THE CANONS OF SUCCESS FIELD REPORT

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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**

ROME

BLUEPRINTING

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

_____ ☐ __ / / __   NO MORE THAN 4 BLUEPRINTS PER WRITER PER DAY TO BE ACCOMPLISHED BEFORE NOON (THIS FACILITATES ACCURATE AND TIMELY PARTS ORDERING).

_____ ☐ __ / / __   1 DEDICATED DISASSEMBLY BAY PER WRITER IS REQUIRED.

_____ ☐ __ / / __   COMPLETE BLUEPRINT 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 BLUEPRINT":
Including, but not exclusive to – Parts, Writer, Bodyman, Painter, Mechanic, Production, etc.

_____ ☐ __ / / __   HAVE ALL PERSONNEL ABOVE **SIGN** THE **ROME ESTIMATE QC SHEET** OR **EASY BLUEPRINT/QC APP** TAKING FULL ACCOUNTABILITY THAT THE BLUEPRINT 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 UNLESS SIGNATURES WERE CAPTURED WITH THE EASY BLUEPRINT/QC APP.

ROME

_____ ☐ _/_/_ 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 "ESTIMATE/SUPPLEMENT BALANCED 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: CORE CHARGE" AND "PARTS RETURN REQUIRED" MUST BE SETUP. CALL ROME SUPPORT TO CHANGE. THIS ENSURES THE TIMELY RETURN OF ASSETS

ROME

PARTS TASK

_____ ☐ __/__/__ **ATTEND THE BLUEPRINT PROCESS.**

_____ ☐ __/__/__ **TAKE PARTS PHOTOS AT DISASSEMBLY**

_____ ☐ __/__/__ **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.

ROME

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 REASSEMBLY.

ROME

_____ ☐ __/__/__ 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 UTILIZING THE EASY WALKAROUND APP.

_____ ☐ __/__/__ SET PRODUCTION EXPECTATIONS AND PRIORITY FOR EACH TECHNICIAN AND PAINT TEAM DAILY.

_____ ☐ __/__/__ SET PRIORITY FOR VEHICLES BEING DELIVERED FOR THE DETAIL TEAM DAILY.

ROME

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.

ROME

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: _____ Sign: _____ Date: _____

ROME

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: _____

ROME

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 prof its 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: _____

ROME

ACCESSING THE SOCRATES KNOWLEDGE LIBRARY

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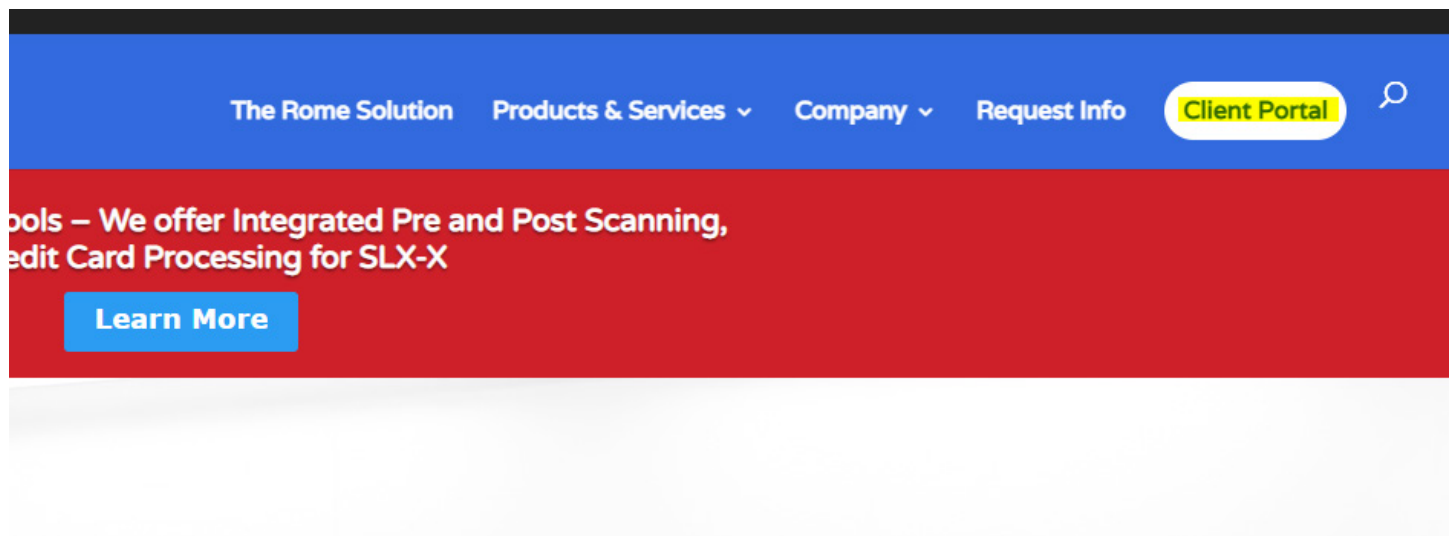
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