

Departmental Action Plan Template

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Class & Student Number: NADA 328-07

Academy Week (Var II): Week 5 – New Car Department

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

At our dealership, we do not do enough training with our sales people. In particular, we have never really worked on phone training. We need to create a regimented phone training process as well as an inbound and outbound call script .

Overall Objective and Specific Desired Results:

I want to create a plan and process for training our sales people to handle inbound and outbound phone calls. The results I am looking for will be as follows:

- Creating a training culture in our dealership
- A well-defined call training process
- A well-defined call handling process with scripts for both inbound and outbound
- Higher percentage in calls converting into appointments that show

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

I will work closely with our sales manager and our IT/BDC manager to create a call handling process with scripts. The process and scripts will be based on the “10 Steps to Setting the Appointment” module from Jennifer Suzuki. We will then set a training program in place, making phone training a regular piece of the puzzle. We will train on call handling two days a week for the first two weeks of implementation, once a week for the next two weeks, and at least twice a month thereafter. In the first two weeks, we will introduce all the parts of the call process and the scripts, as well as model the process for our sales people. In the next two weeks, we will focus on role playing as well as listen to actual calls from our store. In the following weeks, we will mainly focus on role play involving random scenarios.

Before we implement these changes, we will monitor the call conversion rates to see how many calls turn into actual appointments. We will also collect some calls for example and demonstration purposes, and we will measure how long into the conversation that the discussion turns to price. We will then do the same thing after the

first full month of implementation and then after six months to see if the changes are making improvements. Without know what I should expect and what percentages I should be shooting for, I will tentatively say that within six months I will plan to have a 40% conversion rate on inbound calls and 15% conversion rate on outbound calls.

Timeline:

Describe specific short term and long term checkpoints to monitor progress

Short term:

- Be comfortable with the phone script by the end of the first month of training.

Long term:

- Have a 40% conversion rate on inbound calls and 15% conversion rate on outbound calls by the end of six 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:** Myself, Sales Manager, IT/BDC Manager, salespeople
- b. **What:** Commitment to training, processes, and results
- c. **By When:** By December 31, 2018
- d. **How:** Through a regular training schedule and a defined call process

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:
