



# **2021 WORKBOOK**

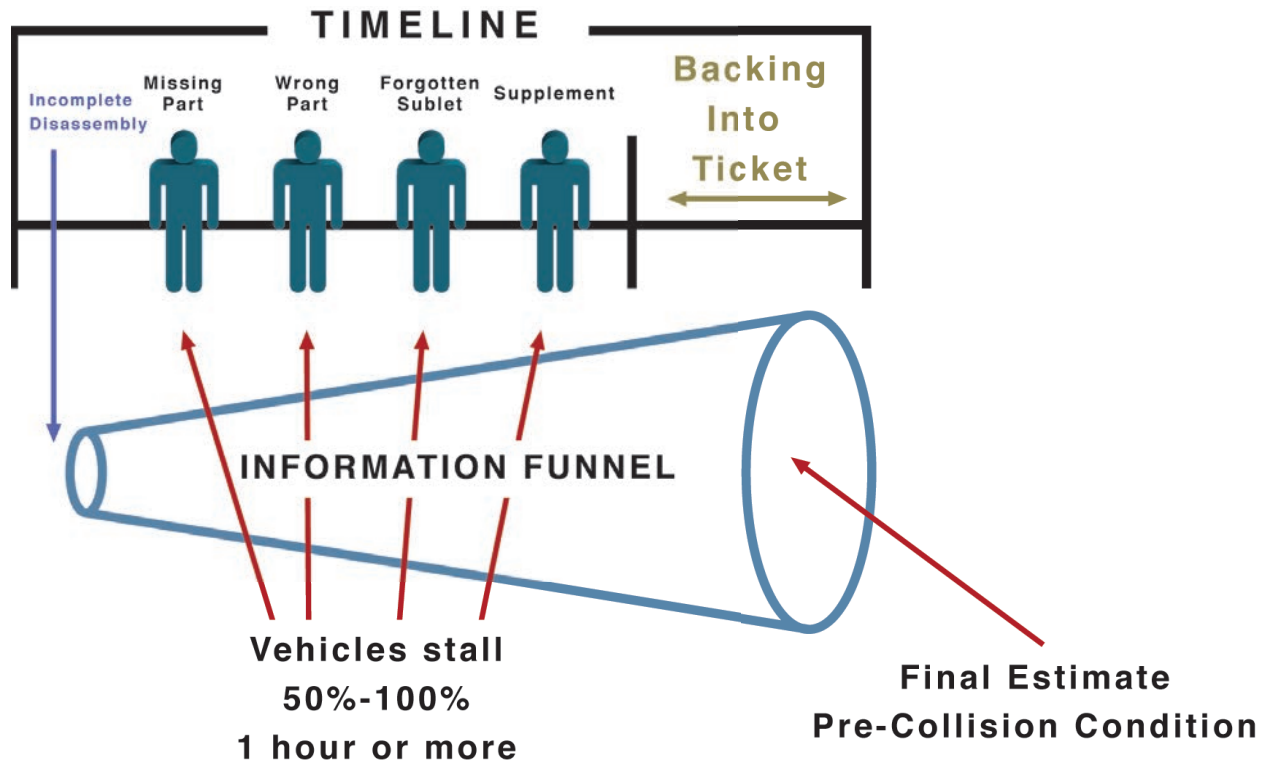
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# **CANONS OF SUCCESS**

## **BODY SHOP BASICS**

# Reactive

Paperwork is not ahead of production



## 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

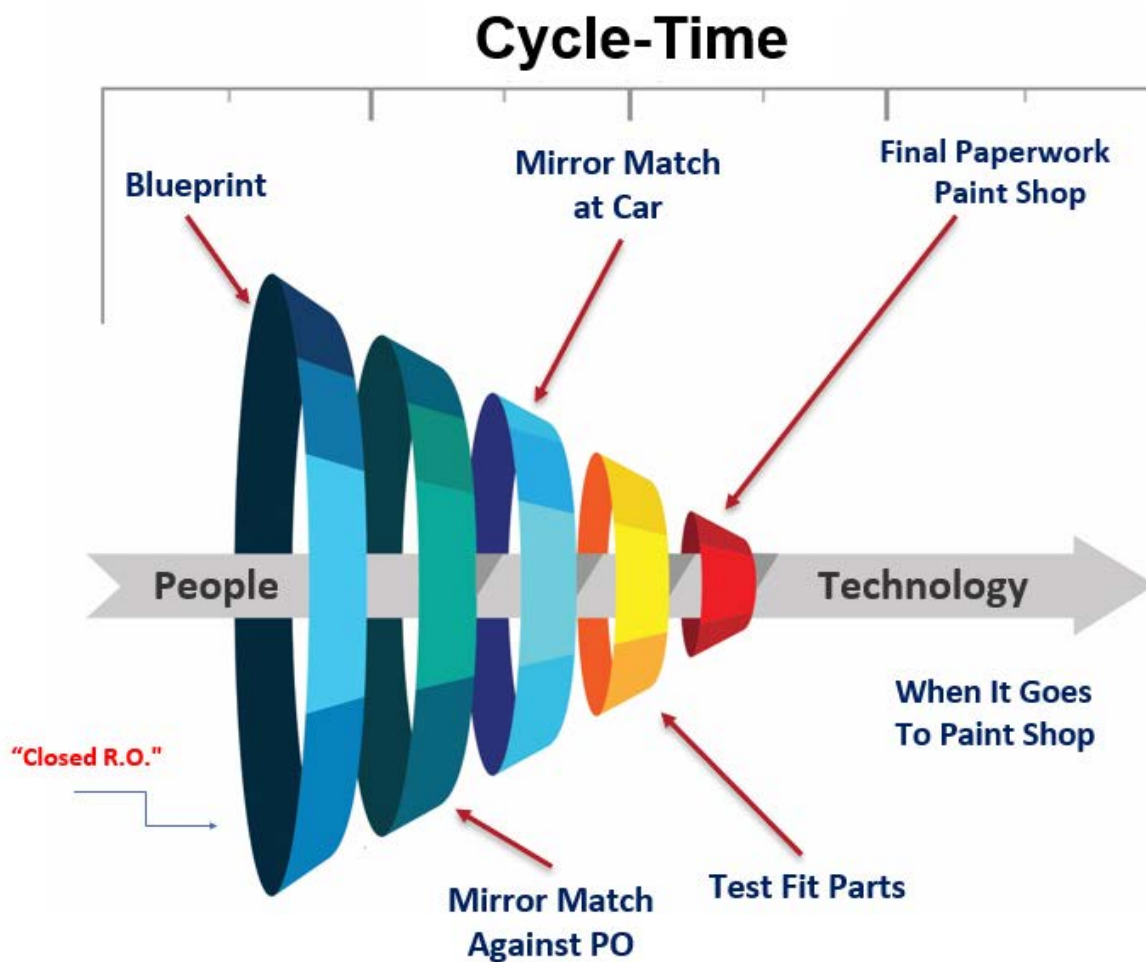
# Proactive

## 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.



# 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

RO Big Forecast - 0063419.00

Task Status	Units	Days	Forecast Date/Time	Over-Ride Date/Time	Task Status	Units	Days	Forecast Date/Time	Over-Ride Date/Time
START			2/11/19 7:30AM		GLASS			2/20/19 4:34PM	
TD/Blueprint	2.89	0.72	2/11/19 2:43PM		Reassembly	8.67	2.17	2/22/19 12:29PM	
Supplement		0.10	2/11/19 3:43PM		SCAN	1.00		2/22/19 5:28PM	
BODY	17.34	4.34	2/18/19 9:04AM		Alignment			2/22/19 5:28PM	
Wheel Recon			2/18/19 9:04AM		BUFF			2/22/19 5:28PM	
Structural			2/18/19 9:04AM		DETAIL			2/22/19 5:28PM	
MECH			2/18/19 9:04AM		Q.C.			2/22/19 5:28PM	
PREP/Paint	11.00	2.75	2/20/19 4:34PM					2/22/19 5:28PM	

Grand Total: 2,499.54      Writer: JODY      % on Target for Date Due: 51.99      RO Completed: ☐

Body Team/Units: MIKEH 8.64      Paint Team/Units: BRIAN 2785 0.00      Frame Team/Units: 0.00      Mech. Team/Units: 0.00

Notes: You cannot "shrink" a task to a date/time before the forecast completion date/time of the prior task. You can "expand" any task to the date/time you want. To "shrink" or "expand" the entire RO, change the date due. If the workload percentage is too big/small, clear the existing date due to forecast the RO at 100% work (and a new date due).



# **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.

Order/Pre-Order

Order/Pre-Order

Order/Pre-Order

RO (0001234 - 1HGCM72674A009677)

Tools Est./Suppl PPD Alert Print Multiple Print

Order/Pre-Order Auth/Cust Auth/Ins Blueprint Dispatch In Shop Completed

Customer Misc. Notes Worksheet Payments Cost

RO No.: 0001234.00 Appointment RO

WEBINAR / NOT WRITTEN / BLUEPRINTING

Status: ☒ Active ☐ Inactive ☐ Void

☐ Tow In ☐ Comeback RO

☐ Total Loss ☐ Reviewed

First Name: SUSAN

Last Name: ROWELL

Addr1: 4104 APPLE LEAF COURT

Addr2:

City, ST, Zip: PASADENA MD 21122

Home/Work: 410-437-5730 301-677-6416

Writer: SCOTTR Year: 04

Writer 2: Prod Date: Source(s):

Call Cust Call Contact/Info Make: HOND Color:

Fleet Acct: Model: ACCORD EX Paint Cd:

PO: Style: Trim Cd:

VIN: 1HGCM72674A009677 Type: Engine:

Notes: Customer Supplmnt Shop Security Office Man. Mail Parts Auto Mail Paint Remarks

Status: Body Paint Mech Frame Sublet

Cost: Parts Body Paint Mech Frame Sublet

Key Tag: Date Creatd: 5/23/17 Date In: 5/23/17 Date Out: Date Cmpit: Date Due: 5/30/17 Time: 9:47AM

Unit: Mileage In: 0 Mileage Out: 0 ST Lic: Date Due: 0

Pay Resp: Owner ☐ Claimant ☐ Insured ☐ Shop ☐

Delivered: Deduct: Grand Total: 1,490.93 Payments: 0.00 Balance: 1,490.93

3

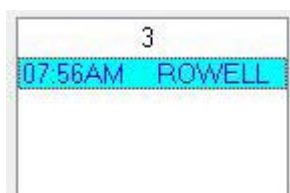
07:56AM ROWELL

# 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”.

The screenshot shows the RO (Repair Order) software interface. At the top, there are three colored boxes labeled "Auth/Cust": a red box, a yellow box, and a green box. Red arrows point from these boxes to the "Auth/Cust" button in the software interface. The interface includes a menu bar (Tools, Est./Suppl, PPD Alert, Print, Multiple Print), a status bar (Order/Pre-Order, Auth/Cust, Auth/Ins, Blueprint, Dispatch, In Shop, Completed), and a main form area. The main form area contains fields for Customer information (First Name, Last Name, Address, City, ST, Zip, Home/Work, Writer, Writer 2, VIN), Status (Active, Inactive, Void), Insurance (Insurer, Adjuster, Claim R.), and Vehicle information (Make, Model, Color, Paint Cd, Trim Cd, Engine). There are also checkboxes for "Call Cust", "Contact/Info", "Parts", "Body", "Paint", "Mech", "Frame", and "Sublet". The bottom of the interface has a tabbed view (Level, Layer, Parts, Labor, Sublet/Misc, Schedule, Forecast, Profile, File Jacket) and buttons for OK and Cancel.

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.

Auth/Ins.

Auth/Ins.

Auth/Ins.

RO (0001234 - 1HGCM72674A009677)
— □ ×

Tools Est./Suppl PPD Alert Print Multiple Print

Order/Pre-Order
Auth/Cust
Auth/Ins.
Blueprint
Dispatch
In Shop
Completed

Customer
Misc.
Notes
Worksheet
Payments
Cost

RO No.: 0001234.00 Appointment RO  
 WEBINAR / NOT WRITTEN / BLUEPRINTING

Status: ☒ Active ☐ Inactive ☐ Void  
☐ Tow In ☐ Comeback RO  
☐ Total Loss ☐ Reviewed

First Name:   
 Last Name:   
 Addr1:   
 Addr2:   
 City, ST, Zip:     
 Home/Work:    
 Writer:  Year:   
 Writer 2:  Prod Date:

Cell:   
 Fax:   
 E-Mail:   
 E-Mail 2:   
 Insurer:   
 Adjuster:   
 Claim R:

Des./Phone:   
 Des./Phone:   
 Spouse:   
 Policy No.:   
 Date Loss:   
 Claim No.:

☒ Call Cust
☐ Call
Contact/Info

Make:  Color:   
 Model:  Paint Cd:   
 Style:  Trim Cd:   
 Type:  Engine:

Notes  
 Customer Supplmnt  
 Shop Security  
 Office Man. Mail  
 Parts Auto Mail  
 Paint Remarks

Status  
Body  
Paint  
 Mech  
 Frame  
 Sublet

Cost  
Parts  
Body  
Paint  
 Mech  
 Frame  
 Sublet

Key Tag:   
 Unit:   
 Mileage In:   
 Mileage Out:   
 ST Lic:

Date Creatd:   
 Date In:   
 In Shop:   
 Date O.P.:   
 Date Due: 0

Pay Resp  
 Owner ☐  
 Claimant ☐  
 Insured ☐  
 Shop ☐  
 Date Cmpit:   
 Date Out:   
 Delivered:   
 Deduct:   
 Time:

Grand Total: 1,490.93  
 Payments: 0.00  
 Balance: 1,490.93

Level
Layer
Parts
Labor
Sublet/Misc
Schedule
Forecast
Profile
File Jacket
A
OK
Cancel

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.

3
07:56AM ROWELL

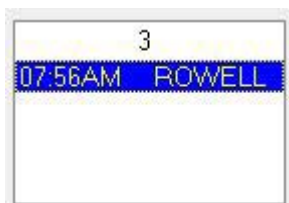
## Proper Repair Order Designation:

# 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.

The screenshot shows the Repair Order (RO) software interface. At the top, there is a navigation bar with buttons: Order/Pre-Order, Auth/Cust, Auth/Ins., **Blueprint** (highlighted in yellow), Dispatch, In Shop, and Completed. Above this bar, three callout boxes labeled "Blueprint" point to the "Blueprint" button. The main form contains customer information (First Name: SUSAN, Last Name: ROWELL, Address: 4104 APPLE LEAF COURT, City: PASADENA, MD, 21122), vehicle details (Make: HOND, Model: ACCORD EX, VIN: 1HGCM72674A009677), and various status and cost fields. The "Blueprint" button is currently yellow, indicating the vehicle has been authorized and now needs to begin the blueprint process.

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”.



## Proper Repair Order Designation:

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.

Dispatch

Dispatch

Dispatch

RO (0001234 - 1HGCM72674A009677)
Tools Est./Supply PPD Alert Print Multiple Print

Order/Pre-Order
Auth/Inst
Auth/Ins
Blueprint
Dispatch
In Shop
Completed

Customer
|
Misc
|
Notes
|
Worksheet
|
Payments
|
Cost

RO No.: 0001234.00 Appointment RO

WEBINAR / NOT WRITTEN / BLUEPRINTING

First Name:  Cell:

Last Name:  Fax:

Addr1:  E-Mail:

Addr2:  E-Mail 2:

City, ST, Zip:    Insurer:

Home/Work:   Adjuster:

Writer:  Year:  Claim R:

Writer 2:  Prod Date:  Source(s):

☐ Tow In ☐ Comeback RO

☐ Total Loss ☐ Reviewed

Spouse:

Policy No:

Date Loss:

Claim No:

Call Out  Contact/Info Make:  Color:

Fleet Acct:  Model:  Paint Cd:

PO:  Style:  Trim Cd:

VIN:  Type:  Engine:

Notes

Customer Supplmnt

Shop Security

Office Man. Mail

Parts Auto Mail

Paint Remarks

Status

Body

Paint

Mech

Frame

Sublet

Cost

Parts

Body

Paint

Mech

Frame

Sublet

Key Tag:

Unit:

Mileage In:

Mileage Out:

ST Lic:

Date Creatd:

Date In:

In Shop:

Date O.P.:

Date Due:

Pay Resp

Owner ☐

Claimant ☐

Insured ☐

Shop ☐

Time:

Date Cmpl:

Date Out:

Delivered:

Deduct:

Betterment:

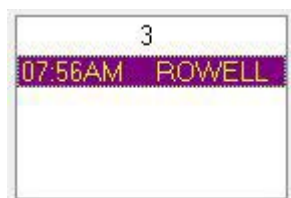
Grand Total: 1,490.93

Payments: 0.00

Balance: 1,490.93

Level
Layer
Parts
Labor
Sublet/Misc
Schedule
Forecast
Profile
File Jacket
A
OK
Cancel

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.

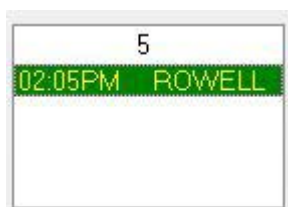


# Proper Repair Order Designation: IN SHOP BUTTON

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.

The screenshot shows the Repair Order (RO) software interface. At the top, there are three buttons labeled "In Shop" in red, yellow, and green. Red arrows point from these buttons to the "In Shop" button in the main interface, which is currently highlighted in yellow. The main interface displays various fields for customer information, vehicle details, and repair status. The "In Shop" button is located in the top navigation bar, and the "Dispatch" button is located in the main interface. The "In Shop" button is currently highlighted in yellow, indicating 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”.

CompletedCompleted

RO (0001234 - 1HGCM72674A009677)  
Tools Est./Suppl PPD Alert Print Multiple Print

Order/Pre-OrderAuth/CustAuth/InsBlueprintDispatchIn ShopCompleted

CustomerMiscNotesWorksheetPaymentsCost

RO No.: 0001234.00Appointment RO  
WEBINAR / NOT WRITTEN / BLUEPRINTING

Status: ActiveInactiveVoid  
Tow InComeback RO  
Total LossReviewed

First Name: SUSAN  
Last Name: ROWELL  
Addr1: 4104 APPLE LEAF COURT  
Addr2:  
City, ST, Zip: PASADENA MD 21122  
Home/Work: 410-437-5730 301-677-6416  
Writer: SCOTTR Year: 04  
Writer 2:  
Prod Date:  
Source(s):

Cell:  
Fax:  
E-Mail:  
E-Mail 2:  
Insurer:  
Adjuster:  
Claim R:  
Make: HOND  
Model: ACCORD EX  
Style:  
Type:  
Color:  
Paint Cd:  
Trim Cd:  
Engine:

Des./Phone:  
Des./Phone:  
Spouse:  
Policy No:  
Date Loss:  
Claim No:  
Notes  
Customer Supplmnt  
Shop Security  
Office Man. Mail  
Parts Auto Mail  
Paint Remarks

Cost  
Body  
Body  
Paint  
Mech  
Frame  
Sublet

Call CustCallContact/Info  
Fleet Acont:  
PO:  
VIN: 1HGCM72674A009677

Make: HOND  
Model: ACCORD EX  
Style:  
Type:  
Color:  
Paint Cd:  
Trim Cd:  
Engine:

Key Tag:  
Unit:  
Mileage In: 0  
Mileage Out: 0  
ST Lic:

Date Creatd: 5/23/17  
Date In: 5/23/17  
In Shop: 9/28/18  
Date O.P.: 5/23/17  
Date Due: 0 5/30/17

Pay Resp  
Owner  
Claimant  
Insured  
Shop

Date Cmpit: 9/28/18  
Date Out:  
Delivered:  
Deduct:  
Betterment:

Grand Total: 1,490.93  
Payments: 0.00  
Balance: 1,490.93

LevelLayerPartsLaborSublet/MiscScheduleForecastProfileFile JacketOKCancel

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

5
02:05PM ROWELL

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

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

RO (0001234 - 1HGCM72674A009677)

Tools Est./Suppl PPD Alert Print Multiple Print

Order/Pre-Order Auth/Cust Auth/Ins. Blueprint Dispatch In Shop Completed

Customer Misc. Notes Worksheet Payments Cost

RO No.: 0001234.00 Appointment RO  
WEBINAR / NOT WRITTEN / BLUEPRINTING

Status: ☒ Active ☐ Inactive ☐ Void ☐ Tow In ☐ Comeback RO  
☐ Total Loss ☐ Reviewed

First Name: SUSAN Cell: Des./Phone: Des./Phone:  
Last Name: ROWELL Fax: Des./Phone:  
Addr1: 4104 APPLE LEAF COURT E-Mail: Spouse:  
Addr2: E-Mail 2:  
City, ST, Zip: PASADENA MD 21122 Insurer: Policy No:  
Home/Work: 410-437-5730 301-677-6416 Adjuster: Date Loss:  
Writer: SCOTTR Year: 04 Claim R. Claim No:  
Writer 2: Prod Date: Source(s):  
Call Cust Call Contact/Info Make: HOND Color: Notes Status Parts  
Fleet Acont: Model: ACCORD EX Paint Cd: Customer Supplmnt Body  
PO: Style: Trim Cd: Shop Security Paint  
VIN: 1HGCM72674A009677 Type: Engine: Office Man. Mail Mech  
Paint Auto Mail Frame  
Remarks Sublet Sublet

Key Tag: Date Creatd: 5/23/17 Pay Resp: Date Cmpl: Grand Total: 1,490.93  
Unit: Date In: 5/23/17 Owner ☐ Date Out: Payments: 0.00  
Mileage In: 0 In Shop: 9/28/18 Claimant ☐ Delivered: Deduct: Balance: 1,490.93  
Mileage Out: 0 Date O.P.: 5/23/17 Insured ☐ Shop ☐ Betterment: Betterment:  
ST Lic: Date Due: 0 5/30/17 Time: 9:47AM

Level Layer Parts Labor Sublet/Misc Schedule Forecast Profile File Jacket A OK Cancel

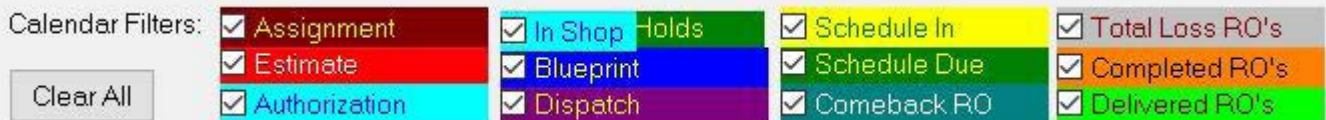
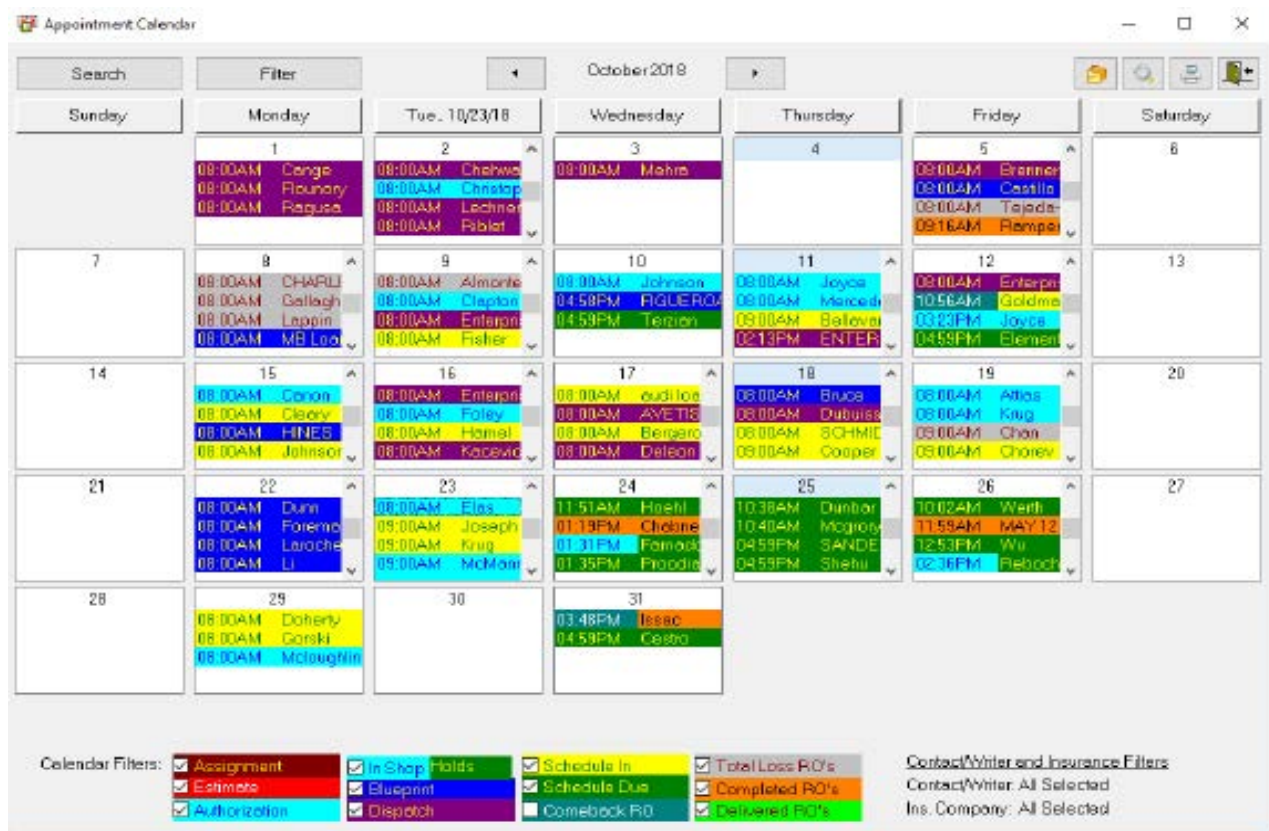
5

☒ In Shop Holds

# 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

Appointment Calendar

Search Filter December 9, 2018 - December 15, 2018

Sunday	Monday	Tuesday	Wednesday	Thurs., 12/13/18	Friday	Saturday
9	10	11	12	13	14	15
	08:00AM Baker	09:00AM Meneus	08:00AM Ely	08:09AM Pattison	08:12AM Dunbar	
	08:00AM James	09:00AM Pauling	08:00AM Plaisir	09:00AM Andrews	08:17AM Woo	
	08:00AM Pappas	10:07AM STOLOFF	08:00AM Spencer-S	09:00AM Arce	08:32AM Vilain	
	08:00AM Yalutova	10:15AM PRIME PO	09:00AM Charles	09:00AM Essa	09:10AM LEVIN	
	09:00AM Hernandez	12:49PM PRIME AC	09:00AM Hendersor	09:00AM Santos	09:54AM Holmes Ne	
	02:45PM Mercedes	03:49PM Pina	09:00AM Zhao	09:00AM Thalh	11:36AM Shea	
	04:56PM Decker	03:49PM Morita	09:00AM Zhao	09:12AM Enterpr	12:11PM Cotton	
	04:58PM Farley	03:50PM Teufel	09:23AM PRIME TO	10:40AM Enterpr	01:15PM Kaufman	
	04:59PM Carre	04:59PM Enterprise	09:41AM Enterprise	11:17AM PRIME T	02:54PM Podjerski	
	04:59PM Drummey	04:59PM Enterprise	09:50AM Enterprise	12:26PM Roos	03:12PM Mceacherr	
	04:59PM Enterprise	04:59PM Enterprise	11:13AM Fieldman	02:56PM Askari	03:31PM Audi Loene	
	04:59PM Enterprise	04:59PM Clair	11:22AM Ward	03:12PM Enterpr	03:37PM Amal	
		04:59PM Coleman	03:12PM Enterprise	03:12PM VOID EN	03:43PM EISENBEF	
			04:58PM Bowman	03:12PM Lyons	03:45PM Elvin	
			04:58PM Seadia	04:22PM Ratzlaff	03:51PM Chan	
			04:59PM Enterprise	04:58PM Flores	04:59PM PRIME PO	
			04:59PM PRIME TO	04:59PM Collymo	04:59PM Monaco	
				04:59PM GIOVINO	04:59PM Acura Loan	
				04:59PM Salvagg	04:59PM Alvarado	
				04:59PM Wheato	04:59PM Dokaoglu	
					04:59PM Galecia	
					04:59PM Payne	
					04:59PM Perring	

Calendar Filters:

- ☒ Assignment
- ☒ Estimate
- ☒ Authorization
- ☐ In Shop Holds
- ☒ Blueprint
- ☒ Dispatch
- ☒ Scheduled In
- ☒ Scheduled Due
- ☐ Comeback RO
- ☒ Total Loss RO's
- ☒ Completed RO's
- ☒ Delivered RO's

Contact/Writer and Insurance Filters  
Contact/Writer: All Selected  
Ins. Company: All Selected

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

Calendar Entries

Date Range: Start Date: 12/13/18 End Date: 12/13/18

by Appointment | by Customer Name | by Home Phone | by Work Phone | by Claim Number | by Damage Profile

Appointment Date:

Calendar	Forecast	RO	Last Name	Home Phone	Work Phone	Cont./Writer	Dmg	Insurance
Date	Time	Date	Time					
12/13/18	8:09AM			0170682.00	Pattison	508-272-8692	SHAWN	2 METROPC
12/13/18	9:00AM			0171101.00	Andrews-Romain	617-637-9653	SHAWN	1 GEICO XD
12/13/18	9:00AM			0171097.00	Arce	813-476-2002	SHAWN	1 GEICO XF
12/13/18	9:00AM			0171095.00	Essa	617-435-8625	SHAWN	1 GEICO XD
12/13/18	9:00AM			0171106.00	Santosousso	781-857-0090	DOMINGA	1 Concord G
12/13/18	9:00AM			0171093.00	Thalheimer	774-480-5521	SHAYNE	1 TRAVELEI
12/13/18	9:12AM			0171100.00	Enterprise Rental	617-469-4600	ANTHONY M	3 Enterprise
12/13/18	10:40AM			0171102.00	Enterprise Rental	617-469-4600	ANTHONY M	3 Enterprise
12/13/18	11:17AM			0171103.00	PRIME TOYOTA U	111-111-1111	ANTHONY M	2 PRIME TO
12/13/18	12:26PM			0171105.00	Roos	617-283-3516	SHAYNE	3 Pure
12/13/18	2:56PM			0171098.00	Askari	617-640-3980	SHAYNE	1 GEICO XD
12/13/18	3:12PM			0171044.00	Enterprise Rental	617-469-4600	ANTHONY M	2 Enterprise
12/13/18	3:12PM			0170846.00	VOID ENTERPRISE	617-469-4600	ANTHONY M	5 Enterprise
12/13/18	3:12PM			0170847.00	Lyons	617-680-1034	TONY	3 TRAVELEI
12/13/18	4:22PM			0171024.00	Ratzlaff	781-354-7056	SHAWN	2 GEICO XD
12/13/18	4:59PM			0171061.00	Collymore	617-755-2094	SHAWN	4 GEICO XD

Calendar Filters:

- ☒ Assignment
- ☒ Estimate
- ☒ Authorization
- ☐ In Shop Holds
- ☒ Blueprint
- ☒ Dispatch
- ☐ Scheduled In
- ☒ Scheduled Due
- ☐ Comeback RO
- ☒ Total Loss RO's
- ☒ Completed RO's
- ☒ Delivered RO's

Body: 63.59 Paint: 70.70 Frame: 4.50 Mech.: 0.00 Labor: 138.79 Est.: 24,518.58

Est. Lost Sales: ☒ Do Not Show ☐ Show Lost Sales ☐ Show Only Lost Sales

Convert Contact/Writer and Insurance Filters Forecast Insert Change Delete  
Filter Contact/Writer: All Selected Ins. Company: All Selected RO Print Print Info Print Auth. Close

### 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

# 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 invoice 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 memo for return
  3. Scan signed credit memo 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

# 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.

**RO Big Board**

Additional Options

Start: 10/01/16 End: 10/31/20 Location: ☐ Schedule In ☒ Auth/Cust ☒ Auth/Ins ☒ Blueprint ☒ Dispatch ☒ In Shop ☐ Completed ☐ Total Loss

Writer: ☐ All ☒ Selected TONY Team: ☒ All ☐ Selected  ☐ Ck Labor Car Status: ☒ ☒ ☒ ☐

Insurance: ☒ All ☐ Selected  ☐ Unassigned Only ☐ Comeback Only ☐ In Shop Holds

Date Due RO Last Name Make Model Dmg Pro Priority Date In ☒ Show Status Colors Walkaround [Big Board Color Chart](#)

										D	I	S	A	S	E	M	C	H	E	L	S	E	y	P	R	E	P	P	A	I	N	T	B	U	F	F	R	E	A	S	S	E	R	S	U	B	E	L	E	T	A	L	I	G	N	W	A	S	H	O	C	C	L	A	S	S
Terzian, Eugenie 781-326-4425 13 TOYO Camry XLE Autom (0000) B. LIGHT HIT CUSTOMER PAY Buff In: 10/11 2:31PM Out: 10/22 12:17PM Cmpl: 10/22 4:59PM																																																																		

	Car Status			Call	Crit P	All P	Labor Dispatching				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
	RO	Due	DP				RP	Name	Make	Model															
<input checked="" type="checkbox"/>	170026	10/10	2		Terzi	Toyo	Camr	Rome	Chad																
<input type="checkbox"/>	170055	10/15	4		Audi v	Audi	Q5 pr	Mike	James																
<input type="checkbox"/>	170266	10/17	3		Hines	Toyor	Camr	Rome	James																
<input type="checkbox"/>	170178	10/18	4		Clapt	Audi	A4 pr	Jose l	James																
<input type="checkbox"/>	170039	10/19	5		Prima	Audi	A5 sp	Steve	Shawn																
<input type="checkbox"/>	170060	10/19	4		Jaruga	Toyo	Siennc	Rome	To 90																
<input type="checkbox"/>	170154	10/19	3		Smith	Benz	M-cln	Jose l	Shawn																

RO's: 22 Body: 168.32 Frame: 0.00 Units: 305.42  
Tagged: 0 Paint: 68.70 Mech.: 8.96 Total: 78,900.28

Shop Notes Part Info Team Priority Print Schedule Forecast Select

Tag Tag All Untag Untag All Prev Tag Next Tag Show Tagged Save Tags Load Tags Reset List Close

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.

# 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** Full 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





### Car Status/ RO number

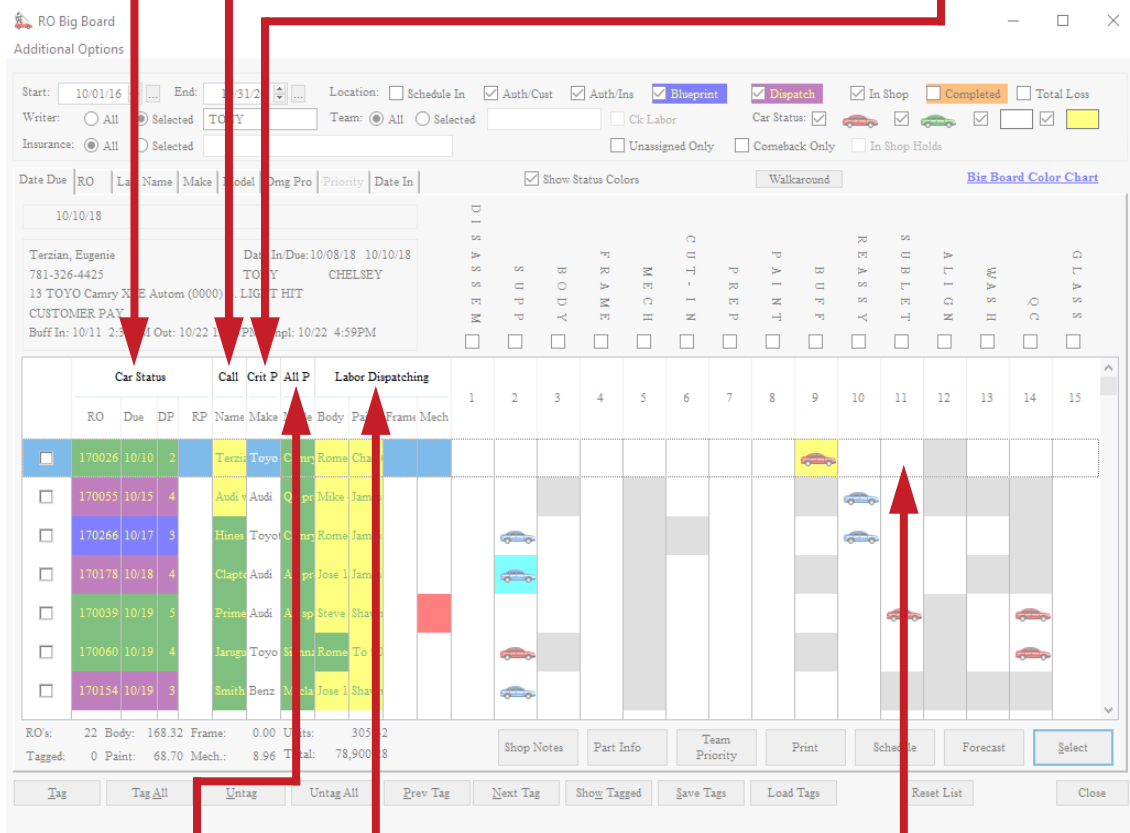
-  Blueprint
-  W Parts
-  Completed

### Customer Service Calls/Name





-  Call for Due date update
-  Call for due date & schedule
-  Scheduled callback
-  Customer callback is current
-  Customer requested callback
-  Task status change callback

### Car Status/ RO number





-  No critical part on the job
-  No critical parts received
-  Some critical parts received
-  All critical parts received







### All parts List/Model

-  No parts on the job
-  No parts received
-  Some parts received
-  All parts received

### Labor Dispatching/Tech

-  No labor
-  No labor assigned to tech
-  Some labor assigned to tech
-  All labor assigned to tech

### Task Status

-  Car in staging
-  Car on schedule
-  Car behind schedule
-  Car stalled

# 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.

Callbacks - Date 38 Task Call 0 Reg. 59 Return 0

Set Existing Callbacks

Filter Options

Date In - Starting Date: 10/23/19 Ending Date: 10/23/20 All Dates

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

Display ROs - ☒ Date Due Changed ☒ Task Status Call ☒ Regular Callback ☐ Callback Current

☒ Show Customer Call Regardless of Date/Location/Callback Status

Writer - ☒ All ☐ Selected

Insurance - ☒ All ☐ Selected

Repair Orders

RO	Last Name	Writer	Contact By	Home Phone	Work Phone	Cell Phone	Date Due	Callback
0034004.00	LUNDBERG	SARA	Phone	952-738-1200			1/11/20	1/13/20
0034049.00	HARSTAD	PAULO	Phone	218-234-1457			2/25/20	2/13/20
0034073.00	Akunna	DAVE	Phone	832-420-8069			2/14/20	2/12/20
0034084.00	THOMPSON	PAULO	Phone	952-686-8166			2/07/20	2/07/20
0034086.00	SUWAN	DAVE	Phone	651-633-4560	651-249-3224		2/07/20	2/14/20
0034088.00	BERG	DAVE	Phone	651-429-9525	651-271-7906		2/05/20	2/07/20
0034093.00	LOANEY	SARA	Phone	651-315-9826	651-315-9826		2/07/20	1/13/20
0034095.00	OJO	DAVE	Phone	202-460-5791	202-460-5791		2/10/20	2/11/20
0034101.00	Reeves	SARA	Phone	123-123-1234			2/11/20	1/13/20
0034102.00	FRIGAARD	DAVE	Phone	651-489-9517			2/07/20	2/12/20
0034116.00	Patel	PAULO	Phone	469-618-4527	469-618-4527		2/07/20	1/24/20
0034121.00	LUKAS	DAVE	Phone	651-348-0800			2/05/20	2/10/20
0034147.00	Hodgeman	DAVE	Phone	763-228-3028			1/21/20	1/21/20

RO Callback Counts: 38 0 59 0 RO Number: Callback Change

Print Callbacks Manual Mail List View Cust Notes Close

## 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

# 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** 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

# 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

R O M E

## 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 ordering and receiving

**RESPONSIBILITY** Parts personnel

## Production

### ACTION

- Check “In Shop” to dispatch vehicle 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

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