

PROFIT MOTIVE: YOUR COMPASS TO FINANCIAL SUCCESS

# Develop and maintain standard operating procedures: Part one

SOPs can be a roadmap to easing your business stress

BY KEITH MANICH | CONTRIBUTING EDITOR

**H**ow much of your day is spent answering questions about procedural items that could be answered just as easily by a chart, worksheet or other method that clearly identified the necessary requirements or steps? Think about how much easier your daily business activities would be if each step, process or requirement was clearly identified. This is the goal of a robust series of standard operating procedures (SOPs).

SOPs can be a roadmap to easing your business stress by providing the “go-to guide” for your employees to reduce, and in some cases, eliminate daily questions, unnecessary phone calls and unproductive activity that reduce workplace efficiencies.

Let’s look at one area of opportunity: incoming customer phone calls. Think about the customer calls your business receives. Are they from customers bringing new business into your store, or are they from customers with questions about vehicle repairs? Both are customer calls, but one is “productive” and one is not and could be eliminated. How? Develop a system that provides customers with repair updates for their vehicles.

You can set expectations when the vehicle arrives — identify the customer’s need for updates, the method preferred and the frequency. This will eliminate “nonproductive” calls to make room for potential new customers.

The process for developing the SOP isn’t as complicated as you might think. The development of an SOP is an establishment

of rules, tasks, measurements and follow-up processes that will reduce process waste and needless redundancy. Let’s take a closer look at the customer contact SOP and the steps needed in the process.

### Identify notification purpose

Explain to the customer that notifications are used to keep them informed throughout the repair process. This is a key performance measurement in most CSI scores as well as with others who watch your business. Next, identify who will make the notification and how you will ensure that it is made on schedule, since the expectation has been set with the customer.

### Schedule notification times, type and frequency

Scheduling notifications in a digital calendar program or email system provides a pre-designated time in the calendar and usually a reminder to make the notification.

### Documentation

This is key to informing other store employ-

ees that the who, what, where, when and why were performed, so that if a question surfaces, documentation provides answers without disrupting workflow or at least minimizes the disruption.

A measurement process also ensures that employees assigned with specific tasks are completing them within the SOP requirements. An audit process is an alternative, but a visual indicator may be a better alternative. Using a visual identifier such as initials in a check box located on a file jacket, or a color indicator for contact calls are examples.

### Measurement

Be consistent and repeatable in your processes so that there becomes an expectation of a specified performance.

1. Provide detailed repair plan
2. Identify contact requirements
3. Provide options for notification
4. Identify method of contact
5. Identify contact frequency
6. Provide required information
7. Schedule calls using calendar
8. Complete documentation
9. Complete visual identifier

Improving performance or eliminating waste for something as simple or sometimes as complex as a customer call will reduce the time spent reacting to a call. This proactive approach in controlling the calls coming in to your shop will free up the opportunity for additional business to reach you through your phone and provide you with enhanced sales and profit potential.

In Part Two, we will examine building SOPs for the production areas. ■

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