

Departmental Action Plan Template

Student Name: Selden Wheeler

Class & Student Number:N32743

Academy Week (Var II):5

Current situation or challenge you want to address based on the Jennifer Suzuki Outline: I want to address our low appointment show rate. Currently have a BDC rep that is at 60% appointment show rate. After listening to several recorded calls it is clear and consistent process needs to be instituted in order to train our BDC reps how to build rapport, sell value in themselves and the buying process. This would give confidence in the customers and make them more likely to follow through and show up for their set appointment time.

Overall Objective and Specific Desired Results: A 70% show rate would be our min standard for all BDC representatives. Increasing the show rate by a minimum of 10% would result in just fewer than 5 appointments more per month per BDC rep. This increase would result in an average of 6 additional cars sold at \$2284 per copy.

Describe your action plan in detail

Reviewing phone calls has given me the opportunity to really listen to how our prospects are being handled. The greeting

was handled properly but the rest of the call was left with no control. The lack of training has caused our BDC representatives to become complacent and not building value in the buying experience.

We first listened to 10 - 15 recorded phone calls to determine where each BDC is with handling the phone call and transitioning to an appointment. The greeting was well done for all members including name and title. They also had a genuine interest in helping the customer and tone of voice was excellent. The areas we are focusing on are making sure the rep is prepared prior to the call with all the details needed to discuss the prospect's vehicle of interest including other similar options. Script cards will also be created to give the BDC rep quick one-answer questions to better control the call. Next we are having the reps role play a hard stop transition that will gain back control and allow them to build value of time savings and convenience. Role play has shown to be a power tool to get BDC more comfortable with this transition. The last step we will work on is the persistence in offering dates and times for the customer to come in. BDC will offer an assumptive day and time for the customer if the customer does not agree to that time BDC will offer no less than 2 dates and times for the customer to choose and then follow up with a confirmation email stating the agreed-upon date and time. Once the appointment is confirmed it is entered in the system and assigned to a salesperson that will have the car cleaned, fueled and ready for the customer's arrival. I realize we are only expecting to increase our current appointment and potential sales by a small number

but I believe these processes will strengthen our BDC long-term and increase other key areas as well giving us a better opportunity to delivery cars to prospects.

Timeline:

Describe specific short term and long term checkpoints to monitor progress

We have already seen the implementation of the script cards strengthen the BDC call. I would expect this complete transition to take 6 months. Long term we will continue to monitor calls weekly and send out a weekly BDC performance spreadsheet showing each BDC rep and where they rank in the group.

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: BDC reps and Sales Managers
- b. What: Sales Managers will be responsible to listen to outbound calls and review performance weekly.

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Today New Leads 50 Activity 235 Showroom 94 Appointments 19

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BDC Performance Summary By BD Agent

Report By: BD Agent

From: 1/1/2018 To: 1/31/2018

Today Yesterday Last 7 Days MTD LM All

Refresh

How are these numbers calculated?
 Leads: Based on the date the lead was received
 Sold: Based on the sold date on the deals (could be previous leads)
 Appts Set: Based on the date the appointment was created (could be previous leads)
 Appts Shown: Based on the date the appointment was scheduled for (could be previous leads)
 Response Times: Based on ADF leads received during the time period that were not marked bad. Shown in # of hours.

Some leads and visits have vehicles associated with them that do not specify their condition or do not have vehicles associated with them at all. Choose Type: All to see results for those items.

BDC Performance Summary By BD Agent

Report Date: 4/7/2018
From 1/1/2018 to 1/31/2018

BD Agent	New Opportunities					Bad		DMS Sold		Appointments								Response Times (Hrs.)															
	Total	ADF	Internet	Phone	Walkin	Dupes	Other	Delivered	Pending	Total		Internet		Phone		Walkin		None	Avg Adj	Avg Actual													
	Excludes bad leads	#	#	% of Good Leads	#	% of Good Leads	#	% of Good Leads	#	% of All Leads	#	% of All Leads	#	% of All Leads																			
Gina Gagnon	306	271	202	66%	59	19%	45	15%	60	18%	71	19%	31	1	68	22%	38	12%	30	18%	18	0%	19	32%	11	19%	0	2.0%	0	1.82	9.18		
James Comeau	7	7	3	43%	1	14%	3	43%	2	18%	4	38%	2	0	1	14%	0	0%	0	0%	0	0%	1	100%	1	100%	0	0%	0	0.23	5.73		
Kris Sproul	280	249	188	67%	51	18%	41	15%	58	17%	64	10%	50	0	66	24%	56	20%	23	12%	20	11%	20	57%	24	47%	14	34%	12	2.07	6.10		
Teresa Hallworth	287	199	146	57%	39	15%	72	26%	45	14%	55	18%	38	0	60	23%	48	18%	20	18%	19	13%	22	59%	19	49%	12	17%	8	1.13	6.97		
Total	850	716	538	63%	150	18%	161	19%	165	16%	194	19%	121	1	193	23%	141	17%	85	16%	57	11%	71	47%	55	37%	37	23%	29	18%	0		

Page 1 of 1

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Today New Leads 50 Activity 235 Showroom 94 Appointments 19

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BDC Performance Summary By BD Agent

Report By: BD Agent

From: 3/1/2018 To: 3/31/2018

Today Yesterday Last 7 Days MTD LM All

Refresh

How are these numbers calculated?
 Leads: Based on the date the lead was received
 Sold: Based on the sold date on the deals (could be previous leads)
 Appts Set: Based on the date the appointment was created (could be previous leads)
 Appts Shown: Based on the date the appointment was scheduled for (could be previous leads)
 Response Times: Based on ADF leads received during the time period that were not marked bad. Shown in # of hours.

Some leads and visits have vehicles associated with them that do not specify their condition or do not have vehicles associated with them at all. Choose Type: All to see results for those items.

BDC Performance Summary By BD Agent

Report Date: 4/7/2018
From 3/1/2018 to 3/31/2018

BD Agent	New Opportunities					Bad		DMS Sold		Appointments								Response Times (Hrs.)															
	Total	ADF	Internet	Phone	Walkin	Dupes	Other	Delivered	Pending	Total		Internet		Phone		Walkin		None	Avg Adj	Avg Actual													
	Excludes bad leads	#	#	% of Good Leads	#	% of Good Leads	#	% of Good Leads	#	% of All Leads	#	% of All Leads	#	% of All Leads																			
Darrell Gentry	1	3	1	100%	0	0%	0	0%	2	50%	3	75%	0	0	1	100%	0	0%	1	100%	0	0%	0	0%	0	0%	0	0%	0	0.00	0.00		
Gina Gagnon	385	271	210	58%	66	18%	89	24%	55	13%	67	16%	47	1	78	21%	49	13%	40	19%	28	12%	25	38%	15	24%	11	12%	7	8%	0	0.25	5.65
James Comeau	11	10	7	64%	3	27%	1	9%	2	14%	3	21%	2	0	1	9%	1	9%	0	0%	0	0%	1	33%	1	33%	0	0%	0	0.18	0.18		
Kris Sproul	302	225	188	58%	59	20%	75	26%	55	16%	62	17%	39	1	71	24%	52	17%	29	17%	21	13%	28	44%	18	31%	16	21%	13	17%	0	1.87	7.12
Teresa Hallworth	346	275	208	60%	53	15%	85	25%	61	14%	75	18%	31	2	62	27%	61	18%	45	22%	29	14%	35	68%	24	45%	11	13%	8	9%	0	0.97	7.18
Total	1026	784	594	58%	181	18%	250	24%	175	14%	210	17%	119	4	241	24%	163	16%	116	20%	76	13%	87	48%	59	33%	38	15%	28	11%	0		

Page 1 of 1

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:
