

Action Plan

GM FLEET AND COMMERCIAL ACCOUNT PLANNING

Fill out the following tables to identify all new accounts you are currently pursuing and prioritize which ones require more planning to achieve your sales goals.

Prospect			
Sales Goals			
List all pursuits and expected outcomes you wish to achieve with this account.			
Decision makers identified? (Y or N)		Buying mode identified? (Y or N)	
Who will make the final decision to purchase and why?			
Next Actions			
Refer to your Account Planning Guide. If you do not have a planning guide for this account, create a new one.			

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Sales Goals			
List all pursuits and expected outcomes you wish to achieve with this account.			
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Next Actions			
Refer to your Account Planning Guide. If you do not have a planning guide for this account, create a new one.			

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Fill out the following tables to identify all existing accounts and prioritize which ones require follow-up contact to ensure repeat and referral business according to the 30/60/90 day best practices.

Existing Account			
Current Business			
List all the ways with which this account is connected with your dealership (Vehicles purchased? Service? Etc.)			
How long since last purchase?		How long since last service visit?	
Additional comments?			
Next Actions			
Refer to the Repeat & Referral Business Best Practices to determine next actions based on time frames identified above.			

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Current Business			
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Refer to the Repeat & Referral Business Best Practices to determine next actions based on time frames identified above.			