Standard Operating Procedure Examples

1. Greeting/Phone   Whom?

Answer all calls within 3 rings using proper script   **Office Staff/Estimators**

"ABS Collision Repair, _____ speaking, May I help you?"

Answer by 3rd ring

If necessary, put current call on hold or ask customer to wait and answer by the 4th Ring

Gain commitment by scheduling estimate appointments   **Estimator or Office Staff**
when possible in Outlook (30 minute slots)

Schedule repairs in Stellix Scheduler

Check for capacity or hours

See Outlook Scheduler SOP

Greet customers as they arrive and qualify their needs   **Office Staff/Estimator**

Ask which insurance company they are using

Ask if the insurance company sent them or if they have an insurance estimate

Have customer complete customer information form

Have customer pull vehicle into Estimate Bay if weather is inclement or offer to pull
vehicle in Estimate Bay for them if there is an age or children are a concern

Offer customer seat and refreshments

Notify estimator that customer is here for an estimate

Keep lobby clean and magazines current   **Office Staff/Detail**

2. Estimating   Whom?

Determine type of repair (Ins or Customer Pay)   **Estimator**

      Insurance – Use standard through approach below

      Customer Pay – Use Claims Free or Package approach

Write through initial estimates   **Estimator**

      Let vehicle talk to you (look for indirect damage)

      Refer to checklist of 118 Forgettables

      Consensus build (make consistent decisions like Repair vs Replace)

      Use P-pages for Not included items

      Write commonly missed items

      Use estimating tools to create an accurate estimate (DRP guide book)

      Take at least 2 photos of each vehicle

Import all estimates into estimating program   **Estimator**

      Write any expectation or special notes on estimates
           - How long, when in & schedule out, etc.

      Print extra copy of estimate and attach to CIF

      Place Estimate & CIF in Daily Estimate Bin

Audit Estimates from Estimate Bin and Validate Imports   **Office Staff/Estimator**

      Check each morning and import if not done

      File estimates in appropriate estimate file

3. Selling Repairs   Whom?

Introduction to the sales person (Estimator)   **Office Staff**

Estimators Greeting   **Estimator**

    Introduction

    Handshake

    Business card given out

    Review CIF and ask about insurance

    Ask customer to vehicle

Building Rapport while writing estimate   **Estimator**

Needs Analysis (Ask questions to determine buying motives)   **Estimator**

    Determine type of repair (Insurance or Customer Pay)

Estimate Presentation   **Estimator**

    Review repairs & educate customer

    Upsell and promote Claims Free or Package Repairs

    Use package selling props

Assume sale (Assumptive Close)

    Maintain 72% closing ratio

Customer Departure

    Walk your customer to the car

    Open car door

    Open estimate center door

    Wave goodbye

Document action for unsold Estimate (Schedule Follow Up)   **Estimator**

4. Sales Follow-Up   Estimator/Office Staff

Call to action documented for all unsold estimates

Schedule follow up call in Outlook

Follow up letters within 24 hours

Make follow up calls within 72 hours and document

See Estimate Follow-up letter (can come from estimate system or Stellix)

5. Scheduling Repairs   Whom?

Review hours and determine when the next date to   **Product Manager**
schedule in the AM release meeting

Daily update of when to schedule next RO in release mtg.

Schedule repairs   **Whoever schedules**

Enter scheduled repair Stellix Scheduler by job/hours

Use time to repair formula of HRS divided by 5 equal days

Let the Scheduler work the hours for you

Create RO as soon as repair is scheduled (see Section 6)

Call & confirm repairs 24 hours prior   **Office Staff**

Identify next day drop offs in Stellix Scheduler or locate
by date in the Scheduled in drawer

Set drop of time

Confirm they bring initial draft

Remind to remove valuables

Remind that we would quickly like to review the repair

6. RO File Creation   Whom?

Create Master RO & Working RO file in Stellix   **Office Staff**

       Work order packet includes: Detail Dept. Checklist, Quality
       Control Checklist, 3 copies of the work order, 3 part supplement
       from with fastener sheet on back, keys to the vehicle, vehicle
       check-in form copy

       Use specific information from estimate

       List customer expectations in "Release Meeting" notes screen
       category after RO is created (by what is written on estimate that
       customer was told)

       Verify REQUIRED administrative fields are filled in

       Enter Scheduled In and Out dates in Date Screen field in Stellix

Order parts now to deliver 1 day prior to it scheduled in date   **Estimator/Parts**
(except LKQ & RPW - take when available or reasonable)

       See parts ordering process (Section 10)

       Include part delivery date on Parts Fax

File sequence according to sequence form   **Office Staff**

       Place created RO in Scheduled in drawer by date scheduled

       Tow-ins should be assigned a next available scheduled in date

       Tow-in schedule in dates should be communicated to customer

       Tow-in paperwork goes in the corresponding day in folder

7. Check in Vehicle   Whom?

Early birds drop offs verified for signature on envelope   **Estimator/Office Staff**
before opening envelope

Review initial payment policy & verify they have signed   **Office Staff**
the work authorizations

See Work Authorization Forms (some ins. Co's have different forms)

Review with customer at counter: **Office Staff**

    Payment arrangements

    Target out date

    When to be updated (Date, time & number on our work authorization sheet)

    Verify phone numbers - Put the updated phone number in Stellix, add "update number"
    in comment section of phone numbers screen so we know which number to call for
    updates

Call Estimator to go to vehicle with customer (Have   **Estimator/Office Staff**
progressive estimator cover for estimates during peak
drop off times)

Complete Vehicle Check In form with customer

    Tell them about our UPD pre-wash and photos process

    Have customer sign check-in sheet

    (Optional if customer chooses to wait) Bring vehicle into the estimate center)

    Review repaired area (dash lights?)

    Anything else the customer noticed?

    Prior damage noticeable at this time?

    Up-sell prior damage if appropriate

    <u>Have customer remove valuables</u>

    (Garage openers, permits, CD's, money, etc.)

If customer chose to wait for pre-wash. Have detailer do the pre-wash, then go over UPD with customer in detail department or estimate center

Make sure to take photos with UPD camera

See Vehicle Check-in form

Prepare file and keys before dispatching   <u>**Office Staff**</u>

Enter "When to be updated" date into CSR Outlook by Estimator

Enter Date Vehicle Received (arrived) in Stellix

Tag keys with RO number, customer name & vehicle

Update the Production List in Excel with basic vehicle info

8. Dispatching/Production Support   Whom?

Walk the work order packets with keys and forms back   **Office Staff**
to the production manager vehicles are dropped off

Pull keys from Work Order Packet & move into Detail   **Detailer**

    1) Prep wash vehicle

    2) Mark prior damage on vehicle/take photos

    3) Add notes on vehicle window

    4) Put Work Order in vehicle (with Supp form started)

    5) Download photos on computer

Allocate Labor in Stellix   **Project Manager**

    Dispatch the job to a body and paint tech on Product Plan

    Give painter list of vehicles that need supplement or blueprint

    Move vehicle into technicians stall or side lot & put keys on keyboard under
    Technicians name and RO number

Parts delivered to vehicles   **Parts**

    Open all parts and review for accuracy

Process supplement or blueprint in tech stalls   **Project Manager**

(See Section 9)

    Moves vehicles in and out for technicians

    Moves vehicles in lot or shop

Use the Tablet PC to write supplements in stalls

Current Work Order put in RO file   **Estimator/Office Staff**

Key control system in place   <u>**Everyone**</u>

      In shop

      In driver's door

      In back lot

      Back board

      Side lot

      Side board

Keys NEVER stay with the car when it is parked outside!

      Pending completion

      <u>Up Front</u>

      Cars for drop off or check in

      In Work Order Packet

Picks up boxes & garage twice daily   <u>**Detailer**</u>

Check on parts not received for techs per job   <u>**Parts**</u>

9. Supplements   Whom?

Supplements form in Working RO file put on dash   **Detail/Project Manager**

Vehicle torn down within 2 hours of arrival   **Technician**

Review New Vehicle Estimates in AM for Paint Supp's   **Painter**

Write Supplement in estimating system with tech   **Project Manager**
at stall using the tablet PC

> Supplements completed daily within 2 hours

> Check Stellix for parts price changes

> Look for Stellix Parts Invoices

> Damaged parts labor credit system in place

> Estimator gives Estimate System Supp or Estimator so estimator can make numbers match in Stellix

Pulls Stock Parts and creates invoices for them   **Parts**

Enters Supplements into Stellix and Balances   **Estimator**

> Prints revised Work Order from Stellix

> Gives revised Work Order to Production Manager

Calls Insurance Co. & gets supplements approval   **Project Manager**

> Reviews Supplement Policy (See policy below)

Supplement Policy

> No vehicle leaves without agreed upon supplement

> Received by shop in insurance print or copy, unless prior approval by Manager

Expectation

> Progressive Manager handles all progressive insurance supplements

10. Parts Management   Whom?

Verify the 5 parts receiving disciplines are adhered to   **Parts**

      1) Count & verify the parts for complete order

      2) Open the box and verify correctness & no damage

      3) Label the part

      4) Store on parts cart for that RO

      5) Take back returns

      Then, sign the invoice

      Properly store parts in appropriate bins, racks or bags

Daily Responsibilities   **Parts**

      1) All parts on carts

      2) All parts on shelves for current vehicles

      3) Deliver parts to vehicle upon vehicle bring dispatched to stall

      4) Returns processed & picked up

      5) Update dry erase board

Enter invoices in Stellix (assuring discount accuracy)   **Parts**

      Print stock parts invoices daily

      Post invoices to accounting

      File invoices by date received per AP vendor

Process returns within 24 hours   **Parts**

      Print 3 copies of return slip from Stellix

      On part to be returned, in RO File & Pending Credit File

Review Status of Pending Credits 2 times a week   **Parts**

11. Communications   Whom?

Production walk daily between 2:30 & 3:30 PM   **Project Manager/Parts**

    Follow Productions Managers Timeline

Update Production List

    Remove vehicles that have left the premises

    Add notes to report

    Add revised target dates (never change original promise date)

    Determine scheduling capacity for meeting

Print Estimators Daily Update list for release meeting   **Project Manager**

Attend daily release meeting at 7:40 AM   **Office Staff**

    Be at the shop at 7:30 AM

Drive daily release meeting (Assign responsibilities   **Project Manager**
for each position)

    Customer updates (Status changes and scheduled updates)

    Follow up with supplements, parts, etc.

    When vehicles can be scheduled in

Pro-Active phone calls (Status updates, status changes   **Estimators**
& supplements)

Jim	**9:00 AM**	Jeff	**9:30 AM**
Daron	**9:00 AM**	Dave	**10:00 AM**
Ryan	**9:30 AM**		

Make documentation in notes screen   **Everyone**

    Update delivery date if charged

    Make note of all customer or insurance contact

Make individual production lists   **Project Manager**

    Individual technician's lists

    Detail & Delivery List

12. Quality Control Process   Whom?

Put QA Form in Vehicle   **Project Manager**

    Body work complete

Quality approved in Body Department before vehicle moves to Paint Department   **Painter/Project Manager**

    Paint work completed

Vehicle is moved back to Body Department and quality is approved prior to reassembly   **Body Tech/Project Manager**

    Vehicle is reassembled

Vehicle quality is checked prior to moving to detail   **Detail/Project Manager**

    Vehicle is detailed and finished

Final quality inspection performed before contacting customer   **Estimator**

13. Pre-Closing Files   Whom?

Files pre-closed 4 hours prior to delivery   **Estimators**

    Identify at daily release meeting

Pre-Closing checklist competed (Done in advance   **Estimators/Office Staff**
of car picked up)

    1) Verify all parts are received in Stellix

    2) Verify all Labor is allocated in Stellix

    3) Verify there is supplement approval

    4) Verify final bill is ready to upload in estimating system

    5) Verify all part price changes have been applied

    6) Verify all stock parts have been added to estimate

    7) Verify Estimating System & Stellix final bill amounts match

    8) Verify documentation in note screen

    9) Verify all dates are entered in date field

    10) List payment arrangements

    11) Print final bill copies (2)

See Pre-closing Checklist Form

Complete Warranty Packet   **Office Staff**

Perform final QA on vehicle when complete   **Estimator**

Call customer & put notes in Stellix   **Estimator**

14. Delivery   Whom?

Phase I - At the vehicle   **Estimator**

Walk to vehicle with customer
- Bring vehicle into Estimate Bay in bad weather

Review the work with the customer
- What work was done
- Additional items
- Supplements repairs
- Prior damage (if applicable)

Ask for a positive response and explain CSI (See CSI Script)

Phase II - At the counter   **Office Staff**

Be sure to verify the signatures

    Power of attorney

    Insurance specific authorizations

Collect Monies & review billing including supplements

Review Warranty and care of the paint

Update the delivery dates in Stellix

Enter payment in Stellix & stamp payment on the front of the folder

Remove vehicle from Production List in Excel

Phase III - At the vehicle   **Estimator**

Walk the customer to the vehicle

Ask for the referral & give business cards

Wave goodbye

15. Closing   Whom?

Close RO File   <u>**Office Staff**</u>

       1) Verify payment is stamped on the front of the folder

       2) Final sequence the RO file

       3) Close the file within 12 hours of delivery (No Exceptions)

       4) Notify Estimator to upload the final bill to the insurer or flee

       5) Add Miles In & Miles Out in Stellix from inspection sheet

       6) In Stellix under vehicle – PO number, add B or N/B (Bonus or No Bonus)

       7) Determine final gross profit

       8) Print closing sheet (RO Analysis)

       9) Mark closed date on RO file

       10) Determine if paid in full or if there are A/R's

       11) Put file in appropriate file drawer

16. Accounts Receivable   Whom?

Review payment policy at drop off   **Office Staff**

Confirm payment type and amount when calling   **Estimator/Office Staff**
to set a specific delivery time

Assure customer pay portion is paid at delivery   **Office Staff**

    Follow up on unpaid supplements and note contacts

    Review the aging daily and call on outstanding balances every 3-5 working days

    Documenting the contacts in managements system notes

Deposits   **Office Staff**

    Write up daily deposit total sheet with payments and credit cards

    Balance daily deposit total sheet to Payment Summary in Stellix

    Accounting transfer daily from Stellix to QuickBooks