

# Departmental Action Plan Template

Student Name: Travis Bachman

Class & Student Number: N328-39

Academy Week (Var II):

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

Outbound appointment setting. Currently we do not track outbound calls. We have been focused on inbound calls.

Overall Objective and Specific Desired Results: Start tracking our outbound phone calls.

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

We have added phone call tracking to our CRM for outbound phone calls completed 4-15-18. We have trained how to call through the app on the CRM so we can track time of call and duration completed 4-21-18. Management will have outbound phone scripts completed by 5-15-18. The goal of these scripts is to help guide the phone call to setting an appointment. We will be tracking daily outbound activity by salesperson and measuring calls vs appointments made.

### Timeline:

Describe specific short term and long term checkpoints to monitor progress

Retrain how to call through Phone app 5-5-18

Templates completed 5-15-18

Recap outbound numbers calls made appointments set 5-19-18

Review templates 5-26-18 make any adjustments necessary to help guide the appointment

Review outbound numbers 6-2-18 determine sales department outbound needs weather we need to go back to step one and re train on how to or if we need specific needs on outbound calls setup short term individual training needs

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: these meeting will take place with the two sales managers and the general sales manager

- b. What: we will be evaluating the CRM outbound activity and appointments scheduled
- c. By When: we will review 5-5-18,5-15-18,5-19-18,5-26-18 and anticipate a fully functional outbound phone process by 5-15-18 we will spend the remainder of may fine tuning individuals based on needs
- d. How: Physically reviewing outbound calls

### 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:

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