

Departmental Action Plan Template

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Class & Student Number: 321 - 17

Academy Week (Var II):

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

My sales staff and sales BDC could be stronger on the phone. They tend to let the customer lead the conversation and end the phone call before they have gathered all the necessary information. Every phone call is about getting the customer to the dealership, but the concepts that Jennifer talked about to us are not being conveyed in the conversations (trust, time-savings, and respect). I want my sales staff and BDC to really understand the theology that Jennifer talked about put it to work.

Overall Objective and Specific Desired Results:

The sales force/sales BDC will be able to lead the phone conversation and give value in a way to have more customers show up for an appointment and in turn sell more cars.

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

I have broken down Jennifer's presentation in to a 8 part "course". Once a week I will run training similar to how Jennifer did in class for my team members. The trainings will be very interactive and

hopefully if I do them right my team will find them very valuable. I have my CRM data to measure the show rates. I also will be able to review phone calls through our recording system.

Timeline:

Describe specific short term and long-term checkpoints to monitor progress

SHORT TERM

Part 1: Listen to current phone calls; discuss positives and negatives of each one. Explain how to lead a phone call with the proper greeting & one-word fact-finding questions. This will include role-play with team members

Part 2: Talk about and discuss the challenges with phone calls. Get the teams frustrations and their thoughts on what makes phone calls difficult. Introduce the three aspects to convey in your 1st phone call and why it will help.

- 1) Trust
- 2) Time Savings
- 3) Respect

Part 3: TRUST - Brainstorm different ways with staff you can convey trust on the phone call. Have them role-play phones calls focusing on proper greeting, one word fact finding questions and building trust

Part 4: Time Savings – Brainstorm different ways we help our customers save time. Building on what we have already discussed, role-play phone calls using proper greeting, one-word fact finding questions, building trust, and showing time savings.

Part 5: Respect – Explain the different ways you can show respect in a phone call. Make is discussion based. Then role-play combining everything we have already learned + Respect.

Part 6: Retailer Jennifer’s worksheets to reflect the dealership’s specific “values/culture” and include what my team has come up with the past 5 sessions. Distribute them and review with the sales staff.

Part 7: Phone call review (have everyone evaluate the phone calls, not just me), discussion on how it's going, what's working and what's not working, & final synopsis with emphasis on me continually monitoring their calls and progress.

LONG TERM

- Continually monitoring their phones calls and show ratios week by week.
- One on one & group training again when necessary

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 team & I
- b. What: buy in that this process will work better and buy in to take the time and really put in into practice
- c. By When: Program starts May 21st and will end by the end of June
- d. How: I will train my sales staff session by session and hold them accountable by reviewing recorded phone calls with them.

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:

My sponsor (Uncle Mike) was very receptive to the ~~idea and excited about the potential outcome.~~ He wants reports after every meeting and update on the staffs progress.