

K-Tech Automotive Inc Courtesy Car Agreement

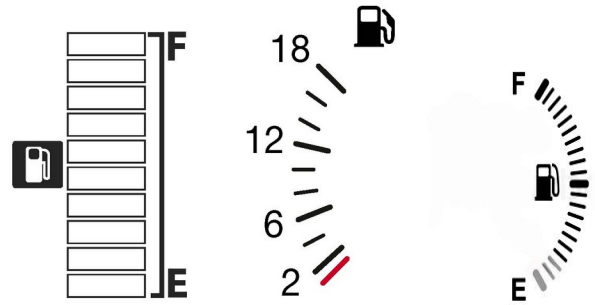
Date of Return: _____ M T W Th F Time: _____ am/pm

Loaner Car ID: _____

Date Loaned Out: _____

Mileage Out: _____ Cust Initial: _____

Mileage Back In: _____ Cust Initial: _____



Fuel Level (see appropriate gauge to the right): _____ / _____

Verification by customer/staff initials

Customer
initial

Staff initial- level in is not lower than fuel level out

I agree that I have a **valid Driver's License, and have a valid current car insurance** that meets California standards for liability, and includes full collision and comprehensive coverages. Collision and comprehensive coverage is required to drive K-Tech courtesy cars.

I will return the courtesy car with at least as much fuel as it had in it when I received it (the amount shown in the gauge record above). I understand that if the tank level is lower than this amount when I return the car, then I will be billed and will be responsible to pay \$12 per gallon to return the tank to the original level. _____

I understand that I am responsible for any parking tickets, tolls and other charges incurred during my use of the vehicle. I will not use the vehicle for commercial purposes without expressed written approval from K-Tech to do so nor without the proper commercial insurance coverage. _____

I will not allow anyone other than myself to drive the courtesy car without K-Tech's expressed written approval. If K-Tech approves another driver in writing, I understand I will still be legally and financially responsible for what happens with and to the vehicle while it is loaned out from K-Tech. _____

I will not smoke cigarettes, marijuana or vape in the vehicle. _____

I assume complete and absolute responsibility and liability, including legal and financial responsibility, for any damage that occurs to the vehicle, to another vehicle, or to anyone or anything else as a result of my use of this vehicle (or use by another approved or unapproved driver). I agree to be responsible for paying loss of use charges of \$40 per day to K-Tech for each day the vehicle is out of operation for damage or repairs due to damage that occurred while the vehicle was in my care or use, until the vehicle is able to be put back into use by K-Tech. If damage occurs to this courtesy car, I understand that I may be required to leave my vehicle in the possession of the shop as collateral until the bill is paid in full for the damage. _____

I understand that if the courtesy car is not returned to K-Tech within 24 hours of my vehicle's repairs being done, then there will be a \$40 per day charge due to K-Tech for the additional time I have the vehicle. _____

I understand that this vehicle MAY NOT LEAVE SONOMA COUNTY without the expressed WRITTEN permission of a K-Tech manager. I agree that I will not take the vehicle outside of the county without this permission. _____

Toll charge will be \$20 per incident plus the actual cost of the toll if you do not notify K-Tech of tolls incurred before or at the time of billing. _____

If I put a pet in the vehicle, I will clean up after my pet, including but not limited to pet hair and pet odor or I may be required to pay up to a \$100 cleaning fee. I accept full financial responsibility for any damage my pet causes to the vehicle. _____

By signing below I agree that I have read and understood the above agreement.

Signature _____

Print Name _____

Date _____

Attach copy of Driver's License:

Verified by _____

Attach copy of customer CURRENT valid insurance card:

Insurance Carrier _____

Insurance Number _____

Paulines Automotive Courtesy Car Agreement

Date of Return: _____ M T W Th F Time: _____ am/pm

Loaner Car ID: _____

Date Loaned Out: _____

Mileage Out: _____ Cust Initial: _____

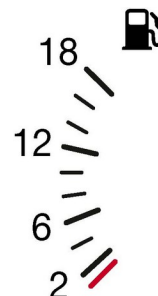
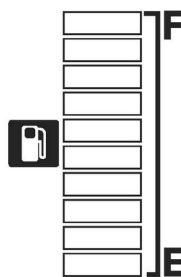
Mileage Back In: _____ Cust Initial: _____

Fuel Level (see appropriate gauge to the right): _____ / _____

Verification by customer/staff initials

Customer
initial

Staff initial- level in is not lower than fuel level out



I agree that I have a **valid Driver's License, and have a valid current car insurance** that meets California standards for liability, and includes full collision and comprehensive coverages. Collision and comprehensive coverage is required to drive Pauline's courtesy cars.

I will return the courtesy car with at least as much fuel as it had in it when I received it (the amount shown in the gauge record above). I understand that if the tank level is lower than this amount when I return the car, then I will be billed and will be responsible to pay \$12 per gallon to return the tank to the original level.

I understand that I am responsible for any parking tickets, tolls and other charges incurred during my use of the vehicle. I will not use the vehicle for commercial purposes without expressed written approval from Pauline's to do so nor without the proper commercial insurance coverage.

I will not allow anyone other than myself to drive the courtesy car without Pauline's expressed written approval. If Pauline's approves another driver in writing, I understand I will still be legally and financially responsible for what happens with and to the vehicle while it is loaned out from Pauline's.

I will not smoke cigarettes, marijuana or vape in the vehicle.

I assume complete and absolute responsibility and liability, including legal and financial responsibility, for any damage that occurs to the vehicle, to another vehicle, or to anyone or anything else as a result of my use of this vehicle (or use by another approved or unapproved driver). I agree to be responsible for paying loss of use charges of \$40 per day to Pauline's for each day the vehicle is out of operation for damage or repairs due to damage that occurred while the vehicle was in my care or use, until the vehicle is able to be put back into use by Pauline's. If damage occurs to this courtesy car, I understand that I may be required to leave my vehicle in the possession of the shop as collateral until the bill is paid in full for the damage.

I understand that if the courtesy car is not returned to Pauline's within 24 hours of my vehicle's repairs being done, then there will be a \$40 per day charge due to Pauline's for the additional time I have the vehicle.

I understand that this vehicle MAY NOT LEAVE SONOMA COUNTY without the expressed WRITTEN permission of a Pauline's manager. I agree that I will not take the vehicle outside of the county without this permission.

Toll charge will be \$20 per incident plus the actual cost of the toll if you do not notify Pauline's of tolls incurred by or at the time of billing.

If I put a pet in the vehicle, I will clean up after my pet, including but not limited to pet hair and pet odor or I may be required to pay up to a \$100 cleaning fee. I accept full financial responsibility for any damage my pet causes to the vehicle.

By signing below I agree that I have read and understood the above agreement.

Signature _____

Print Name _____

Date _____

Attach copy of Driver's License:

Verified by _____

Attach copy of customer CURRENT valid insurance card:

Insurance Carrier _____

Insurance Number _____

Policy CC1 – Service Writer - Checking In Courtesy Cars

12.13.17

To: Service Writer

PURPOSE: Following the proper check-in procedure for courtesy cars is important so that the shop doesn't end up paying for the customers' fuel or tolls, or for damage that occurred while the customer had the vehicle.

POLICY: Always follow the procedure below; don't skip any steps.

PROCEDURE:

1. Go to the courtesy car and check the mileage and fuel level. Note this on the CCA. (NOTE: Make sure the vehicle is on flat ground to get an accurate fuel reading.)
2. Walk around vehicle with customer to verify no new damage, have customer initial the damage report and date next to NO DAMAGE.
3. If there is NEW damage, note this on Damage Report, initial and date it and have the customer initial and date it, too.
 - If there is new vehicle damage, immediately contact the General Manager. DO NOT take the customer's payment for the repairs we did yet, and DO NOT give the customer their car back yet. These are legal things and there are legal reasons for this. Wait for the GM's instructions.
 - If there is new damage, we will need to contact customer's insurance carrier and start claim. The GM or store manager may do this.
4. If the fuel level is lower than it was when they checked it out, then ask them if they would like to take the vehicle to the gas station and top it off, or pay us \$10 per gallon to fill it up for them.
➔ **NOTE:** If the customer says they just "drove it home and back" and if you verify that the vehicle has not been driven more than 10 miles since it was checked out, then for customer satisfaction we should not demand the customer refuels the vehicle.
5. If the customer decides to pay us \$10 per gallon, then add it to the work order as a *non-taxable* part or item.
➔ **NOTE:** Sometimes a customer will only drive the vehicle a mile or two to get home and back. It may be off-putting to the customer to ask them to refuel the vehicle after driving it so little. In this case, if they tell you that they only drove it a mile or 2, we may not ask them to refuel it because rapport with the customer is more important than a few pennies worth of gas.
6. Ask them if they incurred any tolls, and if they did, add them to the work order as a *non-taxable* part or item.

RESULT: The customer refills the fuel tank to at least the level it was at when they took it, or they pay us for the gas, so the shop is not buying fuel for any of the courtesy cars. The customer lets us know if they incurred a toll with the car, and they pay for it on the work order. The service writer immediately contacts the GM if there is any additional damage the courtesy car and the service writer does not collect any money for the repairs yet (this is a legal thing) and does not release the customer's vehicle without GM approval.

I have read and understood this policy

_____ print name
_____ signature

_____ date

Policy CC2 – Service Writer - Checking Out Courtesy Cars

12.13.17

To: Service Writer

PURPOSE: Proper check-out procedure is vital to having the customer understand our expectations for how they should treat and behave with the car, and to help reduce shop costs and liability associated with operating the cars.

POLICY: Always follow the check-out procedure listed below. There must be a property and fully completed Courtesy Car Agreement (CCA) for each time the vehicle is loaned to a customer.

PROCEDURE:

1. Decide which courtesy car customer will be taking.
2. Take a CCA from appropriate wall-mounted bin, and take a damage report from the vehicle's bin.
3. Get customer's drivers license and proof of insurance, make a photocopy of them and staple this photocopy to the back of the CCA. (See Sample Courtesy Car Agreement)
4. Grab the courtesy car key and pull courtesy car up to front of shop without blocking a bay door. Back it in so the customer can drive away in it easily.
5. Write down the car's mileage and fuel level on loaner agreement. Use the image of the fuel gauge that matches the vehicle most closely to make the fuel level.
6. **Have the customer initial for the fuel level**, and you initial it yourself (in the appropriate place).
7. Make sure to tell the customer verbally:
 - They should bring the car back with at least as much fuel in it as it has now, otherwise we'll charge them \$10 per gallon. **HAVE THE CUSTOMER INITIAL THIS.**
 - They need to notify us (before they pay for their vehicle repairs or pick up their vehicle) if they have incurred any tolls, such as bridge tolls, with the vehicle. (NOTE: Add any tolls to their work order as a non-taxable part or item.)
 - They are fully responsible for anything that happens to the vehicle while they have it.
8. After verifying that the driver's license is valid, current, and for the right person, initial the space for this at the bottom of the CCA.
9. Write in the name of the insurance carrier and policy number.
10. **Have customer read, sign, print their name, and date agreement.**
11. Make a photocopy and give the customer a copy of the CCA.
12. Take customer to courtesy car, do a walk around, verify current damage to damage report and have customer initial damage report under CHECK OUT and date it.
13. Go over basics of the vehicle: where fuel tank filler is, where fuel door release and trunk release are located in car.
 - ➔ For Prius, go over display with customer, especially if they have not driven a Prius before. Explain that the engine may shut off at a stop, and that is normal for the engine to start and stop like that.
14. Place the CCA and attached license/insurance photocopy and damage report vertically (so it's sticking out) in the office bin corresponding to the vehicle until the vehicle is returned and checked back in.

RESULT: The above procedure is followed to a T, the customer has a clear understanding of our expectations for them with the car, cars are returned with at least as much gas as they had in them or else the customer is paying for the gas, and the customer notifies us of any tolls so that the customer, not the shop, is paying for these expenses. We can quickly and easily see which customer has each courtesy car by looking in the corresponding bin and finding the CCA there.

I have read and understood this policy _____ print name
_____ signature
_____ date

Policy CC3 – Service Writer – Tracking the Loaning Out of Courtesy Cars

12.14.17

To: Service Advisor

PURPOSE: To have any office personnel be able to go into the office and within 2 minutes figure out which customer has which courtesy car, and to know the status of each courtesy car.

POLICY: Each courtesy car should have two sets of keys that hang on the hook on their bin. While a courtesy car is loaned out, the Courtesy Car Agreement should be placed in the bin for that car. Always properly file the Courtesy Car Agreements with attached documents (license/insurance copy and damage report.)

PROCEDURE:

KEYS:

- We have two sets of keys for each courtesy car (if we don't, contact the manager to order another set).
- If there is one set of keys on the hook, the car is loaned out or being serviced (either way not available to be loaned out).
- If both sets are there, the car is here.

COURTESY CAR AGREEMENT:

- After a customer returns a courtesy car and you do the check-in, punch holes in the Courtesy Car Agreement documents and file them in the Courtesy Car binder with the newest ones in the front. There is a section in the binder for each vehicle.
- Make sure to file the completed Courtesy Car Agreements neatly and with the newest ones in the front in the binder after the customer brings back the vehicle.

RESULT: Any office personnel can look to see if a courtesy car is available to be loaned out or not by the number of key sets on the hook of that car's bin. Any office personnel can quickly see which customer has which car out by finding the Courtesy Car Agreement in that vehicle's bin.

I have read and understood this policy _____ print name

_____ signature

_____ date

Policy CC4 – Service Advisor – How to Write up a Courtesy Car for Service or Repair

7.9.18

To: Manager, Service Advisor

PURPOSE: We want to write up all services and repairs we do to our courtesy cars so we have the record easily available in Winworks. These repair orders need to be written up correctly so we can find vehicle service history and so that accounting reports are accurate.

POLICY: Generate a BAR compliant repair order for all courtesy car servicing and repairs. The only exception is the quick look we do over after each time a customer brings a courtesy car back.

PROCEDURE:

1. Write up the courtesy car repair order the same way you'd write up a customer car.
2. Put the part cost in there as usual, so that our "profit analyzer" report is accurate.
3. Select the tech who will be working on the vehicle, and give the tech the appropriate labor time. Since this is non-customer-pay job, typically you will use warranty book time (see other policy for how to write up non-customer pay work.)
4. Zero out the part list price.
5. Zero out the labor rate.
6. Remove any additional "fees" so that the work order total is zero dollars.

RESULT: The service advisor writes up courtesy car repair orders for all services or repairs excluding the quick check-in we do each time a customer returns the car. The service advisor makes sure the work order total is zero and the part cost is present.

I have read and understood this policy _____ print name

_____ signature

_____ date

Paulines Automotive Inc
Courtesy Car Agreement

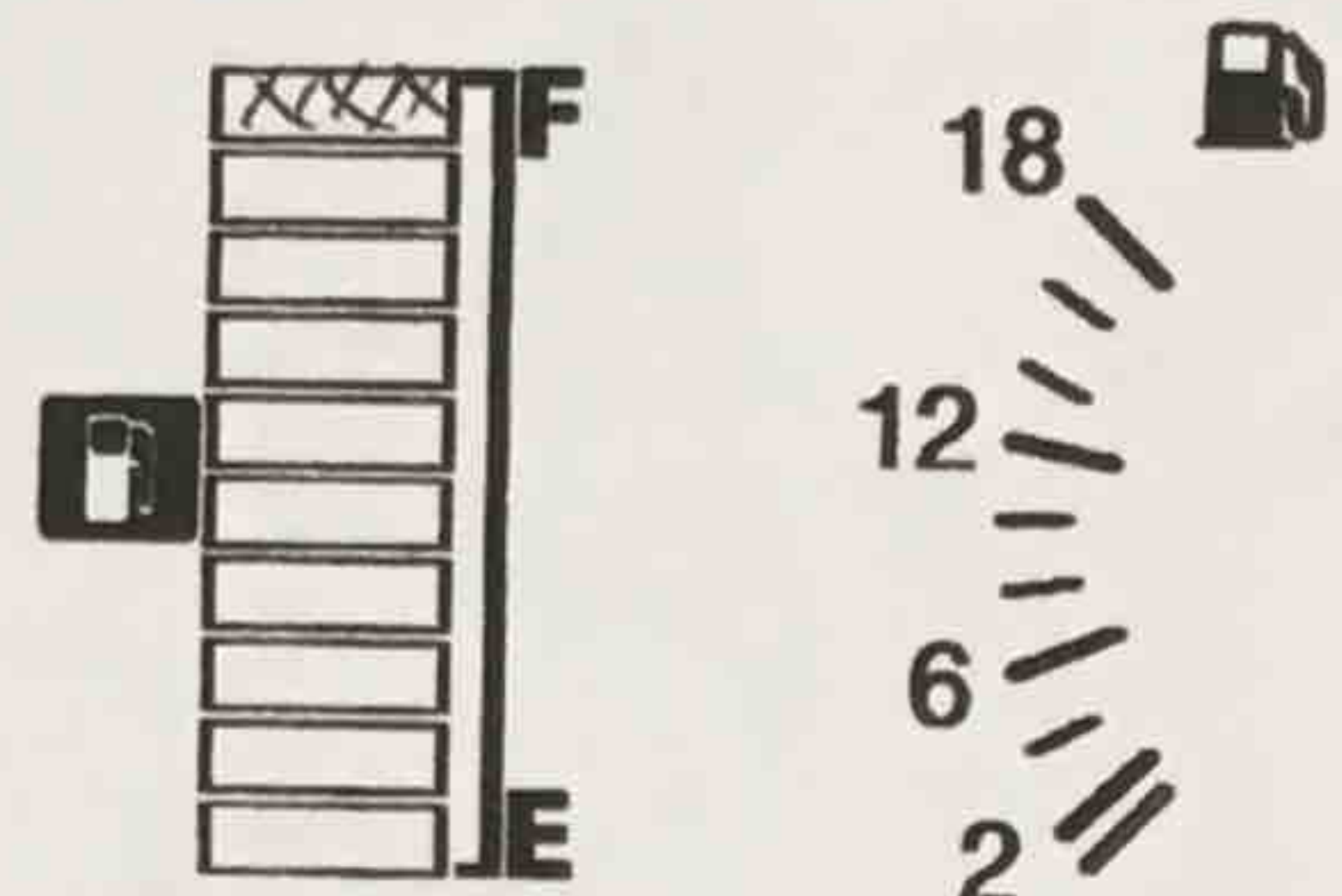
SAMPLE

Loaner Car ID: RED HYUNDAI

Date(s) Loaned: 11/13 - 11/14/17

Mileage Out: 119295

Mileage Back In: 119325



Fuel Level (see appropriate gauge to the right): ms 1 CH
Verification by customer/staff initials Customer Staff - level in is not lower than fuel level out

I agree that I have a valid Driver's License, and have a valid current car insurance that meets California standards for liability, and includes full collision and comprehensive coverages. Collision and comprehensive coverage is required to drive Paulines courtesy cars.

I will return the courtesy car with at least as much fuel as it had in it when I received it (the amount shown in the gauge record above). I understand that if the tank level is lower than this amount when I return the car, then I will be billed and will be responsible to pay \$10 per gallon to return the tank to the original level. ms
Customer acknowledge

I understand that I am responsible for any parking tickets, tolls and other charges incurred during my use of the vehicle. I will not use the vehicle for commercial purposes without expressed written approval from Paulines to do so nor without the proper commercial insurance coverage.

I will not allow anyone other than myself to drive the courtesy car without Paulines expressed written approval. If Paulines approves another driver in writing, I will still be legally and financially responsible for what happens with and to the vehicle while it is loaned out from Paulines.

I assume complete and absolute responsibility and liability, including legal and financial responsibility, for any damage that occurs to the vehicle, to another vehicle, or to anyone or anything else as a result of my use of this vehicle (or use by another approved or unapproved driver). I agree to be responsible for paying loss of use charges of \$40 per day to Paulines for each day the vehicle is out of operation for damage or repairs due to damage that occurred while the vehicle was in my care or use, until the vehicle is able to be put back into use by Paulines.

I understand that if the courtesy car is not returned to Paulines within 24 hours of my vehicle's repairs being done, then there will be a \$40 per day charge due to Paulines for the additional time I have the vehicle.

Toll charge will be \$20 per incident if you do not notify Paulines of tolls incurred by or at the time of billing. ms

By signing below I agree that I have read and understood the above agreement.

Signature Merrilyn Silva
Print Name MERRILYN SILVA
Date 11/13/17

Attach copy of Driver's License:
Verified by CH - Y04

valid copy attached

Attach copy of customer CURRENT valid insurance card:
Insurance Carrier ALLSTATE
Insurance Number CA 127362

valid copy attached

K-Tech Automotive
COURTESY CAR CHECK-IN

VEHICLE

Use a dry-erase marker to write on this sheet.

Check the box below after you checked it and verified it's ok. Make notes about anything you corrected.

- ☐ Exterior Lights_____
- ☐ Dash Indicators_____
- ☐ Fluid Levels_____
- ☐ Tire Pressures_____
- ☐ Windshield clean_____
- ☐ Vehicle clean inside and out_____

NOTES:_____

MILEAGE:_____

Your name:_____

COURTESY CAR TRACKING

- We should have 2 sets of keys for each courtesy car.
- These keys hang on the hooks attached to each bin.
- While the car is loaned out, Agreement goes in the bin.
- When car comes back, Agreement gets filed.

Service Advisor-In-Training Duties

PURPOSE OF THE POSITION: To train in the duties of the Service Advisor, to learn how to make the office run and to handle situations that come up, to assist the Service Advisor in daily and weekly tasks.

BASIC EXPECTATIONS:

You are expected to keep busy at all times during work hours, except during breaks.

You are expected to prioritize duties so that the most important ones always get done, and the lesser ones still get done.

Top Priorities:

1. Customers and anything customer-related.
2. Workflow
3. Assigned tasks (see below for more detail)

You are expected to get all the duties on your checklists done, and checklists turned in on time. Do not check something off if you did not do it. You are expected to use the checklists and perform duties with integrity.

POLICY:

Take responsibility for your assigned tasks and make sure they get done.

PROCEDURE:

Stay in communication with the SA/Manager. Check in periodically. Stay busy with your tasks, do the actions that the SA/Manager requests of you as well. Learn to prioritize. Take responsibility for making sure your tasks get done, regardless of whatever other tasks the manager may assign you in a given day. Your tasks are your responsibility to make sure you get done – the SA/Manager may not know which tasks you have completed or not completed, and may ask you to perform additional tasks – you are still 100% responsible for getting your normal tasks completed no matter what. Learn time management. Work efficiently and effectively.

POLICY:

DO THE CHECKLISTS: Use the checklists provided in the office, and do the duties on them. These checklists are used to run the office, so by using them and doing the tasks on them, you are learning/training in how the office runs.

PROCEDURE:

Know how to use the checklists that are assigned to the Service Advisor position, and have them completed and turned in by their due date:

- Service Writer Daily Checklists – done daily, turned in each Friday
- Office Weekly Checklist – done and turned in each Monday
- Reaches Tracking Sheet – daily, with each reach

POLICY:

Assist the Service Advisor as needed.

PROCEDURE:

Check in customers in and out when needed, and when asked to by Service Advisor.

Do the callbacks reliably and consistently.

Keep walkway and back concrete pad clean and clear, help maintain shop in general appearance – if you see something dirty, clean it or organize it in between other duties. Good rule of thumb is, it will take 5 minutes or less to clean or fix, and if you walk by it more than twice, then just clean it or fix it.

Write repair orders and estimates that the SA asks you to write.

Do any sales that the SA asks you to do.

POLICY:

Help promote and market the business and our services.

PROCEDURE:

Do outside sales/donut runs at least once a month to each vendor or business that we want or get business from. See policy on outside sales.

Walk around town and put door inserts on driver's windows when you have time or when you go out.

Hand out fliers, coupons or business cards whenever you can.

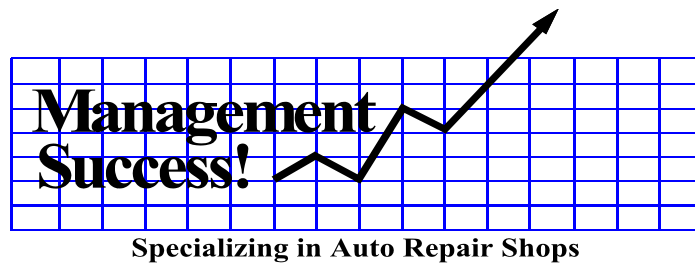
ADDITIONAL DUTIES – THESE ARE YOUR RESPONSIBILITY TO HANDLE:

1. Study the job description for Service Advisor, as you are training for that position, but also helping the SA with necessary duties.
2. Shuttle service
3. Cleaning and organizing shop and office, and general premise. Walkway/entrance, backyard, driveway.
4. Restocking needed items, writing it up if something needs to be ordered, eventually learning how to order things yourself (like office supplies, etc)
5. Callbacks – very important to stay on top of these
6. Thank you cards.
7. Master “Write-it-right.”

8. Keep your mind open and learn from the manager and the people around you.
9. Keep late-drop envelopes stocked by drop box at fence, with pens, in clear plastic bag to keep moisture out.

I have read and understood this: _____ sign

_____ print
_____ date



SAMPLE COMPANY POLICY

ANYTOWN AUTOMOTIVE SERVICE WRITER DUTIES

PURPOSE OF THE POSITION:

The primary purpose of the Service Writer position at Anytown Automotive is to get existing and potential customers to schedule and bring their vehicles in to the shop for service.

POLICY:

Do not quote prices for major repairs over the phone. The only exception is on advertised specials.

POLICY:

Never diagnose a vehicle's symptoms over the phone.

STATISTICS:

The statistics to track and monitor for the Service Writer position is Gross Sales, Average R/O Value and Number of R/O's.

PRIMARY RESPONSIBILITY:

Needed repairs, profitably sold in abundance.

OTHER RESPONSIBILITIES:

The Service Writer is also responsible for greeting arrivals, answering the telephone,

selling services, job estimating, purchasing, shop floor coordination, job scheduling, quality management, and product delivery.

DAILY FUNCTIONS:

1. Open office, turn on computers, change OPEN/CLOSE sign and be ready for customers by 7:00 a.m.
2. Be up front to greet all customers, write original repair order estimate including all information required and needed for the job and have customer sign it.
3. Ask each caller or arrival how they learned or heard about the shop. Ask twice to be sure. This is very important to evaluate and allocate advertising dollars.

SAMPLE COMPANY POLICY - Service Writer Duties - Page 2.

4. Put the hard copy of the repair order in the technicians work order rack in the order that you need them to be done. Make sure a 21 point inspection form is stapled to any R/O where an inspection is needed.
5. When the work order is returned to you for authorization, check to make sure that ALL needed information is on it. If not return it to the technician to be completed.
6. Look in the customer history to see what repairs have been done in the past.
7. Get all parts prices and the availability for all the parts needed for the job and total each of the repairs needed.
8. Call the customer for authorization and high light in yellow the jobs that were authorized. Up date authorization in your computer.
9. Pull all parts that are in stock for the job and put them on the technician parts shelf. Order all the other parts that are needed. High light in green the parts that are pulled and just mark the parts that are ordered. Return the work order to the technicians rack with the back side out. As the parts come in put them on the technicians rack and high light the part on the work order.
10. When parts are delivered enter the invoices into accounts receivable and enter the part onto the repair order.
11. Every two hours of the day, take a list of vehicles and talk to each technician to find the status of each job.

12. When the technician returns the work order after the repairs are done make sure all the information is on the order including ALL parts used, labor functions, technicians name and speedometer reading. If not return the order to the technician for corrections.

13. Enter ALL parts and labor functions on the work order in the computer and call the customer to inform them of the total and that it is done. Put vehicle on the wash list.

14. Ensure that the final quality control check has been done on all vehicles before the customers arrive.

15. When the customer comes to pick up the vehicle, explain the repairs, show old parts if necessary. Go over any recommended repairs and try to get the customer scheduled immediately for a return visit. Collect the money, print the final repair order and have customer sign it.

16. After all of the customers have picked up their cars, run the manager report, do the credit card settlement, put all cash, checks credit slips, cash paid out receipts in the safe and run a tape back up.

17. Make sure everything is locked up and that all cars are inside or locked in the back compound.

SAMPLE COMPANY POLICY - Service Writer Duties - Page 3.

18. Make follow up phone calls, send Thank You cards and Reminders out to the customers that need them. Use the standard follow-up phone script when calling customers who have recommended repairs.

19. In addition to selling work to customers who call or come in, the Service Writer should initiate contacts with prospective customers who can directly or indirectly provide us with sales opportunities. The emphasis for the Service Writer has to be on sales. When these opportunities do not contact us, the Service Writer must supplement advertising and promotion by making phone calls or visits to people who can provide additional sales opportunities.

SERVICE WRITER DUTIES

PURPOSE OF THE POSITION:

The primary purpose of the Service Advisor is to profitably sell large amounts of needed automotive repairs, and to get existing and potential customers to schedule and bring their cars in to the shop for repairs.

POLICY:

Do not quote prices for major repairs over the phone. The only exception is on advertised specials. Do not tell customers labor times or hourly rates.

POLICY:

Never diagnose a vehicle's symptoms over the phone.

STATISTICS:

The statistics to track and monitor for the Service Writer position is Gross Sales, Average R/O value, Real Labor Rate and Number of R/O's. Sales should be at or above \$25,000 weekly, average RO should be at or above \$650 (5x the shop labor rate), Real Labor Rate should be \$118 or higher, and the number of RO's weekly (car-count) should be at least 35.

PRIMARY RESPONSIBILITY:

Needed repairs, profitably sold in abundance.

OTHER RESPONSIBILITIES:

The Service Writer is also responsible for greeting arrivals, maintaining high CSI (customer satisfaction index) answering the telephone, selling services, job estimating, purchasing, shop floor coordination, job scheduling, quality management, and product delivery.

DAILY FUNCTIONS:

1. Open office, turn on computers, and be ready for customers by 8:00 a.m.
2. Be up front to greet all customers, write original repair order estimate including all information required and needed for the job and have customer sign it.
3. Ask each caller or arrival how they learned or heard about the shop. Ask twice to be sure.

This is very important to evaluate and allocate advertising dollars. Record the result of each of these "reaches" on the Reaches Checklist.

4. Put the hard copy of the repair order in the technicians work order rack in the order that you need them to be done. Make sure a Level 1 safety inspection form is stapled to any R/O where an inspection is needed.
5. When the work order is returned to you for authorization, check to make sure that ALL needed information is on it. If not return it to the technician to be completed. Do not rely on verbal communication – make the tech write it down, and you do the same.
6. Look in the customer history to see what repairs have been done in the past.
7. Get all parts prices and the availability for all the parts needed for the job and total each of the repairs needed.
8. Call the customer for authorization and high light in yellow the jobs that were authorized. Update authorization in your computer.
9. Pull all parts that are in stock for the job and put them on the technician parts shelf. Order all the other parts that are needed. On the Tech Sheet, highlight the parts that are pulled (that are here and on the shelf) and mark the parts that are ordered by writing their ETA next to the part. Highlighting indicates that the parts are here and on the shelf, ready for the tech. Return the tech sheet to the technician's rack so it's sticking out for them to see. As the parts come in put them on the technicians rack and high light the part on the work order.
10. When parts are delivered, initial the invoice to the left of each part after confirming it was received. Initial to the right of the part after insuring that it is properly billed on the work order. Ensure pricing is correct – don't charge less than the parts matrix allows, except on some dealer parts or batteries – but you can charge more than the matrix suggests.
11. Every two hours of the day, take a list of vehicles and talk to the Shop Foreman to find the status of each job as necessary. The service writer should know the status of every vehicle in the shop throughout the day, and update the production board at least every 2 hours.
12. When the technician returns the work order after the repairs are done, make sure all the information is on the order including ALL parts used (check-marks next to the part to indicate it was installed), labor functions, technician's name and odometer reading. If not, return the order to the technician for corrections.
13. Enter ALL parts and labor functions on the work order in the computer and call the customer to inform them of the total and that their car is done. Call the customer only AFTER the vehicle has been QC'd and washed, to prevent surprises and unhappy customers.
14. Ensure that the final quality control check has been done on all vehicles before the

customers arrive. Do this by referencing the QC checklist, and staple this internal document to our copy of the repair order to be filed. This document is not for customers.

15. When the customer comes to pick up the vehicle, explain the repairs, show old parts if necessary. Go over any recommended repairs and get the customer scheduled immediately for a return visit. At the very least, schedule a recommended repair call and write it in the scheduler. Make the call on the scheduled date and get them back in to do the repair. Collect the money, print the final repair order and have customer sign it.

16. After all of the customers have picked up their cars, do the credit card settlement, put all cash envelopes, checks and credit slips together for the owner, and make sure all paperwork is in the correct place and folder.

17. Assist the Shop Manager by making sure everything is locked up and that all cars are inside or locked in the lot with windows rolled up.

18. Make follow up phone calls (as per call-back written procedure), and Reminder calls (1 week and 24 hours before appointment) out to the customers that need them. Use the standard follow-up phone script when calling customers who have recommended repairs.

19. In addition to selling work to customers who call or come in, the Service Writer should initiate contacts with prospective customers who can directly or indirectly provide us with sales opportunities. The emphasis for the Service Writer has to be on sales. When these opportunities do not contact us, the Service Writer must supplement advertising and promotion by making phone calls or visits to people who can provide additional sales opportunities.

ADDITIONAL JOB DESCRIPTION:

1. Acting as an interface between the customer and the “back.”
2. Earning our customer’s trust.
3. Delivering extraordinary customer service.
4. Answering the phone, and when physically unable to answer the phone, handling voicemails promptly.
5. Master putting people on hold nicely – as per shop procedure.
6. Checking phone records and email frequently for missed phone calls, appointment requests, and other emails.
7. Acting as an advisor and advising customers on the needs of their vehicles.
8. Earning our customers’ respect by communicating as an expert in the field of auto repair.
9. Explaining thoroughly to customers any needed repairs, including why the repair is needed and what could happen if it's not done. Use visual aids whenever possible (even if you think you can get the job sold without them).

10. Doing things the way you were taught in SA school.
11. Doing call-backs 48 hours after a customer picks up their car. Document these calls on the sheets provided. Document date/time/name, answers to questions and any other relevant information. Use the script provided. If you can't get a live person after the second call on the second consecutive day, then email them instead.
12. Keep the office, counter, coffee pot and walkway clean and orderly. Make sure we are properly stocked on Go Local Cards, business cards, etc.
13. Fill out SA Daily Checklists EVERY DAY and put them in the correct box EVERY DAY.
14. Do actions that result in happy customers who refer their friends and family, and increased profit and income for the shop. Customers are happy before, during, and after the transaction.
15. Schedule appointments – avoid having customer just “drop by.” When we schedule, we have greater control over shop operation and work flow.

I have read and understood this policy _____sign

_____print name

_____date

Truck Vendor Listings

4 Wheel Parts

3403 Santa Rosa Ave Santa Rosa Ca.

707-206-9238

Golden Gate Truck Center

8200 Baldwin St. Oakland Ca. 94621

(800) 826-9746

LMC Truck (Orange Truck Parts)

email – info@paulinesauto.com

pw – paulines

First Name – Paulines

Last Name – Automotive

Santa Rosa Hydramatic

104 College Ave. Santa Rosa 95401

707-542-0303

The Rear End Shop

54 Maxwell Ct. Santa Rosa 95401

707-526-0200

Transfer Case Express

1285 Embarcadero, Oakland Ca.

510-533-2273

Industrial Machine

-mill flywheels

Santa Rosa Hydromatic

-has shims for flywheels, and specialty shims

Hardware Store

-water-jetter to cut out special shim shapes

TRAINING BASED ON BAR RECOMMENDATIONS

If a vehicle odometer is broken/non-functional, we must recommend repairing it. This affects warranties.

We must ALWAYS on EVERY LINE document why we are doing that task. The only exception is tire pressure checks, which are mandated by law. Every service item (including maintenance, fluid exchanges, FI cleanings, repairs) MUST have the reason stated on the RO for why it is being done. Sometimes the reason may be “customer requests” but that alone is not sufficient for most tasks. “Customer requests” is sufficient for maintenance services unless they are being done to correct a problem. Every part must have a reason it is being replaced stated on the RO. **ADD THIS TO YOUR STANDARD TASKS FOR OIL CHANGES AND K-MAINTENANCE RIGHT NOW.**

FI cleanings are NOT considered a maintenance item by the BAR or by most manufacturers, so we should NOT recommend them based on mileage on the RO. We know they are good services and you should tell your customer that, but do not document doing an FI cleaning based solely on mileage. Use “customer requests” for those, or list if there is a driveability issue as a reason for doing an FI cleaning.

FI cleanings must be done the same way at both shops.

1. Connect to fuel rail (NOT engine vacuum unless there is no way to do this ie some weird Audis). Cars that do not allow fuel rail connection must be documented and run the cleaner though a vacuum hose on those cars.
2. Clean the throttle body. Use caution on electronic throttle bodies and those cars for which using a chemical cleaner is NOT advised or forbidden.
3. Put the FI additive in the fuel tank.

You may choose to create an electronic inspection requiring photos of each step to be taken to verify proper service done. Inspections and services must be identical at both shops.

Every time we have a cylinder head off, we must check the block surface for straightness and document test results. **ADD THIS TO YOUR CYLINDER HEAD TEARDOWN STANDARD TASK RIGHT NOW AND MAKE SURE THE TECH CHECKS IT PROPERLY AND DOCUMENTS IT.**

On older and high-mileage vehicles, we must inform the customer and document that we informed them that more problems may be found, a can of worms may be open by touching one thing or doing engine work. Have every customer sign the statement on this (separate sheet of policies) at every check in and keep the doc with the RO. Also type this into the RO to prove we had that conversation with them. This is our responsibility, according the BAR. It is not required by law but is highly advised, and we need to be doing this.

Make sure we are doing a compression test before any cylinder head teardown (charge for it) and the results for each cylinder documented on the RO. This will help spot any block/ring problems that might be present, even if they are not the main issue with the engine. This is especially important on older/high mileage vehicles, because sometimes an engine replacement is better for the customer than a cylinder head tear-down.

We MUST ALWAYS print out the original estimate and each RO revision, every step of the way. Authorizations MUST be documented correctly, be made at the exact time of authorization so the times match up, and be in the actual method of authorization (in person, phone, etc).

K-Tech Automotive, Inc
SERVICE WRITER DUTIES

PURPOSE OF THE POSITION:

The primary purpose of the Service Advisor is to profitably sell large amounts of needed automotive repairs, and to get existing and potential customers to schedule and bring their cars in to the shop for repairs.

PRIMARY RESPONSIBILITY:

Needed repairs, profitably sold in abundance.

STATISTICS:

The primary statistics to track and monitor for the Service Writer position is Gross Sales, Average R/O value, Real Labor Rate and Number of R/O's. Sales should be at or above \$25,000 weekly, average RO should be at or above \$650 (5x the shop labor rate), Real Labor Rate should be \$118 or higher, and the number of RO's weekly (car-count) should be at least 35.

OTHER RESPONSIBILITIES:

The Service Writer is also responsible for greeting arrivals, maintaining high CSI (customer satisfaction index) answering the telephone, selling services, job estimating, purchasing, shop floor coordination, job scheduling, quality management, and product delivery.

Technician's should not talk to customers.

EVERY INSPECTION AND DIAGNOSTIC NEEDS TO BE APPROACHED THE SAME WAY REGARDLESS OF HOW CONFIDENT THE TECH SOUNDS. THAT WAY IS: THESE ARE THE TESTS WE RAN DURING THE DIAGNOSTIC AND THIS IS WHAT WE FOUND. WE CONFIRMED THIS COMPONENT IS FAULTY AND NEEDS TO BE REPLACED WE NEED TO RECHECK THE CAR. IT'S POSSIBLE THIS COMPONENT IS HIDING OTHER PROBLEMS OR ONLY PART OF THE PROBLEM SO WE NEED TO REPLACE IT (SINCE WE CONFIRMED IT'S FAULTY BECAUSE *of the proper procedure the technician used in diagnosing it*. ADDITIONAL REPAIRS OR DIAGNOSTICS MAY BE NECESSARY BUT LET'S START HERE.

Technicians are not perfect regardless of how confident they sound. Even the best of technicians can never say with 100% confidence that replacing a part will repair a car due to the nature of cars. You may not understand this but you must accept it as true because of where it is coming from – I have been a technician for many years and a perfectionist and there is rarely perfection in car repair. It's your job to act as a buffer between the technical aspect and the human aspect and handle customers regardless.

Technicians should not interact with customers in all but the rarest of circumstances. They are not trained to do so. This is your job. If there is a problem with any of this, you and/or the technicians should bring this to the attention of management. Call Paul first and if he doesn't have an acceptable answer then contact me.

FOLLOW POLICIES AND PROCEDURES.

REMEMBER TO SET UP THE NARRATIVE LONG BEFORE TALKING NUMBERS.

IT IS CRITICAL THAT THE AVERAGE OF WORK ORDERS FOR THE MONTH MAINTAIN 60% GROSS PROFIT. IF YOU DON'T TRUST THE NUMBERS THEN CONTACT KATE FOR ASSISTANCE BEFORE GIVING THE CUSTOMER A QUOTE. IT IS CRITICAL THAT YOU BELIEVE IN THE NUMBERS AND UNDERSTAND WHY WE USE THEM. REMEMBER – WE SELL GOOD QUALITY PARTS THAT ARE UNDER WARRANTY AND WILL PROTECT THE CUSTOMER IN THE LONG RUN. IF YOU DO NOT FEEL COMFORTABLE GIVING THE ESTIMATE THEN CALL ME IMMEDIATELY.

Alternatives To 'I Don't Know' & 'I Can't' and 'No'

I can ...

I can tell you that ...

At this time....

In order to answer that, I need....(my tech to look at it).

Before I can respond, I need ...

I don't want to give you wrong information.

I will know after ...(my tech does the inspection)

After talking to ... (my tech..)

Let me find out.

Let me make sure I understand exactly what's being asked...

ALSO – DO NOT REFERENCE “THE DEALER” EITHER BY “THE DEALER” OR BY NAME, BECAUSE THIS CAN LEAD CUSTOMERS TO BELIEVE THE DEALER IS THE AUTHORITY AND NOT US, WHICH LEADS TO LOSS OF CONFIDENCE IN US. INSTEAD SAY **“OUR SUPPLIER.”**

Attributes Of A Good Service Writer

There are many things that lead to a successful business. One of them is a good Service Writer. I have visited lots of shops where it was obvious that the Service Writer was not trained and was not motivated.

There are many important attributes of a good Service Writer.

1. They are alive.
2. They are motivated.
3. They like people.
4. People like them.
5. They enjoy their job.
6. They have good communication skills.
7. They have patience.
8. They know what they are doing.
9. They have stable lives.

There are others, but these are some of the more important ones.

Are They Alive?

It is amazing how many Service Writers are just going through the motions. They are not happy and this communicates to customer immediately. Customers react unfavorably to a Service Writer, who is acting like a walking zombie.

If they are not motivated, it greatly affects their sales. You can advertise like crazy, but the sales will be slow because the Service Writer is turning people off. This is especially true when they answer the phone.

In some shops, they have a mirror right beside the phone with the word “SMILE” above it. This way, when anyone answers the phone they will look at themselves in the mirror and remember to smile while talking to the customer.

Are They Focused?

I have seen in the past, Service Writers who are pretty good at their jobs, suddenly, start forgetting things and not following up or stay on top of their job. At the same time, the sales start to drop when it was busy. Later in talking to the Service Writer, you will find that he has some major problem going on.

Sometimes, you will find that they have a drinking or drug problem or they are going through a divorce or they have financial problems. When a Service Writer has personal problems, it will affect his ability to do his job.

Do They Like People?

When we do interviews with Service Writers, occasionally, we find that they actually don't like sales. Mainly this comes from not knowing how to handle people in general or not knowing how to sell. It is really apparent to customers when a Service Writer does not know how to deal with people or is not happy with life in general.

Often times, Service Writers get busy and are short with customers or they fail to take enough time with the customers to make sure they have handled all of the customers questions and considerations.

Handling customers requires a person who likes people, who has patience with people that are confused and don't fully understand what they are agreeing to have done with their car. Anytime a Service Writer loses his patience he generally loses the customers.

Do They Know What They Are Doing?

A high percentage of problems Service Writers have with customers come from their inability to handle problems thrown at them by customers. I have seen Service Writers start to lose their effectiveness when they start having problems that they don't know how to handle.

They have problems with price shoppers, they don't know how handle upset customers and what they or others at the shop did to help create the upsets.

Their lack of training causes them to lose sales, upset customers and not enjoy their job. Many do not fully understand their responsibilities and what is expected of them.

I can not tell how many times, I have seen Service Writers suddenly light up and take off once they understand what they are suppose to do and how to do it more effectively. Many times, you can turn a Service Writer who is not doing well into a happy, very effectively salesperson, who makes good money for themselves and you, by having them adequately trained on their job. **Is your Service Writer producing at the levels you would like? It is only money...Yours!**



HAT – COURTESY/SHOP CAR MANAGER

VIEWPOINT: Courtesy cars help us make money and their condition reflects the standards of the business. Shop cars help us do our jobs with greater ease. They need to be in tip-top shape, and records maintained.

APPROACH TO THE JOB: Make sure the cars and trucks are in tip top shape, and all records and docs on them are maintained. Know what is needed in regards to this, use your checklists, and get the job done.

PURPOSE: Keep everything related to courtesy/shop vehicles in pristine, organized condition so we have no surprised or mishaps with the vehicles.

BASIC ACTIONS OF THE JOB:

1. Make sure all courtesy and shop vehicles have at least 2 keys that are permanently labeled.
2. Check the registration stickers on all vehicles and inform manager of any that are expired or expiring in the next 30 days.
3. Refer to the “vehicle owned” list to make sure you are tending to all vehicles.
4. Make sure the damage reports are current for all vehicles. Update as needed.
5. Make sure the cars are kept clean and vacuumed.
6. Make sure our license plate frames are on all our vehicles.
7. Check the mileage and oil change stickers at least once a month and write cars up for service as needed.
8. Get a Level 1 done on each courtesy car every 30 days, and shop vehicles every 6 months.
9. Make sure the cars get smogged promptly when smog is due (you will be given copy of DMV smog request when they are due).
10. Put registration in glove box and registration sticker on vehicles when you are provided with them. Razer the stickers so no one steals them.

IDEAL SCENE: The courtesy/shop vehicles are clean, fully serviced and repaired in reliable safe condition, and have current stickers on them. Level ones are done on schedule, and smogs for the cars are done promptly. Any repairs the cars need are promptly written up, dispatched, and work performed. All vehicles have at least 2 keys that are permanently labeled (no paper tags) so we always have a spare easily found in the office (courtesy car) or on the key board (shop vehicle). All vehicles have current damage reports in dropbox.

VALUABLE FINAL PRODUCTS:

1. 2 or more permanently labeled keys for each vehicle, hanging in the correct location
2. Current registration stickers razered on each vehicle
3. Registration in the glovebox
4. Up to date “vehicles owned” list
5. current damage report
6. a clean and vacuumed vehicle
7. a set of license plate frames on our vehicles
8. a level 1 done each month
9. an estimate written and dispatched to service or fix a car
10. A needed smog done in a timely manner

Courtesy/Shop Vehicle Manager Start Up Checklist

					Reg good through MM/YY	CURRENT MILEAGE	NEXT OIL CHANGE DUE DATE/ MILEAGE	DAMAGE REPORT CURRENT	CLEAN AND LOANABLE?
1996	SUBARU	OUTBACK	GREEN	3NSF285					
1998	VOLVO	V70 XC AWD	WHITE	7ANG597					
2003	TOYOTA	PRIUS	WHITE	5DKY830					
2006	BMW	530i	WHITE	5SJA445					
2008	TOYOTA	PRIUS	GREEN	6SLL289					
2012	VOLKSW AGEN	JETTA	WHITE	7BIG431					
1971	CHEVROL ET	PICK UP	ORANG E	5D33318					
1989	ISUZU	PICK UP	SILVER	3X79337					
1999	CHEVROL ET	S10 PICK UP	WHITE	03882Z1					
2000	TOYOTA	TACOMA P/U	WHITE	7A01999					
2001	VOLKSW AGEN	JETTA	SILVER	4NDK393					
2001	HONDA	CRV	BLACK	4ULP098					
2002	TOYOTA	PRIUS	BLUE	4WRR820					
2005	HYUNDAI	ELANTRA	RED	7ZVY527					

PHONE BASICS:

The purpose of the phone is to book the appointment.

If you book the appointment = good.

If you didn't book the appointment = do better.

Record

Policy – Service Writer 1 – How to do Callbacks

1.18.24

To: Service Writer

PURPOSE: Calling the customer after the service shows the customer we care, gives us a chance to fix any problems they may have had with their service, and gives us an opportunity to book them for another appointment. It also gives us information to continuously improve our customer service. It is a key piece of our work flow and office operations.

POLICY:

- “Callbacks” is the term we use for the calls we give customers ideally 3 days after they pick up their car, to check in with them, book an appointment for a recommended repair they did not do at the time, etc.
- We also do “30, 60, and 90 day callbacks, which can be addressed in a separate policy and may be done by you or by a store manager/service writer.
- Call people according to schedule – don’t forget or put it off!
- Getting a human on the phone is preferable to getting voicemail.
- Use the scripts.
- Fill out the callback sheets correctly.
- Handle any issues that you can handle yourself, turn the rest over to a manager.
- Turn in the sheets correctly, in the correct location – the General Manager’s bin in the studio at the K-Tech location.

PROCEDURE:

1. Open up Winworks, go to the Lookup Screen, and generate a list of vehicles that have left since you did callbacks last. Ideally callbacks are don 3 days after the car is picked up, but if we have an independent contractor doing them then doing them once a week is better than them not getting done. Make sure at least a couple days have passed since they picked up the car (usually the date the RO was closed). If you do them the same day every week, you’ll get the hang of a good flow for this so we don’t miss anyone or call anyone too soon.
 1. Go to the Lookup Menu, and select Advanced Search on the right hand side.
 2. Enter the “from” date as the date you want the report for, and the “to” date as the day BEFORE (weird computer glitch makes this the way to do it).
2. Print out callback sheets to make your notes on. You will fill out one callback sheet per customer. If you leave a voicemail, fill out the customer info and write “left message” on the callback sheet. Make notes about anything like a voicemail not set up, or a callback number being incorrect.
3. When speaking with the customer or leaving a message, use the script on the callback sheet and ask the customer all the questions on the sheet.
4. Try to make asking the questions sound natural and conversational, not robotic.
5. Handle any issues that you feel you can handle, let the customer know you’ll notify the manager about anything you have not had training on how to handle, and highlight these cases with a highlighter on the callback sheet to draw the manager’s attention to them quickly.
6. Handlings may include scheduling the customer for a return visit to handle an issue with their vehicle. Know how to schedule appointments correctly, or be ready to use a cell phone or another line to turn them over to the store manager/SW to get them in the schedule. We don’t want them getting off the phone without an appointment being booked.
7. Callback are an opportunity to book appointments to keep a steady flow of cars in the shop, so get a certain level of competency with the sales aspect of booking appointments. Use policies and trainings in the Service Writer section of the How To manual to train on this, or ask your supervisor for assistance with this.
8. Put the completed callback sheets in the General Manager’s bin in the K-Tech studio.

RESULT: The service writer calls customers to check on them after they pick up their vehicle. The service writer calls them on schedule, uses the script, and properly documents the callback.

I have read and understood this policy

_____ print name
_____ signature
_____ date

Policy – Service Writer 2 – When to do Callbacks

1.18.24

To: Service Advisor

PURPOSE: Callbacks should be done 2-3 days after the customer picks up the vehicle, because that has given them enough time to drive the vehicle around and see how it performs, and it is early enough for us to be fresh in the customer's mind and be able to resolve any issues that may have arisen from their service before the issue gets bigger.

POLICY:

- Do callbacks 2 days after the customer picks up their vehicle. The only exception to the 2-day rule is vehicles picked up on Thursday or Friday, which you will do the callbacks for on Monday because we are closed on the weekend. Other exceptions may include if we have an independent contractor coming in once a week to do them.
- Preferably call in the morning when people's minds are still fresh.
- Don't get behind on callbacks – they are a key piece of our work flow.
- If they don't answer, leave a message according to the "leave a message" script.
- Make sure the person you are calling does NOT currently have their car in the shop. Consider RO's that were put on account but that the customer has not picked up yet.

PROCEDURE:

1. Make sure the person you are calling does NOT currently have their car in the shop.
2. Try to call people in the morning, when their minds are still fresh and they are more likely to be available.
3. On Mondays, call people who picked up Thursday and Friday. (NOTE: The schedule noted applies when callback are being done "in house." If an independent contractor is doing them once a week, that is acceptable and this schedule does not need to be followed. We are keeping it here in this policy because this is the ideal way to do them.)
4. On Tuesdays, as long as you are fully caught up, you will have no callbacks to do, and you can focus on recommended repair, service reminder, and 30-60-90 day calls. (NOTE: these may be taken over by store manager instead of independent contractor.)
5. On Wednesdays, call people who picked up on Monday.
6. On Thursdays, call people who picked up on Tuesday.
7. On Fridays, call people who picked up on Wednesday.
8. If they don't answer, leave a voice message following the "leave a message" script.

RESULT: The service writer does callbacks 2 days after the customer picks up their vehicle, except for people who picked up on Thursday or Friday – those people get called Monday. The service writer does not fall behind on callbacks – they are all done on schedule. The service writer makes the calls in the morning whenever possible. If an independent contractor is doing the callbacks, we can make do with them getting done once a week as long as we don't fall behind.

I have read and understood this policy _____ print name

_____ signature

_____ date

Policy – Service Writer 3 – Documenting Callbacks

1.18.24

To: Service Writer

PURPOSE: Tracking callbacks allows us to stay organized so we call the right people at the right time, and so the owner gets all the information she needs for marketing from the callbacks.

POLICY: Fill out a callback sheet for each customer, even if you aren't able to reach them. Follow the script. Complete the callback sheet accurately with information obtained from the customer during the callback.

PROCEDURE:

- Callback sheets are located in the electronic shop manual. You may need to print them out.
- The "Service Date" on the callback sheet is the date the invoice was closed. It is typically the day the customer picks up their vehicle, but not always.
- The "Callback Date" is the date you are doing the callback (today's date).
- Document the customer's answers to each of the questions.
- Some of the questions have a "yes no" after them – circle the customer's answer, and make notes to elaborate.
- For the questions about whether we informed customers about certain things upon vehicle delivery, if they say no, circle "no" and then explain it to them right then and there. Make notes stating that you did this.
- Verify their email address and write "verified" on the email address line on the callback sheet if the email address we have is correct. If we don't have an email address in Winworks, get their email address and enter it in Winworks and on the callback sheet. If the email address we have is incorrect, then update it and write the correct one on the callback sheet. If their address or any other information is missing in Winworks, get it from the customer and fill it in in Winworks. Update any emails in Winworks also as needed.
- If you don't get a human being, and instead leave a voice message, fill out the top of the callback sheet with customer information and date as usual and then write "message" on the callback sheet to indicate you left a message. Make any other relevant notes, such as "customer voicemail box full" etc.
- If the phone number is incorrect, email the customer or contact them via mail to get the correct information so we can put it in Winworks.
- Place all completed callback sheets in the designated area/bin (the General Manager's bin in the K-Tech studio).

RESULT: The service writer thoroughly fills out a callback sheet for each customer scheduled for a callback. The service writer uses the script when doing the callbacks. The service writer generates a callback sheet for the customer even if s/he wasn't able to reach them.

I have read and understood this policy _____ print name

_____ signature

_____ date

Full System Isolate (Initial Concern) Presentation Script – V9

Mr. / Mrs. _____ this is _____ from _____ is now a good
(Customers name) (Your name) (Shop name)
time to talk? If the answer is “No” ... responding with... When is a Good time to call you back?

If the answer is “yes”... respond with... Great!

My ASE technician _____ and I have personally inspected _____
(F&B) (Tech's first Name) (Credibility) (Mirror back Concern as customer stated)

And have taken digital photographs and or a video for your records as well.

Over all the _____ is in Great Shape. (If it truly it is)
(System being addressed only)

List Three Positive Of The Particular System We Are Addressing:

The _____ is in _____ shape, (choose the proper wordage, normal,
(All for reassurances) (Insert word) excellent, not leaking, good, great,
The _____ is in _____ shape, condition, satisfactory)
(Insert word) (Blend in with failure explanation)
The _____ is in _____ shape,
(Insert word)

We have isolated your concern and identified these items needing immediate attention (Deliver with Urgency and Conviction!) Be prepared to explain functionality of failed component(s), along with ECM.

Failure _____
Effect _____
Cause _____
Maintenance _____

Again, overall the _____ is in Great Shape! (Reassurance)
(System being addressed)

Your total investment for this repair is \$ _____ dollars (include all taxes and ad on fees),

The good news is the parts are in stock. (Assuming the sale)

Our repairs have a 24 month 24,000 miles Nationwide Guarantee. (Or insert Guarantee this repair has)
(F & B and Reassurance)

So with your permission I'll have _____ get started on the repairs. (Do not pause,
(Do not pause keep pushing through) (Insert tech's first name)
keep pushing through.)

Once the repair is completed and your vehicle is road tested. I'll have _____ to perform a complimentary maintenance inspection, to make sure the rest of the vehicle is in safe and operating order. Is this a good number to reach you periodically throughout the day with updates?

Thank you - I will be talking with you soon. (Always assume the customer wants it fixed!!!)

Additional Notes:

CALLBACK SHEET - Pauline's

service date _____

callback date(s) _____

"Hello Mr./Ms. _____, this is (your name) from Pauline's Automotive. I'm calling to see if you were satisfied with your last visit to our shop. Do you have a moment to answer a few questions?"

1. What was your impression of our facility?
2. How satisfied were you with the service you received?
3. Was the complaint that you brought the car in for taken care of?
4. What would you like to see added or changed about our service?
5. Would you recommend our shop to others? **Yes No**
6. When you picked your car up, did our service writer tell you about our:
 1. Warranty, and how it applies to the work you had done on your vehicle? **Yes No**
 2. Referral program. **Yes No**
 3. Financing options **Yes No**
7. Happy customers only – ask for Google Review (or other review if they're not on Google, like Yelp!)

"What is a good email address for you?" _____ or "Is _____ still a good email address for you?" ***
Verify entire mailing address and look for obviously misspelled names and verify name spelling if it looks odd. "Is _____ your correct mailing address?" Update on this sheet and update Winworks.

CALLBACK SHEET - Pauline's

service date _____

callback date(s) _____

"Hello Mr./Ms. _____, this is (your name) from Pauline's Automotive. I'm calling to see if you were satisfied with your last visit to our shop. Do you have a moment to answer a few questions?"

2. What was your impression of our facility?
2. How satisfied were you with the service you received?
3. Was the complaint that you brought the car in for taken care of?
4. What would you like to see added or changed about our service?
5. Would you recommend our shop to others? **Yes No**
6. When you picked your car up, did our service writer tell you about our:
 1. Warranty, and how it applies to the work you had done on your vehicle? **Yes No**
 2. Referral program. **Yes No**
 3. Financing options **Yes No**
7. Happy customers only – ask for Google Review (or other review if they're not on Google, like Yelp!)

"What is a good email address for you?" _____ or "Is _____ still a good email address for you?" ***
Verify entire mailing address and look for obviously misspelled names and verify name spelling if it looks odd. "Is _____ your correct mailing address?" Update on this sheet and update Winworks.

CALLBACK SHEET - KTECH

service date _____

callback date(s) _____

“Hello Mr./Ms. _____, this is (your name) from K-Tech Automotive. I'm calling to see if you were satisfied with your last visit to our shop. Do you have a moment to answer a few questions?”

1. What was your impression of our facility?
2. How satisfied were you with the service you received?
3. Was the complaint that you brought the car in for taken care of?
4. What would you like to see added or changed about our service?
5. Would you recommend our shop to others? **Yes No**
6. When you picked your car up, did our service writer tell you about our:
 1. Warranty, and how it applies to the work you had done on your vehicle? **Yes No**
 2. Referral program. **Yes No**
 3. Financing options **Yes No**
7. Happy customers only – ask for Google Review (or other review if they're not on Google, like Yelp!)

“What is a good email address for you?” _____ or “Is _____ still a good email address for you?” ***
Verify entire mailing address and look for obviously misspelled names and verify name spelling if it looks odd. “Is _____ your correct mailing address?” Update on this sheet and update Winworks.

CALLBACK SHEET - KTECH

service date _____

callback date(s) _____

“Hello Mr./Ms. _____, this is (your name) from K-Tech Automotive. I'm calling to see if you were satisfied with your last visit to our shop. Do you have a moment to answer a few questions?”

1. What was your impression of our facility?
2. How satisfied were you with the service you received?
3. Was the complaint that you brought the car in for taken care of?
4. What would you like to see added or changed about our service?
5. Would you recommend our shop to others? **Yes No**
6. When you picked your car up, did our service writer tell you about our:
 1. Warranty, and how it applies to the work we did on your vehicle? **Yes No**
 2. Referral program. **Yes No**
 3. Financing options **Yes No**
7. Happy customers only – ask for Google Review (or other review if they're not on Google, like Yelp!)

“What is a good email address for you?” _____ or “Is _____ still a good email address for you?” ***
Verify entire mailing address and look for obviously misspelled names and verify name spelling if it looks odd. “Is _____ your correct mailing address?” Update on this sheet and update Winworks.

Full System Isolate (Initial Concern) Presentation Script – V9

Mr. / Mrs. _____ this is _____ from _____ is now a good
(Customers name) (Your name) (Shop name)
time to talk? If the answer is “No” ... responding with... When is a Good time to call you back?

If the answer is “yes”... respond with... Great!

My ASE technician _____ and I have personally inspected _____
(F&B) (Tech's first Name) (Credibility) (Mirror back Concern as customer stated)

And have taken digital photographs and or a video for your records as well.

Over all the _____ is in Great Shape. (If it truly it is)
(System being addressed only)

List Three Positive Of The Particular System We Are Addressing:

The _____ is in _____ shape, (choose the proper wordage, normal,
(All for reassurances) (Insert word) excellent, not leaking, good, great,
The _____ is in _____ shape, condition, satisfactory)
(Insert word) (Blend in with failure explanation)
The _____ is in _____ shape,
(Insert word)

We have isolated your concern and identified these items needing immediate attention (Deliver with Urgency and Conviction!) Be prepared to explain functionality of failed component(s), along with ECM.

Failure _____
Effect _____
Cause _____
Maintenance _____

Again, overall the _____ is in Great Shape! (Reassurance)
(System being addressed)

Your total investment for this repair is \$ _____ dollars (include all taxes and ad on fees),

The good news is the parts are in stock. (Assuming the sale)

Our repairs have a 24 month 24,000 miles Nationwide Guarantee. (Or insert Guarantee this repair has)
(F & B and Reassurance)

So with your permission I'll have _____ get started on the repairs. (Do not pause,
(Do not pause keep pushing through) (Insert tech's first name)
keep pushing through.)

Once the repair is completed and your vehicle is road tested. I'll have _____ to perform a complimentary maintenance inspection, to make sure the rest of the vehicle is in safe and operating order. Is this a good number to reach you periodically throughout the day with updates?

Thank you - I will be talking with you soon. (Always assume the customer wants it fixed!!!)

Additional Notes:

Full System Isolate (Initial Concern) Presentation Script – V9

Mr. / Mrs. _____ this is _____ from _____ is now a good
(Customers name) (Your name) (Shop name)
time to talk? If the answer is “No” ... responding with... When is a Good time to call you back?

If the answer is “yes”... respond with... Great!

My ASE technician _____ and I have personally inspected _____
(F&B) (Tech's first Name) (Credibility) (Mirror back Concern as customer stated)

And have taken digital photographs and or a video for your records as well.

Over all the _____ is in Great Shape. (If it truly it is)
(System being addressed only)

List Three Positive Of The Particular System We Are Addressing:

The _____ is in _____ shape, (choose the proper wordage, normal,
(All for reassurances) (Insert word) excellent, not leaking, good, great,
The _____ is in _____ shape, condition, satisfactory)
(Insert word) (Blend in with failure explanation)
The _____ is in _____ shape,
(Insert word)

We have isolated your concern and identified these items needing immediate attention (Deliver with Urgency and Conviction!) Be prepared to explain functionality of failed component(s), along with ECM.

Failure _____
Effect _____
Cause _____
Maintenance _____

Again, overall the _____ is in Great Shape! (Reassurance)
(System being addressed)

Your total investment for this repair is \$ _____ dollars (include all taxes and ad on fees),

The good news is the parts are in stock. (Assuming the sale)

Our repairs have a 24 month 24,000 miles Nationwide Guarantee. (Or insert Guarantee this repair has)
(F & B and Reassurance)

So with your permission I'll have _____ get started on the repairs. (Do not pause,
(Do not pause keep pushing through) (Insert tech's first name)
keep pushing through.)

Once the repair is completed and your vehicle is road tested. I'll have _____ to perform a complimentary maintenance inspection, to make sure the rest of the vehicle is in safe and operating order. Is this a good number to reach you periodically throughout the day with updates?

Thank you - I will be talking with you soon. (Always assume the customer wants it fixed!!!)

Additional Notes:

PHONE BASICS:

The purpose of the phone is to book the appointment.

If you book the appointment = good.

If you didn't book the appointment = do better.

Record

Policy – Service Writer 1 – How to do Callbacks

1.18.24

To: Service Writer

PURPOSE: Calling the customer after the service shows the customer we care, gives us a chance to fix any problems they may have had with their service, and gives us an opportunity to book them for another appointment. It also gives us information to continuously improve our customer service. It is a key piece of our work flow and office operations.

POLICY:

- “Callbacks” is the term we use for the calls we give customers ideally 3 days after they pick up their car, to check in with them, book an appointment for a recommended repair they did not do at the time, etc.
- We also do “30, 60, and 90 day callbacks, which can be addressed in a separate policy and may be done by you or by a store manager/service writer.
- Call people according to schedule – don’t forget or put it off!
- Getting a human on the phone is preferable to getting voicemail.
- Use the scripts.
- Fill out the callback sheets correctly.
- Handle any issues that you can handle yourself, turn the rest over to a manager.
- Turn in the sheets correctly, in the correct location – the General Manager’s bin in the studio at the K-Tech location.

PROCEDURE:

1. Open up Winworks, go to the Lookup Screen, and generate a list of vehicles that have left since you did callbacks last. Ideally callbacks are don 3 days after the car is picked up, but if we have an independent contractor doing them then doing them once a week is better than them not getting done. Make sure at least a couple days have passed since they picked up the car (usually the date the RO was closed). If you do them the same day every week, you’ll get the hang of a good flow for this so we don’t miss anyone or call anyone too soon.
 1. Go to the Lookup Menu, and select Advanced Search on the right hand side.
 2. Enter the “from” date as the date you want the report for, and the “to” date as the day BEFORE (weird computer glitch makes this the way to do it).
2. Print out callback sheets to make your notes on. You will fill out one callback sheet per customer. If you leave a voicemail, fill out the customer info and write “left message” on the callback sheet. Make notes about anything like a voicemail not set up, or a callback number being incorrect.
3. When speaking with the customer or leaving a message, use the script on the callback sheet and ask the customer all the questions on the sheet.
4. Try to make asking the questions sound natural and conversational, not robotic.
5. Handle any issues that you feel you can handle, let the customer know you’ll notify the manager about anything you have not had training on how to handle, and highlight these cases with a highlighter on the callback sheet to draw the manager’s attention to them quickly.
6. Handlings may include scheduling the customer for a return visit to handle an issue with their vehicle. Know how to schedule appointments correctly, or be ready to use a cell phone or another line to turn them over to the store manager/SW to get them in the schedule. We don’t want them getting off the phone without an appointment being booked.
7. Callback are an opportunity to book appointments to keep a steady flow of cars in the shop, so get a certain level of competency with the sales aspect of booking appointments. Use policies and trainings in the Service Writer section of the How To manual to train on this, or ask your supervisor for assistance with this.
8. Put the completed callback sheets in the General Manager’s bin in the K-Tech studio.

RESULT: The service writer calls customers to check on them after they pick up their vehicle. The service writer calls them on schedule, uses the script, and properly documents the callback.

I have read and understood this policy

_____ print name
_____ signature
_____ date

Policy – Service Writer 2 – When to do Callbacks

1.18.24

To: Service Advisor

PURPOSE: Callbacks should be done 2-3 days after the customer picks up the vehicle, because that has given them enough time to drive the vehicle around and see how it performs, and it is early enough for us to be fresh in the customer's mind and be able to resolve any issues that may have arisen from their service before the issue gets bigger.

POLICY:

- Do callbacks 2 days after the customer picks up their vehicle. The only exception to the 2-day rule is vehicles picked up on Thursday or Friday, which you will do the callbacks for on Monday because we are closed on the weekend. Other exceptions may include if we have an independent contractor coming in once a week to do them.
- Preferably call in the morning when people's minds are still fresh.
- Don't get behind on callbacks – they are a key piece of our work flow.
- If they don't answer, leave a message according to the "leave a message" script.
- Make sure the person you are calling does NOT currently have their car in the shop. Consider RO's that were put on account but that the customer has not picked up yet.

PROCEDURE:

1. Make sure the person you are calling does NOT currently have their car in the shop.
2. Try to call people in the morning, when their minds are still fresh and they are more likely to be available.
3. On Mondays, call people who picked up Thursday and Friday. (NOTE: The schedule noted applies when callback are being done "in house." If an independent contractor is doing them once a week, that is acceptable and this schedule does not need to be followed. We are keeping it here in this policy because this is the ideal way to do them.)
4. On Tuesdays, as long as you are fully caught up, you will have no callbacks to do, and you can focus on recommended repair, service reminder, and 30-60-90 day calls. (NOTE: these may be taken over by store manager instead of independent contractor.)
5. On Wednesdays, call people who picked up on Monday.
6. On Thursdays, call people who picked up on Tuesday.
7. On Fridays, call people who picked up on Wednesday.
8. If they don't answer, leave a voice message following the "leave a message" script.

RESULT: The service writer does callbacks 2 days after the customer picks up their vehicle, except for people who picked up on Thursday or Friday – those people get called Monday. The service writer does not fall behind on callbacks – they are all done on schedule. The service writer makes the calls in the morning whenever possible. If an independent contractor is doing the callbacks, we can make do with them getting done once a week as long as we don't fall behind.

I have read and understood this policy _____ print name

_____ signature

_____ date

Policy – Service Writer 3 – Documenting Callbacks

1.18.24

To: Service Writer

PURPOSE: Tracking callbacks allows us to stay organized so we call the right people at the right time, and so the owner gets all the information she needs for marketing from the callbacks.

POLICY: Fill out a callback sheet for each customer, even if you aren't able to reach them. Follow the script. Complete the callback sheet accurately with information obtained from the customer during the callback.

PROCEDURE:

- Callback sheets are located in the electronic shop manual. You may need to print them out.
- The "Service Date" on the callback sheet is the date the invoice was closed. It is typically the day the customer picks up their vehicle, but not always.
- The "Callback Date" is the date you are doing the callback (today's date).
- Document the customer's answers to each of the questions.
- Some of the questions have a "yes no" after them – circle the customer's answer, and make notes to elaborate.
- For the questions about whether we informed customers about certain things upon vehicle delivery, if they say no, circle "no" and then explain it to them right then and there. Make notes stating that you did this.
- Verify their email address and write "verified" on the email address line on the callback sheet if the email address we have is correct. If we don't have an email address in Winworks, get their email address and enter it in Winworks and on the callback sheet. If the email address we have is incorrect, then update it and write the correct one on the callback sheet. If their address or any other information is missing in Winworks, get it from the customer and fill it in in Winworks. Update any emails in Winworks also as needed.
- If you don't get a human being, and instead leave a voice message, fill out the top of the callback sheet with customer information and date as usual and then write "message" on the callback sheet to indicate you left a message. Make any other relevant notes, such as "customer voicemail box full" etc.
- If the phone number is incorrect, email the customer or contact them via mail to get the correct information so we can put it in Winworks.
- Place all completed callback sheets in the designated area/bin (the General Manager's bin in the K-Tech studio).

RESULT: The service writer thoroughly fills out a callback sheet for each customer scheduled for a callback. The service writer uses the script when doing the callbacks. The service writer generates a callback sheet for the customer even if s/he wasn't able to reach them.

I have read and understood this policy _____ print name

_____ signature

_____ date

Full System Isolate (Initial Concern) Presentation Script – V9

Mr. / Mrs. _____ this is _____ from _____ is now a good
(Customers name) (Your name) (Shop name)
time to talk? If the answer is “No” ... responding with... When is a Good time to call you back?

If the answer is “yes”... respond with... Great!

My ASE technician _____ and I have personally inspected _____
(F&B) (Tech's first Name) (Credibility) (Mirror back Concern as customer stated)

And have taken digital photographs and or a video for your records as well.

Over all the _____ is in Great Shape. (If it truly it is)
(System being addressed only)

List Three Positive Of The Particular System We Are Addressing:

(All for reassurances)

The _____ is in _____ shape, (choose the proper wordage, normal,
(Insert word) excellent, not leaking, good, great,

The _____ is in _____ shape, condition, satisfactory)
(Insert word) (Blend in with failure explanation)

The _____ is in _____ shape,
(Insert word)

We have isolated your concern and identified these items needing immediate attention (Deliver with Urgency
and Conviction!) Be prepared to explain functionality of failed component(s), along with ECM.

Failure _____

Effect _____

Cause _____

Maintenance _____

Again, overall the _____ is in Great Shape! (Reassurance)
(System being addressed)

Your total investment for this repair is \$ _____ dollars (include all taxes and ad on fees),

The good news is the parts are in stock. (Assuming the sale)

Our repairs have a 24 month 24,000 miles Nationwide Guarantee. (Or insert Guarantee this repair has)
(F & B and Reassurance)

So with your permission I'll have _____ get started on the repairs. (Do not pause,
(Do not pause keep pushing through) (Insert tech's first name)

keep pushing through.)

Once the repair is completed and your vehicle is road tested. I'll have _____ to perform a
complimentary maintenance inspection, to make sure the rest of the vehicle is in safe and operating
order. Is this a good number to reach you periodically throughout the day with updates?

Thank you - I will be talking with you soon. (Always assume the customer wants it fixed!!!)

Additional Notes:

CALLBACK SHEET - Pauline's

service date _____

callback date(s) _____

"Hello Mr./Ms. _____, this is (your name) from Pauline's Automotive. I'm calling to see if you were satisfied with your last visit to our shop. Do you have a moment to answer a few questions?"

1. What was your impression of our facility?
2. How satisfied were you with the service you received?
3. Was the complaint that you brought the car in for taken care of?
4. What would you like to see added or changed about our service?
5. Would you recommend our shop to others? **Yes No**
6. When you picked your car up, did our service writer tell you about our:
 1. Warranty, and how it applies to the work you had done on your vehicle? **Yes No**
 2. Referral program. **Yes No**
 3. Financing options **Yes No**
7. Happy customers only – ask for Google Review (or other review if they're not on Google, like Yelp!)

"What is a good email address for you?" _____ or "Is _____ still a good email address for you?" ***
Verify entire mailing address and look for obviously misspelled names and verify name spelling if it looks odd. "Is _____ your correct mailing address?" Update on this sheet and update Winworks.

CALLBACK SHEET - Pauline's

service date _____

callback date(s) _____

"Hello Mr./Ms. _____, this is (your name) from Pauline's Automotive. I'm calling to see if you were satisfied with your last visit to our shop. Do you have a moment to answer a few questions?"

2. What was your impression of our facility?
2. How satisfied were you with the service you received?
3. Was the complaint that you brought the car in for taken care of?
4. What would you like to see added or changed about our service?
5. Would you recommend our shop to others? **Yes No**
6. When you picked your car up, did our service writer tell you about our:
 1. Warranty, and how it applies to the work you had done on your vehicle? **Yes No**
 2. Referral program. **Yes No**
 3. Financing options **Yes No**
7. Happy customers only – ask for Google Review (or other review if they're not on Google, like Yelp!)

"What is a good email address for you?" _____ or "Is _____ still a good email address for you?" ***
Verify entire mailing address and look for obviously misspelled names and verify name spelling if it looks odd. "Is _____ your correct mailing address?" Update on this sheet and update Winworks.

CALLBACK SHEET - KTECH

service date _____

callback date(s) _____

"Hello Mr./Ms. _____, this is (your name) from K-Tech Automotive. I'm calling to see if you were satisfied with your last visit to our shop. Do you have a moment to answer a few questions?"

1. What was your impression of our facility?
2. How satisfied were you with the service you received?
3. Was the complaint that you brought the car in for taken care of?
4. What would you like to see added or changed about our service?
5. Would you recommend our shop to others? **Yes No**
6. When you picked your car up, did our service writer tell you about our:
 1. Warranty, and how it applies to the work you had done on your vehicle? **Yes No**
 2. Referral program. **Yes No**
 3. Financing options **Yes No**
7. Happy customers only – ask for Google Review (or other review if they're not on Google, like Yelp!)

"What is a good email address for you?" _____ or "Is _____ still a good email address for you?" ***
Verify entire mailing address and look for obviously misspelled names and verify name spelling if it looks odd. "Is _____ your correct mailing address?" Update on this sheet and update Winworks.

CALLBACK SHEET - KTECH

service date _____

callback date(s) _____

"Hello Mr./Ms. _____, this is (your name) from K-Tech Automotive. I'm calling to see if you were satisfied with your last visit to our shop. Do you have a moment to answer a few questions?"

1. What was your impression of our facility?
2. How satisfied were you with the service you received?
3. Was the complaint that you brought the car in for taken care of?
4. What would you like to see added or changed about our service?
5. Would you recommend our shop to others? **Yes No**
6. When you picked your car up, did our service writer tell you about our:
 1. Warranty, and how it applies to the work we did on your vehicle? **Yes No**
 2. Referral program. **Yes No**
 3. Financing options **Yes No**
7. Happy customers only – ask for Google Review (or other review if they're not on Google, like Yelp!)

"What is a good email address for you?" _____ or "Is _____ still a good email address for you?" ***
Verify entire mailing address and look for obviously misspelled names and verify name spelling if it looks odd. "Is _____ your correct mailing address?" Update on this sheet and update Winworks.

PMI (ADDITIONAL CONCERNS) PRESENTATION SCRIPT- V11 Revised 10/23

Mr. / Mrs. _____ this is _____ from _____ is now a good
(Customers name) (Your name) (Shop name)

time to talk? If the answer is "No" ... responding with... When is a good time to call you back?

If the answer is "yes" ... respond with ... Great!

The repairs on your _____ system have been completed and we don't see any other issues with this repair at this time! (Make sure nothing else is needed before you proceed)

As promised, my ASE Technician _____ and I have personally completed the Preventive Maintenance Inspection on your vehicle and have taken digital photographs of your vehicle. I have emailed them to you. Are you able to access your email and we can look at it together? (Don't wait for a response, say the next sentence right away, then wait for the customer's response.) **Overall** - your vehicle is in great shape (If it truly is).

First: We started with the test drive and under-hood inspection

We have inspected _____ it's in great shape,

We have inspected _____ it's in great shape,

We have identified your _____ are bad and they need your immediate attention.

We have inspected _____ it's in great shape,

We have identified your _____ are bad and they need to be replaced

We're also going to _____ and _____.

Additional Notes:

Overall your _____ is in great shape!

These additional repairs also have the 24 -month- 24,000 miles Nationwide guarantee. I have the parts here/ordered. And we can get this work done and your vehicle back to you by _____. I just need your authorization to begin the work.

(Wait for the customer to process which is called getting the agreement from the customer that the repair is needed... Customer will usually ask the price, then continue the script below - We like to wait for them to ask the price before we state it because it shows the repair needs to be done, which has to come first before discussing costs to be sure we have their agreement that the work needs to be done and address any objection up to that point... If a customer has not asked for a price by this time but says go ahead with the repairs, we legally need to state the price to them anyway by continuing. Either way, you continue as follows...)

Your total investment today is \$_____ dollars which brings your total investment To \$_____.

And again your vehicle is well worth the investment (if t is), so with your permission I will get _____ started on the additional repairs. (Do not pause keep pushing through)

Is _____ still the best phone number to reach you?

Great...I'll give you a call once your vehicle has been road tested and completed.

(If a customer has not asked for the price by this time we need to state it to them.)

Additional Notes:

Appointment Script

When you feel you can't use the "Anytime" script due to heavy volume

If customer calls, but your shop is unable to get to their car today.

How did you hear about (your company name)? *Direct mail, Customer referral, Online Search, Etc.*

(Owner Name) had us set aside time for you to bring in your vehicle on (give specific day and time options). Which day and day would work best for you?

If customer says they have to come in today, we say...

We will make time for you as soon as possible!

These scripts must be used on the phone or at the counter.

The same process must take place every time to best serve the customer.



K-Tech Automotive/Pauline's Automotive
30-60-90-Day Follow-up / Recommended Repair and
General
“Leave a Message” Script

(NOTE; Be very cheerful and make it light hearted)

“Hello (Customer Name), this is (Your Name) from K-Tech Automotive/Pauline's Automotive.

The reason for my call is to follow-up on your(Customer Vehicle).

It's been about (4weeks)since you were here and again I just wanted to make sure everything is going great with the (Service Done).”

***NOTE; “NO” recommended repairs, then say...**

“I hope all is well and if you have any questions or need anything just give me a call at 707-824-6881/707-823-9060. Otherwise, you have a wonderful day and we'll see you during your next visit.”

***NOTE; “WITH” recommended repairs to sell, then say...**

“I do remember there were a few things that we spoke about while you were here?

However there is “one” item in particular that I feel we should talk about.

I don't want to see it turn into something that will cost you a lot more to fix as it keeps getting worse.

So just give me a quick call and I can let you know what's going on.

Our number is 707-824-6881/707-823-9060.

I hope you are having a great day and I'll speak to you soon.”

K-Tech Automotive/Pauline's Automotive
30-60-90 Day Follow-up / Recommended Repair
Call Script

(NOTE; Be very cheerful and make it light hearted)

"Hello **Cust. Name** , this is **Your Name** from K-Tech Automotive/Pauline's Automotive.

How are you doing today?"

(Listen and acknowledge their response)

"Well... the reason for my call is to follow-up on your **Cust. Vehicle** .

As you know we follow-up on all of our really good customers and I just wanted to make sure

that everything is still perfect. It's been about (4 weeks) since you were here and again I just wanted to see if everything is going great with the **Service Done**."

(Listen and acknowledge their response)

***NOTE; If it's NOT OK all you do is find out when they can get the vehicle back in.**

***NOTE; OK, but "NO" recommended repairs, then acknowledge and say...**

"I'm really glad everything is doing well and we will see you on your next visit. You have a wonderful day!"

***NOTE; "WITH" recommended repairs to sell, then acknowledgment and say...**

"Do you remember how there were a few things that we spoke about while you were in?"

(Listen and acknowledge their response)

K-Tech Automotive/Pauline's Automotive
Full Script for Customer Satisfaction/Referral Program

Introduce yourself.. and the name of the shop.

“Hi!. This is: _____ from K-Tech Automotive/Pauline's Automotive”.

(if you perceive your communication is not well received you can joke and say you are not trying to sell him anything: **“don’t worry I’m not telemarketer! I’m not trying to sell you anything!”** (keep it light)

“We routinely do customer satisfaction calls to make sure we performed good quality service and wanted to check if you were satisfied with your last visit here. Do you have a minute to answer some questions?”

If they say no; in a friendly manner tell them: **“no problem. This only takes a minute or two. What is the best time for me to call?”** –get a time to call and call them back.

If they say, it’s ok now:

- 1. What was your impression of our facility?**
- 2. How satisfied were you with the service you received?**
- 3. Was the complaint that you brought the car in for taken care of?**
- 4. What would you like to see added or changed about our service?**
- 5. Would you recommend our shop to others?**

Note: The MOST important thing is to get in communication with the customer. The order of these questions does not really matter. This questions are just guidelines to get them talking and increasing the communication with your clients.

Note: if the above survey discovers any clients who are not satisfied, tell them you are sorry and see if they can bring the car over for you to look at it.

If everything is ok, continue as follows:

Once you perceive they are in communication with you (not resisting your call) tell them:

“I wanted to let you know we are growing because of people like you, referring friends and family to us and we are thinking of putting together a referral program

in appreciation to our clients' help. We thought of different options to reward clients sending friends and family, but we decided just asking you what you would like. These are the options we thought for each friend or family you may send to us:"

Discounted service or oil change in our shop

Movie ticket.

Car wash.

Gift certificate to restaurant.

Gift certificate to coffee shop.

Donation to your favorite charity.

Get them to answer their best choice.

"Thank you very much for your time. Is there anything you need from us now?"

(Keep it open for an appointment).

GUIDELINE FOR DOING A CUSTOMER FOLLOW UP CALL WITH RECOMMENDED REPAIRS

SAMPLE SCRIPT

"Hello Mr/Ms _____ (customer's name) _____, this is _____ (your name) _____ from _____ (name of shop) _____. I'm calling to see if you were satisfied with your last visit to our shop. Do you have a moment to answer a couple of questions?"

- 1. What was your impression of our facility?**
- 2. How satisfied were you with the service you received?**
- 3. Was the complaint that you brought the car in for taken care of?**
- 4. What would you like to see added or changed about our service?**
- 5. Would you recommend our shop to others?**

IF THEY HAVE RECOMMENDED REPAIRS

"While your car was here our technician recommended (the following repair). Did you get that taken care of?"

"It's important to handle these problems before they become a major repair. I have an opening in our schedule book for tomorrow morning, or would you rather drop it off after lunch? Great! We'll see you then."

IF THERE ARE NO RECOMMENDED REPAIRS

Thanks for your answers. Feedback from our customers helps us continue to improve. Please let us know whenever there's anything we can do for you.

K-Tech Automotive/Pauline's Automotive
Phone Script for Office Assistant

October 18, 2013

Purpose: To make a strong positive connection with customers, and to get them to the person who can help them. To capture all phone calls rather than letting them go to voicemail.

Procedure:

Say with a Smile on your face:

**“Thank you for calling K-Tech Automotive/Pauline's Automotive, this is _____,
how may I help you?”**

Whatever they need help with, you should say:

**“We can help you with that. _____ is the person I'd like you to speak with and
s/he'll be available shortly. May I please take your name and phone number and
have him call you right back?”**

Then let _____ know they called so he can call them back.

Do not attempt to give repair advice, pricing, or any other information over the phone. Simply be very friendly, smile, and take a message including name and phone number, even if they say we have their phone number.

I have read and understood this procedure _____ print

_____ sign

_____ date

THE SERVICE WRITER ROLE AND CALLING FOR RECOMMENDED REPAIRS

It is the job of the service writer to get the customer in and sell to them. **The product of a salesman is: sold services in sufficient volume and correct profit so the company can expand and prosper.** In order to sell you have to have customers. A service writer must call out to book customers, and promote heavily to current customers to send in their family and friends. It is essential they do whatever is needed to get the customers in. If you don't like to call out or don't like people that much, then service writer or salesman is not the job for you. A good service writer has to like people and want them to come in, and drive them in by calling, talking, etc.

A good service writer insists the techs inspect each car and kicks the inspection form back until it is properly filled out. That is his main sales tool with many customers. He can get a lot more bookings plus correctly help his customers with this information.

This is a sample script for calling recommended repairs. In the first place, before the customer OKs the work he wants done you should show him the safety and economy points that need fixing and get him to buy these before he leaves the shop. If he does not, maybe you can book him for next week and you should: You should let them know it is cheaper and easier to get it done all at once while in the shop as the labor time is less, right? Just "close" (get their agreement and willingness to pay for the entire job) them for the main points of the inspection. Take it easy on new customers as they might get overwhelmed by too much found, but follow up on them.

Script

"I have an opening next Tuesday at 10:00am, Mrs. Jones. My Master Tech will reserve that slot for lining your front brakes, etc."

You never ask, "Would you like..." but positively approach this and close him.

If they got out the door, call them and say something like the following: (This is not verbatim or robotic, as everyone is different. Stay tuned into your customers and handle each as an individual.)

"Mrs. Jones, this is Pete from ABC Auto. When you were here I was concerned about your front brakes and I have scheduled your Chevrolet Tahoe with our top tech for Tuesday at 10:00 pm." (If she says she can't make it then, pick another time and say the same thing.)

Remember it is your job to close them for the sale. Safety points are easy to handle as are economy points: *"I don't want you driving around with those brakes, so come on in next Friday at 10:00am."* Your job is to get their car repaired, book them.

On the written recommended repair you can offer them a discount to book in, and you can do that over the phone if the boss OKs it. I would do that for big jobs, not oil changes, by the way. On maintenance you can say you have a special for \$30.00 off maintenance, too.

If you don't have any recommended repairs around call the customer base and book them for maintenance that they need:

"Mrs. Jones, it's time for your 30 thousand mile check up for the Corolla. I will have Jim do it tomorrow at 2pm like the last time, ok?"

You can call the entire customer base and ask them each the following:

"How did you like your last service? Did the reason you brought the car in get handled?" Do you have any recommendations for us to improve our service? Any Complaints? "

This again is not robotic: You want to know if they were happy or not with you. If happy, then you book them for either their next maintenance or tell them about the free inspection with the current "Winter Special." Book them for the special. If they come up unhappy, book them for a free inspection for the master tech to rectify whatever went wrong.

Drill how to do this with a fellow employee or the owner until you can handle all of the above circumstances easily. You should set goals for yourself. (If you call 20 people give yourself a goal to book at least 5, for example.)

If you get a machine leave a friendly message:

"Mrs. Jones, this is Pete from ABC Auto. I was just checking to see how your Chevrolet was running after our repair a few months ago. Call me at _____"

Ari Cohen
Consultant

Appointment Script

When you feel you can't use the "Anytime" script due to heavy volume

If customer calls, but your shop is unable to get to their car today.

How did you hear about (your company name)? *Direct mail, Customer referral, Online Search, Etc.*

(Owner Name) had us set aside time for you to bring in your vehicle on (give specific day and time options). Which day and day would work best for you?

If customer says they have to come in today, we say...

We will make time for you as soon as possible!

These scripts must be used on the phone or at the counter.

The same process must take place every time to best serve the customer.

