|  |  |  |
| --- | --- | --- |
| **Financial control** | **YES or NO**  **✓ 🗶** | **Items I will work on**  **✓** |
| 1. I have a financial dashboard in place to monitor Key Performance Indicators (KPIs) |  |  |
| 1. I have a 12 month Profit & Loss (P&L) forecast budget in place and review against actual results each month. |  |  |
| 1. I know our daily, weekly, monthly and yearly sales breakeven points |  |  |
| 1. The business has an average $ sale target and I monitor actual results weekly |  |  |
| 1. I understand the difference between cashflow and profit |  |  |
| 1. I understand the difference between margin and markup |  |  |
| 1. The business has an up to date and functioning point of sale (POS) software program |  |  |
| 1. I know how to correctly access reports within my POS or accounting program. |  |  |
| 1. I understand how to read a basic Profit & Loss statement and Balance Sheet |  |  |
| **Marketing and advertising** | **YES or NO**  **✓ 🗶** | **Items I will work on**  **✓** |
| 1. The business documents and analyses the source of all new customers |  |  |
| 1. I have a long term view of the value of our customers and know their lifetime value |  |  |
| 1. I calculate and monitor the acquisition cost of different marketing campaigns |  |  |
| 1. I have stopped marketing that doesn’t work |  |  |
| 1. I have marketing strategies in place that generate enough new customers. Marketing options could include:    * Referral program    * Staff rewards program    * Google marketing    * Editorials    * Social media    * Advertorial    * Radio    * Business brochures    * Local newspaper adds    * Mailbox flyers    * Business alliances    * Host beneficiaries    * Networking groups    * Sporting club sponsorships    * School promotions    * Coupon booklet |  |  |
| 1. I have a bound business information pack that is used to win commercial and fleet work |  |  |

|  |  |  |
| --- | --- | --- |
| **Website and online marketing** | **YES or NO**  **✓ 🗶** | **Items I will work on**  **✓** |
| 1. The business has an updated website with content covering common services and repairs |  |  |
| 1. I actively ensure that the website appears on page one for common Google search terms such as ‘mechanic Crows Nest’ |  |  |
| 1. Customers have easy access on the website to make online bookings and enquiries |  |  |
| 1. The business is registered on common online directories |  |  |
| **Workshop, office and staff presentation** | **YES or NO**  **✓ 🗶** | **Items I will work on**  **✓** |
| 1. The business has clear and attractive signage clearly visible to passing traffic |  |  |
| 1. The office is modern and is always kept neat and tidy |  |  |
| 1. All business awards and certificates are neatly displayed in the office |  |  |
| 1. No junk or personal items are left lying around the workshop |  |  |
| 1. Signage attracts customers to enter the office and not the workshop |  |  |
| 1. A documented cleaning roster is in place and is followed by the staff |  |  |
| 1. There is a documented dress standard and uniform policy in place that staff follow |  |  |
| **Customer database management** | **YES or NO**  **✓ 🗶** | **Items I will work on**  **✓** |
| 1. The business has a computerised database management system |  |  |
| 1. Customer details are updated after each booking |  |  |
| 1. The database management system is used to:    * Send 24hr booking reminders    * Send thank you letters    * Send service and repair reminders    * Send seasonal offers and business information |  |  |
| 1. Everyone in the database is contacted at least once every twelve months |  |  |
| 1. The business has a regular newsletter that educates and keeps customers informed about the business |  |  |
| **Phone procedures** | **YES or NO**  **✓ 🗶** | **Items I will work on**  **✓** |
| * 1. Documented phone handling procedures are in place that staff follow |  |  |
| * 1. All staff have been adequately training in phone handling procedures |  |  |
| * 1. A phone script is incorporated into phone enquiry note pads |  |  |
| * 1. The sale is always assumed, and staff never deliver a recommendation followed by silence |  |  |
| * 1. The customer’s name and phone number are always confirmed when taking a booking |  |  |
| * 1. Staff always listen to a customer’s enquiry before putting them on hold |  |  |
| * 1. Lost phone enquiries are monitored |  |  |
| * 1. The phone system can handle multiple calls |  |  |
| **Customer service** | **YES or NO**  **✓ 🗶** | **Items I will work on**  **✓** |
| 1. Documented customer service procedures are in place that staff follow |  |  |
| 1. All staff have been adequately trained in customer service procedures |  |  |
| 1. Customers are always greeted with a smile and by name if possible |  |  |
| 1. During the car drop off process staff ensure that:  * the customer’s correct contact details are confirmed * the scope of repairs is confirmed and the customer is asked if there are specific areas of concern * the required pick up time is confirmed * the repair and diagnostic process is explained to the customer so they have a clear understanding of what is going to happen as well as their financial commitment |  |  |
| 1. Customers are kept up to date on job progress and they are contacted when we promised to contact them |  |  |
| 1. Customer approval is always obtained prior to undertaking any repairs |  |  |
| 1. Prior to the customer arriving to pick up their car we ensure that they are clear on what work has been performed and the expected costs |  |  |
| 1. Overruns on a quote are communicated to customers ASAP |  |  |
| 1. Customers are always thanked for their business and they are always walked to the front door |  |  |
| 1. Customer service feedback forms are in place |  |  |
| 1. There is a process for evaluating customer complaints and mistakes |  |  |
| 1. There is a system in place for monitoring and discussing reworks |  |  |
| 1. There are quality controls in place to ensure work standards are maintained |  |  |
| **Sales** | **YES or NO**  **✓ 🗶** | **Items I will work on**  **✓** |
| 1. Documented sales procedures are in place that staff follow |  |  |
| 1. All service staff have been adequately trained in sales |  |  |
| 1. Customers are always advised of what needs repairing and not just what they ask for |  |  |
| 1. Customers are presented with options to solve their problems |  |  |
| 1. The business aims for wallet share and not market share |  |  |
| 1. The sales pitch on common service and repairs has been documented |  |  |
| 1. The business sells benefits and value – not parts and labour |  |  |
| 1. A documented system is in place for following up quotes |  |  |
| 1. Business brochures detailing the full range of services are given to every new customer |  |  |
| 1. The business provides a full range of services that utilises the workspace and minimises seasonal fluctuation |  |  |
| 1. A range of vehicle services is offered at different price points for varying customer requirements |  |  |
| 1. The business has a documented guarantee and warranty policy in place that is clearly communicated to customers |  |  |
| 1. Labour rates are regularly reviewed |  |  |
| 1. Consumables charges are regularly reviewed to ensure they are covering actual expenses |  |  |
| **Invoicing and Point of Sale (POS)** | **YES or NO**  **✓ 🗶** | **Items I will work on**  **✓** |
| 1. Invoicing procedures are documented and followed by staff |  |  |
| 1. The POS system has common service and repair descriptions pre- written to streamline the invoicing process |  |  |
| 1. Regular computer back-ups are performed and the data is stored offsite |  |  |
| 1. Invoices cover everything that has been performed on all jobs |  |  |
| 1. Invoices are always prepared prior to customer arrival |  |  |
| 1. Customers are always taken through their invoice and staff offer to show them any replaced or damaged parts |  |  |
| 1. An allocated replaced-parts bin is available, so that parts can be easily shown to customers |  |  |
| **Job cards and job allocation** | **YES or NO**  **✓ 🗶** | **Items I will work on**  **✓** |
| 1. A documented job card process is in place that staff follow |  |  |
| 1. Well designed job cards are correctly filled out by all technicians |  |  |
| 1. A service checklist is in place that clearly displays what must be checked during a standard service |  |  |
| 1. Up-selling and cross-selling templates are in place to help technicians identify what needs repairing and not just what customers ask for |  |  |
| 1. Technicians document their start and finish times plus a recommended charge time on their job cards |  |  |
| 1. Technicians have access to each vehicle history via the POS or previous job cards |  |  |
| 1. Jobs cards are pre-prepared the night before |  |  |
| 1. A job progress board is in place that clearly displays who has been allocated what job and the status of each job |  |  |
| **Booking diary** | **YES or NO**  **✓ 🗶** | **Items I will work on**  **✓** |
| 1. A documented process is in place for staff to follow for taking bookings |  |  |
| 1. Booking times are confirmed with customers |  |  |
| 1. The booking diary process allows the monitoring of technician hours available, versus hours presold on bookings and carry overs |  |  |
| 1. A 24 hour reminder is given for the following day’s bookings |  |  |
| 1. Customers are contacted when they are one hour late for their scheduled booking |  |  |
| 1. If there are cancellations staff proactively try to bring future bookings forward |  |  |
| **Human resources** | **YES or NO**  **✓ 🗶** | **Items I will work on**  **✓** |
| 1. A documented staff recruitment procedure is in place |  |  |
| 1. A documented staff induction process is in place |  |  |
| 1. A documented staff appraisal system is in place |  |  |
| 1. All staff have training and improvement goals |  |  |
| 1. An up-to-date organisation chart is in place |  |  |
| 1. All tasks and duties have been allocated to someone via the responsibility schedule which is displayed for all staff to see |  |  |
| 1. Documented job agreements and job descriptions are in place |  |  |
| 1. A documented incentive scheme is in place |  |  |
| 1. Policies covering annual leave, personal leave, bereavement leave and overtime are place |  |  |
| 1. The business complies with OHS requirements and systems are in place to identify any issues |  |  |
| 1. A staff social club is established |  |  |
| **Staff meetings** | **YES or NO**  **✓ 🗶** | **Items I will work on**  **✓** |
| 1. Regular team meetings are held, following a planned agenda |  |  |
| 1. A staff suggestion board is in place to encourage staff ideas |  |  |
| 1. Monthly management meetings are held with key personnel |  |  |

|  |  |  |
| --- | --- | --- |
| **Technician output targets** | **YES or NO**  **✓ 🗶** | **Items I will work on**  **✓** |
| 1. The business has a system in place that allows monitoring of individual technician output and productivity. |  |  |
| 1. All technicians have output targets that are clearly displayed |  |  |
| 1. A staff scoreboard is in place that keeps staff informed as to their actual output results |  |  |
| 1. Labour output results are reviewed and discussed as a team each week |  |  |
| **Credit control** | **YES or NO**  **✓ 🗶** | **Items I will work on**  **✓** |
| 1. A documented credit policy is in place for staff to follow |  |  |
| 1. A documented debt collection policy is in place |  |  |
| 1. The business has access to finance solutions which can be offered to customers |  |  |
| 1. Where appropriate, customers are asked when they drop off their vehicle how they will be paying their invoice |  |  |
| 1. Invoices are always ready prior to customer arrival to reduce the temptation to offer credit |  |  |
| **Tools and equipment** | **YES or NO**  **✓ 🗶** | **Items I will work on**  **✓** |
| 1. A staff member is nominated to be responsible for equipment maintenance |  |  |
| 1. The proper location of all tools and equipment is documented |  |  |
| 1. A documented equipment maintenance procedure is in place covering damaged equipment, equipment maintenance and equipment purchases |  |  |
| 1. An annual tool and equipment review is carried out to ensure that technicians can work efficiently |  |  |
| **Stock control** | **YES or NO**  **✓ 🗶** | **Items I will work on**  **✓** |
| 1. A staff member is nominated to be responsible for stock control |  |  |
| 1. A documented stock control procedure is in place, including stock usage, stock ordering and stock returns |  |  |
| 1. An annual stocktake is carried out |  |  |
| 1. An annual supplier review is carried out |  |  |
| **Insurance** | **YES or NO**  **✓ 🗶** | **Items I will work on**  **✓** |
| 1. Adequate insurances are in place covering:  * Workers’ compensation * Public liability * Product liability * Business assets * Business revenues |  |  |

|  |  |  |
| --- | --- | --- |
| **Policies and procedures manual** | **YES or NO**  **✓ 🗶** | **Items I will work on**  **✓** |
| 1. All key tasks and routines are documented in a policies and procedures manual. Procedures could include:    * Team overview    * Opening procedures    * Phone etiquette    * Banking procedures    * Filing accounts receivable    * Timesheet and job card reconciliation    * Work scheduling and job management    * Write-offs policy    * Point of sale transaction    * Customer returns    * Customer credits    * Processing aged account payments    * Debtor review    * Purchasing and stock ordering    * Receipt of stock    * Entering supplier invoices    * Stock purchased on credit cards    * Supplier stock returns    * Creditor review    * Accounts payable end of month    * End of day trading procedures    * Workshop checklists    * Management of work in progress    * Quality control processes    * Wages    * Bank reconciliation procedures    * End of month and end of quarter processes |  |  |
| 1. All documentation is regularly updated |  |  |
| 1. A process is in place to track and control all updates to documentation |  |  |
| 1. A documented exit strategy is in place for the business |  |  |

**--------------**