

PRIORITIZED ACTION PLAN

After every onsite coaching visit, your store receives a written, prioritized Action Plan. A KPI snapshot sits at the top. Each item is tagged by category and tracked from one visit to the next. Nothing falls off the plan until it is delivered.

KPI SNAPSHOT • 30 DAYS PRIOR TO VISIT

INTERNET		WALK-IN		PHONE		CALL PERFORMANCE	
Leads	1,527	Leads	171	Leads	127	Failure Rate	13.5%
Bad Lead Rate	45%	Bad Lead Rate	4%	Bad Lead Rate	10%	Target	< 10%
Sold	60	Sold	75	Sold	27	Avg Response	18 min
Conversion	7.2%	Conversion	45.5%	Conversion	23.7%	Target	< 5 min

1

CRITICAL RELOCATE BDM TO BDC ROOM

BDM must be physically located inside the BDC to manage the room, take T.O.'s, monitor activity and results in real time, and provide immediate coaching. This single change enables all other process improvements by creating constant management presence and accountability.

2

CRITICAL MANDATORY T.O. PROCESS FOR UNAPPOINTED LEADS

Mandatory T.O. for all fresh leads (internet and phone) that were contacted but remain unappointed. BDM takes at least two T.O.'s per BDR per day. Prioritize live T.O.'s when possible; if unable, BDM conducts a follow-up call within 15 minutes. Treat with the same urgency as a showroom T.O. Deals are hiding in these unappointed leads.

3

CRITICAL MAP / PAR / TARGET SCORECARD FOR BDC AGENTS

Daily BDR scorecard establishing MAP (Minimum Acceptable Performance), PAR, and TARGET goals focused on fundamental KPIs: Activity, Contacts, Appointment Rate, Appointment Show Rate. Use the Goal Calculator to determine the BDC contribution goal for monthly appointments and sales. Consider tying to compensation with individual and team-based components.

4

EFFICIENCY UPDATE ALL TEMPLATES WITH CLEAR CALLS-TO-ACTION

Complete overhaul of all email and text templates. Remove all "if" statements and replace with motivational calls-to-action. Create templates targeted to where the customer is in the buying journey: selecting inventory, credit concerns, trade questions. Journey-stage templates create more relevant communication and help identify which step is blocking the customer.

5

EFFICIENCY IMPLEMENT "GOLDEN HOURS" FOLLOW-UP CADENCE

Update CRM follow-up processes for fresh leads to make multiple contact attempts during the first 72 hours. Assign call, text, and email tasks during this critical window. Days 3–6 are the highest defection risk, so heavy, multi-channel contact during this period prevents competitor capture.

6

EFFICIENCY

UPDATE MISSED APPOINTMENT PROCESS TIMING

Modify CRM to trigger a missed-appointment task 15–30 minutes after appointment time. Product Specialist calls within 30 minutes, BDC follows up 2 hours later. Speed of recovery directly impacts reschedule rate.

7

FOUNDATION

LONG-TERM FOLLOW-UP PROCESS (REPLACE AUTO-LOST)

Rather than marking leads "Auto Lost" after 30–60 days, build a long-term follow-up: monthly newsletter with new inventory, trade evaluation link, and service specials to drive re-engagement. Run long-term follow-up for 90–180 days before marking lost. Recovers deals that would otherwise disappear.

8

FOUNDATION

REAL-TIME SHOWROOM VISIT TRACKING

Establish a process to start and stop showroom visits in the CRM in real time. Receptionist starts the visit when greeting the customer on arrival. Critical for accurate missed-appointment follow-up and unsold showroom traffic follow-up. Without real-time tracking, follow-up timing is guesswork.

9

FOUNDATION

CLEAR "ACTIVE LEADS WITHOUT FUTURE FOLLOW-UP" DAILY

BDM is responsible for clearing "Active Leads without Future Follow-Up" in the CRM daily, ensuring every lead is placed into the correct follow-up process. Leads in this bucket are invisible to the team and represent lost opportunities. A non-negotiable daily discipline.

10

GROWTH

LEVERAGE AI FOR PERSONALIZED RESPONSE CREATION

Train the team to use AI tools to create personalized template responses with customer-specific details, compelling text messages, email responses addressing specific questions, and phone scripts for different scenarios. Personalization at scale, without requiring individual writing skill from every team member. Include AI-assisted response training in daily sessions and monthly one-on-ones.

11

CARRY

"SAVE A LEAD" MANAGEMENT REVIEW MEETINGS

Weekly review of every lead where contact was made but no appointment was set. Carried from Visit 3. Cadence holding; review continuing into Visit 5.

12

DELIVERED

TRANSITION TEXTING TO CRM-NATIVE, SUNSET PODIUM

Completed between Visit 3 and Visit 4. Texting is now native in the CRM, customer history is captured in the conversation thread, and Podium is retired. Confirmed compliance with TCPA template review.

How the categories work.

CRITICAL

items move first.

EFFICIENCY

closes time and process gaps.

FOUNDATION

builds the systems behind the work.

GROWTH

adds capability for the next quarter. Status: CARRY from a prior visit,

DELIVERED

completed.