Monthly Checklist for Dealership Service Managers

“Good service is good business.”

# Week 3:

* Weekly meeting with Service Writers
* Run Service Recap Report to review performance of each Service Advisor and compare labor against monthly goal
* Review Service sales goals with Owner or General Manager
* Run service productivity reports
* Run a report to identify Job Status by Technician
* Review unclaimed/unsubmitted Warranty in your business system’s warranty manager
* Review unpaid or shorted Warranty in your business system’s warranty manager
* Ensure that customers are being updated on their service statuses
* Post Technician Efficiencies and Service Writer Recovery Rates to recognize team performance
* Dealership owned Service Tools review
* Spot check that shop supplies, disposal fees, and special-order parts freight are being charged consistently


# Week 4:

* Weekly meeting with Service Writers
* Run Service Recap Report to review performance of each Service Advisor and compare labor against monthly goal
* Run service productivity reports
* Review unclaimed/unsubmitted Warranty in Warranty Manager
* Review unpaid or shorted Warranty in Warranty Manager
* Run Financial Statement for departmental income
* Ensure that customers are being updated on their service statuses
* Ensure Service Writers do a lot walk and take inventory of units that haven’t been paid for and reconcile with Work Order statuses and to identify units that haven’t been tagged or flagged
* Do a walk-around to identify safety issues

Post Mechanic Efficiencies to recognize team performance


# Week 1:

* Weekly meeting with Service Writers
* Meet with Parts Manager to discuss status of back ordered parts and special-order parts related to the service department
* Run Service Recap Report to review performance of each Service Advisor and compare labor against monthly goal
* Review Service sales goals with Owner or General Manager
* Run service productivity reports
* Run a report to identify Job Status by Technician
* Review unclaimed/unsubmitted Warranty in your business system’s warranty manager
* Review unpaid or shorted Warranty in your business system’s warranty manager
* Ensure that customers are being updated on their service statuses
* Post Technician Efficiencies and Service Writer Recovery Rates to recognize team performance
* Review Work Order cycle time


# Week 2:

* Weekly meeting with Service Writers
* Run Service Recap Report to review performance of each Service Advisor and compare labor against monthly goal
* Review Service sales goals with Owner or General Manager
* Run service productivity reports
* Run a report to identify Job Status by Technician
* Review unclaimed/unsubmitted Warranty in your business system’s warranty manager
* Review unpaid or shorted Warranty in your business system’s warranty manager
* Ensure that customers are being updated on their service statuses
* Post Technician Efficiencies and Service Writer Recovery Rates to recognize team performance
* Review that all warranty claim causal parts are being returned
* Weekly safety class for the Service department (<10 minutes long)


# Daily:

* Morning meeting with Technicians to identify challenges
* Review Technician daily schedule and make sure everyone is clocked into a Work Order
* Review Work Order counts in your Work Order Manager
* Is there a next step for each Work Order?
* Are there Work Orders with no required hours and no actual hours?
* Run Job Status Report
* Check if Jobs that are put on Pending Hold are being managed
* Are there Work Orders with all Jobs done? Do they need to be reset with times or closed out?
* Review work orders that are “Tech Completed” prior to invoicing for completeness
* Check proper parts are charged and freight is added if applicable
* Check labor is correct – either Flat Rate or Time and Materials
* Check extras are charged like Shop Supplies and Enviro fees
* Check the cost is what was quoted by the customer
* Check text message inbox to address any unanswered customer conversations
* Customer delivery follow-up call or text
* Call customers with issues that cannot be done via text or email
* Ensure that unsold parts are returned to the Parts department
* Review Appointment calendar and make sure appointments are entered properly
* Review Technician timecards throughout the day
* At end of day, update Technician timecards with billable hours


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