Policy 13 – Service Writer – Read “Write it Right”

8.23.22
To: Service Writer

PURPOSE: To make sure all office staff is trained in the BAR policies and procedures in “Write it Right.” To protect us from write-ups from the BAR, and to protect us otherwise legally.

POLICY: Read “Write it Right” at least every 6 months and follow the rules and regulations in it.

PROCEDURE:

- Always follow the “Write it Right” manual when writing estimates and work orders. “Write it Right” is available online – do a search for “BAR Write it Right” and you'll find it.
- Read the entire “Write it Right” manual from front to back before the end of your first week of employment. Do this a minimum of every 6 months.
- Take notes or highlight key points, or things you learned or need to remember to do.
- Keep your copy of “Write it Right” easily accessible and refer to it as needed.
- Failure to follow “Write it Right” puts the company in danger, which would put the company in jeopardy.
- Always follow “Write it Right,” and other BAR/legal regulations that you have been made aware of.
- If you have any questions about “Write it Right,” ask the your supervisor for clarification.

RESULT: The service advisor reads “Write it Right” before the end of their first week of employment, and then every 6 months to brush up on the rules and regulations. The service advisor takes notes and studies the manual, making notes of anything not understood and asking their supervisor about them. The service advisor follows the rules and regulations in “Write it Right.”

I have read and understood this policy ________________________________print name

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Policy 14 – Service Writer – MASTERING “WRITE IT RIGHT” AND ALL PRINTED BAR REGS IN SHOP HOW-TO MANUAL

03.20.2024
To: Service Writer, Managers

PURPOSE: To make sure all office staff is FULLY COMPETENT AND CONSISTENTLY FOLLOWING ALL BAR policies and procedures in “Write it Right” as we all the additional important regulations we have placed in the manual for your review and trainign. To protect us from write-ups from the BAR, and to protect us otherwise legally, and make sure we’re doing things correctly.

POLICY:

- Follow Policy_ServiceWriter_13_Writing ROs_Read Write it Right.
- You MUST keep a paper copy of Write it Right handy for quick access to refer to.
- You MUST review it at least every 6 months.
- If you are new to the company, you must read it all the way through prior to writing any estimates Ros (except if under your supervisor’s direct observation.)
- Read it again all the way through at least weekly for your first month here (as new experiences in the shop WILL raise new questions about it),
- Then read it all the way through again every 2 weeks for your second month of employment,
- Then read it all the way through again at least monthly until you hit the 6 month of employment mark.
- Then the minimum of reading it all the way through again every 6 months is acceptable, (unless circumstances dictate a need to reread more often.)

PROCEDURE:

- Always follow the “Write it Right” manual when writing estimates and work orders. “Write it Right” is available online – do a search for “BAR Write it Right” and you'll find it. It’s also in the Service Writer section of the How-To manual in Dropbox. But by now, you will have you own printed copy right by you work station for easy access.

- Read the entire “Write it Right” manual all the way through from front to backaccording to the schedule above.

- Take notes or highlight key points, or things you learned or need to remember to do. Make notes all over this thing, it’s a major reference for you with writing estimates/Ros/invoices correctly. Don’t skim this thing – realize how important it is.

- Add additional BAR regulations to it as you go – either ones you looked up (share copy with your supervisor if you find something important), ones you pulled from our Dropbox manual, or others given to you or found in any fashion.

- If you have any questions about “Write it Right,” ask the your supervisor for clarification as close to IMMEDIATELY as possible. Make written notes of your questions and answers, email to owner, because others may have the same questions too.

- Understand that we’re here to support you, and can only do that if you communicate with us if you don’t understand something, if you’re not clear about something, if you don’t understand why something is important – otherwise we just may find a mistake down the road and ask you why didn’t you follow the instructions? That question isn’t to be mean – its a serious question. WE WANT ALL OF OUR TEAM TO SUCCEED!

- Become a MASTER of Write it Right and BAR regulations.

RESULT: The service advisor becomes a MASTER of Write it Right and BAR regs that may not be in Write it Right.

I have read, understood and agree to follow this policy ________________________________print name
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Policy 15 – Service Writer – How to Write Up Inter-Shop Work

8.23.22
TO: Service Advisor, Manager

PURPOSE: To write up inter-shop work correctly for the financial department. To track inter-shop work.
DEFINITION: "Inter-shop work" - work done or shared between both locations – K-Tech and Pauline's.

POLICY: Record inter-shop work correctly every time.

PROCEDURE:

If one shop does a WARRANTY job for the other shop:

1. The warranty RO has to be written by the shop that did the original work, in order for us to be able to collect labor warranty money.
2. With the manager/SW of the other shop, agree on a due date/time and keep the other shop informed on vehicle progress, treating the other shop just like you would a normal customer with due times.
3. Write it up basically like a normal job, putting it under the customer's name.
4. Price it the way you price and enter labor times for warranty work depending on vendor (see other policies).
5. Select the "Warranty – no charge" box in each warranty task and select the vendor who supplied the parts needing to be warrantied (see other policy on writing up warranty work).
6. Delete any surcharges, unless there was one or more "customer pay" tasks on the same RO.
7. Have the tech name be the real name of the tech doing the job. The name of techs from the other shop should be listed in your employees list drop down menu.
8. The shop that has the warranty is responsible for the cost of labor to pay the tech from the other shop, so the tech's hours need to be factored into the manager's Friday reports as though the tech were from the shop with the warranty. This will affect the warranty shop's cost of labor and GP.
9. The shop with the warranty emails the warranty RO and tech copy to the shop doing the work, so that shop doing the work can manually track billed hours to pay the tech for this warranty work.
10. Print out the final invoice and final tech copy and put it in the GM's box for review.
11. Make it clear when doing payroll in the body of your payroll email how many billed hours for the tech were warranty work for the other shop, so the owner can make bookkeeping adjustments. The hours the tech did need to be on payroll sheets for the shop the tech normally works for just as though they were normal hours for that tech – in other words, they are considered normal billed hours for the sake of the payroll spreadsheet. However the body of the email needs to explain and state the number of billed hours for which tech were for warranty work for the other shop (so the owner can make bookkeeping adjustments).

If one shop sends a TECHNICIAN over to the other shop to help production:

1. With the manager/SW of the other shop, agree on the terms of use of the technician, and terms for paying the technician (including # billed hours the tech will get.)
2. The shop that used the tech will record the cost of labor and it will affect the gross profit of that shop. Make sure the techs name is on the RO. Basically the same as the warranty work description above.
3. The shop that borrowed the tech emails the RO and tech copy to the shop who's tech is doing the work, so that shop doing the work can manually track billed hours to pay the tech for this work.
4. Print the final invoice and tech copy and put it in the GM's box for review.
5. Make it clear in the body of the payroll email when doing payroll how many billed hours for the tech were work for the other shop, so the owner can make bookkeeping adjustments.

If one shop SUBLETS work to another shop:

1. With the manager/SW of the other shop, agree on a due date/time and keep the other shop informed on vehicle progress, just like you would a normal customer.
2. The sublet will be recorded like a normal sublet.
3. Work may be done at a discounted rate, as negotiated between shop managers.
4. The shop doing the work should list the other shop as the "owner" and put the car under the other shop's name.
5. The shop doing the work should put the work "on account" instead of collecting payment at the time of completion of work. Email the GM the work order, so they can collect payment or make bookkeeping adjustments.
6. GM will reach out to the owner before having any bookkeeping adjustments made.

RESULT: All inter-shop work is documented correctly, and the expense is affecting the appropriate shop.

I have read and understood this policy ________________________________print name
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Policy 18 – Service Writer - How To Prioritize Repairs

8.23.22
To: Service Writer

PURPOSE: To provide framework for prioritizing repairs, to allow the service writer to communicate effectively with customer about their vehicles needs. Proper prioritization of repairs with customers leads to greater customer satisfaction which leads to return customers and increased referrals, which in turn lead to shop expansion.

POLICY: If you need to prioritize repairs for a customer, do it as written below.

PROCEDURE:

- Start with the most important repairs in terms of priority. A service writer should sell any **safety** items first. These items have legal ramifications and it is important that the customer spend her/his money on these items first.
- Next should come those items that affect the **performance** or **reliability** of the vehicle.
- This should be followed by the **economy/maintenance** items.
- Next in line of importance are those items which do not affect the performance or reliability but are a **convenience** for the customer.
- Next in line of importance are items that make the car look nice (**appearance**).
- The service writer is the professional and should know what is best for the customer in terms of what needs to be done now and those items that can wait. It is part of building trust and establishing a rapport with the customer.
- A service writer should refuse to do work on any car that leaves it in an unsafe condition.

Here are examples and descriptions of the categories repairs fall into:

1. (S) Safety Items: Worn tires, brakes, burnt-out lights, loose or worn steering components, etc. All of the critical repairs or safety items are listed together.

2. (R)Reliability Items: Items which could keep the car from starting and cause it to stall or stop while driving. Items like cracked fan belts, fluid leaks, old ignition component, etc.

3. (E) Economy Items: A dirty air filter, dirty fluids, misaligned steering, routine maintenance, etc.

4. (C)Convenience Items: Struts that no longer hold a trunk lid up, an inoperative radio, etc.

5. (A) Appearance Items: A missing hubcap or broken chrome trim, etc.

Result: The service writer clearly prioritizes and communicates needed items with the customer, and prioritizes by safety first, then reliability/performance, then economy items, then convenience items, then appearance items.

I have read and understood this policy ________________________________print name

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Policy 21 – Service Writer – Get Customers to Leave the Vehicle

8.23.22
To: Service Writer, Receptionist

PURPOSE: We want customers to drop the vehicle off, not wait for it. If they drop it off and leave it, we have time to do a proper inspection as well as do the needed repairs. When customers wait, there is less chance of us being able to do repairs on the vehicle that day. Plus the technician and office can feel rushed if the customer is waiting, which can lead to comebacks. Also, we want to leave time for wrong parts and other unexpected issues, and if we have unexpected issues with the customer waiting, it can inconvenience and upset the customer, and we want to avoid that.

POLICY: When the customer is making their appointment, prepare them to drop off and leave the vehicle instead of waiting for it.

PROCEDURE:

1. Don't ask – tell the customer they can "drop it off at their appointment time and our technician will do a thorough inspection of the vehicle and we will then let them know if we find anything that needs to be addressed."

2. Don't wait until the customer shows up to tell them they need to leave it. It might be too late by then for them to get a ride or arrange a shuttle or loaner. **Prep them from the initial appointment.**

3. Find solutions for customers so they can leave the vehicle. Maybe the solution is a shuttle service, or a loaner car. Book every appointment - don't lose any jobs.

RESULT: The service writer prepares customers to leave their vehicle all day from the time they book the appointment – and does not wait until the customer shows up to tell them. The service writer doesn't lose any jobs because the service writer finds solutions to the customers' problem of needing to leave the vehicle; these solutions can include offering shuttle service or a courtesy car.

I have read and understood this policy ________________________________print name

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Policy 22 – Service Writer – Buy Time on the Vehicle as Needed

8.23.22
To: Service Writer

PURPOSE: Sometimes we need extra time to get a job done. We want to “buy time” with the customer as needed so that we can get the job done, and get it done right. We don't want to lose work, pretty much ever.

POLICY: Buy time as needed with the customer if we need it to get the job done. Use the rapport you have developed with the customer right from the initial contact.

PROCEDURE:

- Develop rapport with every contact they have with us, right from the beginning. That way, it will be easier to buy time if we need it.

- If we need more time to do a proper repair, buy time with the customer. This means get their ok for us to keep the vehicle longer and have them be ok with it.

RESULT: The service writer develops rapport with customers with every contact, so that if we need to buy time with their vehicle in order to get the repair done right, we can do it and have the customer be ok with it.

I have read and understood this policy ___________________________________print name

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Policy 23 – Service Writer – Never say “No,” “Can't,” “Won't,” “Don't” or “I don't know” to a Customer

8.23.22
To: Service Writer, All staff

PURPOSE: Avoid using the words “no,” “can't,” “won't,” “don't,” or “I don't know” with a customer because they come across as negative on a conscious or unconscious level, and there is always another way to say something without saying anything negative. Saying negatives can come across like we're telling the customer “no,” and we never want to say “no” to a customer – we always want to say “yes.” **THIS IS A VERY IMPORTANT POLICY AND NOT TO BE TAKEN LIGHTLY. DOING THIS WILL MAKE YOUR INTERACTIONS WITH CUSTOMERS SMOOTHER AND EASIER.**

POLICY: Never say “no,”“can't,” “won't,” “don't,” or “I don't know” to a customer. Find another way to communicate what you are trying to communicate. Avoid using negatives in general conversation.

PROCEDURE:

- Instead of saying “can't,” think about what you CAN do and rephrase it to talk about what you can do. For example, instead of saying you “can't” or “won't” replace the brake pads without replacing the rotors, say “**when we replace brake pad, we always want to replace the rotors because….**”

- If someone calls and asks “are you open on the weekends,” instead of saying “no, we're closed on the weekends,” say “**we're open Monday through Friday, 8 am to 5 pm**. **How can I help you?”**

- Instead of saying “we don't know what's wrong with your vehicle without doing an inspection,” say “**once we do an inspection, we'll be able to tell you what your vehicle needs. I can get you in tomorrow, is 8 am good or is 9 better for you?**”

- Etc….

RESULT: The service writer avoids using the words “no,”“can't,” “won't,” “don't,” or “I don't know” with a customer, and instead finds a positive way to communicate what they are trying to communicate.

I have read and understood this policy ___________________________________print name

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Policy 24 – Service Writer – An Asterisk* Before a Task Name Means it's Not Approved Yet

8.23.22
To: Service writer

PURPOSE: Putting an asterisk (*) before the task name on a work order shows anyone looking at it that the task has not been approved by the customer yet.

POLICY: Put and asterisk (*) before the task name on a repair order or estimate for any task that has not been approved by the customer yet. Once the task is approve, immediately record the quote (control Q) and remove the asterisk.

PROCEDURE:

1. When writing up tasks on work orders, put an asterisk before the task name.
2. After you get the task approved by the customer, record the quote (control + q) and remove the asterisk immediately.

RESULT: The service writer puts an asterisk before each task name for a task that has not been approved, and removes the asterisk immediately after the task is approved by the customer.

I have read and understood this policy ________________________________print name

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Policy 26 – Service Writer – Ask the Customer for the Wheel Key Location

8.23.22
To: Service Advisor, Technician

PURPOSE: Finding out where the wheel key is located will help streamline the technician's job and respect the customers' property. Documenting the key location helps us find it faster in the future.

POLICY: If the tech cannot find the wheel lock key for a vehicle, call the customer and ask them if they know where it is Document in repair instructions the location of the wheel key and also enter it into the vehicle's "note" box under the vehicle icon for future reference.

PROCEDURE:

1. If a competent tech cannot find the wheel lock, call the customer and ask them if they know where it is.
2. If a trainee or C level tech cannot find the wheel lock, ask a senior tech to look first before calling the customer.
3. Document the original wheel lock location on the RO in the repair instructions box and in the customer's vhicle file. Highlight it on the RO so the tech can see it.
4. The technician should put the wheel key back where it came from.

RESULT: If the tech can't find the wheel lock key, the service advisor calls the customer to ask if they know where the key is. The service advisor documents wheel key location in Winworks. The tech makes sure the wheel key gets back to where it came from.

I have read and understood this policy ___________________________________print name

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Policy 27 – Service Writer – Selling Diagnostic Time

8.23.22
To: Service Advisor

PURPOSE: We want to have streamlined guidelines for diagnostic time amounts so all team members know what to expect.

POLICY: Use the times below as guidelines for selling diagnostic time.

PROCEDURE:

1. Standard diagnostics are 1.0 hours at a diagnostic rate, sometimes higher than the "standard" shop rate.

2. Starting/charging system tests are generally 0.5. If it turns out to require more than a starting/charging system test, more time should be sold. This usually gets sold when the customer insists the battery or alternator might be bad causing a no-start. We offer this mostly as a courtesy to this type of customer. Many no-starts should be sold as standard 1.0 diagnostics.

3. Noise/vibration/harshness diagnostics by themselves start at 1.0.

4. Electrical diagnostics (ie parasitic draw where the battery drains, intermittent lighting issues, etc) start at 2.0 hours.

5. Technicians should stop when they reach the diagnostic time allotted and have their notes complete with the tests and test results they have completed. This typically includes a scan tool printout (2 copies – one for our records and one for the customer).They should recommend additional reasonable diagnostic time and list out additional tests they intend to do with the extra time. This builds value for the customer and makes the sale easier for the service advisor.

6. The service writer should then sell the extra time explaining the reason for it and what additional testing will be performed, re-dispatch the updated tech notes with an additional diagnostic task line, and then the tech will continue with the diagnostic.

7. The service writer can increase diagnostic times from the above times if they have information that leads them to believe more than the above time may be required, such as other shops have tried diagnosing it and failed, or the customer worked on it themselves and may have tampered with things, etc.

8. It's better to sell extra time and knock it down, rather than have to call the customer back for extra time. But if additional diagnostic time is needed, sell it.

9. Techs should recommend and service writers should sell time to run monitors after check engine light or driveability repairs to verify the repair. The monitor for the system repaired needs to say "complete" with no pending or current codes in order to verify the repair.

RESULT: The service writer uses the times above as guidelines for selling diagnostic time. If the tech uses up the diagnostic time allotted and legitimately needs more, the tech should write up what testing was done with results, and what additional testing needs to be done with additional time needed. The service writer should sell the extra time.

I have read and understood this policy __________________________________print name

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Policy 28 – Service Advisor – Upselling Additional Diagnostic Time

8.23.22
To: Service Advisor

PURPOSE: We need to follow certain procedures when upselling additional diagnostic time in order to avoid confusion with the customer and to make sure we focus first on what originally brought them in before focusing on any additional vehicle needs. Otherwise customers can get nervous and wonder why we are trying to sell them extra work they need when the problem they brought it in for is still not diagnosed.

POLICY: When calling the customer to upsell additional diagnostic time, DO NOT email them the Level One inspection yet and DO NOT go over what was found on the Level One with them yet. Focus only on a solution for the reason they brought the vehicle in to the shop first.

PROCEDURE:

1. Receive the technician's notes requesting the additional diagnostic time. These notes will also include their Level One inspection.

2. You should sell the additional diagnostic time ONLY:
    - DO NOT go over the Level One inspection results with the customer yet, and
    - DO NOT email the customer the Level One electronic inspection yet.

3. Sell the ADDITIONAL DIAGNOSTIC TIME ONLY at this time. Tell the customer what test we already did for the diagnostic and what our findings were, and tell them the specific additional tests that we will do for the additional time.

4. After you sell the additional diagnostic time, dispatch the updated tech notes with the additional diagnostic time on it to the tech.

5. When the tech finishes the additional diagnostic testing and turns notes in, estimate the tech's recommendations and speak with the customer about the diagnostic recommendations as well as the Level One results.

6. In other words, the time to talk with the customer about the Level One findings is AFTER all diagnostic is done and at the time you are selling the work needed to correct the customer complaint.

RESULT: The Service Advisor sends and goes over the Level One inspection form with the customer only AFTER all diagnostic is entirely complete.

I have read and understood this policy ___________________________________print name

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Policy 31 – Service Writer – Never Sell Work Without Tech Notes in Hand

8.23.22
To: Service Writer

PURPOSE: The service writer should never sell any work without having the tech notes and Parts and Labor Request Form in your hand ("short-cut"), because without them information could be missed which can result in things like confusion, loss of income, billing less hours than the job calls for, and misinformation to the customer.

POLICY: Get the technician notes and the techs' Parts and Labor Request form in your hand and review them when estimating and selling work.

PROCEDURE:

1. Get the technician notes and Parts and Labor Request Form from the "Needs Estimate" box.
2. Read them thoroughly and make sure they are complete. Send them back if they are not complete.
3. Do your estimate based off of them.
4. Sell the work.

NOTE: If you start writing up jobs before you receive full tech notes and Parts and Labor Request form for the sake of time, that is ok. But, MAKE SURE you do NOT call the customer to talk about the car or sell the work UNTIL you have received those documents and reviewed them thoroughly to ensure the estimate is accurate.

RESULT: The service writer always has the completed tech notes and Parts and Labor Request Form in their hand and has thoroughly reviewed them and estimated work based off of them before selling any work or talking with any customer about the details of repairs their vehicle may need.

I have read and understood this policy ___________________________________print name

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Policy 33 – Service Writer – Only Close RO's when the Vehicle is Finished

8.23.22
To: Service Advisor, Manager

PURPOSE: Only close work orders when the vehicle is completely done, otherwise it makes the weekly stats misleading and can make it look like there are workflow problems the following week. It also makes it harder to add additional items the vehicle needs, like fluid top offs or additional parts, to the RO if the RO is closed, and the service advisor needs to bill out all items that go on vehicles.

POLICY: Only close an RO when the vehicles is completely done and QA'd. Do not close an RO if the vehicle is not done and could not be driven away by the customer.

PROCEDURE:

- Leave RO's open until the vehicle is completed.
- Do not close RO's before the vehicle is done. The vehicle is considered done when all work and the QA is completed.
- Big jobs like engines or transmissions may be closed on Fridays, ONLY WITH SUPERVISOR PERMISSION, if the vehicle is running and just needs the final road test and QC. ONLY WITH SUPERVISOR PERMISSION.
- If you think you have a legitimate reason for closing an RO before the vehicle is done, contact your supervisor. DO NOT CLOSE THE RO WITHOUT SUPERVISOR APPROVAL.

RESULT: The service writer only closes the RO if the vehicle is COMPLETELY done. The service advisor contacts the supervisor if they think they have a special case where the RO should be closed before the vehicle is done and DOES NOT CLOSE THE RO WITHOUT SUPERVISOR PERMISSION.

I have read and understood this policy ________________________________print name

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Policy 35 – Service Advisor – Update Customers by 11 am and 2 pm Each Day

8.26.22
To: Service Advisor

PURPOSE: We need to update customers at least twice a day so that they don't need to call us wondering what is the status of their vehicle. If a customer has to call us to inquire about their vehicle instead of us calling them, we lose credibility. We also want to reach out to them to give them confidence in us and show them we are on top of it. It also buys us time and breathing room with the vehicle. The purpose of these check-in calls are not so much to give the customers an update on their vehicle – the purpose is mainly to be the one in control of the conversations and show the customer we're on top of things.

POLICY: Update all customers who have vehicles in the shop at 11 am and 2 pm.

The only exceptions are customers with vehicles we have arranged to keep for extended periods of time (approx 3 days or more), who should be updated daily instead.

PROCEDURE:

1. Figure out the general status of each vehicle in the shop by 11 am.

2. Call each customer and tell them their vehicle is in progress, we are just checking in with them, and we'll update them with more details this afternoon.

3. Don't go into any details about their vehicle or any needed repairs. Just let them know we are working on their vehicle and we'll get back to them this afternoon. The purpose of this call is just to let the customer know we have their vehicle in progress and haven't forgotten about them.

4. If they ask about our findings or what their vehicle needs, tell them the tech will turn in their notes to you after the inspection is complete and that you'll review the tech's findings and call them in the afternoon.

5. If they ask any specifics after that, just repeat the last step, step 4 above until they understand.

6. If you call the customer at 11 am, and then call them with an estimate to get approval at noon, then give them their next update closer to 3 pm than 2 pm.

RESULT: The service advisor updates customers at 11 am and 2 pm each day, even if the inspection or estimate is not complete. Customers feel cared for and well-attended to.

I have read and understood this policy ________________________________print name

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Policy 36 – Service Writer – Use the Pre-Service Check-In Sheet

8.26.22
To: Service advisor

PURPOSE: We need to use the pre-service check-in sheet with each customer before/during the check-in process in order to streamline the check-in process, stimulate the customer to think about things their vehicle might need, help ensure we have the correct customer contact information, and to give waiting customers something constructive to do while waiting so they remain patient.

POLICY: Use the pre-service check-in sheet at each customer check-in.

PROCEDURE:

1. Have copies of the Pre-service check-in sheet ready to go on a clipboard (or 2, depending on how busy your shop is).
2. When a customer comes in for their appointment, ask them nicely to fill out the sheet.
3. If you have more than one customer checking in at a time, give the Pre-service check-in sheet to each customer on a clip board right away after greeting them and ask them to please fill it out.
4. Converse with them based on whatever vehicle needs came up for them while filling out the sheet.
5. Enter their contact information into Winworks if new customer, verify contact info if existing customer.
6. Place the completed Pre-Service check in sheet in their dispatch folder, at the very bottom of the RO packet (since it's the first thing done and packets are stapled in reverse chronological order).

RESULT: The service advisor consistently, smoothly and with ease uses the Pre-Service check-in sheet at each customer check in.

I have read and understood this policy ________________________________print name

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Policy 38.5 - Service Writer – Writing RO's - Using Standard Tasks

8.26.22
To: Service Writer

PURPOSE: Standard tasks include parts you may not think of, like brake cleaner, lube, washers, etc. They are also used for tracking and have prepopulated wording already done for you. This makes it faster and more accurate when making your RO's or estimates.

POLICY: Use standard tasks when available on all RO's and estimates.

PROCEDURE:

1. Familiarize yourself with the standard task list to understand the wording and where it is located on the list.
2. Open the RO.
3. Hit the "ADD" button.
4. From the drop down menu, select the standard task if there is one for that item.
5. Select "OK" to add the task to your RO.
6. Process through any attached tasks by selecting "OK" for each one to complete the process of adding your standard task and linked tasks to your RO.
7.

RESULT: Using the standard tasks make your RO's and estimates more accurate and helps you to complete your RO's and estimates faster.

I have read and understood this policy ___________________________________print name

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Policy 38 – Service Writer – Selling K-Maintenance

8.26.22
To: Service Advisor

PURPOSE: We sell K-maintenance instead of just "oil changes" because it's for more profitable than an oil change, and it's a better service for the car.

Definition of "K-maintenance": maintenance scheduled by the manufacturer by time and mileage. For example 25K, 30K, 60K, 90K service. Includes more than an oil change, such as fluids, filters, etc.

POLICY: When a customer comes in for an oil change, sell a K-maintenance instead based on the service closest to the mileage of the vehicle. Use the K-Maintenance standard task. Make sure it looks clean and professional on the RO.

PROCEDURE:

1. When a customer comes in for an oil change, sell a K-maintenance instead.
2. If you know the approximate mileage before the car comes in, you can pre-write it and this will be faster. The customer will have to wait less time which means happier customer which means easier sale. This is a good reason to ask the customer if they know the approximate mileage when they book the appointment.
3. Don't try to sell the K-maintenance over the phone before they come in. Wait until they are in front of you.
4. Look up the vehicle in Alldata and pull up the Severe Service table/info. Use the mileage closest to the car's mileage. Round up if needed. Use good judgment on selecting the correct service interval.
5. Select Winworks standard task "K-maintenance." We need to use the standard task for tracking purpose, and because the legally protective wording is already in the task: "note problems found." {If we don't have this wording in there, then it's a lot more work for you to document findings on every single item. **ALWAYS USE THE STANDARD TASK**.}
6. A Level-One, Tire pressure check, and some other additional linked standard tasks should automatically pop up to populate the work order – click OK on each of these items to get them on the RO.
7. In the task name, in front of "K-Maintenance," enter the mileage interval of the maintenance, ie "150K-Maintenance."
8. Copy and paste the wording from Alldata for the details of that service into the Winworks task description box.
9. Fix the formatting so that each section is separated by a blank line. It should look clean and readable. A "section" usually begins with the words "Repair," "Inspect," "Reset," "Rotate," etc
10. Enter the parts and labor like you normally would. Ensure the work is profitable and the profit light is green (see pricing policies).
11. Print it out and have the customer sign and approve the work.
12. On the printed tech copy, use a highlighter to highlight each line item on the K-Maintenance task that says something like: "Repair," "Inspect," "Reset," "Rotate," etc
13. Order the parts and dispatch the work.

RESULT: The service advisor profitably sells K-maintenance instead of oil changes. The service advisor writes the task up correctly and uses the standard task.

I have read and understood this policy ________________________________print name

________________________________signature

________________date

Policy 39 – Service Writer – Writing up AC Complaints

8.10.22
To: Service writer, reception, manager

PURPOSE: To write up AC work consistently, efficiently, and prevent comebacks and misunderstandings with customers.

POLICY: When a customer comes in with the classic AC complaint "my AC is not blowing cold enough," write it up as an "AC system Service" and have the tech use the electronic inspection form "AC System Service."

PROCEDURE:

1. Customer comes in with complaint "Air-Conditioning does not blow cold" or "Air-Conditioning does not blow cold enough."
2. Use the standard task "**AC System Service**" to write this up. Don't do a "Diagnostic" yet.
3. Include all notes in the standard task. Ask the customer if there are any other symptoms like noises or blend door issues and include these in the standard task notes for the tech. The standard task notes should say "Customer requests AC system service because AC does not blow cold (*or "blow cold enough" depending on the complaint*). Perform AC system service and recheck. Additional diagnostics or repairs may be required." (Also include if there are other symptoms like noises/intermittent operation/etc for the tech.)
4. Explain to the customer that AC typically stops blowing cold due to the refrigerant being low, and there are several things that can cause the AC to stop blowing cold, and this is the first step.
5. If the AC stops blowing cold soon after the service, then it is likely there is a large leak that needs a diagnostic and then a repair to fix the leak.
6. The technician must use the electronic inspection form "**AC System Service**" while doing the AC system service.
7. After the AC service is complete, you will have more information on how to proceed and if a recheck or diagnostic is required after that.
8. If an AC diagnostic is required after the AC system service, then you write up an **AC System diagnostic** and the tech uses the "**AC system Diagnostic**" electronic form.

NOTE: It's normal for an AC system to lose some refrigerant and stop blowing cold over the years due to small leaks at schraeder valves or other junctions. If the AC caps are not present, that can also cause faster leakage. But if it stops blowing cold due to loss of refrigerant before approximately 2-3 years, then there is a problem that requires a diagnostic or repair.

RESULT: The service writer writes up AC complaints such as "AC does not blow cold" or "AC does not blow cold enough" as an AC system service. The service writer gets a complete electronic "AC System Service" inspection from the tech. A diagnostic is done only after the AC system service task is performed and a problem still remains. At that point, and "AC Diagnostic" electronic inspection would need to be completed by the tech.

I have read and understood this policy ________________________________print name

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Policy 40 – Service Advisor – All Work Must Be Sold By Noon!

1.8.24
To: Service advisor, office personnel, manager

PURPOSE: All work must be sold by noon to get the highest income for the shop. Every minute after noon that it takes to reach the customer to do a sale reduces the chance that we will get the sale, and reduces the chance that we will get all of the sale. This is CRITICAL to workflow.

POLICY: You must do whatever it takes to make sure all vehicles are inspected, tech notes/inspection reports and parts and labor requests turned in asap, so your estimate can get done and you can have all customers with vehicles there for inspection called before noon and all work sold.

PROCEDURE:

- Make sure you are dispatching for success – dispatch work to the techs in a fair manner that also takes into consideration their abilities, and in a manner that gives time for all inspections to get done as early as possible, with all inspection paperwork turned in by 11 am at the latest so you can do estimates and sell work by noon.

- Have an inspection dispatched in each tech's work order rack in the morning when they come in, so they don't have to wait and don't feel tempted to work on a repair from the prior day while they wait. Starting and stopping work on a car increases the chance of an error being made and reduces efficiency, so we want them doing only inspections in the morning.

- Make sure techs are NOT working on repairs from the prior day in the morning, but instead are doing the inspections in their box. They can work on repairs from the day before once all their inspections and paperwork are turned in. Depending on your situation, you may need to train them to make sure they have an open rack before they leave each night for inspections in the morning to avoid getting "I have to finish this car because I don't have a rack to do the inspection on."

- Do a quick morning production meeting once you have everyone checked in and work dispatched to let each tech know what is expected of them and by what time.

  - As needed, write "due by" times on the RO's in marker in the upper right of the tech copy so they can see by what time they should have that particular inspection done to stay in timeline, and this will help them stay on track. For example, if the first inspection is 1.0 hours, and the tech starts work at 8 am, you would put a "due by 9 am" time on the RO. (You would NOT make the due by times on all of them 11 am – that is not helpful in keeping them on track – calculate the labor time on the RO, the order in which the RO's are in their box, and plan out for them by time when each particular vehicle inspection should be turned in by.)

  - Encourage them to push themselves with speed of inspection, but not to the point of making mistakes or missing things. You can explain to the techs that the "due by" times are intended to help you to get the reports in so that you can get the estimates done and sell their work most quickly and effectively so they know the positive intention behind it. Leadership is important here so they don't feel micromanaged. You can let then know these times also help you stay on track of whether inspections are on schedule too, they are not just for the techs.

- Check the "NEEDS ESTIMATE" box often and get going immediately on the estimate.

- Know what your techs are working on at virtually all times.

- As soon as you have an estimate done, drill the sale with a colleague until ready, then call the customer and sell the work. Order the parts immediately after selling the work, unless you've already preordered them.

- Do whatever it takes to get all the work sold by noon. A sense of urgency is required to do this.

RESULT: The service advisor sells all work by noon, resulting in faster speed of service to the customer, which results in increased sale and happier customers who write us good reviews.

I have read and understood this policy ______________________________print name

______________________________signature

________________date