

Departmental Action Plan

Student Name: **Brandon Breit and Donovan Kemp**

Class: **N318**

Student Number: **04 and 05**

Academy Week: **Variable II**

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

Overall, our current situation and challenge regarding our phone system is identifying exactly how many “sales” calls we are receiving and how many of those “sales” calls are getting connected to a sales representative. Currently we are having difficulty identifying which sales representative is answering the calls, and if they are indeed logging these sales calls into our CRM (Dealersocket) for further follow up. We have put in place a system to help us with this challenge that will be outlined in the action plan section. Jennifer Suzuki has provided us with excellent resources in regards to handling live sales calls which has helped us set more firm appointments, which has led to more shown appointments and ultimately produced more sales for our store.

Overall Objective and Specific Desired Results:

Our overall objectives for the new CRM and appointments are: We have invested in a new phone tracking recording system (CarWars) that is integrated with our CRM (Dealersocket). This system has provided us the ability to measure our connected calls, call quality, and if an appointment was set (soft or firm). The system also indicates if no appointment was made. We have the ability to use the system to listen to all calls, and use the calls for training purposes. The system makes it easier to call back customers that we were not able to set a firm appointment using Jennifer Suzuki’s word tracks. Our desired results is being able to track sales calls and help sales people set more firm appointments. Our desired results also include these firm appointment’s to be confirmed by a manager daily. Being able to track every call and see each appointment feed into the CRM automatically instead of relying on a sales person to manually log them in, will automatically help us see an increase in appointments sold and will help us to begin measuring real performance.

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

Our action plan in general is relatively straight forward and will be quantifiable after a few months of measurements to compare to the previous months, before changes. Sales managers will be given specific instruction to teach the sales force how to answer incoming sales calls by using the resources given to us by Jennifer Suzuki. The sales calls will be monitored by CarWars and the sales managers on duty each day. All calls will be reviewed for lost opportunities and used to help the sales force make more impact on phone calls to set firm appointments. We need to make it apparent that the future of more car sales is directly correlated to firm, confirmed appointments. The quicker we get this established into our

business plan, the quicker we will reap the benefits of a full showroom every day of the week! The idea of our action plan seems to compute well on paper, but it will take a true effort to make sure all sales managers and sales personnel is on board and held accountable for treating the phones like a live customer that is in the showroom trying to buy a car. Also to help with connecting customers to the correct department we put in place a bridge for when the live receptionist is away from the phone. The bridge will allow the customer to press 1 for sales and 2 for service etc. We believe a combination between funneling all the sales calls to the appropriate department, executing appointment setting phone techniques and staying on top of confirming appointment will gradually increase shown appointments and increase sales as a whole. Accountability is the key to making this work. Dealer and General Manager will review data and measurement's at the end of August to determine areas of improvement.

Timeline: Describe specific short term and long term checkpoints to monitor progress

Short Term: The short term will be getting all systems set up, and sales phone training in place. We want this set up by 6-05-17

Long Term: listening to calls and measuring sales peoples performance on the phones, analyzing CRM measurements 8-31-17 for review.

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

Who: Sales Managers (Mike, Duane, Felix)

What: Training sales employees how to use close ended questions to secure more firm appointments on the phones. Confirm appointments that are showing in CRM as an appointment, following up with sales person to make sure we are prepared for the customers arrival.

By When: 6/05/17

How: via group sales meetings/ training, helping one on one for struggling sales employees. Role play at meetings to provide good examples of how to make a positive impact on the phones.

Dealer agreement: The dealer agrees to the action plan provided and has agreed to sign up for trial run with "CarWars" to see if it creates positive reinforcement and results. Results will be measured 8-31-17 against our CRM to review and advise.