

**PROFIT MOTIVE: YOUR COMPASS TO FINANCIAL SUCCESS**

# Making your staff accountable: Part 1

Decide what tasks they should tackle and order of importance in SOPs

BY **KEITH MANICH** | CONTRIBUTING EDITOR

In all operations within the store, tasks have to be identified and placed in an order of importance. Why? Because some tasks have significantly more importance to the operation than others. Some are critical while some are routine.

The ideal way to start is by identifying the employees by job description and what their job requires them to do. All aspects of the job must be considered, the time-frame to perform work tasks, the degree of importance of each task and how each task relates to sales and customer service.

Let's look at a specific job that has significant impact on the customer. Counter person, service advisor, customer service rep — pick a name, but this is the person who is responsible for setting the customer expectations for your store. This is the first contact with the customer and represents the store in their eyes. This person is the customer moment of truth.

The below tasks are typically associated with this job description:

**The greeting**

- How it's delivered, conversation tone
- Speak with a smile, eye contact

**Answer incoming calls**

- First contact with customer
- Number of rings before call pickup
- Communicate next steps

**Make outgoing calls to customers**

- Customer steps for claims/repairs
- Document call content in repair order
- Identify repair chain of events

**In some cases, liaison between the store**

**and a third party payer**

- Answer third party's questions
- Handle supplement
- Repair order questions or concerns

**Identify scheduling opportunities**

- Ensure promised dates are acceptable
- Provide updates to schedules and production flow

**Schedule work into the store**

- Make sure promised in and out dates can be kept and any changes are updated at least 24 hours in advance

**Help bring vehicles into production**

- Make drop-off arrangements
- Maintain schedule to ensure correct production sequence by day, week, month

**Handle form supply and filing**

- Order needed forms, office supplies
- Place forms into repair order folder
- Have a ready supply of presorted folders with direction of pay, inspection, photo and other necessary paperwork prepared for customers

**Create repair order document**

- Use presupplied information from third party payer or customer to preload the repair order worksheets to reduce time spent on this process with the customer

**Complete vehicle check-ins**

- Complete vehicle check-in form
- If using a scheduling visual, make sure it is completed

**Complete vehicle walk-around**

- Do a vehicle walk around and upsell any unrelated prior damage
- Point out all damage so that there is no question that it was there when the vehicle is delivered in the event that the customer doesn't want it fixed

**Take necessary photos**

- Photograph all vehicle damage, even if unrelated to the current loss
- Photograph any areas that show a paint mismatch
- Photograph the dashboard while the seven-second test burn is occurring as well as once the test burn has cycled through in the event there are fault codes not related to the current loss

**Process file for the estimator/blueprinter**

- Forward only completed repair order paperwork to the estimating/blueprinting staff to minimize questions
- Provide a supplement repair check sheet with the RO in the event that damage is missed during the disassembly process

**Document the in-process repair order and arrange for a rental car**

- Ensure daily updates are made
- Assist as needed with follow-up calls

**Close the file**

- ARs and APs finalized
- All parts listed
- Supplements complete

Continue reading next month to learn how to prioritize these tasks and how to build the corresponding SOP to implement in your shop. 📖

SEARCH THESE & HUNDREDS OF OTHER ARTICLES

▶▶ [ABRN.COM/ProfitMotive](http://ABRN.COM/ProfitMotive) ◀◀

**\$ Streamlining process, efficiency**

**\$ Managing the internal customer**

**\$ The ease of using shop SOPs**