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Managing bookings

by Geoff Mutton

Managing bookings in an auto workshop is a real juggling act, and keeping all the balls in the air requires not only management skill, but some accurate time estimates based on experience.

It's a universal question in all businesses that don't really know where their next job is coming from, or how long it might take. How do they manage to fit it into a day – book in too many jobs and the pressure is on to rush them through on time; book in too few and you can start sweeping up soon after lunch. Neither scenario is good for team morale or profitability.

So how can a busy workshop consistently find its sweet spot.

How many hours in your day

Begin by understanding the hours available in a day. But job prices can vary dramatically, from \$50 to \$5,000, so the number of jobs booked in is irrelevant.

Workshops sell labour hours so that's what must be estimated and monitored.

When estimating how many hours the workshop can sell, consideration must be given to the different skill levels and additional responsibilities technicians perform around the workshop.

For example, a three-team workshop might estimate they have 14 hours available each day:

- four hours for the owner
- six hours for a qualified technician
- four hours for the second-year apprentice

Estimate hours booked

Logically, as each booking is taken, an estimate of the time it will take should be logged – easier said than done because of the many variables inherent in vehicle service and repair.

Here are some tips that might help:

- Put together an internal job time/price list of the most common repairs. This will provide some consistency, regardless of who takes the booking.
- When taking bookings, always ask if there is anything else the customer would like checked or looked at. Most customers hope that a routine service will fix other random issues, but that's not always the case. If you don't ask, they won't tell.
- Factor in any additional work sold on the back of a vehicle service. From experience, the price of additional work performed could be twice as much as the service originally booked. An average one hour service could extend up to three hours if additional work is approved.

Break downs are unpredictable

Time allocated by a workshop for these unforeseen events can only be a personal choice by the owner or manager. But our tip is to allocate less time to cope with breakdowns than your history with breakdowns actually shows. It is better to explain that a breakdown can't be done for a couple of days, than short-change the workshop in the hope of filling allocated breakdown hours that might not be needed. It doesn't make sense to have staff doing nothing while waiting for an unscheduled breakdown.

Train for consistency

Many mistakes in time estimating in a busy workshop can be traced to incorrectly recorded entries in the booking diary. Everyone in a workshop, from the apprentice up, should be capable of taking a booking, but what they enter into the diary can only be consistently useful if everyone is trained in the booking process.

Everyone must know how to take a booking, and how much information to collect and enter into the diary. That takes training.

It looks easy, but is so often overlooked:

- correct customer name
- best contact number
- vehicle details and registration
- job requirements – service plus extras
- drop-off and pick-up time.

Have parts at the ready

There is nothing worse than having a job ready to go but the parts haven't arrived. Difficult or unexpected jobs aside, there is no excuse for not having standard parts available to cope with the expectations of a service or repair.

The booking diary needs to be reviewed 24 hours, or even 48 hours in advance, so that stock can be pre-ordered for on-time delivery.

Avoid no-shows with reminders

No-shows by one or two customers can put a big dent in the workshop's actual sold hours and the longer the booking has been held, the more likely this might happen.

Reduce the frequency of no-shows by sending 24-hour booking reminders via SMS. Customers leading busy lives will appreciate this courtesy.

Review vehicle history

It is imperative that every vehicle's history is reviewed and discussed before making time estimates for a repair or service.

Quite often, repairs that might have been forecast at the last service, might now be well overdue. It is a lot easier to get the customer's go-ahead on additional work before the job is started, than wasting everyone's time having to re-diagnose the same problem, and wait again for the customer's approval.

Paper versus electronic diary

Workshop bookings have traditionally been entered in paper diaries. Early electronic diaries were pretty crude, but in recent years, more workshops are making the jump to electronic diaries, which can be integrated into complex point-of-sale software systems. Today's diaries are user friendly, and provide workshops with greater control for job planning and progression.

Workshops are always busy as the end of year and the Christmas season approaches. All the more reason for taking the plunge and instituting good bookings management as soon as possible. There will always be days when things go horribly wrong, but the more that job bookings accurately fill the available work hours, the happier your team and bank balance will be.

The place to start is www.tatbiz.net.au/capricorn

Just go for it!