COLLISION CENTER STANDARD OPERATION PROCEDURES

COLLISION CENTER STANDARD OPERATION PROCEDURES WITH ROME TECHNOLOGIES

Front Desk Customer Service
(This would be combined with the estimate/advisor if you do not have a CSR)

1 Greeting/Phone

- Answer all calls within three rings
- Gain commitment by scheduling estimate appointments after 12 PM whenever possible. These should be given 30-minute slots.
- Schedule estimate appointments ONLY in Rome Calendar

2 Greet Customers as they arrive and discuss their needs.

- Ask which insurance they are using
- Ask if the insurance company sent them or if they have an insurance estimate.

3 Have customer complete a customer information form.

- Drivable cars should go to a “Estimator bay” if weather is inclement or offer to pull the vehicle in for them if need be.
- Offer customer a seat and refreshments/snack.
- Notify an available estimator that customer is here for an estimate.

4 Maintain the collision center calendar reviewing that nothing on the calendar is behind today.

- Only exception is Total Loss RO’s

5 When an assignment is received, call the customer to schedule drop off.

- If the customer does not answer, EMS export to the customer information into an Assignment appointment and move it to the following Sunday for further outreach.

6 Make re-schedule calls to all drivable pre-orders that did not show up prior to lunch.

- Move the missed appointment to the following Sunday until a reschedule can be set with the customer
- Make 3-4 attempts to reach out before closing these out as a lost sale or voided.

7. **Make all customer service calls (current customers) before lunch. Utilize the Customer Service call screen.**
8. **Make all DRP assignment and date change calls before lunch.**

ADVISORS/ESTIMATOR

1. **Advisors should check the calendar every day and see what work will be coming in.**
   - Set aside your afternoon for estimate appointments
2. **Advisors should have a discussion with the customer to set expectations regarding the collision repair process. Pre-sell the delivery expectation.**
   - Do not write an estimate
   - Make the customer understand the full process of how the car will be handled between the body shop and the Insurance Company.
   - Work to try to get the keys from the customer and have the car stay for a full teardown to identify additional Damage.
3. **Once the customer signs the authorization, the CSR will mark the Cust/ Auth and ins/Auth green in Rome and mark it dropped off in CCCone.**
4. **Scan all Documents into the ROME file jacket.**
   - NO PAPER FILE JACKETS!
5. **Once the customer leaves, the advisor will write a pre-estimate and put it through to blueprinting.**
   - Import the original estimate if you have one.
   - Assign the labor to the body tech doing the teardown.
   - Mark Pre-scan/Teardown/Blueprint completed (X) on the schedule button in the RO.
6. **When the blueprint returns to the advisor, they will review the estimate and make sure it matches the DRP agreement.**
   - Mark Supp completed (X) on the schedule button in the RO.

7 **Advisors will update the calendar items in Blueprint/Dispatch/In Shop statuses.**

- Nothing In Shop should be behind today.
- Anything in a Auth Hold/Blueprint/Part Hold status should be no more than 3 days behind today.

8 **Meet with your production manager and or technicians each morning to go over the walkaround and make the updates to the big board.**

- PHYSICALLY walk the shop.

9 **Have the ticket reviewed before the car goes to paint. walkaround and make the updates to the big board.**

- Be confident enough that you will have no supplements to add during re-assembly to theoretically close the ticket.

10 **All tickets dated out upon vehicle delivery.**

- Make sure to enter delivery date in RO when customer physically picks up the vehicle.

ROME

2421 Mountain Road
Pasadena, MD 21122

800-373-ROME
www.rometech.com

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