Core Procedures for Service advisor workflow

1. Stay on task to completion or until you are able to change the status of a work order(there is nothing else you can do on the repair order until: A. Customer approves B. Technician does assigned repairs and needs to go over revisions C. Parts come in etc…

The only exceptions are to take and schedule appointments, check in and out a customer/car, emergency parts orders. Phone quotes can wait, however get the pertinent information so that you may do so, getting customer info, problem. Etc….The same thing goes for discussing customer repair orders or estimates that have already be written”Can I call you back in 10-15-20 minutes? I have something I am working on and I’ll get right back to you”. This also applies for a technician that needs to go over something “real quick”. We can get back to them when we are ready to as well.

1. Text/Emails to customers: All prices for revisions should be texted to customer with the “already approved amount is this”. All revisions must include the amount for each one listed in the order of customer concern first, and then in order of importance. \*\*\*Any approved revisions should have the customer and advisor confirming original price and approved revisions with a grand total of the complete repair order\*\*\*
2. Disclaimers for “we have to do this first” or “may be more than one thing broken, leaking, or wrong” must be carefully addressed on each revision that requires it. Example, you have oil leaking from an oil stand. Your tech is 100% sure of this, however the oil pan or

other parts of engine have oil on them as well. The is disclaimer would be that-

“your oil leak is in such a way that it drains on other components via gravity makes and them appear as though they are leaking, when in fact they might not be. We don’t want to be hasty and condemn that other gasket for leaking, so we must fix what we see leaking now and clean thoroughly and recheck. We may have other leaks, we know (x) is leaking for sure”

“We know this mechanical/electrical component has failed and cannot further test/drive/operate until this is repaired. Due to this we cannot operate/test the system completely to make sure we don’t have other Leaks/malfunctions in system operation/ faults even if they are related to the same system we are working on”. Any/all systems must be fully functional to verify complete effectiveness of repair and that the system is now operating like it was intended.