First Name, Last Name

AGE:

OCCUPATION:

STATUS:

LOCATION:

EDUCATION:

TIER:

ARCHETYPE:



ABOUT ME:

This section should be a short paragraph to describe the user journey at a high level. Highlight other factors listed on the persona and incorporate them in a real-world setting, based on how they would use the potential product.

GOALS

- What goals does this persona hope to achieve?
- What tasks do they need to complete/perform?
- What ambitions, hopes, and/or dreams do they have?
- What experiences elicit what emotions?

FRUSTRATIONS

- What frustrations is this persona trying to avoid?
- What obstacles are present that keep them from their goals?
- What emotions are elicited out of these frustrations?
- How is this persona currently dealing with them?

MEDIA PREFERENCES/CHANNELS

- Trade publications, magazines, newspapers
- Websites, social media, mobile apps
- Television

IDEAL EXPERIENCE

- What product features would cause this persona to make a buying decision?
- · What would bring him/her back to buy again?

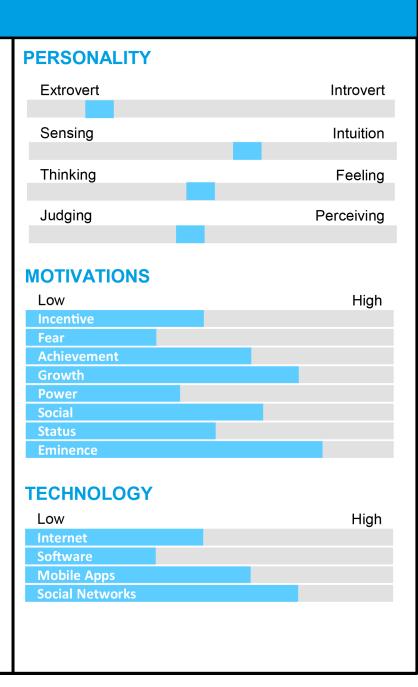


Figure 5-2. Customer persona template

Cynthia Reagan

AGE: 45

OCCUPATION: Attorney

STATUS: Divorced

LOCATION: Dallas, Texas

EDUCATION: Post Graduate, J.D.

TIER: Luxury

ARCHETYPE: Sport Coupe Owner



ABOUT ME:

Ever since I opened my own law practice five years ago, it just seems like I don't have a free moment to myself. So, I have very little time to deal with things like shopping or servicing my roadster. Especially now that I am single again, there really just aren't enough hours in

the day Right now, it is overdue for an oil change at 15,0000 miles, but I just don't think about scheduling a service appointment until after the dealership is closed. I'd like to have after hours access when making a service request, as well as be able to track the work being done and the associated cost. Last time, the dealership didn't even call me when it needed more work, which was upsetting. And when the car is ready, it would be great to receive a text notifying me they are done so that I could just run by and pick it up. Or better yet, they could drop it off to me. I am so busy these days that it just doesn't seem like I have enough hours in the day.

GOALS

- Continue to build my practice and grow my client base
- Sell my house and move closer to my office
- · Work on cultivating a personal life to meet new people
- Go on a European vacation: France, Italy, and Spain

FRUSTRATIONS

- I just don't have enough hours in the day to get things done in my personal life
- Right now I am not handling everyday life things very well and I feel disorganized and chaotic
- I wish it was easier to interact with the dealership to simplify the service and repair process

MEDIA PREFERENCES/CHANNELS

- The Wall Street Journal, New York Times, Harvard Business Review, Dallas Morning News
- LinkedIn, Facebook, Twitter, Instagram
- CNN, MSNBC, Bloomberg, Showtime, Netflix, Prime

IDEAL EXPERIENCE

- Be able to schedule service requests 24/7
- Get service updates texted to me as the work is done
- Provide pick up and drop off services
- Be able to pay online, without ever going to the garage
- Receive notifications on new products & services

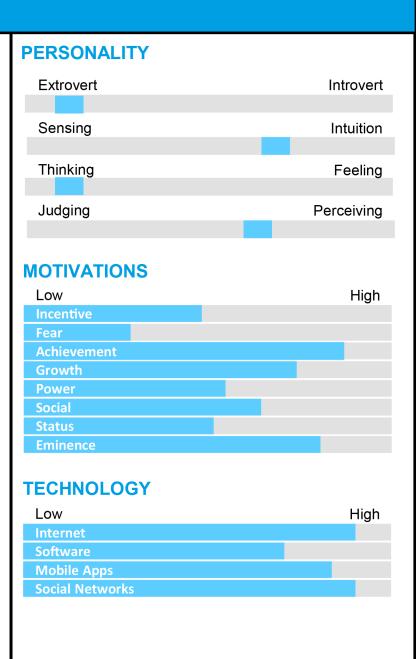


Figure 5-3. Sports coupe owner persona

Persona: Title **Version:** X.x Your Text • Your Text Your Text Your Text Your Text Customer **Expectations** Stage 1 Stage N+1 Stage 2 Stage 3 Stage 4 **CX Journey** 1. Your Text Customer Goals Dept #1 Dept #2 Dept #3 Dept #N+1 1 1 Your Text 1 Your Text Your Text Your Text Your Text 2 2 2 3 3 3 3 Touchpoints & 3 **Emotional Responses Positive Positive** Overall Customer Neutral Neutral Experience Negative Negative 1. Your Text **Improvement Ideas**

Figure 5-4. E2E CX journey map template

Persona: Sports Coupe Owner Version: 1.0 I want to find a reputable garage or I don't have a lot of time to take my I should be promptly greeted, and the I expect great service, high quality, Picking up my vehicle should be quick **Customer Expectations** dealership that offers high-quality vehicle in for service, so scheduling an check in process should be simple and and professionalism to gain my loyalty and easy, and I should receive an repairs and professional service. appointment should be simple. accurate, with items correctly done. and repeat business. accurate itemized final bill. **Evaluate** Dispose/Repurchase **CXJ: Service Vehicle Purchase Service Advocate** 1. The service light on my dashboard 1. I am greeted promptly and they are 1. I will refer this business to my 1. The deciding factor: I may/may not 1. Evaluate my short list based on has lit up, stating my vehicle needs reputation, service quality, location, prepared for my visit friends, family, coworkers, etc., if: do business with this dealership repair and/or service and professionalism 2. The service is performed within the · I am treated fairly and with 2. Ask friends, family, coworkers, etc., 2. Make a decision as to which one I specified timeframe 2. Excellent service will win my respect Customer 3. I am informed of and approve/ who provides their service will use in my area • The staff is professional business again 3. Give the garage or dealership a call Goals 3. Find a few reputable garages or decline additional work My repairs and/or service are 3. Poor service means I will go dealerships where I can get it fixed to schedule an appointment 4. Service is done right the first time completed on time and within the elsewhere next time 4. Research each option and determine 4. Arrange for a loaner vehicle the day 5. I receive an itemized bill and am original estimate a short list of possibilities of service walked through the work performed Dealership is professionally managed (clean and safe) **Branding** Sales Service **Financing** There is something wrong with my I am going to schedule an 7 The service agent was rude I would not refer this dealership if I am only lukewarm on using New my life depended on it. The way I Horizons again, after everything I vehicle appointment at New Horizons No rental car...UGH!!! was treated is inexcusable went through to get my vehicle Speak to people for referrals I just scheduled an appointment **Touchpoints &** properly serviced and repaired Stuff was added to my bill without for next Monday The service manager called and **Emotional Responses** my approval...very disappointing I think I found a reputable dealer apologized They also hooked me up with a to fix it Some repairs were not performed; She scheduled a 2nd appointment rental...score! I will have to take it in again to get the missed items fixed **Positive Positive** Overall **Neutral** Customer Experience Negative **Negative** 1. Develop a mobile app to make 1. Make scheduling an appointment 1. Send out feedback survey on app 1. Provide push notifications when 1. Provide training to the service staff **Improvement** finding information about service 2. Offer coupons/discounts on next and arranging for a rental car 2. Upgrade the rental car system next service is due Ideas and repairs easy to find available on the app 3. Send repair progress notifications 2. Call customers who have not been 4. Provide viewable bill on app 3. Do random follow-up customer calls back for over a year

Figure 5-5. Service vehicle customer experience journey map

New Horizons Service Department Strategic Planning Canvas

Date: 06/09/20XX

Iteration #1

Step 1: The Environment

Vision: Dedicated to customers and driven by excellence

Mission: To become the world's most renowned center for customer service in the automotive sector

Value proposition: Easy to buy and obtain service

Competitive Landscape?

We are the only dealer within a radius of 150 miles in the tristate area that sells and services this make of vehicle

Marketplace Challenges & Trends?

Another luxury vehicle competitor is building a dealership 25 miles from us, in the next town over

Step 3: Strategic Objectives

- Increase quarter-overquarter sales
- Increase the quality of our service to our customers
- Increase the use of Technology to effectively run our business
- Modernize our facilities

Step 4:Competitive Opportunities

- 1. Do random service follow up customer calls
- 2. Perform telephone customer inquiries on lapsed service
- 3. Develop a Service & Repair mobile app
- 4. Provide training to the service staff
- 5. Upgrade loaner car program system
- 6. Upgrade hardware throughout dealership

Step 5: KRs

- Increase quarter-over-quarter sales by 5 percent, for a cumulative total of 20 percent within the next 12 months
 - Increase service department sales by 2 percent per quarter by implementing a Service Follow-Up program
 - Increase service department sales by 3 percent per quarter by implementing a Lapsed Service Inquiry program
- Increase the quality of our service to our customers within the next 6 months by:
 - Decreasing the Service Request Error rate by 65 percent
 - Increasing our Net Promoter Score by 25 percent
- Increase the use of Technology to effectively run our business by:
 - Launching the first release of the Service and Repair
 Mobile App by the end of Q1 2019 and the second by Q2 2019
 - Performing an upgrade to the Loaner Car Program system upgrade by the end of Q4 2019
- Modernize our facilities by upgrading the computer hardware in the service dept. within the next 90 days

Step 6: Tactics

Please reference the following tactical plans:

- 1. After Service customer follow -up call program
- Service Lapsed
 customer call program
- 3. Service & Repair mobile app plan
- 4. Service staff training plan
- 5. Loaner Car Program system upgrade plan
- 6. Dealership computer hardware upgrade

Step 7: Workforce

The following staff and teams will be assigned to the following opportunities:

- 1. Service Dept & Technology
- Service Dept & Outside Customer Service firm
- 3. Loaner Car Dept and Technology
- 4. Service Dept
- 5. Service Dept
- 6. Technology

Step 8: Measure & Report

- KR measurements will be compiled by the Data Analytics group
- 2. Frequency will be based on the metric collected, based on the following schedule:
 - #1: Sales-quarterly
 - #2: Biweekly
 - #3: Monthly
 - #4: Monthly
- 3. Metrics results will be posted in the TBP team war room on the fifth day of each month

Step 2:

Customer/Persona Identification

- 1. Luxury sedan owner
- 2. Sports coupe owner
- 3. SUV owner
- 4. Truck owner
- 5. Van owner

2

Step 9: Evolve & Optimize

- 1. The Loaner Car program system upgrade will also require all the hardware to be upgraded throughout the dealership
- 2. The Loaner Car program's processes also need to be revised/modified, as the system undergoes the planned software update
- 3. Training will need to be developed and conducted to ensure service dept staff is up to date on the new processes

Figure 6-9. New Horizons service department strategic planning canvas

Quadrant II: Values Quadrant I: Beliefs Leading Self Leading Others Core Values Extended Values • Believe & trust in yourself • Be a servant leader & teacher Customer Centricity Agility Develop & maintain a healthy Purposefulness Quality & Innovation Respect others Adaptability mind & body Think w/a kaizen mind Respect, Honesty, & Integrity Responsiveness Possess a bias toward action Develop others Trust & Loyalty Inclusion Face challenges head-on Lean Mindset & Thinking Accountability & Mastery Diversity • Embrace innovation/disruption • Leverage common sense for Continuous Learning & Improvement Empowerment problem solving & decision making • Foster experimentation Teamwork & Collaboration Autonomy & Purpose • Imagination & Experimentation • Practice Emotional Intelligence (EQ) • Focus on quality, value & flow • Environmental Awareness Gather feedback Display persistence & tenacity Humility & Graciousness Practicality & Genuineness Visibility & Transparency • Be a student Always be improving (People, Observation & Reflection process, & technology) Plan Do and learning Economic & Social Responsibility **Quadrant IV: Actions Quadrant III: Behaviors** Act Check Methods Processes • Enterprise Alignment • Genchi Genbutsu • Eight Steps to a Lean Culture Customer-Driven Outcomes • Lean Enterprise Strategic Value Stream Mapping Business-Driven Outcomes **Planning Process** Voice of the Customer (VoC) Centralized Strategic Decision Making (CSDM) Framework Objectives & Key Results (OKRs) Customer Persona Analysis Strategic Planning Canvas · Conversations, Feedback, and Customer Experience Vision, Mission, & Value Proposition Recognition (CFRs) Journey Mapping (CXJM) Strategic Themes Toyota Production System (TPS) • Omnichannel Customer Competitive opportunities • Toyota Business Practices (TBP) Experience Strategy (OCXS) On-the-Job Development (OJD) Tactical plans and operational tasks Design Thinking • Scientific Method – PDCA Cycle Investment Strategy • Lean Startup Strategic Roadmap Lean Six Sigma Minimum Viable Product (MVP) release Plan Agile Methods

Figure 8-1. The Leading Culture dimension

New Horizons Service Department Strategic Planning

Date: 06/09/20XX

Iteration #1

Step 1: The Environment

Vision: Dedicated to customers and driven by excellence

Mission: To become the world's most renowned center for customer service in the automotive sector Value proposition: Easy to

Competitive Landscape?

buy and obtain service

We are the only dealer within a radius of 150 miles in the tristate area that sells and services this make of vehicle

Marketplace Challenges & Trends?

Another luxury vehicle competitor is building a dealership 25 miles from us, in the next town over

Step 2: Customer/ Persona Identification

- 1. Luxury sedan owner
- 2. Sports coupe owner
- 3. SUV owner
- 4. Truck owner
- 5. Van owner

Step 3: Strategic Objectives

- Increase quarter-overquarter sales
- 2. Increase the quality of our service to our customers
- 3. Increase the use of technology to effectively run our business
- 4. Modernize our facilities

Step 4: Competitive Opportunities

- 1. Perform random service follow-up customer calls
- 2. Perform telephone customer inquiries on lapsed service
- 3. Develop a service & repair mobile app 2.
- 4. Provide training to the service staff
- 5. Upgrade loaner car program system
- 6. Upgrade hardware throughout dealership

Step 5: KRs

- 1. Increase quarter-over-quarter sales by 5%, for a cumulative total of 20% within the next 12 months
- Increase service department sales by 2%/quarter by implementing a service follow-up program
- Increase service department sales by 3% per quarter, by implementing a lapsed service Inquiry program
- 2. Increase the quality of our service to our customers within the next 6 months by:
 - Decreasing the service request error rate by 65%
 - Increasing our Net Promoter Score by 25%
- 3. Increase the use of technology to effectively run our business by:
- Launching the first release of the service and repair mobile app by the end of Q1 2019 and the second by Q2 2019
- Performing an upgrade to the loaner car program system upgrade by the end of Q4 2019
- 4. Modernize our facilities by upgrading the computer hardware in the service department within the next 90 days

Step 8: Measure & Report

- OKRs will be complied by the data analytics group
- 2. Frequency will be based on the metric collected, on the following schedule:
 - #1: Sales-quarterly
 - #2: Biweekly
 - #3: Monthly
- #4: Monthly
- Metrics results will be posted in the TBP team war room on the fifth day of each month

Step 6: Tactics

- 1. After service customer follow-up call program
- Service-lapsed customer call program
- 3. Service & repair mobile app plan
- 4. Service staff training plan
- Loaner car program system upgrade plan
- 6. Hardware upgrade

Step 7: Workforce

- 1. Service department & technology
- Service department &
 outside customer service
 firm
- Loaner car department & technology
- 4. service department
- 5. service department
- 6. Technology

Step 9: Evolve & Optimize

- 1. The Loaner Car program system upgrade will also require all the hardware to be upgraded throughout the dealership
- 2. The Loaner Car program's processes also need to be revised/modified, as the system undergoes the planned software update
- 3. Training will need to be developed and conducted to ensure service dept staff is up to date on the new processes

Figure 8-9. New Horizons Service Department strategic planning canvas

Strategic Objective	Opportunity	Tactical Plan	Timeframe	Cost Estimate & Investment Strategy					
Strategic Objective	Оррогсинсу	racticarrian	rimename	Cost Estimate	Total	Investment Type			
Increase quarter-over- quarter sales	1. Do random service follow-up customer calls	 After Service customer follow-up call program 	Next 12 months	\$1.25M	\$2.25M	New			
	2. Perform telephone customer inquiries on lapsed service	2. Service Lapsed customer call program	Next 12 months	\$1.00M		Core			
Increase the quality of our service to our customers	Develop a Service & Repair mobile app	Service & Repair mobile device application	Next 6 months	\$6.00M	\$7.50M	New			
	4. Provide training to the service staff	4. Service agent customer service training	Next 6 months	\$1.50M		Enhancement			
Increase the use of technology to effectively run our business	5. Upgrade loaner car program system	5. Loaner Car Program (LCP) system upgrade	Next 12 months	\$5.00M	\$5.00M	Enhancement			
Modernize our facilities	6. Upgrade hardware 6. Dealership Computer throughout dealership hardware upgrade		Next 90 days	\$2.50M	\$2.50M	Enhancement			
Total Service Department Investment Allocation \$17.25M \$17.25M									
Figure 8-10. New Horizons service department investment strategy by theme									

Respect for People	Teamwork	Quality	Empowerment	Visibility & Transparency	Continuous Evolution	Enjoyment				
Isolated and inaccessible leadership (IO)	Work is focused on the individual performer; the kaizen team is an island (IO)	Billing inaccuracies and incomplete work result in irate customers (EO)	Problem solving deferred to supervisor (IO)	Staff lacks knowledge around dealership's vision, mission, and values (OAO)	Staff lacks knowledge around dealership's vision, mission, and values (OAO)	Formal conversational style; casual interaction is minimal (IO)				
Respect is given on formal power and position (IO)	Command-and- control leadership style; continuous feedback not supported (OAO)	Discounts given to defuse irritated customers (EO)	Staff lacks a sense of urgency and ownership (EO)		Training must be done on days off; discourages continuous learning (OAO)	Service noise level is low; Parts playing country music (IO)				
Customer interactions are professional, friendly, and polite (IO)	Siloed and splintered organization; little interaction/teamwork between depts (OAO)	Irate customers venting to each other in the waiting room (EO)	No motivation to greet customers or go the "extra mile" on the customer service side (EO)	Posters denote kaizen progress, supporting visibility and transparency (WEO)	Loan department not offering/selling extended warranties (OAO)	Low job satisfaction; in their work (EO)				
Customer conflict resolution is professional and thoughtful (IO)	Service department war room is Lean Central; pillar of teamwork in action (WEO)	No follow-up from sales people regarding service or customer care (OAO)	-	Certifications on the wall are old and out of date (WEO)	Inconsistent appearance of the dealership overall; outdated décor/ high tech equipment looks odd (WEO)	Dealership's tone is solemn and subdued; friendly but disengaged staff (EO)				
Compensation/ rewards based on longevity, not performance (OAO)		Cluttered and disorganized service bays; no central storage for parts (WEO)	Observations IO = Interaction EO = Emotions OAO = Organiz WEO = Work Er	ational Aspects	Cramped working conditions; no personal items (WEO)	Dealership doesn't convey vibrancy; bathrooms are in a state of disarray (WEO)				
Bonuses are carrot- and-stick approach (OAO)		Intake area full of stains on floors and walls (WEO)			Doors are full of finger-prints; paint is rubbing off door handles (WEO)					
Pay deductions for customer discounts (OAO)										
	Figure 8-12. New Horizons Service Department Culture Gap Analysis Worksheet									

Respect for People	Teamwork	Quality	Em	powerment	Visibility & Transparency	Continuous Evolution	Enjoyment				
Isolated and inaccessible leadership (IO) B1 & 3; AP4, 6, & 7; AM1	Work is focused on the individual performer; the kaizen team is an island (IO) B3, AP2, 3, 4, 6, & 7	Billing inaccuracies and incomplete work result in irate customers (EO) B2; AP2, 3, 4, & 6; AM1	deferred to supervisor (IO) AP1, 2,3,4,&6; AM7		deferred to supervisor (IO) AP1,		Staff lacks knowledg around dealership's vision, mission, and values (OAO) B1, 2, 3, & 4; AP1, 3, & 4	Staff lacks knowledge around dealership's vision, mission, and values (OAO) B1,2,3,&4;AP1,3,&4	Formal conversational style; casual interaction is minimal (IO) AP1,3,&4; AM1		
Respect is given on formal power and position (IO) B1 & 3; AP1 & 7; AM1	Command-and- control leadership style; continuous feedback not supported (OAO) B1; AP2, 3, & 4; AM1	Discounts given to defuse irritated customers (EO) B2; AP2, 3, 4, & 6; AM1	Staff lacks a sense of urgency and ownership (EO AP1, 2, 3, 4, & 6; AM7)		urgency and ownership (EO		urgency and ownership (EO			Training must be done on days off; discourages continuous learning (OAO) AP2, 3. & 4	Service noise level is low; parts playing country music (IO) B4; AP2 & 6; AM1
Customer interactions are professional, friendly, and polite (IO) B1, 2, & 3; AP6	Siloed and splintered organization; little interaction/teamwork between depts (OAO) B1 & 3; AP6, AM2 & 7	Irate customers venting to each other in the waiting room (EO) B2, AP2, 3, 4, & 7; AM1	to greet customers or go the "extra mile" on the customer service side (EO)		to greet customers or go the "extra mile" on the customer		Posters denote kaizen progress, supporting visibility and transparency (WEO) B1; AP2 & 6	Loan department not offering/selling extended warranties (OAO) B3 & 4; AP2, 3, & 6	Low job satisfaction; in their work (EO) B2 & 4; AP2 & 6; AM1		
Customer conflict resolution is professional and thoughtful (IO) B1, 2, & 3; AP6	Service department war room is Lean Central; pillar of teamwork in action (WEO) B1,2,&3;AP2,3,4,&6	No follow-up from sales people regarding service or customer care (OAO) B2 & 3; AP2, 3, 4, & 6; AM1	-		Certifications on the wall are old and out of date (WEO) AP2,3,&6	Inconsistent appearance of the dealership overall; outdated décor/ high tech equipment looks odd (WEO) B2 & 4; AP2 & 6; AM1	Dealership's tone is solemn and subdued; friendly but disengaged staff (EO) B 2 & 4; AP2 & 6; AM1				
Compensation/ rewards based on longevity, not performance (OAO) B4; AP2, 3, & 4		Cluttered and disorganized service bays; no central storage for parts (WEO) B3; AP2, 3, 4, & 6; AM1		Observations IO = Interaction EO = Emotions OAO = Organiz WEO = Work Er	ational Aspects	Cramped working conditions; no personal items (WEO) B2 & 4; AP2 & 6; AM1	Dealership doesn't convey vibrancy; bathrooms are in a state of disarray (WEO) B2 & 4; AP2 & 6; AM1				
Bonuses are carrot- and-stick approach (OAO) B4; AP2, 3, & 4		Intake area full of stains on floors and walls (WEO) AP3 & 6, AM1				Doors are full of finger-prints; paint is rubbing off door handles (WEO) B2 & 4; AP2 & 6; AM1					
Pay deductions for customer discounts (OAO) B4; AP2, 3, & 4											

Figure 8-14. New Horizons Service Department Culture Gap Analysis Worksheet (revised)

Leadership Leads: Nancy/Jim	Collaboration Leads: Lisa/Donna	Customer Service Leads: Lisa/Randy	Self-Leadership Leads: Jannie/Rick	Rewards & Recognition Leads: Nancy/Chuck	Brand & Reputation Leads: Lisa/Mary	Brand & Reputation
Isolated and inaccessible leadership (IO) B1 & 3; AP4, 6, & 7; AM1 Respect for People	Work is focused on the individual performer; the kaizen team is an island (IO) B3, AP2, 3, 4, 6, & 7 Teamwork	No follow-up from sales people regarding service or customer care (OAO) B2 & 3; AP2, 3, 4, & 6; AM1 Quality	Problem solving deferred to supervisor (IO) AP1, 2, 3, 4, 6; AM7 Empowerment	Training must be done on days off; discourages continuous learning (OAO) AP2, 3. & 4 Continuous Evolution	Irate customers venting to each other in the waiting room (EO) B2, AP2, 3, 4, & 7; AM1 Quality	Dealership doesn't convey vibrancy; bathrooms are in a state of disarray (WEO) B2 & 4; AP2 & 6; AM1 Enjoyment
Respect is given on formal power and position (IO) B1 & 3; AP1 & 7; AM1 Respect for People	Formal conversational style; casual interaction is minimal (IO) AP1,3,&4; AM1 Enjoyment	No motivation to greet customers or go the "extra mile" on the customer service side (EO) AP 1, 2, 3, 4, & 6; AM7 Empowerment	Staff lacks a sense of urgency and ownership (EO) AP1, 2, 3, 4, & 6; AM7 Empowerment	Compensation/rewards based on longevity, not performance (OAO) B4; AP2, 3, & 4 Respect for People	Service noise level is low; Parts playing country music (IO) B4; AP2 & 6; AM1	Doors are full of fingerprints; paint is rubbing off doorhandles (WEO) B2 & 4; AP2 & 6; AM1 Continuous Evolution
Command-and-control leadership style; continuous feedback not supported (OAO) B1; AP2, 3, & 4; AM1 Teamwork	Siloed and splintered organization; little interaction/ teamwork between depts (OAO) B1 & 3; AP6, AM2 & 7 Teamwork	Billing inaccuracies and incomplete work result in irate customers (EO) B2; AP2, 3, 4, & 6; AM1 Quality	Certifications on the wall are old and out of date (WEO) AP2, 3, & 6 Visibility & Transparency	Bonuses are carrot-and- stick approach (OAO) B4; AP2, 3, & 4 Respect for People	Low job satisfaction; in their work (EO) B2 & 4; AP2 & 6; AM1 Enjoyment	Cramped working conditions; no personal items (WEO) B2 & 4; AP2 & 6; AM1 Continuous Evolution
	Loan department not offering/selling extended warranties (OAO) B3 & 4; AP2, 3, & 6 Continuous Evolution	Discounts given to defuse irritated customers (EO) B2; AP2, 3, 4, & 6; AM1 Quality	Staff lacks knowledge around dealership's vision, mission, and values (OAO) B1, 2, 3, & 4; AP1, 3, & 4 Visibility & Transparency	Pay deductions for customer discounts (OAO) B4; AP2, 3, & 4 Respect for People	Dealership's tone is solemn and subdued; friendly but disengaged staff (EO) B2 & 4; AP2 & 6; AM1 Enjoyment	Intake area full of stains on floors and walls (WEO) AP3 & 6, AM1 Continuous Evolution
	Service department war room is Lean Central; pillar of teamwork in action (WEO) B1, 2, & 3; AP2, 3, 4, & 6 Teamwork	Customer interactions are professional, friendly, and polite (IO) B1,2, & 3; AP6 Respect for People	Posters denote Kaizen progress, supporting visibility and transparency (WEO) B1; AP2 & 6 Visibility & Transparency	Observations IO = Interaction EO = Emotions	Legend IS	Cluttered and disorganized service bays; no central storage for parts (WEO) B3; AP2, 3, 4, & 6; AM1 Quality
		Customer conflict resolution is professional and thoughtful (IO) B1,2, & 3; AP6 Respect for People	Staff lacks knowledge around dealership's vision, mission, and values (OAO) B1, 2, 3, & 4; AP1, 3, & 4 Visibility & Transparency		ational Aspects	

Figure 8-15 New Horizons Service Department Culture Gap Analysis Worksheet by theme

New Horizons Service Department Strategic Planning Canvas – Quarter 1

Date: 06/30/20XX

Iteration #2

Vision: Dedicated to customers and driven by excellence

Mission: To become the world's most renowned center for customer service in the automotive sector Value proposition: Easy to buy and obtain service

Competitive Landscape?

We are the only dealer within a radius of 150 miles in the tristate area that sells and services this make of vehicle

Marketplace Challenges & Trends?

Another luxury vehicle competitor is building a dealership 25 miles from us, in the next town over

Step 2: Customer/ Persona Identification

- 1. Luxury sedan owner
- 2. Sports coupe owner
- 3. SUV owner
- 4. Truck owner
- 5. Van owner

Step 1: The Environment | Step 3: Strategic Objectives

SO1: Increase quarter-over-quarter sales by 5%

SO2: Increase the quality of our service to our customers

SO3: Increase the use of technology to effectively run our business

SO4: Modernize our facilities

Step 4: Competitive Opportunities

CO1: Do random service follow-up customer calls

CO2: Perform telephone customer inquiries on lapsed service

CO3: Complete the Service Request Intake process kaizen efforts

CO4: Provide training to the service staff

CO5: Develop a service & repair mobile app

CO6: Upgrade loaner car program system

CO7: Upgrade hardware/décor throughout dealership

Step 5: Key Results (KRs) SO1/CO1

- a. Pilot Follow-up Call Script
- b. Make 25 outbound calls/week
- c. Set 5 appointments/month
- d. Increase sales by 2%

SO1/CO2

- a. Pilot Lapsed service Call Script
- b. Make 50 outbound calls/week
- c. Set 10 appts/month
- d. Increase sales by 3%

SO2/CO3

a. Decrease the service Request Error rate by at least 30%

b. Increase NPS by 15%

SO2/CO4

- a. Secure the training vendor
- b. Complete training
- c. Increase NPS by 15%

SO3/CO5

- a. Complete 100% of process work
- b. Launch 1st release of app

SO4/CO7

- a. Complete 100% of Hardware upgrade
- b. Compete 100% of Dealership redecorating

Step 6: Tactics

- 1. After Service Customer Follow-up Call program
- 2. Service Lapsed Customer Call program
- Service & Repair Mobile App plan
- Service Staff Training plan
- Loaner Car Program System Upgrade plan
- Dealership Computer Hardware Upgrade

Step 7: Workforce

- 1. Service Dept & Technology
- 2. Service Dept & Outside Customer Service firm
- 3. Loaner Car Dept and Technology
- 4. Service Dept
- 5. Service Dept
- 6. Technology

Step 8: Measure & Report

- 1. KPI measurements will be complied by the Data Analytics group
- 2. Frequency will be based on the metric collected, based on the following schedule:
 - #1: Sales-quarterly
 - #2: Biweekly
 - #3: Monthly
 - #4: Monthly
- 3. Metrics results will be posted in the TBP team war room on the fifth day of each month

Step 9: Evolve & Optimize

- 1. The loaner car program system upgrade will also require all the hardware to be upgraded throughout the dealership
- 2. The loaner car program's processes also need to be revised/modified, as the system undergoes the planned software update
- 3. Training will need to be developed and conducted to ensure service Dept staff is up to date on the new processes

Figure 8-17. New Horizons service department Quarter 1 strategic planning canvas

Strategic Objective	Competitive Opportunity	Key Results	Assigned To	Mid	Status (RAG)	Final Grade	Final Status (RAG)
Increase	1. Implement a service	a. Pilot follow-up call script	Gail	0%		0%	
quarter-over-quarter sales	follow-up customer call program	b. Make 25 outbound calls/week		0%		0%	
		c. Set 5 appointments per month		0%		0%	
		d. Increase sales by 2%		0%		0%	
	2. Perform telephone	a. Pilot Lapsed Service Call script	Gail	0%		0%	
	customer inquiries on lapsed service	b. Make 50 outbound calls/week		0%		0%	
	·	c. Set 10 appointments per month		0%		0%	
		d. Set 10 appointments per month		0%		0%	
Increase the quality of our service to our customers	3. Complete the Service Request Intake process	a. Decrease the Service Request Error rate by at least 30%	Jannie	0%		0%	
	kaizen efforts	b. Increase NPS by 15%		0%		0%	
	4. Provide training to the service staff	a. Secure the training vendor	Donna	0%		0%	
		b. Complete training		0%		0%	
		c. Increase NPS by 15 percent		0%		0%	
	5. Develop a Service & Repair mobile app	a. Complete 100% of process work	Rick	0%		0%	
		b. Release Service & Repair Launch 1st mobile app		0%		0%	
Increase the use of technology to effectively run our business	6. Upgrade loaner car program system	N/A	Donna	0%		0%	
Modernize our facilities	7. Upgrade hardware/décor throughout dealership	a. Complete 100% of hardware upgrade	Randy	0%		0%	
		b. Complete 100% of dealership		0%		0%	

Figure 8-18. New Horizons service department Quarter 1 OKRs

Objective Type	Objective	Opportunity Type	Opportunity	Role	Key Results	Mid	Status (RAG)	Final Grade	Final Status (RAG)		
Strategic		Competitive	C3: Complete the Service Request Intake process	Lead	a. Decrease the Service Request Error rate by at least 30%	0%		0%			
	S2. Increase		kaizen efforts		b. Increase NPS by 15%	0%		0%			
Strategic		Competitive/	's is managed straining to	Lead/ sensei to	a. Maintain 100% compliance with Service Technician Certifications each quarter	0%		0%			
Strategie	the quality of our service to		offer and provide superior service to our customers	Randy	b. Maintain overall "Current" certification status from auto manufacturer over the next 12 mos	0%		0%			
Strategic	our customers	our customers	our customers	Competitive/ Culture (Self Leadership)	C9: Empower employees to more fully exercise their self-leadership skills and abilities	Lead/ sensei to Rick	a. Provide TBP training to all service department staff within the next 90 days to enhance problem-solving capabilities and develop a sense of urgency to solve problems/issues	0%		0%	
					b. Provide OJD to the directors inside of the dealership in the next 90 days	0%		0%			
Lean	L1: Increase my		G1: Complete the advanced customer service training course	Sole	a. Complete the course within the next 30 days	0%		0%			
Leadership	customer service skills	Growth		Performer	b. Raise my personal NPS by 10 points in the next 90 days	0%		0%			
Lean	L2: Increase my ability to believe	Constitu		Sole	a. Complete phase II within the next 90 days	0%		0%			
Leadership	andtrust in myself, facing challenges head on	Growth			Performer	b. Ensure the OKRs remain in Green status in the next 90 days	0%		0%		
Lean	L3: Dedicate time and energy to self-development and mentoring/	Growth	G3: Receive on-the-job development coaching/ mentoring from Nancy during Phase II Service	Sensei to Rick/	a. Execute the four steps of OJD, using PDCA cycle in Q1	0%		0%			
Leadership	coaching others		Request Intake Process project	Randy	b. Set OKRs for each within week 1 of Q1	0%		0%			

Figure 9-7. Jannie Peterson's individual first-quarter OKRs

Objective Type	Objective	Opportunity Type	Opportunity	Role	Key Results	Mid	Status (RAG)	Final Grade	Final Status (RAG)			
Strategic		Competitive		Lead	a. Decrease the Service Request Error rate by at least 30%	0%		0%				
			kaizen efforts		b. Increase NPS by 15%	0%		0%				
Strategic	the quality of our service to our customers	Competitive/ Culture (Self	ic manaractarer straining to	Lead/ sensei to	a. Maintain 100% compliance with Service Technician Certifications each quarter	0%		0%				
Strategic		Leadership)	offer and provide superior service to our customers		b. Maintain overall "Current" certification status from auto manufacturer over the next 12 mos	0%		0%				
Strategic		our customers	our customers		Competitive/ Culture (Self Leadership)	C9: Empower employees to more fully exercise their self-leadership skills and abilities	Lead/ sensei to Rick	a. Provide TBP training to all service department staff within the next 90 days to enhance problem-solving capabilities and develop a sense of urgency to solve problems/issues	0%		0%	
					b. Provide OJD to the directors inside of the dealership in the next 90 days	0%		0%				
Lean	L1: Increase my		G1: Complete the advanced	Sole	a. Complete the course within the next 30 days	0%		0%				
Leadership	customer service skills	Growth	customer service training course	Performer	b. Raise my personal NPS by 10 points in the next 90 days	0%		0%				
Lean	L2: Increase my ability to believe	Cucuth		Sole	a. Complete phase II within the next 90 days	0%		0%				
Leadership	andtrust in myself, facing challenges head-on	Growth		Performer	b. Ensure the OKRs remain in Green status in the next 90 days	0%		0%				
	L3: Dedicate time	nd energy to elf-development nd mentoring/	G3: Receive on-the-job development coaching/ mentoring from Nancy during Phase II Service RequestIntake Process project	Sole Performer	a. Execute the four steps of OJD, using PDCA cycle in Q1	0%		0%				
Lean	self-development				b. Conduct weekly sensei/student sessions with Nancy	0%		0%				
	coaching others				c. Set OKRs for each within week 1 of Q1	0%		0%				
			G4: Provide mentoring/ coaching to Randy and Rick									

Figure 9-9. Jannie Peterson's individual first quarter OKRs (revised)

Jannie Peterson's Q1 Lean Leader's Self-Development Canvas

Date: 07/20/20XX

Iteration: 1

Step 1: Leading Self Beliefs

- Believe, Trust,
 Persistence, & Tenacity:

 Score ___5 ___
- 2. Healthy Mind & Body: Score 9
- 3. Handling Challenges & Bias for Action:

 Score__3.5___
- 4. Problem Solving & Decision-Making:Score 8
- 5. Emotional Intelligence: **Score** 8___
- 6. Learning & Development: **Score**__9___

Step 3: Lean Leadership Objectives

- **L1:** Increase my customer service skills
- **L2:** Increase my ability to believe and trust in myself and face challenges head on
- L3: Dedicate time and energy to self-development and mentoring/coaching others

Step 5: Key Results (KRs)

L1/G1.a.: Complete the course within the next 30 days **L1/G1.b.:** Raise my personal NPS by 10 points in the next 90 days

L2/G2.a.: Complete phase II within the next 90 days **L2/G2.b.:** Ensure the OKRs remain in Green status in the next 90 days

L3/G3.a.: Execute the four steps of OJD, using PDCA cycle in Q1

L3/G3.b.: Conduct weekly Sensei/Student sessions with Nancy

L3/G4.a.: Set OKRs for each within week 1 of Q1 L3/G4.b.: Conduct monthly CFRs with both

Step 4: Growth Opportunities

- **G1:** Complete the advanced customer service training course
- **G2:** Lead the Phase II Service Request Intake Process Kaizen team
- **G3:** Provide mentoring/ coaching to Randy and Rick

Step 7: Engage & Execute Observations

- I will need to make sure I have a backup when I am out during training
- 2. Since I'll be mentoring both Rick and Randy, I need to ensure I schedule time with Nancy to discuss the process.

Step 6: Tactics

Please reference the following tactical plans:

- 1. Advanced customer service training course
- 2. The Phase II Service
 Request Intake Process
 Kaizen project
- 3. On-the-Job Development coaching/mentoring process for the Phase II Service Request Intake Process project

Step 9: Evolve & Optimize

Add the following KR to the L3G3 opportunity:

- b. Conduct weekly Sensei/Student sessions with Nancy
 - i. Schedule regular sessions with Nancy
 - ii. Conduct sessions
 - iii. Implement course corrections
 - iv. Provide feedback to Nancy on results

Step: 8: Measure & Report

- 1. Progress will be officially reported twice per quarter.
- 2. The first checkpoint is 45 days after the start of qtr
- 3. While the 2nd checkpoint will be held 3 days after the end of the quarter
- 4. OKR status will be tracked using tracking template.
- Status will be reported using the standard reporting scale
- 6. Lean Leadership Self-Development CFRs will be conducted on a weekly basis between the student and Sensei

Step 2: Values & Personal True North

- Respect for People
- Continuous Improvement
- Teamwork
- Quality
- Mastery
- Empowerment
- Customer Centricity

Vision: To excel at being an exceptional Lean leader who believes and trusts in herself and who is committed to self development, serving others, and providing high quality customer service

Mission: To encourage and empower myself and others to become the best Lean leaders possible

Value Proposition: To courageously lead and empower myself and others using my Lean mindset so that I face challenges head on, build future leaders, and provide high quality customer service, which are all achieved through my dedication to continuous improvement, respect for people, and commitment to teamwork

Figure 9-10. Jannie Peterson's Q1 Lean leader's self-development canvas