

Sample Marine Process Map

Dealerships with written process maps have far greater success fixing things right the first time, being profitable, gaining customer loyalty, and getting the entire team to work together in a cohesive way.

Below is a sample process map. Get your team to help you customize your shops “Road to the Repair” based on your dealerships needs. Review this information with all new hires and with the entire team seasonally to make adjustments where needed.

Place your process map in a highly visible place so all team members can see it and refer to it whenever a situation in the shop goes sideways. The process map is a living document that should be adjusted regularly based on your changing shop needs.

Scheduling and Initial Communication

- Make a positive first impression on the phone and in person
- Uncover customer’s expectations and make sure they are realistic
- Put yourself in the customer’s shoes and convey empathy
- Prioritize work fairly on a tangible schedule
- Pre-write the work order and run the history
- Agree storewide on who can schedule work
- Know your shop capacity and lot capacity
- Check on parts availability if we know what is needed
- Get customer and product info
- Ask for all concerns and document them
- Allow time for emergencies
- Block out extra time during sales events, training, vacation time, etc.
- Verify warranty and service contract info
- Inform customer on diagnostic fee or estimate
- Never ‘promise’ anything that is not 100% within your control
- Check on recalls and tech bulletins that may apply
- Never diagnose on the phone or at the counter
- Return messages promptly

Write-up

- Use solid communication skills – LUV (Listen, Understand, Verify)
- Get as much information from the customer as possible
- Perform walk-arounds to look for additional sales and liability issues
- Capture concerns in the customer’s words: “Customer states...”
- Note ‘FFV’ on work order, schedule, open RO list, and product if it is a comeback
- Get all phone numbers and e-mails for customer – determine best way to contact
- Set a ‘call back’ time and document it to ensure follow through

- Put the customer's primary concern on line one of the work order
- Ask if there is 'anything else?'
- Take enough time to do a proper write-up
- Educate the customer and use language they understand
- Verify all customer and product info
- Set an estimate
- Get an authorized signature
- Get the keys, locks, etc
- Have the customer remove valuables
- Determine plug location (in or out?)
- Suggest additional maintenance based on history and hours
- Use this opportunity to develop a trusting relationship with the customer
- Input follow up info on your route sheet or computer reminders to ensure you are reaching out to customers when promised.

Repair

- Know your techs skill levels and speed
- Use a dispatch guide sheet when unsure
- Know your techs favorite and least favorite jobs
- Spread 'gravy' work fairly
- Get parts pulled proactively and have tickets readily accessible
- Write a complete parts request
- Make sure **all** parts are available before we start a job
- Make sure the job is approved for enough time
- Bill all parts and sublets properly to the ticket
- Communicate any delays or issues
- Lot crew should review the schedule and have next jobs readily staged
- Pre-pull parts and pre-load the shop the night before
- Don't rush the job. Take time and diagnose jobs properly
- Use all available diagnostic tools including manuals and bulletins
- Duplicate the customer's concern
- Keep the customer informed, even if there is no news
- Install all new parts and keep the old ones – tag for warranty
- Communicate if you are 'in over your head' or if you break something
- Make sure all parts and labor are properly billed to the work order
- Treat the customer's property with respect and care
- Document each work order line with the 3 C's (concern, cause, and correction)
- Look for additional work **AFTER** you have diagnosed the primary concern
- Quality check your own work using the same diagnostic that was originally used

Quality Control

- Quality control is the job of **EVERYONE** at the store
- The first quality control person is the tech
- Make sure the fix we performed takes care of the customer's concern

- Make sure the product is clean
- Remove all shop rags, tools, manuals, etc...
- Perform Q.C. on the work order to ensure:
 - All parts, labor, and sublets are billed out properly
 - We are within our estimate for time and money
 - We have all needed warranty info
 - All lines of the work order have been addressed
 - The 3 C's are on every line (concern, cause, correction)

Delivery

- Call the customer and pre-deliver over the phone
- Give the total bill down to the penny including tax and shop fees
- Be prepared to answer any questions
- Set expectations for the customers (might it run different? Smoke for a bit? Etc.)
- Arrange pick up or delivery time
- Let them know about any storage fees if not picked up by agreed upon date
- Thank the customer for their business
- Give them a copy of the invoice
- Collect the money
- Inform them on future services that will be needed
- Schedule them if possible for next service
- Have a 'final resting spot' to easily find keys, paperwork and product
- Educate the customer on proper trailering practices

Follow up

- Use a consistent follow up method with all service customers (phone, text, etc)
- Determine who will be responsible for doing follow up
- Make follow up results available to entire team
- Ask if everything was done to their satisfaction
 - If yes, thank them
 - If no, apologize and find out what we could of done to serve them better
- Thank them for their honest feedback and let them know you will use it
- Use appropriate conflict resolution and customer retention techniques
- Discuss follow up results on a weekly basis in team meetings
- Let the customer know about their next needed service
- See if they would like to schedule it