



THE CANONS OF SUCCESS FIELD REPORT

HUMAN ARCHITECTURE

_____ ☐ / /

MAINTAIN THE RIGHT NUMBER OF PEOPLE

Utilize the benchmark scorecard ratings for each role. This ensures accurate and timely execution of best practices.

_____ ☐ / /

TEAMING

Team writers to your technicians. Ensure the highest level of information flow between the shop floor and the shop office.

_____ ☐ / /

RATIO

The shop's body men to admin ratio should never exceed 1:1. The parts department should be 33% of your front office staff. If "fat," the Parts department is the only place. (Remember: 80% of your stalls are parts related.)

_____ ☐ / /

FRONT OFFICE OVERHEAD EXPENSE NOT EXCEEDING 9 -10% OF TOTAL SALES



BLUEPRINTING

____ ☐ ____ / ____ / ____

ALL DROP OFFS/BLEUPRINTS MUST BE SCHEDULED (TOW-INS NEED TO BE FACTORED IN BASED ON HISTORICAL DATA).

____ ☐ ____ / ____ / ____

NO MORE THAN 4 BLEUPRINTS PER WRITER PER DAY TO BE ACCOMPLISHED BEFORE NOON (THIS FACILITATES ACCURATE AND TIMELY PARTS ORDERING).

____ ☐ ____ / ____ / ____

1 DEDICATED TEAR DOWN BAY PER WRITER IS REQUIRED.

____ ☐ ____ / ____ / ____

COMPLETE BLEUPRINT WITHIN ONE TO THREE HOURS OF VEHICLE POSSESSION.

____ ☐ ____ / ____ / ____

ALWAYS WRITE AT THE CAR WITH AN ESTIMATING SYSTEM (RECOMMEND MOBILE CART WITH LAPTOP/WINDOWS TABLET HARDWIRED TO THE INTERNET).

____ ☐ ____ / ____ / ____

INVITE ALL PERSONNEL WHO ARE DIRECTLY INVOLVED IN THE REPAIR PROCESS OR ADMINISTRATION OF THE JOB TO REVIEW THE FINISHED “ESTIMATE OR PRECOLLISION CONDITION OF THE VEHICLE BLEUPRINT”:

Including, but not exclusive to – Parts, Writer, Bodyman, Painter, Mechanic, Production, etc.

____ ☐ ____ / ____ / ____

HAVE ALL PERSONNEL ABOVE **SIGN THE ROME ESTIMATE QC SHEET** TAKING FULL ACCOUNTABILITY THAT THE BLEUPRINT REFLECTS THE TRUE PRE-COLLISION CONDITION OF THE VEHICLE, BEFORE YOU BEGIN THE REPAIR PROCESS ELIMINATING THE NEED FOR SUPPLEMENTS.

____ ☐ ____ / ____ / ____

SCAN THE ROME ESTIMATE QC SHEET INTO THE ELECTRONIC FILE JACKET AS A PERMANENT RECORD.

____ ☐ ____ / ____ / ____

CREATE TECHNICIAN INCENTIVE DRAW TO SUPPORT A TIMELY TEAR DOWN.

40% disassembly, 10% body, 50% reassembly.

(TIP: BODYMAN WILL NOT BE ABLE TO ASK FOR SUPPLEMENTS AFTER BLUEPRINTING.)

____ ☐ ____ / ____ / ____

PARTS EMPLOYEE(S) TAKES PHOTOS OF DISASSEMBLED PARTS THAT NEED TO BE ORDERED TO SUPPORT “PHOTO ORDERING.”

____ ☐ ____ / ____ / ____

THE RESULT OF THE BLUEPRINT IS A “CLOSED REPAIR ORDER” SO WE HAVE AN ACCURATE RECIPE TO MANAGE THE REPAIR PROCESS FROM THE BEGINNING OF THE JOB.

*** NOTE: NO DISASSEMBLE – REASSEMBLE TEAMS: BODYMAN (TEAM) TAKES THE VEHICLE THROUGH ENTIRE REPAIR PROCESS FRONT TO BACK.**

TECHNICAL PROCEDURE:

1. Bodyman assigned by writer disassembles collision in its entirety in the blueprint bay.
2. Writer completes the blueprint supplement with the estimating system.
3. Invite all personnel who are directly involved in the repair process or administration of the job. Have all personnel review and sign the estimate QC Sheet, taking on accountability that it is the complete pre-collision condition for the repair.
4. Scan into the electronic file jacket as a permanent record.

PARTS PROCEDURES

____ ☐ ____ / ____ / ____

PARTS ORDERING PERSON MUST SEE ALL PARTS THEY BUY BEFORE BUYING THEM.

____ ☐ ____ / ____ / ____

PARTS ORDERING PERSON MUST SIGN THE BLUEPRINT FOR THE SPECIFIC JOB.

____ ☐ ____ / ____ / ____

MISSION CRITICAL PARTS ARE DESIGNATED BEFORE ORDERING.

____ ☐ ____ / ____ / ____

MIRROR-MATCH PARTS AGAINST THE P.O. UPON RECEIPT.

____ ☐ ____ / ____ / ____

INVOICES SHOULD BE POSTED WITHIN 20 MINUTES OF RECEIPT.

____ ☐ ____ / ____ / ____

MIRROR-MATCH PARTS AT THE CAR WITH YOUR TECHNICIAN.

____ ☐ ____ / ____ / ____

TECHNICIANS TAKE FULL RESPONSIBILITY THAT THE PARTS ARE CORRECT FOR THE JOB WHEN THEY SIGN.
(TIP: Do not return aftermarket parts. MAKE THEM FIT.)

____ ☐ ____ / ____ / ____

TECH DISPATCH SHEET MUST BE SCANNED INTO THE R.O. AS A PERMANENT RECORD.

____ ☐ ____ / ____ / ____

TEST-FIT ALL PARTS BEFORE GOING TO PAINT.

____ ☐ ____ / ____ / ____

PARTS EMPLOYEES AT A MINIMUM HAVE ACCESS TO DAMAGE PHOTOS WHETHER IT BE IN ROME OR SOME OTHER SYSTEM/FILE.

***NOTE: TURN ON “CORE CHARGE” AND “PARTS RETURN REQUIRED” SECURITIES TO ENSURE TIMELY RETURN OF ASSETS.**

ROME

PARTS TASK

_____	☐	/ /	ATTEND THE BLUEPRINT PROCESS.
_____	☐	/ /	TAKE PARTS PHOTOS AT TEARDOWN.
_____	☐	/ /	DESIGNATE MISSION CRITICAL PARTS.
_____	☐	/ /	DO ALL PARTS ORDERING.
_____	☐	/ /	PRICE MATCH.
_____	☐	/ /	AVAILABILITY.
_____	☐	/ /	STRATEGY.
_____	☐	/ /	RECEIVE PARTS.
_____	☐	/ /	DAMAGE (NEGOTIATES).
_____	☐	/ /	CREATE TRANSACTIONS FOR DAMAGE (LABOR/PARTS).
_____	☐	/ /	CREATE CORE CHARGES.
_____	☐	/ /	POST CORE CHARGES.
_____	☐	/ /	STORE PARTS; i.e. BIN LOCATION.
_____	☐	/ /	INVENTORY MANAGEMENT.
_____	☐	/ /	MANAGE SPLIT QUANTITY.
_____	☐	/ /	POST INVOICE(S).
_____	☐	/ /	FIRST MIRROR-MATCH AT P.O.
_____	☐	/ /	DELIVERS PARTS TO TECH.
_____	☐	/ /	SECOND MIRROR-MATCH AT CAR.
_____	☐	/ /	GETS TECHNICIAN SIGNATURE.
_____	☐	/ /	PART OF DAILY WALKAROUND TEAM.
_____	☐	/ /	CREATE RETURNS.
_____	☐	/ /	CALL VENDOR FOR RETURN PARTS(S) PICKUP.
_____	☐	/ /	POST CREDIT.
_____	☐	/ /	SCAN INVOICE, CREDITS, CORE CHARGES, & TECHNICIAN DISPATCH SHEETS.

CUSTOMER SERVICE

- _____ ☐ ____ / ____ / ____ WALK-INS NOT ALLOWED.*
(*All estimates scheduled for formal appointments increases closing potential by 80%)
- _____ ☐ ____ / ____ / ____ TAKE APPOINTMENTS AFTER 12:00PM. THE MORNING IS FOR BLUEPRINTS AND WRITING SUPPLEMENTS.
- _____ ☐ ____ / ____ / ____ ALL CUSTOMER SERVICE CALLS MADE BEFORE LUNCH.
- _____ ☐ ____ / ____ / ____ ALL ASSIGNMENT CALLS MADE BEFORE LUNCH.
- _____ ☐ ____ / ____ / ____ ALL DATE CHANGE CALLS MADE BEFORE LUNCH.
- _____ ☐ ____ / ____ / ____ ALL DRIVABLE PRE-ORDERS THAT DID NOT SHOW UP SHOULD BE RESCHEDULED BEFORE LUNCH.
- _____ ☐ ____ / ____ / ____ THE CALENDAR IS MAINTAINED FOR ASSIGNMENTS, APPOINTMENTS, AND DRIVABLE PRE-ORDERS “NEVER BEHIND TODAY” BY CSRs.
- _____ ☐ ____ / ____ / ____ CHECK IN CUSTOMERS USING THE EASY CHECK IN APP.
- _____ ☐ ____ / ____ / ____ ENTER ALL PAYMENTS INTO THE ROME SYSTEM.
- _____ ☐ ____ / ____ / ____ GO OVER RECEIVABLES ON A DAILY BASIS.

ADMINISTRATION

_____ ☐ ____ / ____ / ____

NO REVENUE CAN BE ADDED TO THE REPAIR ORDER AFTER THE CAR GOES TO PAINT.

_____ ☐ ____ / ____ / ____

SET PROFIT REQUIREMENT AT 45%.
(The ticket cannot be reviewed unless it meets this standard.)

_____ ☐ ____ / ____ / ____

SETUP PROFIT ALERT FOR TEXTING TO UPPER MANAGEMENT WHEN ATTEMPTS ARE MADE TO CLOSE THE TICKET OUTSIDE OF OUR MARGIN REQUIREMENT.

_____ ☐ ____ / ____ / ____

AT THE VEHICLE DROP-OFF, ALWAYS SELL DELIVERY EXPECTATIONS.
(TIP: Deliveries should be done between 12:00pm and 4:00pm, at least 30 minutes apart.)

_____ ☐ ____ / ____ / ____

NO TICKETS CAN BE CLOSED UNLESS VEHICLE IS DELIVERED.

_____ ☐ ____ / ____ / ____

ALL TICKETS DATED OUT UPON VEHICLE DELIVERY.

_____ ☐ ____ / ____ / ____

MUST BE PAPERLESS. (No more job jackets!)

- _____ ☐ / / ONE ESTIMATOR WRITES THE ENTIRE JOB FRONT TO BACK.
- _____ ☐ / / THE BODYMAN/BODYMAN TEAM IS REQUIRED TO REPAIR THE VEHICLE FRONT TO BACK INCLUDING DISASSEMBLY AND
- _____ ☐ / / A BLUEPRINT BAY PER WRITER IS REQUIRED.
- _____ ☐ / / REQUIRED ATTENDANCE OF TWO ROME 20 GROUP MEETINGS ANNUALLY.
- _____ ☐ / / BI-MONTHLY REVIEW PARTICIPATION REQUIRED WITH DEALERSHIP UPPER MANAGEMENT.
- _____ ☐ / / NEW EMPLOYEES MUST UNDERGO BASIC ROME TRAINING AS IT RELATES TO THEIR JOB TITLE.

PRODUCTION

_____ ☐ ____ / ____ / ____

WRITER IS RESPONSIBLE FOR A TIMELY AND ACCURATE BLUEPRINT.

_____ ☐ ____ / ____ / ____

WRITER FOLLOWS THE VEHICLE THROUGH THE ENTIRE REPAIR PROCESS.

_____ ☐ ____ / ____ / ____

COMPLETE A WALK-AROUND AND TOUCH EVERY VEHICLE ON THE LOT ONCE PER DAY.

_____ ☐ ____ / ____ / ____

SET PRODUCTION EXPECTATIONS AND PRIORITY FOR EACH TECHNICIAN AND PAINT TEAM DAILY.

_____ ☐ ____ / ____ / ____

SET PRIORITY FOR VEHICLES BEING DELIVERED FOR THE DETAIL TEAM DAILY.

ACCOUNTING

____ ☐ ____ / ____ / ____

PARTS DEPARTMENT CANNOT SEE PROFIT ON PART SALES UNTIL ROME RO IS CLOSED ENSURING ENGAGED URGENCY WITH THE COLLISION CENTER.

____ ☐ ____ / ____ / ____

SUB -ACCOUNTS ARE REQUIRED IN ORDER TO RECONCILE PARTS AND SUBLET WIP ON THE DMS.

____ ☐ ____ / ____ / ____

REQUIRED ROME DAILY MANAGEMENT REPORTS:

- ☐ SALES JOURNAL
- ☐ RECEIPTS JOURNAL
- ☐ INVOICE VENDOR RECONCILIATION REPORTS (STAPLED TO THIRD-PARTY INVOICE)
- ☐ EXPORT JOURNAL FROM ROME DMS INTERFACE

____ ☐ ____ / ____ / ____

PAYROLL HISTORY REPORT IS REQUIRED TO BE TURNED IN TO ACCOUNTING FOR EACH PAY CYCLE.

TRAINING CHECKLIST

Please initial each item that was covered. Then print name, sign and date.

CSR's

- _____ The Calendar is used to create all insurance assignments, estimate appointments, and is used to create all Repair Orders.
 - _____ Update the calendar continuously and are accountable to all assignment and estimate appointments.
 - _____ Update all Lost Sale opportunities.
 - _____ Update the calendar upon vehicle drop off utilizing the Auth Cust, Ins Auth and Blueprint RO designations to establish blueprint priorities.
 - _____ Any Calendar entry behind today needs to be prioritized and updated.
- _____ Utilize the File Jacket to scan all documents in a timely manner.
- _____ Repair orders are linked to the DMS customer and vehicle service history.
- _____ Utilize the Customer Service screen to prioritize and document all customer contacts.
 - _____ Utilize Phone or Text/Email communications through Customer Service.
 - _____ Ensure ALL customer communication is documented through Customer Service for historical records.
- _____ Create the DMS Customer/Vehicle link upon RO creation.
- _____ DMS errors and Make/Model errors demonstrated with resolutions.
- _____ Payments are being received and scanned in Rome and a receipts report is being turned into accounting daily for the deposit.
- _____ The RO Notes tab is utilized to document all insurance and non-customer communication and RO facts.
- _____ Easy Check in used at Customer drop off.
- _____ Fully read and understand the Cannon's of Success.

Print: _____

Sign: _____

Date: _____

WRITERS

- _____ Easy Walkaround is utilized to update technician priority, identify parts issues, adjust date due, and update repair status
- _____ Easy Check in used at customer drop off.
- _____ Update the calendar utilizing the RO designations to establish completed Blueprint RO's, Dispatch RO's, In Shop RO's and Completed/Delivered RO's.
- _____ Use the Big Board for labor assignment, load levels, and production status updates.
- _____ Successful Blueprints with estimate/supplements written at the vehicle and Estimate QC sheets signed and scanned.
- _____ RO's are being reviewed by the Writer prior to contacting the customer to schedule delivery.
 - _____ All restrictions to reviewing have been demonstrated to each Writer- parts not received, labor not paid, sublet not costed.
 - _____ Two way estimating for PPD's utilized.
 - _____ Writers use Assign by account code or manual, Unassign, Reassign, Draw and Pay All to maintain payroll and load levels.
- _____ The RO Notes tab is utilized to document all insurance and non-customer communication and RO facts.
- _____ RO Remarks is utilized to include all payment information for the customer.
- _____ Fully read and understand the Cannon's of Success.

Print: **ROME** _____

Sign: _____

Date: _____

TRAINING CHECKLIST

Please initial each item that was covered. Then print name, sign and date.

MANAGER

- ___ All mobile apps are installed and utilized.
 - ___ Easy Check-in is utilized for customer drop offs.
 - ___ Easy Image is utilized by the front office, parts dept and technicians to photo document RO specific details.
 - ___ Easy Technician is utilized by the techs to communicate priority, date due, parts status, update payroll and update the repair status from their work area.
- ___ Paper file folders are scanned, and a paperless environment has been created.
- ___ The RO Notes tab is utilized to document all insurance and non-customer communication and RO facts.
- ___ Repair order designations are understood and are actively being used to manage RO's.
 - ___ CSR's update the Auth Cust upon vehicle drop off.
 - ___ Writers update the Ins Auth to designate the vehicle for Blueprint.
 - ___ Writers update the Blueprint designation upon supplement import.
 - ___ Writers update the Dispatch designation when critical parts are received.
 - ___ Writers update In Shop and Completed.
- ___ Blueprints are being performed in a thorough and timely manner and estimate QC sheets are being initialed and scanned.
 - ___ Writers ensure that timely and accurate blueprints are being performed including the required attendees.
 - ___ Estimates are written at the vehicle in the writer's blueprint stall.
- ___ The Big Board and Load Levels are used to establish technician assignment availability.
- ___ Payments are being received and scanned in Rome and a receipts report is being turned into accounting daily for the deposit.
- ___ RO's are being dated out and exported to the DMS daily upon vehicle delivery.
 - ___ A DMS RO reconciliation report is turned into accounting daily.
- ___ Key reports have been reviewed: Sales, Profit, Receipts, Receivables, Cycle Time.
 - ___ Subtotal sorted reports have been demonstrated: By Writer, Insurance Company, Source, Make or ZIP Code.
 - ___ Comparison Summary Sales/ Profit reports have been demonstrated.
 - ___ Accounting WIP report has been demonstrated to Shop Management and Dealer Accounting.
 - ___ Vendor Payable, Receipts, Sales and Receivable reports have been demonstrated to Accounting.
- ___ The payroll process has been reviewed and the payroll history report turned into accounting at the end of the payroll period.
 - ___ Technicians receive a Payroll Worksheet.
 - ___ The technicians review the payroll worksheet and approve. Payroll is Committed.
 - ___ The Payroll History report is printed for Accounting.
- ___ Fully read and understand the Cannon's of Success.

Print: _____

Sign: _____

Date: _____

TRAINING CHECKLIST

Please initial each item that was covered. Then print name, sign and date.

PARTS

- _____ Parts are being ordered and received in a timely manner to ensure that all team members understand the status of parts by RO.
 - _____ Parts and Sublet invoices are being posted and vendor reconciliation documents are being attached to original vendor invoices and turned into accounting.
 - _____ Easy Image used to document parts to order and damaged parts.
 - _____ PPD supplements
 - _____ Open Credit and Parts to return reports are run frequently to ensure that parts profits are maximized.
 - _____ Vendor Payable reports are reviewed frequently to ensure that vendor discounts are correct.
 - _____ Damage parts credits are performed correctly.
 - _____ Parts are labelled, assigned to a Bin Location and Tech Dispatching sheets are signed by the technician and scanned.
 - _____ Parts are mirror matched at delivery and upon dispatching to the technician.
 - _____ The Parts team has become a part of the Blueprinting Process.
- _____ Fully read and understand the Cannon's of Success.

Print: _____

Sign: _____

Date: _____

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ROME

TECHNOLOGIES

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