

Building a Business Plan for a High-Performance Commercial Dealership Division

A strategic approach to developing your commercial division into a profit center through integrated services, optimized processes, and performance-driven leadership.



Agenda



Strategic Foundations

Business plan components, vision creation, and mission alignment



Team Development

Recruiting practices, KPI implementation, and resource allocation



Performance Systems

CRM optimization, meeting structures, and performance management



Culture & Evaluation

Building high-performance culture and conducting gap analyses



Vision & Mission Statement

Vision Statement

"To become the region's premier commercial vehicle partner, transforming fleet operations through innovative solutions."

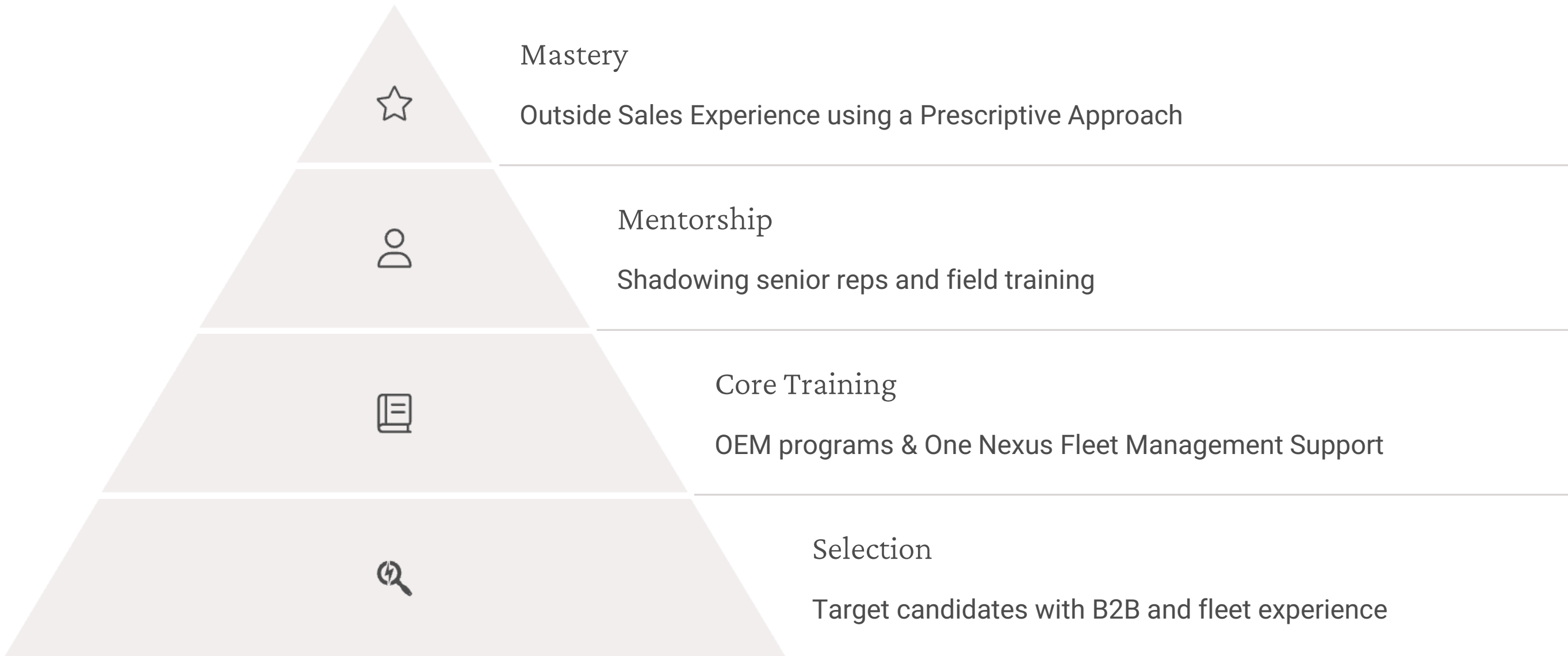
- Forward-looking
- Aspirational
- Differentiating

Mission Statement

"We deliver integrated vehicle and technology solutions that improve fleet efficiency, reduce costs, and enhance operations."

- Customer-focused
- Value-driven
- Action-oriented

Recruiting & Onboarding Practices



Resource Allocation for Sales Teams

Dedicated Management
Fleet-focused sales leadership driving strategy

Support Services
Dedicated fleet delivery and registration specialists



Business Development
Prospecting specialists generating qualified leads

Account Management
Relationship managers handling existing fleets



Commercial Customer Strategy

Market Analysis

Identify target industries and fleet segments with growth potential

Assess local competition and market share opportunities

Service Suite

- Advanced telematics solutions
- Fleet optimization tools
- Cash flow & cycling analysis

Revenue Models

Develop pricing structures for vehicles, upfitting, and ongoing services

Utilize subscription models for telematics and fleet management



Commercial Customer Services



Cash Flow Analysis

Effective tools for tracking fleet investments and returns



Cycling Strategy

Optimized replacement schedules for maximum value



Telematics Integration

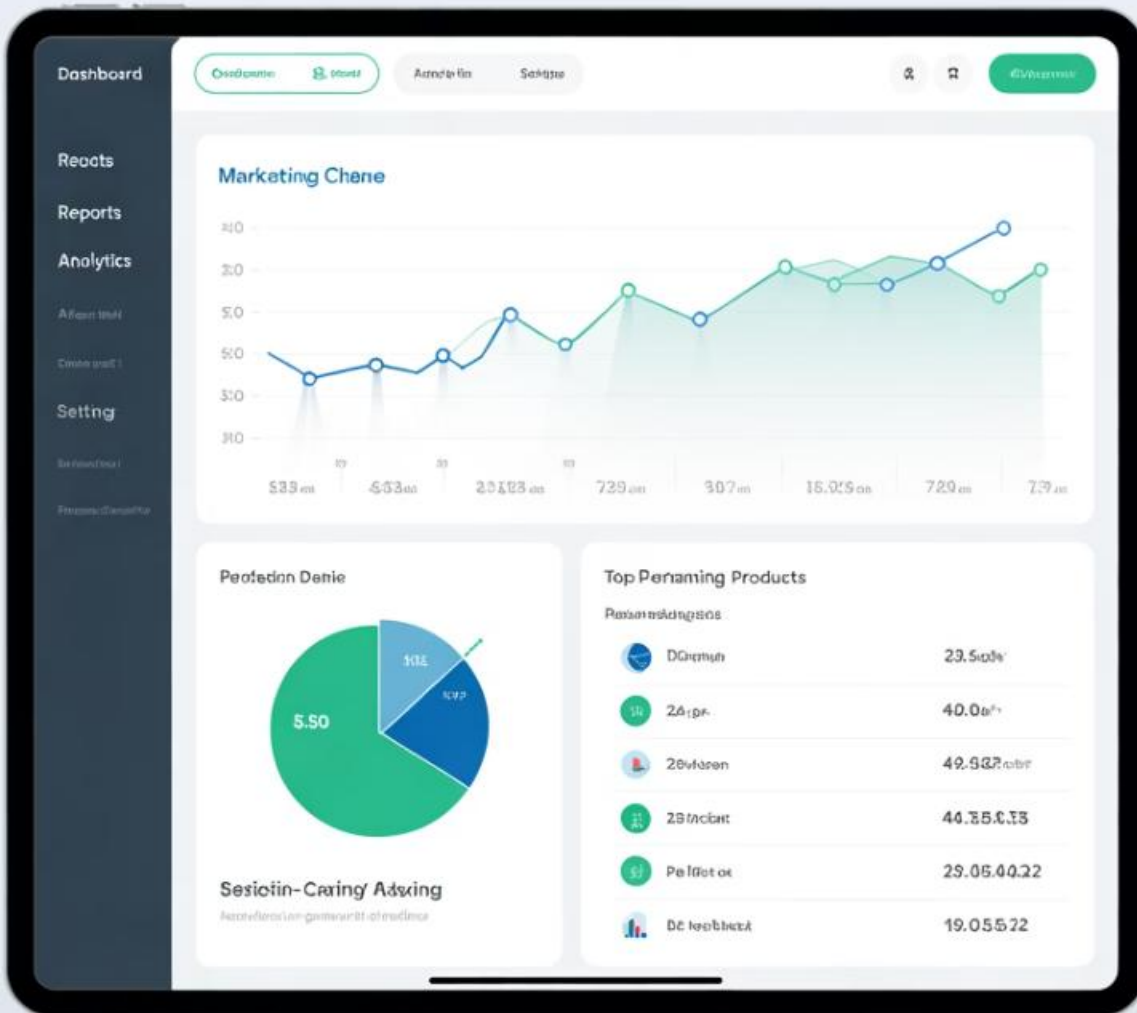
Advanced monitoring solutions for fleet efficiency



Fleet Management

Comprehensive services to reduce customer downtime

Performance Insights



Sample Commercial Account Manager KPIs

of New Customer Presentations

Customer Outreach

of Telematics Sign Ups

Telematics Adoption

of Maintenance/Fuel Program Sign Ups

Consolidated Billing

of Commercial Sales

Growth

CRM Optimization

- Data Integrity & Management
- Lead Management
- Customer Segmentation
- Sales Process Automation
- Marketing Campaign Integration
- Reporting & Dashboards
- Customer Retention & Lifecycle Management
- Mobile CRM Usage
- Integration with Third-Party Tools
- Training & User Adoption





Sales Meeting Structures

Frequency	Format	Duration	Focus Areas
Daily	Morning Huddle	15 minutes	Quick wins, daily priorities, obstacles
Weekly	Pipeline Review	45 minutes	Deal progress, sticking points, strategies
Monthly	Performance Review	90 minutes	KPIs, market trends, success stories
Quarterly	Strategic Planning	Half-day	Gap analysis, market shifts, new goals

Performance Management Strategies



Define expectations

Clear roles and measurable targets for each position



Track progress

Regular monitoring of KPIs with visualization tools



Provide feedback

Consistent coaching sessions and development planning



Recognize achievement

Structured rewards for meeting and exceeding targets

Creating a High-Performance Culture



Recognition Programs

Monthly awards for top performers and most improved team members



Development Paths

Clear advancement opportunities from BDR to management roles



Transparent Metrics

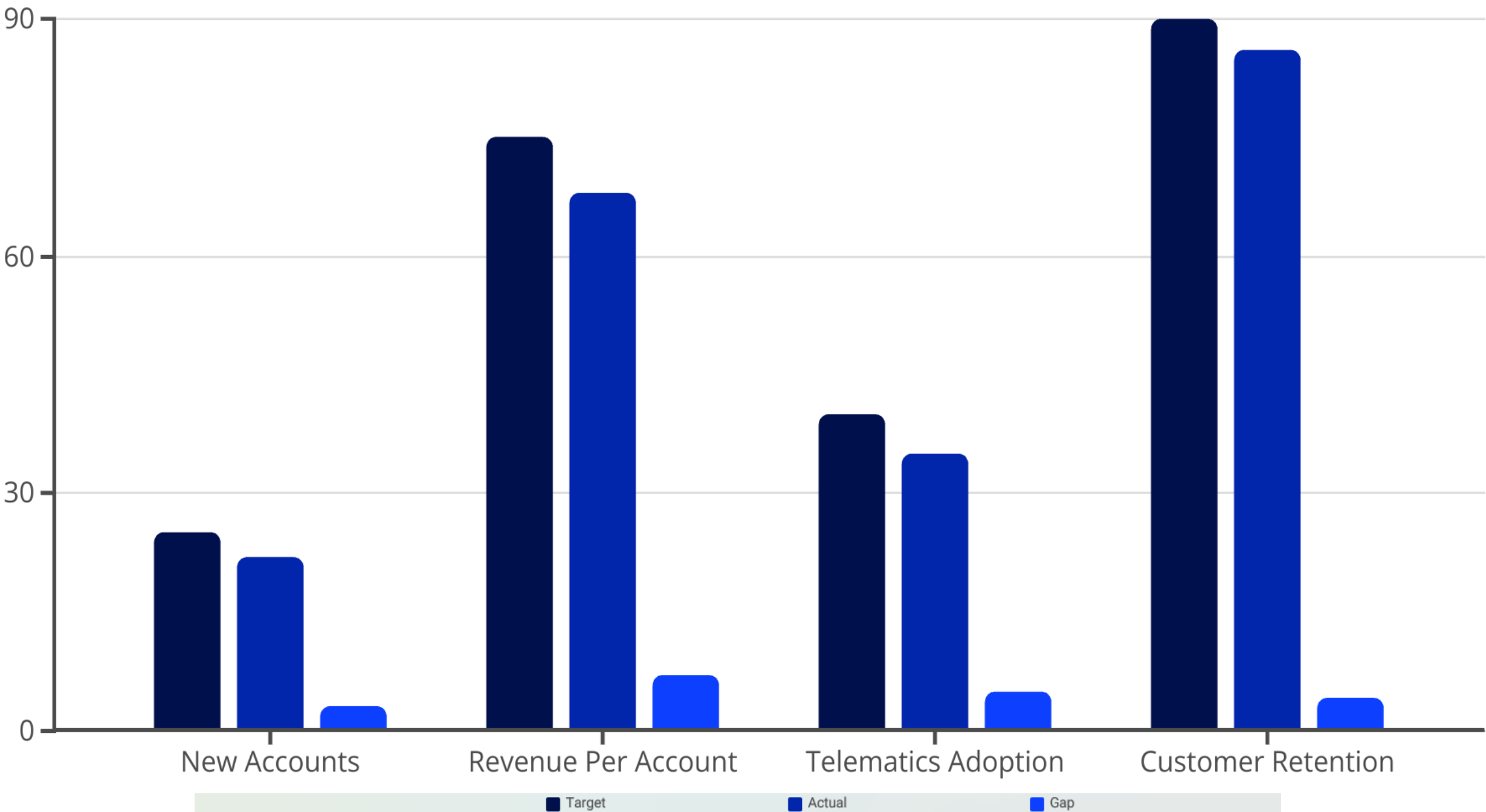
Visible performance dashboards showing individual and team progress



Celebration Rituals

Team recognition for milestone achievements and breakthrough deals

Quarterly Gap Analyses



Identify performance gaps, determine root causes, and develop action plans. Adjust resource allocation and training to close gaps effectively.

Building Your Commercial Success

Strategic Vision

Begin with clear goals, customer focus, and service differentiation.

Operational Excellence

Implement structured processes, customer-centric CRM, and focused KPIs.

Performance Culture

Foster accountability, development paths, and results recognition.

Sell with a Fleet Management strategy & win with consistency.

