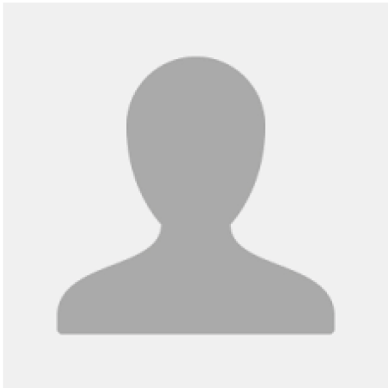


# First Name, Last Name

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?

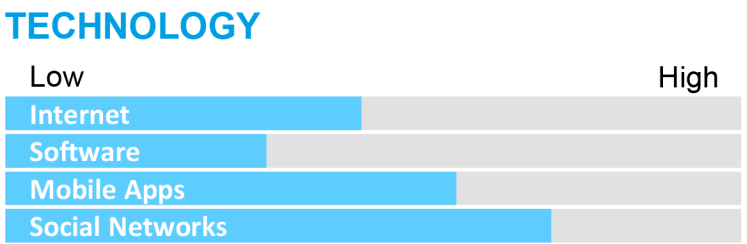
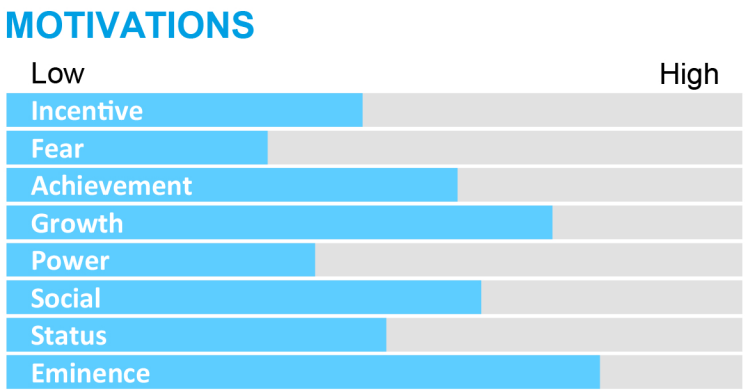
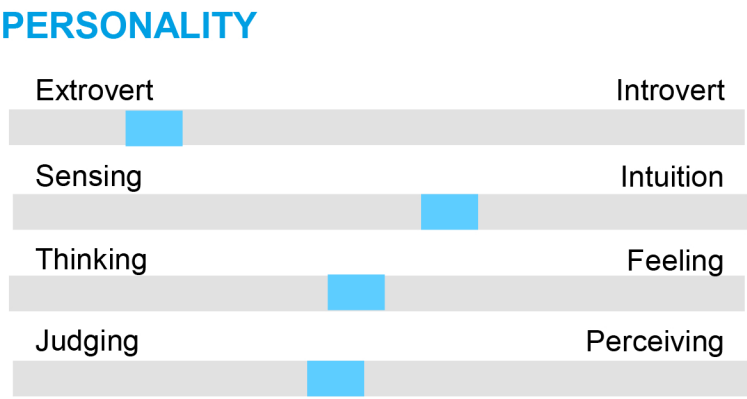


Figure 5-2. Customer persona template

# 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 15,000 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

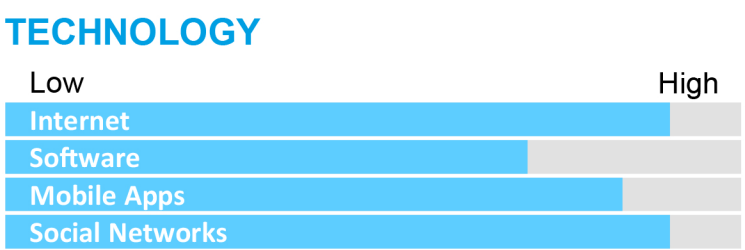
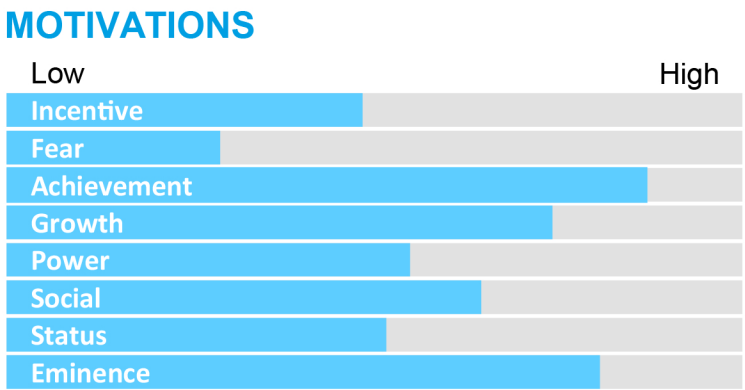
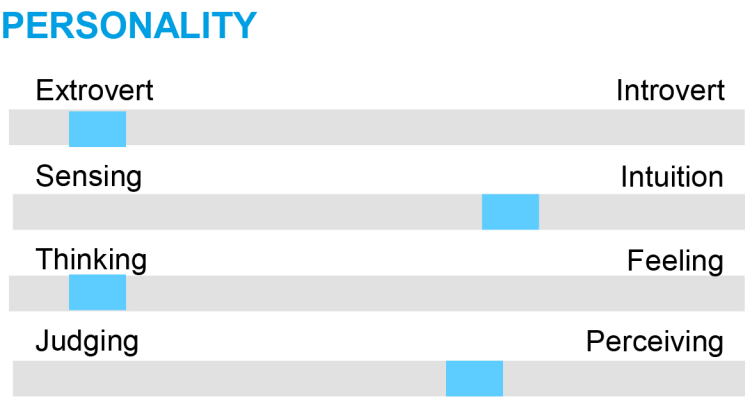


Figure 5-3. Sports coupe owner persona

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

Figure 5-4. E2E CX journey map template

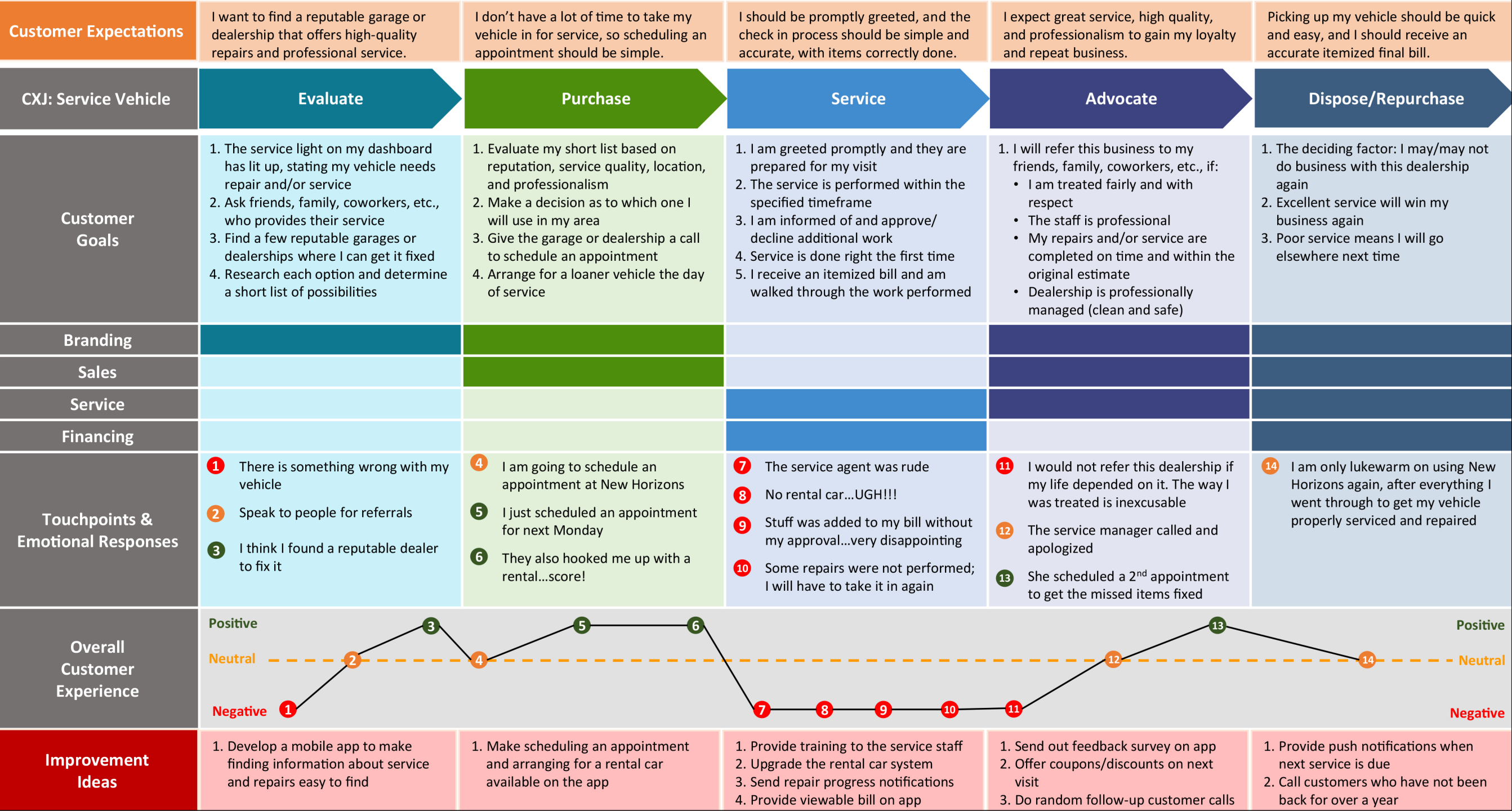
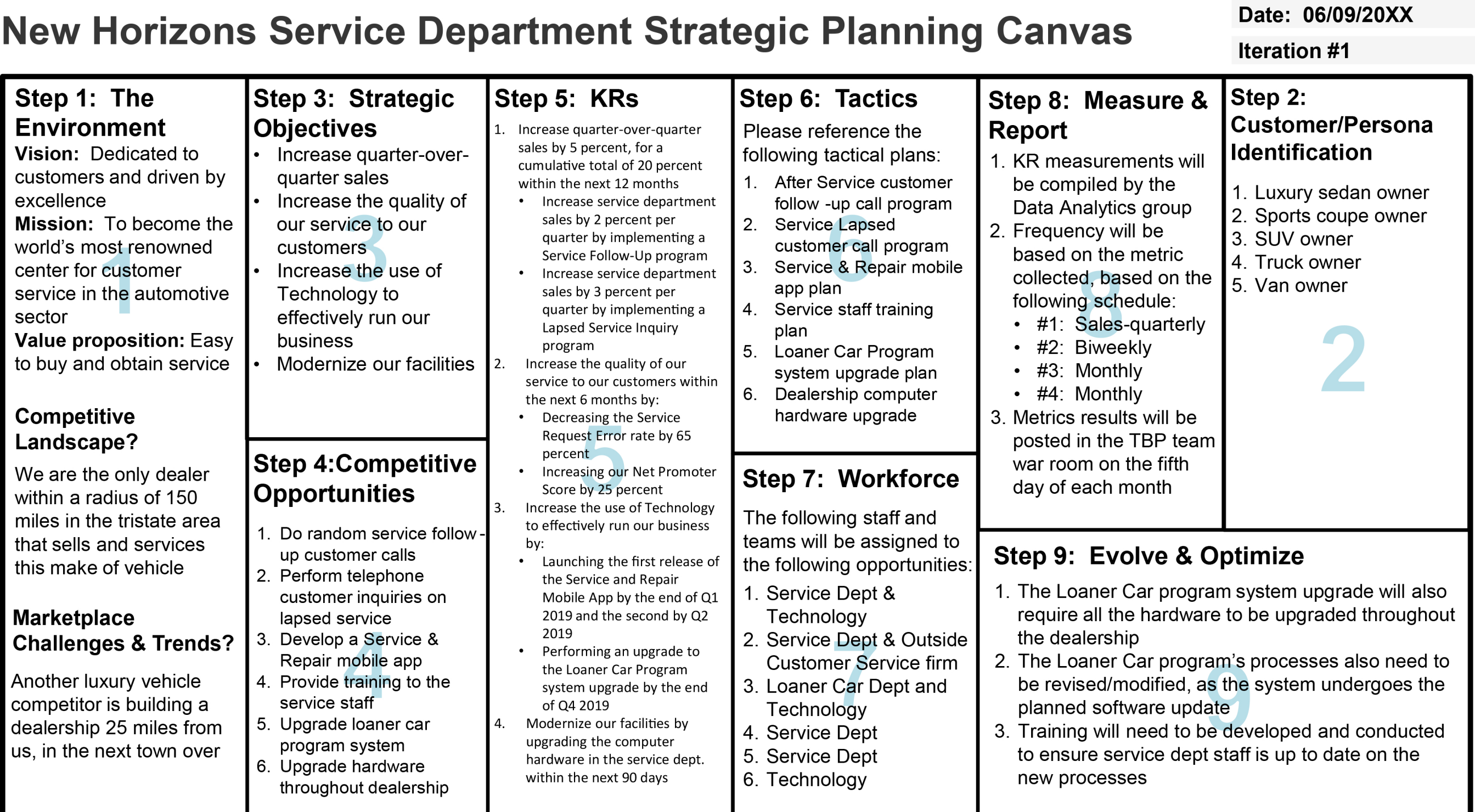
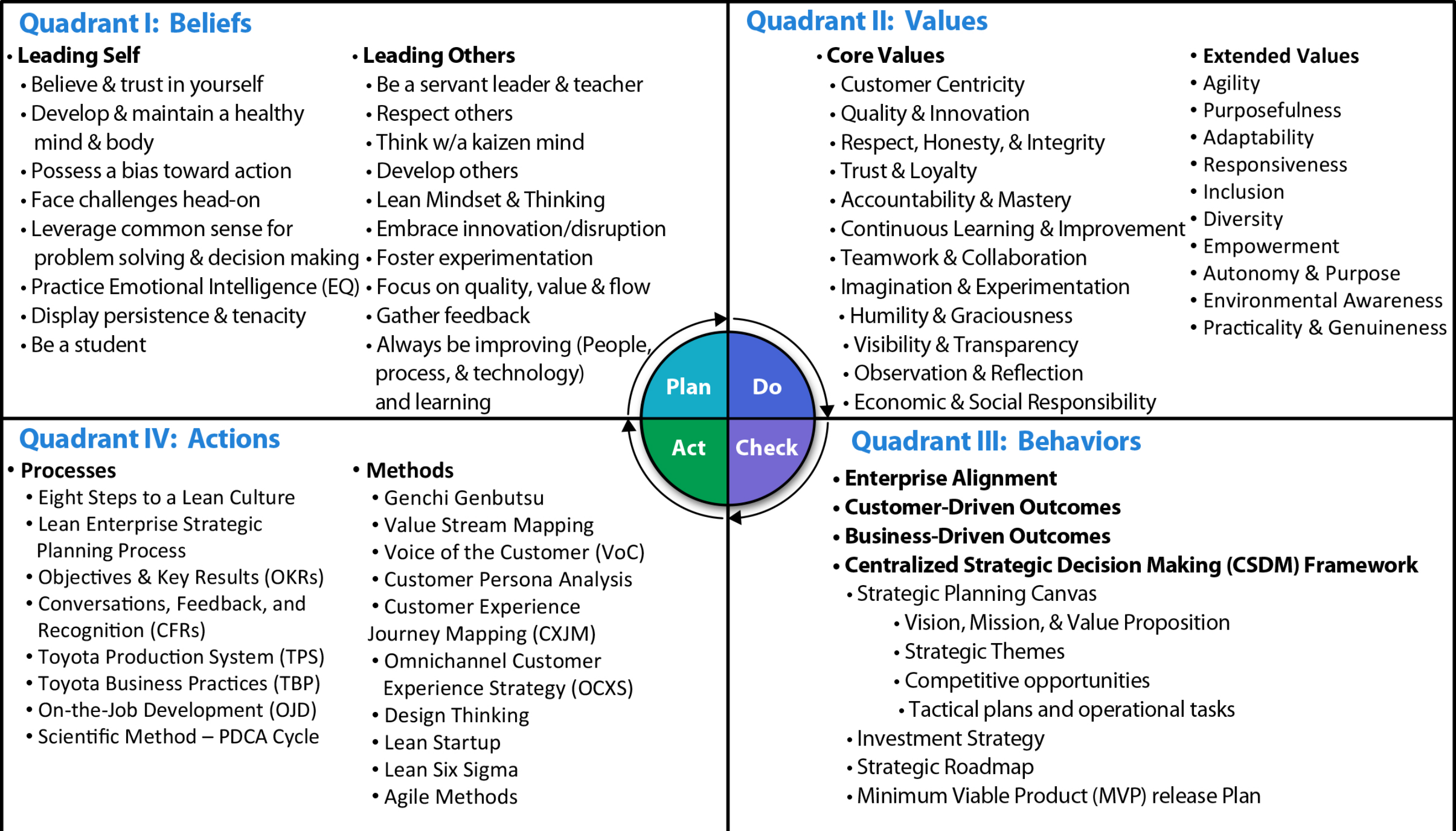


Figure 5-5. Service vehicle customer experience journey map







**Figure 8-1. The Leading Culture dimension**

# New Horizons Service Department Strategic Planning

Date: 06/09/20XX

Iteration #1

<b>Step 1: The Environment</b> <b>Vision:</b> Dedicated to customers and driven by excellence <b>Mission:</b> To become the world’s most renowned center for customer service in the automotive sector <b>Value proposition:</b> Easy to buy and obtain service <b>Competitive Landscape?</b> We are the only dealer within a radius of 150 miles in the tristate area that sells and services this make of vehicle <b>Marketplace Challenges &amp; Trends?</b> Another luxury vehicle competitor is building a dealership 25 miles from us, in the next town over	<b>Step 3: Strategic Objectives</b> 1. Increase quarter-over-quarter 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		<b>Step 5: KRs</b> 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			<b>Step 8: Measure &amp; Report</b> 1. 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 3. Metrics results will be posted in the TBP team war room on the fifth day of each month
	<b>Step 4: Competitive Opportunities</b> 1. Perform 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					
<b>Step 2: Customer/Persona Identification</b> 1. Luxury sedan owner 2. Sports coupe owner 3. SUV owner 4. Truck owner 5. Van owner			<b>Step 6: Tactics</b> 1. After service customer follow-up call program 2. Service-lapsed customer call program 3. Service & repair mobile app plan 4. Service staff training plan 5. Loaner car program system upgrade plan 6. Hardware upgrade	<b>Step 7: Workforce</b> 1. Service department & technology 2. Service department & outside customer service firm 3. Loaner car department & technology 4. service department 5. service department 6. Technology	<b>Step 9: Evolve &amp; Optimize</b> 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		
				Cost Estimate	Total	Investment Type
Increase quarter-over-quarter sales	1. Do random service follow-up customer calls	1. 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	3. Develop a Service & Repair mobile app	3. 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 throughout dealership	6. Dealership Computer 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)	<b>Observations Legend</b> IO = Interactions EO = Emotions OAO = Organizational Aspects WEO = Work Environment		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	Empowerment	Visibility & Transparency	Continuous Evolution	Enjoyment
Isolated and inaccessible leadership (IO) <b>B1 &amp; 3; AP4, 6, &amp; 7; AM1</b>	Work is focused on the individual performer; the kaizen team is an island (IO) <b>B3, AP2, 3, 4, 6, &amp; 7</b>	Billing inaccuracies and incomplete work result in irate customers (EO) <b>B2; AP2, 3, 4, &amp; 6; AM1</b>	Problem solving deferred to supervisor (IO) <b>AP1, 2, 3, 4, &amp; 6; AM7</b>	Staff lacks knowledge around dealership's vision, mission, and values (OAO) <b>B1, 2, 3, &amp; 4; AP1, 3, &amp; 4</b>	Staff lacks knowledge around dealership's vision, mission, and values (OAO) <b>B1, 2, 3, &amp; 4; AP1, 3, &amp; 4</b>	Formal conversational style; casual interaction is minimal (IO) <b>AP1, 3, &amp; 4; AM1</b>
Respect is given on formal power and position (IO) <b>B1 &amp; 3; AP1 &amp; 7; AM1</b>	Command-and-control leadership style; continuous feedback not supported (OAO) <b>B1; AP2, 3, &amp; 4; AM1</b>	Discounts given to defuse irritated customers (EO) <b>B2; AP2, 3, 4, &amp; 6; AM1</b>	Staff lacks a sense of urgency and ownership (EO) <b>AP1, 2, 3, 4, &amp; 6; AM7</b>		Training must be done on days off; discourages continuous learning (OAO) <b>AP2, 3, &amp; 4</b>	Service noise level is low; parts playing country music (IO) <b>B4; AP2 &amp; 6; AM1</b>
Customer interactions are professional, friendly, and polite (IO) <b>B1, 2, &amp; 3; AP6</b>	Siloed and splintered organization; little interaction/teamwork between depts (OAO) <b>B1 &amp; 3; AP6, AM2 &amp; 7</b>	Irate customers venting to each other in the waiting room (EO) <b>B2, AP2, 3, 4, &amp; 7; AM1</b>	No motivation to greet customers or go the "extra mile" on the customer service side (EO) <b>AP1, 2, 3, 4, &amp; 6; AM7</b>	Posters denote kaizen progress, supporting visibility and transparency (WEO) <b>B1; AP2 &amp; 6</b>	Loan department not offering/selling extended warranties (OAO) <b>B3 &amp; 4; AP2, 3, &amp; 6</b>	Low job satisfaction; in their work (EO) <b>B2 &amp; 4; AP2 &amp; 6; AM1</b>
Customer conflict resolution is professional and thoughtful (IO) <b>B1, 2, &amp; 3; AP6</b>	Service department war room is Lean Central; pillar of teamwork in action (WEO) <b>B1, 2, &amp; 3; AP2, 3, 4, &amp; 6</b>	No follow-up from sales people regarding service or customer care (OAO) <b>B2 &amp; 3; AP2, 3, 4, &amp; 6; AM1</b>	-	Certifications on the wall are old and out of date (WEO) <b>AP2, 3, &amp; 6</b>	Inconsistent appearance of the dealership overall; outdated décor/high tech equipment looks odd (WEO) <b>B2 &amp; 4; AP2 &amp; 6; AM1</b>	Dealership's tone is solemn and subdued; friendly but disengaged staff (EO) <b>B 2 &amp; 4; AP2 &amp; 6; AM1</b>
Compensation/rewards based on longevity, not performance (OAO) <b>B4; AP2, 3, &amp; 4</b>		Cluttered and disorganized service bays; no central storage for parts (WEO) <b>B3; AP2, 3, 4, &amp; 6; AM1</b>	<b>Observations Legend</b> IO = Interactions EO = Emotions OAO = Organizational Aspects WEO = Work Environment		Cramped working conditions; no personal items (WEO) <b>B2 &amp; 4; AP2 &amp; 6; AM1</b>	Dealership doesn't convey vibrancy; bathrooms are in a state of disarray (WEO) <b>B2 &amp; 4; AP2 &amp; 6; AM1</b>
Bonuses are carrot-and-stick approach (OAO) <b>B4; AP2, 3, &amp; 4</b>		Intake area full of stains on floors and walls (WEO) <b>AP3 &amp; 6, AM1</b>			Doors are full of finger-prints; paint is rubbing off door handles (WEO) <b>B2 &amp; 4; AP2 &amp; 6; AM1</b>	
Pay deductions for customer discounts (OAO) <b>B4; AP2, 3, &amp; 4</b>						

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

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

# New Horizons Service Department Strategic Planning Canvas – Quarter 1

Iteration #2

<div><div>1</div><div><b>Step 1: The Environment</b> <b>Vision:</b> Dedicated to customers and driven by excellence <b>Mission:</b> To become the world’s most renowned center for customer service in the automotive sector <b>Value proposition:</b> Easy to buy and obtain service  <b>Competitive Landscape?</b> We are the only dealer within a radius of 150 miles in the tristate area that sells and services this make of vehicle  <b>Marketplace Challenges &amp; Trends?</b> Another luxury vehicle competitor is building a dealership 25 miles from us, in the next town over</div></div>	<div><div>2</div><div><b>Step 2: Customer/Persona Identification</b> 1. Luxury sedan owner 2. Sports coupe owner 3. SUV owner 4. Truck owner 5. Van owner</div></div>	<div><div>3</div><div><b>Step 3: Strategic Objectives</b> <b>SO1:</b> Increase quarter-over-quarter sales by 5% <b>SO2:</b> Increase the quality of our service to our customers <b>SO3:</b> Increase the use of technology to effectively run our business <b>SO4:</b> Modernize our facilities</div></div>	<div><div>4</div><div><b>Step 4: Competitive Opportunities</b> <b>CO1:</b> Do random service follow-up customer calls <b>CO2:</b> Perform telephone customer inquiries on lapsed service <b>CO3:</b> Complete the Service Request Intake process kaizen efforts <b>CO4:</b> Provide training to the service staff <b>CO5:</b> Develop a service &amp; repair mobile app <b>CO6:</b> Upgrade loaner car program system <b>CO7:</b> Upgrade hardware/décor throughout dealership</div></div>	<div><div>5</div><div><b>Step 5: Key Results (KRs)</b> <b>SO1/CO1</b> a. Pilot Follow-up Call Script b. Make 25 outbound calls/week c. Set 5 appointments/month d. Increase sales by 2% <b>SO1/CO2</b> a. Pilot Lapsed service Call Script b. Make 50 outbound calls/week c. Set 10 appts/month d. Increase sales by 3% <b>SO2/CO3</b> a. Decrease the service Request Error rate by at least 30% b. Increase NPS by 15% <b>SO2/CO4</b> a. Secure the training vendor b. Complete training c. Increase NPS by 15% <b>SO3/CO5</b> a. Complete 100% of process work b. Launch 1<sup>st</sup> release of app <b>SO4/CO7</b> a. Complete 100% of Hardware upgrade b. Compete 100% of Dealership redecorating</div></div>	<div><div>6</div><div><b>Step 6: Tactics</b> 1. After Service Customer Follow-up Call program 2. Service Lapsed Customer Call program 3. Service &amp; Repair Mobile App plan 4. Service Staff Training plan 5. Loaner Car Program System Upgrade plan 6. Dealership Computer Hardware Upgrade</div></div>	<div><div>7</div><div><b>Step 7: Workforce</b> 1. Service Dept &amp; Technology 2. Service Dept &amp; Outside Customer Service firm 3. Loaner Car Dept and Technology 4. Service Dept 5. Service Dept 6. Technology</div></div>	<div><div>8</div><div><b>Step 8: Measure &amp; Report</b> 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:<ul style="list-style-type: none"><li>• #1: Sales-quarterly</li><li>• #2: Biweekly</li><li>• #3: Monthly</li><li>• #4: Monthly</li></ul>3. Metrics results will be posted in the TBP team war room on the fifth day of each month</div></div>	<div><div>9</div><div><b>Step 9: Evolve &amp; Optimize</b> 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</div></div>
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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 quarter-over-quarter sales	1. Implement a service follow-up customer call program	a. Pilot follow-up call script	Gail	0%		0%	
		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 customer inquiries on lapsed service	a. Pilot Lapsed Service Call script	Gail	0%		0%	
		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 kaizen efforts	a. Decrease the Service Request Error rate by at least 30%	Jannie	0%		0%	
		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	S2: Increase the quality of our service to our customers	Competitive	C3: Complete the Service Request Intake process kaizen efforts	Lead	a. Decrease the Service Request Error rate by at least 30%	0%		0%	
					b. Increase NPS by 15%	0%		0%	
Strategic		Competitive/ Culture (Self Leadership)	C8: Leverage our auto manufacturer’s training to offer and provide superior service to our customers	Lead/ sensei to Randy	a. Maintain 100% compliance with Service Technician Certifications each quarter	0%		0%	
					b. Maintain overall “Current” certification status from auto manufacturer over the next 12 mos	0%		0%	
Strategic		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 Leadership	L1: Increase my customer service skills	Growth	G1: Complete the advanced customer service training course	Sole Performer	a. Complete the course within the next 30 days	0%		0%	
					b. Raise my personal NPS by 10 points in the next 90 days	0%		0%	
Lean Leadership	L2: Increase my ability to believe and trust in myself, facing challenges head on	Growth	G2: Lead the Phase II Service Request Intake Process kaizen team	Sole Performer	a. Complete phase II within the next 90 days	0%		0%	
					b. Ensure the OKRs remain in Green status in the next 90 days	0%		0%	
Lean Leadership	L3: Dedicate time and energy to self-development and mentoring/ coaching others	Growth	G3: Receive on-the-job development coaching/ mentoring from Nancy during Phase II Service Request Intake Process project	Sensei to Rick/ Randy	a. Execute the four steps of OJD, using PDCA cycle in Q1	0%		0%	
					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	S2: Increase the quality of our service to our customers	Competitive	C3: Complete the Service Request Intake process kaizen efforts	Lead	a. Decrease the Service Request Error rate by at least 30%	0%		0%	
					b. Increase NPS by 15%	0%		0%	
Strategic		Competitive/ Culture (Self Leadership)	C8: Leverage our auto manufacturer’s training to offer and provide superior service to our customers	Lead/ sensei to Randy	a. Maintain 100% compliance with Service Technician Certifications each quarter	0%		0%	
					b. Maintain overall “Current” certification status from auto manufacturer over the next 12 mos	0%		0%	
Strategic		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 Leadership	L1: Increase my customer service skills	Growth	G1: Complete the advanced customer service training course	Sole Performer	a. Complete the course within the next 30 days	0%		0%	
					b. Raise my personal NPS by 10 points in the next 90 days	0%		0%	
Lean Leadership	L2: Increase my ability to believe and trust in myself, facing challenges head-on	Growth	G2: Lead the Phase II Service Request Intake Process kaizen team	Sole Performer	a. Complete phase II within the next 90 days	0%		0%	
					b. Ensure the OKRs remain in Green status in the next 90 days	0%		0%	
Lean Leadership	L3: Dedicate time and energy to self-development and mentoring/ coaching others	Growth	G3: Receive on-the-job development coaching/ mentoring from Nancy during Phase II Service Request Intake Process project	Sole Performer	a. Execute the four steps of OJD, using PDCA cycle in Q1	0%		0%	
					<b>b. Conduct weekly sensei/student sessions with Nancy</b>	0%		0%	
			G4: Provide mentoring/ coaching to Randy and Rick		c. Set OKRs for each within week 1 of Q1	0%		0%	

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



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

<b>Step 1: Leading Self Beliefs</b>  1. Believe, Trust, Persistence, & Tenacity: <b>Score</b> __5__  2. Healthy Mind & Body: <b>Score</b> __9__  3. Handling Challenges & Bias for Action: <b>Score</b> __3.5__  4. Problem Solving & Decision-Making: <b>Score</b> __8__  5. Emotional Intelligence: <b>Score</b> __8__  6. Learning & Development: <b>Score</b> __9__	<b>Step 5: Key Results (KRs)</b>  <b>L1/G1.a.:</b> Complete the course within the next 30 days <b>L1/G1.b.:</b> Raise my personal NPS by 10 points in the next 90 days  <b>L2/G2.a.:</b> Complete phase II within the next 90 days <b>L2/G2.b.:</b> Ensure the OKRs remain in Green status in the next 90 days  <b>L3/G3.a.:</b> Execute the four steps of OJD, using PDCA cycle in Q1 <b>L3/G3.b.:</b> Conduct weekly Sensei/Student sessions with Nancy  <b>L3/G4.a.:</b> Set OKRs for each within week 1 of Q1 <b>L3/G4.b.:</b> Conduct monthly CFRs with both		<b>Step 6: Tactics</b>  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	<b>Step 8: Measure &amp; Report</b>  1. Progress will be officially reported twice per quarter. 2. The first checkpoint is 45 days after the start of qtr 3. While the 2 <sup>nd</sup> checkpoint will be held 3 days after the end of the quarter 4. OKR status will be tracked using tracking template. 5. 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	<b>Step 2: Values &amp; Personal True North</b>  <ul style="list-style-type: none"> <li>• Respect for People</li> <li>• Continuous Improvement</li> <li>• Teamwork</li> <li>• Quality</li> <li>• Mastery</li> <li>• Empowerment</li> <li>• Customer Centricity</li> </ul> <b>Vision:</b> 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
<b>Step 3: Lean Leadership Objectives</b>  <b>L1:</b> Increase my customer service skills <b>L2:</b> Increase my ability to believe and trust in myself and face challenges head on <b>L3:</b> Dedicate time and energy to self-development and mentoring/coaching others	<b>Step 4: Growth Opportunities</b>  <b>G1:</b> Complete the advanced customer service training course <b>G2:</b> Lead the Phase II Service Request Intake Process Kaizen team <b>G3:</b> Provide mentoring/coaching to Randy and Rick	<b>Step 7: Engage &amp; Execute Observations</b>  1. 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.	<b>Step 9: Evolve &amp; Optimize</b>  Add the following KR to the L3G3 opportunity: <b>b. Conduct weekly Sensei/Student sessions with Nancy</b> <ol style="list-style-type: none"> <li>Schedule regular sessions with Nancy</li> <li>Conduct sessions</li> <li>Implement course corrections</li> <li>Provide feedback to Nancy on results</li> </ol>		<b>Mission:</b> To encourage and empower myself and others to become the best Lean leaders possible  <b>Value Proposition:</b> 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