

The Proper Use of a Route Sheet

By Valerie Ziebron

- Always write in pencil – at least the areas that will be changing (status and communication).
- Fill in route sheet daily for all newly opened work orders to ensure that every open RO is on sheet.
- Record all ten digits of the best contact number to reach the customer at.
- Be sure to fill in the date that the RO was generated.
- Description of work is to be used for the customer's primary concern so we remember to always mention that first when communicating.
- The tech assigned hours category is optional.
- The status category gets updated to reflect the job status (waiting on parts, sublet, approval, quality control, detail, warranty information, etc.).
- The communication slot is the most critical. It let's us know when the customer has last been contacted and when we need to call again.
- The route sheet should be reviewed and updated before you leave for the day.
- Review the route sheet daily when parts arrive.
- Review the route sheet daily to be sure the customers are being called.
- Run a highlighter through the line to indicate the ticket has been closed only after the boat has been delivered.
- When most of the sheet is highlighted, it is time to create a fresh sheet and review why older open tickets are being carried over.
- If you fall behind with keeping up the route sheet, know that it happens to the best service departments. Cut yourself some slack and take a little time to get back on track
- It is usually best to use a separate route sheet for internal work orders.