SERVICE SCHEDULING BEST PRACTICES

- Understand that the schedule will always be changing based on new information. Review throughout the day and update the status and notes on parts status, customer approval, etc.
- Every time new RO is generated, document it on the schedule and/or route sheet.
- Capture all 10 digits of the best contact number for the customer.
- Document the customer's Primary Concern first and be sure to mention it first when communicating with the customer.
- Keeping the 'status' updated (in process, waiting on parts, etc.) is the real key to customer satisfaction. This allows <u>anyone</u> in the dealership to quickly answer customer inquiries on the status of their unit.
- The 'notes' section is very critical. It lets you know when the customer has been contacted and when they need to be called/contacted again.
- The schedule should be reviewed and updated before you leave for the day. Be certain to stay current on all dates.
- Review the schedule sheet daily when parts arrive.
- Review the schedule sheet daily to be sure customers are being called.
- Fill in the 'status codes' dot, or run a highlighter through the line to indicate the RO has been closed – after the unit has been delivered.
- When the majority of the RO's on the sheet are completed, filled dots or highlights, it's time to create a fresh sheet and review why older open RO's are being carried over to the new sheet.
- If you fall behind with keeping the schedule sheet updated, know that it does happen to the best service departments. Cut yourself some slack and take the time to get back on track.
- It can be helpful to use a separate schedule or route sheet for internal work, customer work, or even break it down by brands or service advisors.