 8. Measure results until we achieve our desired goal.*

Timeline:

Describe specific short term and long term checkpoints to monitor progress

Short term: establish phone recording 1 month

Long Term: training, implementation, reaching out goal within following 3 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: Sales Staff, Sales Managers, 3rd party Vendor*
- b. *What: Record, Review, Train, Measure*
- c. *By When: We should achieve our goal within 4 months.*
- d. *How: Follow the plan and hold everyone accountable.*

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:

