SAMPLE DELIVERABLE

ONSITE COACHING AGENDA

VISIT 5 · 2-DAY ONSITE COACHING
COACH: M. GRAY
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Every onsite visit follows the same operating rhythm: accountability audits, live observation, role-play with named reps, and an exit meeting with a written plan. Each session is tagged by category so leadership knows exactly what is being worked on, and why.

DAY 1

TUESDAY, APRIL 14

Time	Session	Category	Participants
8:30–9:30	**LEADERSHIP CHECK-IN & VISIT 4 PROGRESS REVIEW** Review the prior visit's action items, mark what is delivered, in progress, or carried forward. Review KPI deltas vs the Assessment baseline. Set the tone for the visit.	ASSESSMENT	GM · GSM
9:30–11:00	**LEAD RESPONSE ACCOUNTABILITY AUDIT** Verify 30-minute response-window enforcement. Check the lead reassignment process when a salesperson does not respond within the window. Review the CRM for any remaining delays caused by holding leads until after the sales meeting. Confirm the process is eliminating first-contact delays.	ACCOUNTABILITY	BDC MGR · SALES MGR
11:00–12:00	**BDM DAILY TASK SCHEDULE REVIEW** Evaluate BDM adherence to a structured daily schedule: morning huddle with prior-day metrics, scheduled coaching sessions, a midday CRM audit, and an end-of-day checkpoint. Assess personal activity completion against the 25–50+ daily activity target. Is the schedule documented, visible, and consistently followed?	ACCOUNTABILITY	BDM · BDC MGR
12:00–12:45	**LUNCH BREAK**		
12:45–2:30	**BDC LIVE CALL COACHING** Monitor appointment-setting quality and objection handling on live calls. Evaluate used-vehicle value positioning: quality, certification, and financing advantages vs competing on price alone. Coach on T.O. process execution for unappointed phone-ups. BDM should be taking a minimum of 2 T.O.s per BDR per day.	COACHING	BDC MGR · NAMED REPS
2:30–4:00	**LEAD LOGGING & SOURCE VERIFICATION DEEP DIVE** Cross-reference the CRM desk log, inbound call logs, and showroom traffic logs to identify under-logged phone-ups. Verify every customer interaction is logged with the correct source and timestamp. Implement a standardized process for how and when to log walk-ins and phone-ups. Review weekly lead-source reporting for accuracy.	PROCESS	BDM · RECEPTIONIST
4:00–5:00	**DAY 1 DEBRIEF WITH MANAGEMENT** Summarize Day 1 findings: lead-response compliance, BDM schedule adherence, and lead-source data observations. Align on Day 2 priorities.		GM · GSM · BDC MGR

DAY 2

WEDNESDAY, APRIL 15

8:30–10:00	**BDC ACTIVITY ACCOUNTABILITY AUDIT** Review the BDC activity dashboard completion and review process. Verify consistent physical BDM presence in the BDC, active coaching, daily 1:1 side-by-side coaching, and monthly evaluations. Review key activity metrics against goals: tracking is sustainable, accurate, and ongoing.	ACCOUNTABILITY	BDM · BDC MGR
10:00–11:00	**USED VEHICLE TEMPLATE & MESSAGING REVIEW** Audit used-vehicle response templates for value differentiation from new-vehicle messaging. Coach on brand-promise positioning for price objections on pre-owned inventory. Confirm SEO and hours messaging are incorporated. The 20–30 day rollout window is underway.	PROCESS	BDC REPS · SALES MGR
11:00–12:00	**CRM REWARDS POINTS & OUTBOUND CAMPAIGN REVIEW** Review a targeted outbound campaign using available CRM Rewards points to drive immediate service and sales opportunities. Evaluate the high-value truck campaign developed with supporting call guides and templates. Measure early results from campaigns deployed during Visit 4.	BENCHMARK	BDC MGR · SERVICE MGR
12:00–12:45	**LUNCH BREAK**		
12:45–2:30	**PHONE SKILLS & OBJECTION HANDLING COACHING** Reinforce live coaching on building the phone-skills library for common objections. Review confirmation calls that confirm the customer on the showroom day and time. Capture recordings for the new BDC playback library.	COACHING	BDC REPS
2:30–3:30	**BDC & SALES MANAGEMENT ALIGNMENT** Strengthen alignment between BDC and sales management. Reinforce shared responsibility for appointment outcomes and showroom traffic. Ensure a seamless handoff process and a matching conversion from lead to sale.	ACCOUNTABILITY	GSM · BDC MGR
3:30–5:00	**EXIT MEETING WITH MANAGEMENT** Present final visit findings, status updates on prior Visit 4 action items, and the written Action Plan for Visit 6. Confirm the next visit date and its priorities. Get signoff on coaching commitments and timeline.		GM · GSM · BDC MGR

Session categories. ACCOUNTABILITY verifies process adherence. COACHING is direct rep-level skill building. PROCESS covers systems and workflow. BENCHMARK measures against targets. ASSESSMENT reviews progress vs baseline.

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