2021 WORKBOOK

CANONS OF SUCCESS

BODY SHOP
BASICS

Reactive

Paperwork is not ahead of production

TIMELINE

Incomplete Disassembly · Missing Part · Wrong Part · Forgotten Sublet · Supplement

Backing Into Ticket

INFORMATION FUNNEL

Vehicles stall 50%-100% 1 hour or more

Final Estimate Pre-Collision Condition
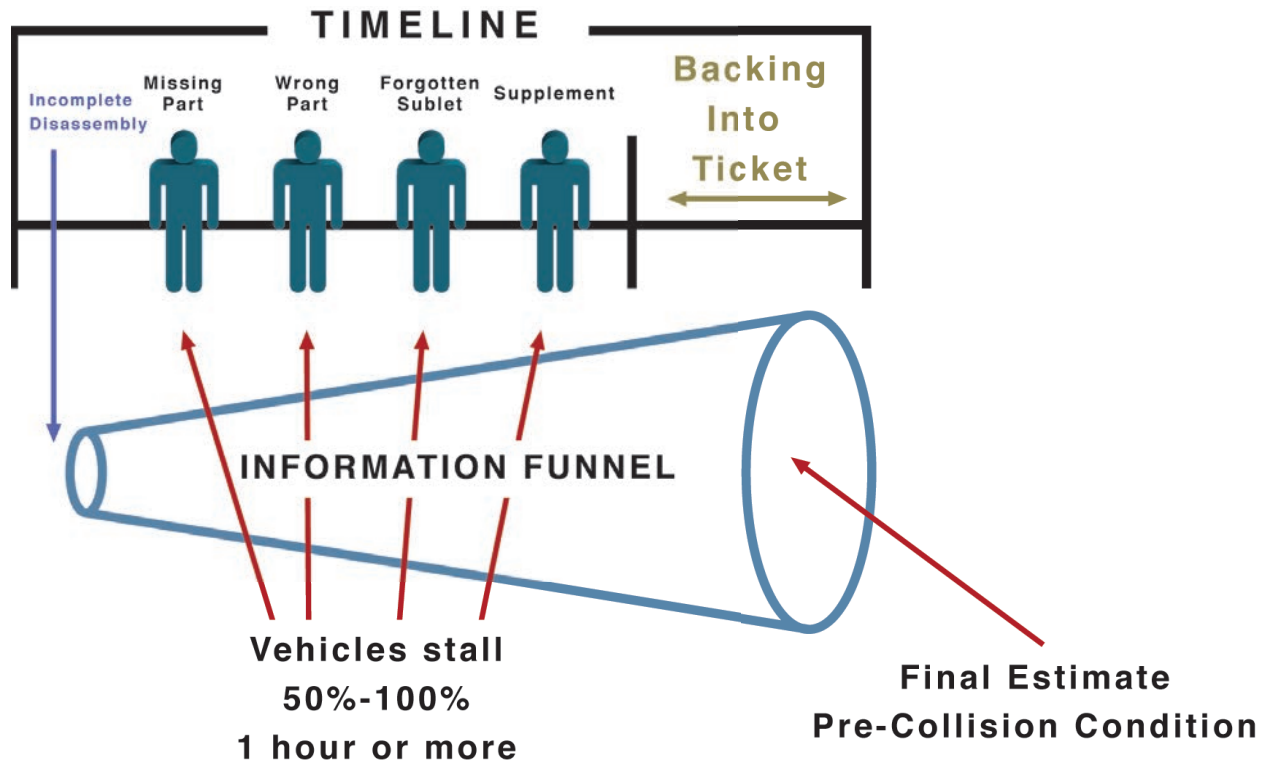
Results:

○ Vehicle is not ready for customer pick up

○ Customer calling for vehicle status means low CSI

○ Cash flow not keeping up with demand... using your - credit line to pay payroll or bills

○ Accounts receivable is higher than 10% of monthly revenues in 30 days

○ Reduced gross profit

○ Increased stress, reduced morale

○ Increased cycle time

ROME

Proactive

Blueprint
The best place for the job, because every job is custom

Knowledge Funnel
Create a formal document defining the pre-collision condition of the vehicle before we start the repair. This will include the viewpoint of each person involved (technician, parts, painter, production & writer, etc.) then signed and scanned into the R.O. as a permanent record.

ROME
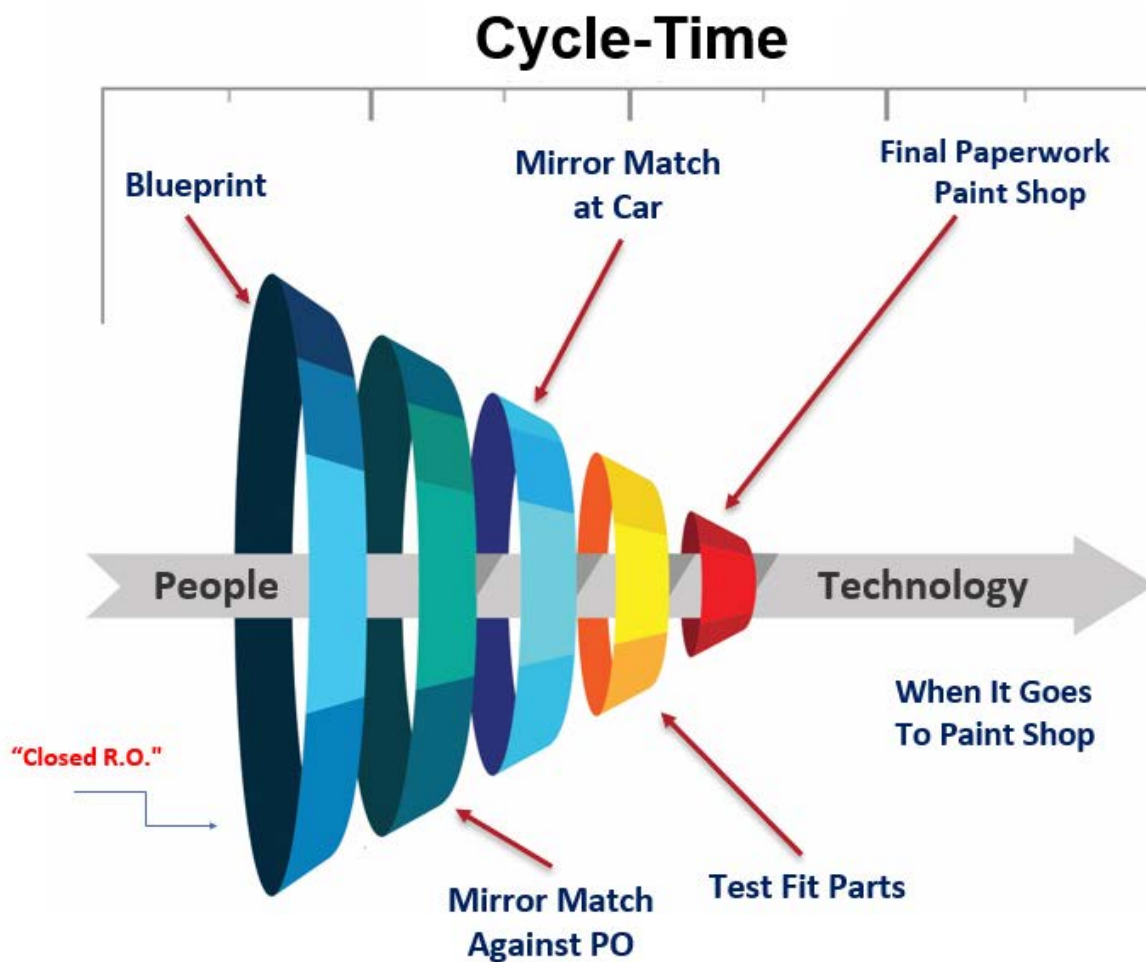
MEASURE TO MANAGE
"Exceptional Managers Manage by Exception."

The Forecast

INCLUDES:

- ○ Number of days in the shop
- ○ Damage Profile - Severity
- ○ Projected profitability by income category
- ○ Customer "love call" cycle
- ○ New load on shop resources by department, by technician,by writer
- ○ Defines action item priorities by department (decision-priority technology)
- ○ Cars to fix - Parts to buy - Customers to   call
- ○ Production cycle where the car will be on any given day based on hours worked per man per day per car, including admin and sublet days, with consideration of holidays and weekends and the projected date due
- ○ Cycle time of mission-critical parts
- ○ Cycle time of all parts

VEHICLE DESIGNATION

Proper Repair Order Designation:
ORDER/PRE-ORDER PARTS BUTTON

The Order/Pre-order button has three color conditions. First, the "Red" color means parts are not selected for order or pre-order. Yellow button color means parts are selected for order/pre-order where your parts department will now see this RO on their Parts Management List. Finally, "Green" color means the parts department has ordered all of the parts currently on the original import.

To change the color from "Red" to "Yellow", simply click on the button. By the Writer clicking on the "order/pre-order" parts button (changing it from Red to Yellow) they are authorizing the Parts Department to proceed with ordering parts. If the RO does not have any parts on it the parts department will not see the RO on their list until parts are added. Only make the designation yellow when you are ready for parts to be ordered. If you select ordering parts too early, the RO will stay on the Parts Management list until they are ordered and parts utilization score will decline.
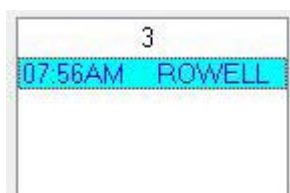
Proper Repair Order Designation:
AUTH/CUST BUTTON

By the CSR or Writer clicking on the "Auth/Cust" button, they are indicating that the vehicle has been dropped off and is on the property and Customer Authorization is in the process of being obtained. This RO will show on the calendar in Light Blue on the RO Date on the calendar. Once Customer Authorization is obtained, a second click on the "Auth/Cust" button will change the button color to "Green" and automatically change the "Auth/Ins." button to "Yellow".

A scheduled in RO will be yellow on the calendar on the RO's Date In until the Auth/Cust button is clicked to yellow. Once the Auth/Cust is yellow the RO will appear on the calendar in light blue on the RO's Date In.

Proper Repair Order Designation:
AUTH/INS. BUTTON

By the CSR or Writer clicking on the "Auth/Ins." button, changing it to green, they are indicating that the Insurance Authorization is in the process of being obtained.

This RO will show on the calendar in Light Blue on the RO Date In. Once Insurance Authorization is obtained, a second click on the "Auth/Ins." button will change the button color to "green" and automatically change the "Blueprint" button to yellow.


ROME

Proper Repair Order Designation:
BLUEPRINT BUTTON

The Blueprint button will automatically change to "yellow" when the "Auth/Ins." Button is changed to "green". The Blueprint button being "yellow" indicates the vehicle has been authorized and now needs to begin the blueprint process. The car should be torn down and blueprinted with 1-3 hours of vehicle possession.

This RO will show on the calendar in royal blue on the RO date in. When the blueprint is completed click on the blueprint button to change to "green". This will automatically change the Dispatch to "yellow".

ROME

Proper Repair Order Designation:
DISPATCH BUTTON ON HOLD
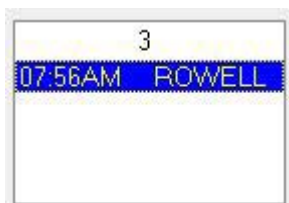
When the Dispatch button is "yellow" this indicates that the Blueprint is completed and we are waiting/on-hold before moving to production. A technician should be assigned during the Blueprint process to be paid for teardown time. The RO is "On Hold" due to supplement approval, waiting on mission critical parts to be received (the parts required to get the vehicle through the body/frame/mech production steps) and we have a technician bay in the shop for the job to be started, we can mark that the "Dispatch" or "On hold" completed.

This RO will show on the calendar in Purple on the RO date in. When the RO is assigned to a technician we will click on the Dispatch button to change it to "green". The In Shop button will automatically change to "yellow" indicating the RO is in the "In Shop" status.

ROME
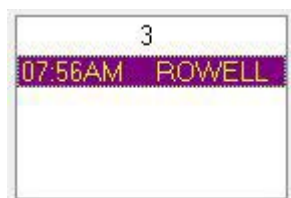
Proper Repair Order Designation:
IN SHOP BUTTON

When the Dispatch button is clicked from "yellow" to "green this will automatically change the In Shop button from "red" to "yellow". This indicates that the repairs have been started and the vehicle is now being managed through the big board production task to the date due.

This RO will show on the calendar in "green" on the RO date due. It will stay on this date unless the date due is updated based on new   forecasting/production delays.
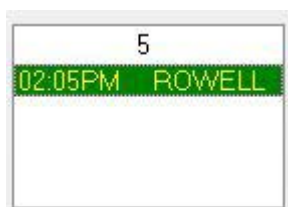
Proper Repair Order Designation:
COMPLETED BUTTON

When the RO is completed click on the In Shop to change it to "green". This will automatically put a Date Completed on the RO changing the Completed Button to "orange".

This RO will show on the calendar in "orange" on the RO date due.

In Shop-Auth/Ins-Hold:
In Shop/Hold

Vehicle is on hold for some damage condition and awaiting authorization from customers insurance company.

CALENDAR

An accurate calendar is required to gain the full benefit of the Rome Management solution. The efficiency of all departments is dependent upon its accuracy. We use vehicle designation to allow each department to define and prioritize the decisions it makes which will impact the cycle time and customer service. Each designation has a predefined location on the calendar for easy decision- making. The following list outlines the vehicle designations, correct locations, the dates that define them and the responsible parties that maintain each designation. By looking at the calendar, management can see any inaccuracies and know who needs to correct them.

There are three levels of detail in the calendar; Month, Week and Day
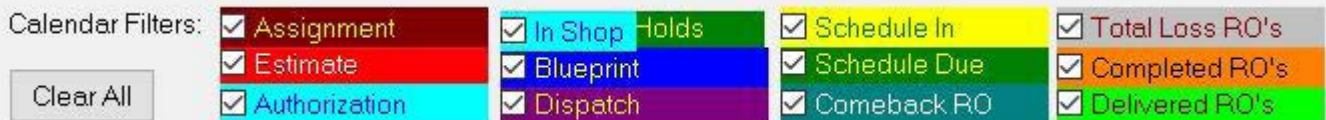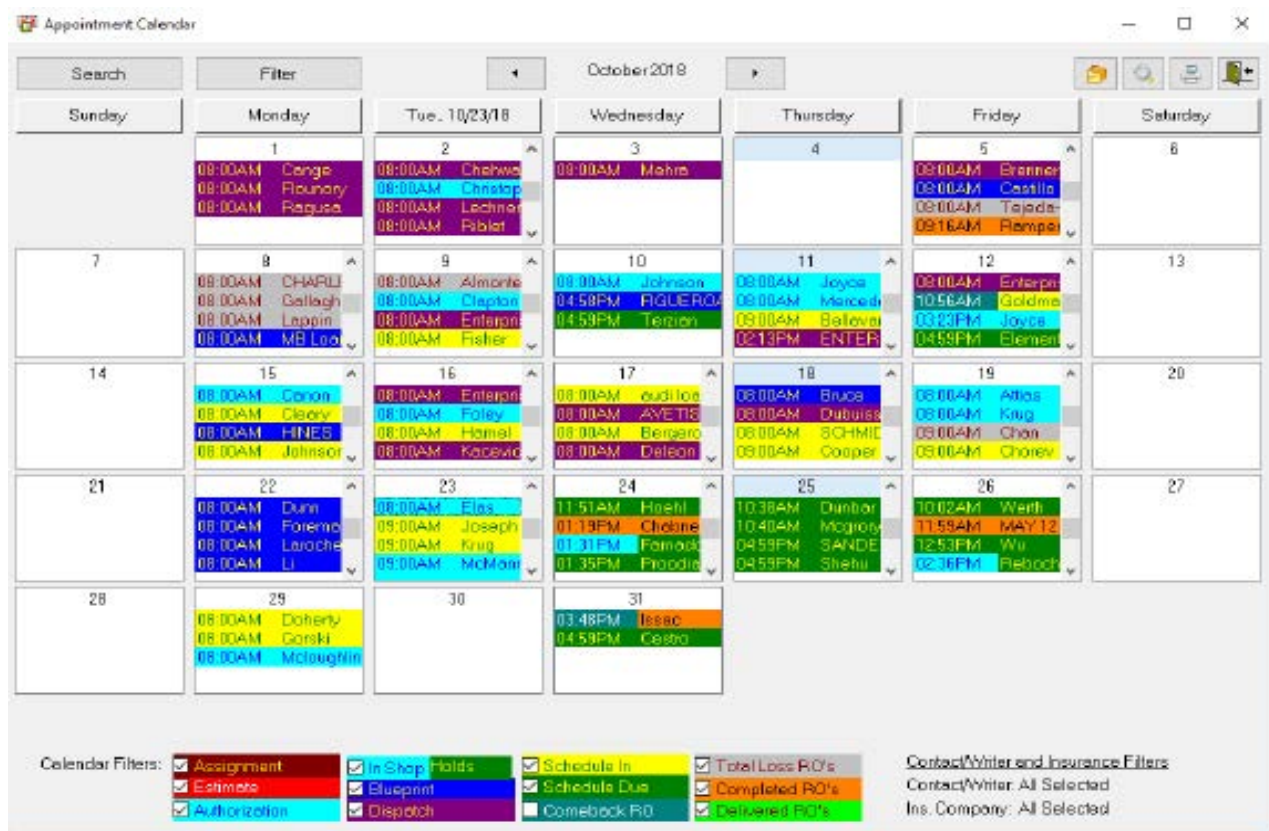
Calendar: Weekly View - Click the magnifying glass to see the week

Calendar: Daily View - double click on the date in rome to see the daily view

Vehicle Designation Color Code
- Assignments - BURGUNDY
- Estimates (Appointments) - RED
- Scheduled in (drivable preorder) - YELLOW
- Staging
  - Waiting for authorization (Cust/Ins)- LIGHT BLUE
  - Waiting for blueprints - DARK BLUE
  - Waiting for parts - PURPLE
- Scheduled Due (In-shop) - GREEN
- Completed ROs(Not delivered)- ORANGE
- Completed ROs(Delivered)- LIME GREEN
- Total loss ROs – GREY
- Comeback ROs - TEAL

Vehicle Location
(Based on the vehicle designation)
- Assignments - Must never be behind "today"
- Appointments - Must never be behind "today"
- Scheduled in - Must never be behind "today"
- Staging - No more than one day behind "today"

BASED ON DATE IN
- Scheduled due - Must never be behind "today"
- Completed ROs - No more than one day behind "today"

BASED ON DATE DUE
- Total loss - Any day including "today"

BASED ON DATE IN

Person Responsible for Updating Calendar
CUSTOMER SERVICE
- Assignments
- Appointments
- Scheduled in (drivable Pre-Order)

WRITER
- Staging - Authorization

WRITER/PRODUCTION
- Staging - Blueprint
- Schedule Due (date due)
- Total Loss

PRODUCTION/WRITER
- Staging - Waiting for Parts

TECH/QC
- Completed ROs

ROME

PARTS

A great parts department makes a great body shop. Having the proper ratio of manpower to revenue ensures that the parts department does not cause a bottleneck in the collision center. Based on   industry standards we recommend one parts person for every $150 - $200k in monthly shop revenue.

Parts personnel are responsible for ordering, receiving, returning, dispatching, blueprinting, and   posting of the invoices in a timely manner (within 20 minutes of receipt). Proper manpower is essential to a successful collision center.

RO Parts - None 3 Suppl 4 Rcv 16 Ret 6 CoreR 2 Rcv

Filter Options

Date Created - Starting Date: 6/04/16   Ending Date: 6/08/21   All Dates

Vehicle Location - ☑ Car In Shop   ☐ Schedule In   ☑ Staging

Display ROs - ☑ No Parts Ordered   ☑ Supplement Order   ☑ Parts to Receive   ☑ Part To Return   ☑ Core To Return   ☑ Receive Credit

Writer - ◉ All   ○ Selected

Insurance - ◉ All   ○ Selected

Make - ◉ All   ○ Selected

by RO | by Date In | by Date Due

RO	Last Name	Writer	Insurance Company	Make	Date In	Date Due	No Order	Order	Receive	Return
0034049.00	HARSTAD	PAULO	WESTERN NATION/	HYUN	1/13/20	2/25/20	0	16	30	0
0034073.00	Akunna	DAVE	GEICO	HOND	1/22/20	2/14/20	0	1	20	1
0034084.00	THOMPSON	PAULO	CUSTOMER PAY	FORD	1/30/20	2/07/20	1	0	2	0
0034095.00	OJO	DAVE	STATE FARM	HOND	2/04/20	2/10/20	0	1	5	0
0034101.00	Reeves	SARA	AMERICAN FAMILY	Honda	2/05/20	2/11/20	0	2	0	0
0034102.00	FRIGAARD	DAVE	AUTO CLUB INSUR/	HYUN	1/13/20	2/07/20	0	23	27	0
0034116.00	Patel	PAULO	GEICO	HOND	1/13/20	2/07/20	10	0	0	0
0034121.00	LUKAS	DAVE	AMERICAN FAMILY	Kia	1/14/20	2/05/20	0	3	38	1
0034147.00	Hodgeman	DAVE	AMERICAN FAMILY	Honda	1/16/20	1/21/20	0	0	0	10
0034157.00	BLUHM	SARA	THE GENERAL	Ford	1/16/20	2/07/20	0	1	18	0
0034158.00	HANSEN	SARA	STATE FARM	HOND	1/16/20	2/03/20	0	5	34	1
0034164.00	UMER	SARA	STATE FARM	HYUN	1/16/20	1/31/20	2	0	0	0
0034190.00	HUBBARD	PAULO	MTC	HOND	1/20/20	2/06/20	0	1	23	0
0034206.00	SILBERSACK	DAVE	STATE FARM	HOND	1/21/20	2/19/20	0	2	37	4
0034221.00	ANDERSON	BOB	HONDA SERVICE	HOND	1/23/20	1/28/20	0	3	0	0
0034236.00	Ahlman	PAULO	AMERICAN FAMILY	Ford	1/24/20	2/06/20	0	2	22	0
0034240.00	Seta	SARA	GEICO	HOND	1/21/20	2/13/20	0	1	2	0

RO Part Counts: 3 4 16 6 2 5   RO Number: Change

Print   Close

Parts Tasks

Parts are Ready to Order

Action Check order parts box in RO

RESPONSIBILITY Writer/ Estimator

RESULT Triggers the ordering process from the RO

Prioritize Parts Ordering

Action
1. Go to Parts screen by clicking the Parts button
2. Check "No Parts Ordered" and "Some Parts Ordered"
3. Select Boxes in the following order:

   1st Priority:"Car in Shop " by earliest "Date Due"

   2nd priority: Cars in "Stagin" by earliest "Date in"

   3rd Priority: Cars Not in Shop (drivable preorder) by earliest date in

RESPONSIBILITY Parts Person

RESULT Prioritizes ROs by order in which parts should be ordered

Order Parts in RO

Action
1. Tag mission critical parts
2. Create purchase order and filter by part type
3. Check default cycle time for parts arrival date/time within PO

RESPONSIBILITY Parts Person

RESULT Parts ordered

Receive Parts in RO

Action
1. Verify accuracy of parts to invoice/PO
2. Post/balance incoice to PO
3. Scan invoice into electronic file jacket
4. Print tech dispatch sheet
5. Deliver/verify parts accuracy with technician

RESPONSIBILITY Parts Person

RESULT Accurate parts are received, job costing for part is in RO, accounts payable updated, parts inventory established

Return Parts

Action
1. Create credit memo
2. Signature from vendor on credit meme for return
3. Scan signed credit meme into electronic file jacket

RESPONSIBILITY Parts Person

RESULT Open credits established

Blueprinting

Action Review/comment-final estimate at the point of teardown

RESPONSIBILITY Parts Person

RESULT Accurate understanding of parts needed for repair

ROME

PRODUCTION-BIG BOARD

The Big Board offers the most comprehensive view of the entire collision center. On a single screen you can see if customer service calls have been made, if mission-critical parts have been delivered, if all the parts have been delivered, what cars to dispatch, what needs to be done on each vehicle today, if the vehicle is on schedule, by department, by hours, by dollars, by insurance company, by technician, and by a writer.

The Big Board can be sorted by vehicle designation, allowing rapid, precise and efficient decision-making, for blueprinting, dispatching, and production management. All of the information is updated live so you can make decisions that have an immediate impact on your facility.

Updating the Big Board with a tablet during walk around is an invaluable tool. You can set the workflow for the entire shop for daily production and automatically update technician stations. The technician station provides an up-to-the-minute task list for each tech. As the vehicle moves through production the big board will generate alerts via email or texting to the proper management personnel of any delays on the shop floor so prompt action can be taken to get things back on track.

ROME

Production Decision-making

Initiate Blueprinting

COMPLETED BY WITHIN 1 - 3 hours from time of vehicle possession

Action
1. Check "Blueprint" box
2. Write estimate at the car
3. All involved parties review estimate at the car
4. Update staging box:waiting for parts in repair order

RESPONSIBILITY Production or Writer

RESULT Ful vision of the pre-collision condition of the vehicle

Initiate Dispatching

Action
1. Check "waiting for parts" box
2. Check mission critical parts column for availability
3. Run technician load level report/select technician/assign labor
4. Update in shop checkbox in repair order
5. Print shop repair order/copy of estimate/give to technician
6. verify accurate data due

RESPONSIBILITY Production/Writer

RESULT Vehicle is in production

Initiate Walk Around

Action
1. Define production tasks per vehicle per technician on the Big Board screen
2. Verify vehicle inventory
3. Make sure all cars are on schedule (Green)
4. Verify accurate vehicle designation
5. Verify accurate Date Due

RESPONSIBILITY Production/Writer

RESULT Stage is set for daily tasks to be completed by technicians

ROME

Car Status/ RO number

- **RO#** (blue) Blueprint
- **RO#** (purple) W Parts
- **RO#** (orange) Completed

Customer Service Calls/Name

- **NAME** (red) Call for Due date update
- **NAME** (red) Call for due date & schedule
- **NAME** (yellow) Scheduled callback
- **NAME** (green) Customer callback is current
- **NAME** (blue) Customer requested callback
- **NAME** (orange) Task status change callback

Car Status/ RO number

- ☐ No critical part on the job
- **MAKE** (red) No critical parts received
- **MAKE** (yellow) Some critical parts reveived
- **MAKE** (green) All critical parts received
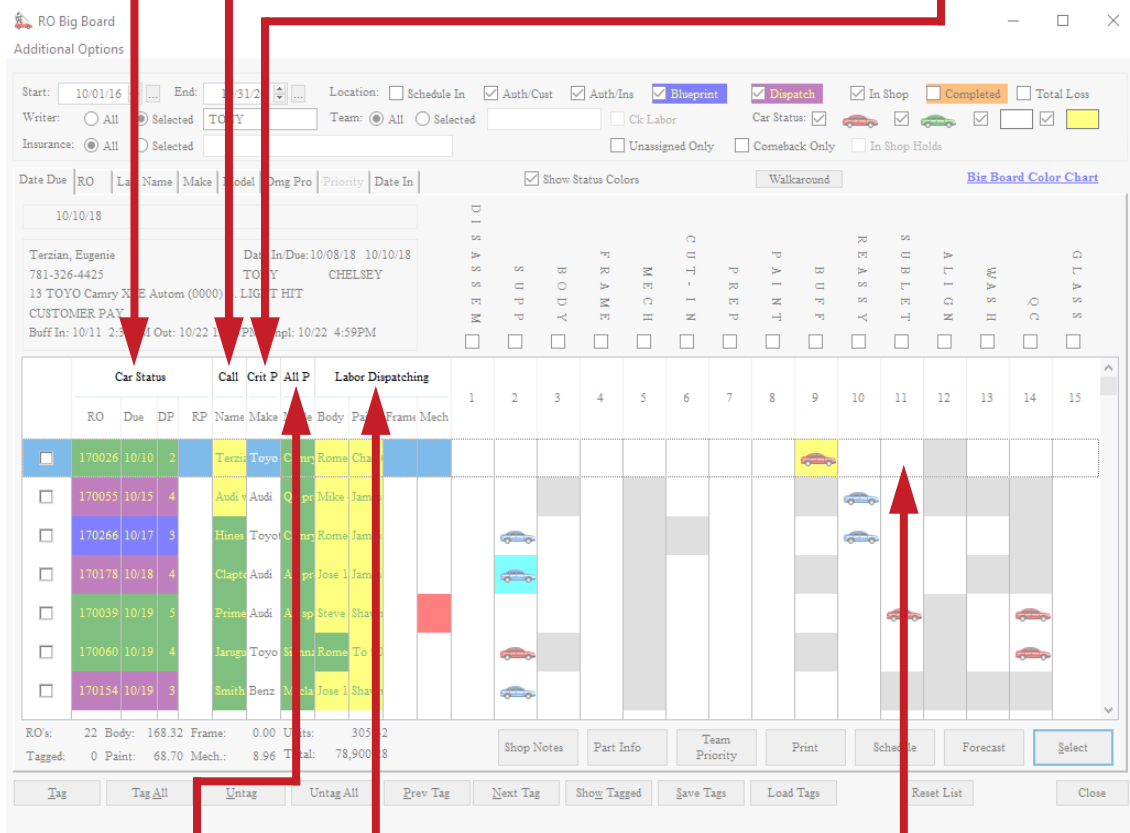
All parts List/Model

- ☐ No parts on the job
- **MODEL** (red) No parts received
- **MODEL** (yellow) Some parts reveived
- **MODEL** (green) All parts received

Labor Dispatching/Tech

- ☐ No labor
- **TECH NAME** (red) No labor assigned to tech
- **TECH NAME** (yellow) Some labor assigned to tech
- **TECH NAME** (green) All labor assigned to tech

Task Status

- (blue car) Car in staging
- (green car) Car on schedule
- (red car) Car behind schedule
- (yellow box) Car stalled

ROME

CUSTOMER SERVICE

Customer service is essential in developing new and ongoing relationships. By taking advantage of the emailing, texting, dynamic call logs and integration with the ARMs system, you have many ways to maintain contact and consideration with your partners and customers. These contacts should be made in a timely manner on a daily basis.

Calls: Order of Importance

Type: Inquiry calls
Color: Blue
Made when: Several times per day
Responsibility: Writer or Estimator
Result: Customer inquiry is answered in a timely manner

Type: Date change calls
Color: Red
Made when: Before lunch
Responsibility: Writer or Estimator
Result: Customer is informed of new delivery date and why

Type: Vehicle Status
Color: N/A
Made when: Automatically generates when customer, insurance, rental car screens are updated
Responsibility: Generated by technician station via email and/or texting
Result: Customer is kept informed throughout the repair process with up to the minute status changes diminishing the number of inquiry calls received on a daily basis

Type: Daily callbacks
Color: Yellow
Made When: Before lunch
Responsibility: Customer Service
Result: Customer is informed vehicle is on schedule

ROME

Calls

TYPE	Daily callbacks
COLOR	**Yellow**
MADE WHEN	Before lunch
RESPONSIBILITY	Customer Service
RESULT	Customer is informed vehicle is on schedule

TYPE	Date change calls
COLOR	**Red**
MADE WHEN	Before lunch
RESPONSIBILITY	Writer or Estimator
RESULT	Customer is informed of new delivery date and why

TYPE	Inquiry calls
COLOR	**Blue**
MADE WHEN	Several times per day
RESPONSIBILITY	Writer or Estimator
RESULT	Customer inquiry is answered in a timely manner

TYPE	Vehicle Status
COLOR	N/A
MADE WHEN	Automatically generates when customer, insurance, rental car screens are updated (must be set up)
RESPONSIBILITY	Generated by technician station via email and/or texting
RESULT	Customeris kept informed throughout the repair process with up to the minute status changes diminishing the numer of inquiry calls received on a daily basis

ROME

WORKFLOW

Assignments

ACTION

- EMS assignments into calendar
- call potential customer for estimate appointment

RESPONSIBILITY   Customer Service

Appointments (estimate appointment)

ACTION

- Write estimate at car with customer
- Close deal, get keys or set appointment for drop off

RESPONSIBILITY   Writer

Follow up calls

ACTION

- Assignments that are not set for appointment
- Appointments that were not closed
- Four attempts before selecting lost sale

RESPONSIBILITY   Customer Service

Staging - Easy Check In

ACTION

- Update customer information
- Get authorization from customer

RESPONSIBILITY   Customer service

ACTION

- Verify prior damage/ customer signature
- Take photos of damage and prior damage, current mileage and fuel, warning lights ect

RESPONSIBILITY   Writer

ROME

Staging

ACTION
- Tag Keys, make sure "Parts", "Authorization" and "Blueprint" are checked
- Print and place ticket in windshield
- Scan all documents in the file jacket

RESPONSIBILITY   Writer or Customer Service

ACTION
- Dispatch vehicle for blueprint
- Technician notifies estimator disassembling is complete

RESPONSIBILITY   Writer or production

ACTION
- Convert final estimate into Rome
- Confirm accurate date due
- Call customer with delivery date

RESPONSIBILITY   Writer

ACTION Monitor master parts ordering screen for odering and receiving

RESPONSIBILITY   Parts personnel

Production

ACTION
- Check "In Shop" to dispatch cehicle for repair
- Assign labor to technician

RESPONSIBILITY   Writer or Production

ACTION   Dispatch parts to technician

RESPONSIBILITY   Parts personnel

ACTION   Update technician station as work is completed

RESPONSIBILITY   Technician

ACTION
- Monitor vehicle for production problems
- QC vehicle
- Post completed date

RESPONSIBILITY   Writer or Production

Delivery

ACTION   Call Customer for pick up

RESPONSIBILITY   Writer or Customer Service

ACTION   Verify final paperwork

RESPONSIBILITY   Writer

ACTION
- Cashier ticker
- Postdate out on repair order
- Post delivery date on repair
- Scan in payment

RESPONSIBILITY   Customer Service

ACTION   Daily walk around

RESPONSIBILITY   Production or Writer

ROME

ROME

TECHNOLOGIES

ROME