



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 when possible in Outlook (30 minute slots)

Estimator or Office Staff

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 schedule in the AM release meeting

Product Manager

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 (except LKQ & RPW - take when available or reasonable)

Estimator/Parts

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 before opening envelope

Estimator/Office Staff

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

Office Staff

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 progressive estimator cover for estimates during peak drop off times)

Estimator/Office Staff

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

Have customer remove valuables

(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

Office Staff

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 to the production manager vehicles are dropped off

Office Staff

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

Everyone

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

Up Front

Cars for drop off or check in

In Work Order Packet

Picks up boxes & garage twice daily

Detailer

Check on parts not received for techs per job

Parts

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 at stall using the tablet PC

Project Manager

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 for each position)

Project Manager

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 & supplements)

Estimators

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 of car picked up)

Estimators/Office Staff

- 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

Office Staff

- 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
to set a specific delivery time**

Estimator/Office Staff

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