

Initial Customer Inquiry

Problem: Customers are calling or using our online scheduler and saying they want one or two things but then they show up with a laundry list.

Solutions:

- We have the customers send us an email of everything they want done on the boat. Having that info before they arrive is really helpful getting parts lined up, knowing the size of the job, etc.
- Be upfront with the customers on what we can and can't do.
- Call the customer and pre-write the ticket and go over the schedule to set their expectations proactively.
- Send reminders about their appointment that ask 'is there anything else' so we know before they arrive.
- Build a script on what the advisor should ask on the phone.
- Assign a service writer to each new boat customer so they have a contact person in service instead of calling sales person and having them promise the moon.
- Get model and serial number if we don't have it so we can start lining up parts.
- Customers send pictures of codes and video of issues happening to help diagnose.
- We call/email customers to confirm their appointment. We go over everything then and make sure there are no add-ons. We used to do this just for our mobile service, but we started doing it for all intake and it's been time well spent.
- Be transparent and let the customer know that add ons could take longer. Help them prioritize what needs to be done now.

Write Up

Problem: We're not getting enough information on the work orders and then we're having a hard time getting back in touch with the customer. The techs are spending longer trying to diagnose or waiting on information.

Solutions:

- Customers can be in a hurry, but we explain that they are critical to fixing the boat as quickly and affordably as possible. Once they understand that their boat will be done quicker, they are usually good with giving us better explanations and responding to our call backs.
- Get the customer involved.
- Get more than one way to reach them.
- We get permission to text customers if possible. They usually respond right away to a text.
- Go out to the boat with the customer when possible and mark (with painters tape) what is wrong or exactly where they want the fish finder to go.
- Start each line with "Customer states..." and read it back to them. Have them sign it. This gets them to clarify and give us better info. It also makes it clear what they are paying for and when they will hear back from us.
- Go Pros on the advisor clip boards so we can video the entire boat easily. Game changer!
 - Look for additional work at the same time.
- Texting is KEY! Get pictures in advance via text. Get customers used to texting us and attach the pictures and video to their R.O.
- Drawing/sheet of boat to mark spots for installs.
- Test/role-play with advisors to see if they're asking the right questions. Techs coach them on what they need to know to diagnose.
- Customers have to fill in an online form ahead of time. Eliminates a lot of issues and lets us get ahead of things.
- Advisor needs to never diagnose at the counter.
- Training SA to understand what's needed in the jobs – parts – time frame – info.
- With our good customers we set a pre-approval amount that gives us a cushion to take care of additional maintenance without having to ask.
- Have and update accurate parts and job codes.

Scheduling

Problem: Customers get upset because their buddy who came in later was done first. We work on jobs that are easy to get to or the ROs that are fresh in our mind while others get lost in the pile.

Solutions:

- Review the Open RO list daily and share it in weekly meetings. This can really help prioritize jobs fairly.
- Explain to the customer that the techs have specialties like doctors and we dispatch according to tech capability to fix it right the first time.
- We set up a Winterization Station tent outside and did it while the customer waited. It was a bit of a pain at times but we didn't have boats sitting on the lot getting damaged and it made a big difference to the shops numbers.
- If the RO has three lines or less we try to fast track it for quick service
 - most are done within 24 hours or even when the wait.
- Diagnose within 24 hours boats with 3 lines or less.
- Look at the boats to diagnose and order parts within 24 hours of intake. This jump starts the entire process – estimates, approval, parts, etc.
- We added a Quick Lane for fast service. It's not always easy but it's great for the bottom line and we don't have as many open tickets.

Problem: The schedule is only seen by the people at the service desk. This makes everything very reactive – parts, moving boats, etc..

Solutions:

- Everyone can see the schedule. We may not know when we will be working on the boat, but we know what boats are next to be worked on.
- We use Google Sheets. We use Google Calendar.
- We implemented a policy where sales has to give service a minimum 2-3 days for delivery standard.

- Whiteboard. Simple but it keeps us organized. When we stop using it, everything backs up.
- We recently added a video screen where the schedule can be seen by everyone and discussed in shop meetings.
- Bundle the techs week.
- Tablet installed on forklift so driver knows the boats that will be worked on for the day/week.
- Block our time for sales/warranty/policy work
- Reschedule extra work found or added if it isn't essential.
- We leave two hours of open schedule time per tech daily. It always fills up!
- Use a schedule. Even if it's just outlook, google calendar or excel.
- Have a (dispatch sheet) that shows the techs strengths so everyone can know who to assign to which R.O.
- Have a diagnostic day and a warranty day. Better organization.
- Make sure the tech knows what jobs are coming up – improves efficiency.

Our biggest problem is the owner and sales send customers over to the shop and then we have to look like the bad guys.

Our service advisor feels it is only fair to work on the boats in the order they come in VS. working on them in the order the customer needs them back. Some people tell us they won't need it for weeks but it's still done first come.

Dispatch

Problem: We often have to dispatch various lines of the same work order to different techs. It's hard to coordinate and often part of the RO is done and then the boat sits.

Solutions:

- We moved our techs work spaces so each A tech has a maintenance tech next to him. It took a shift in thinking to plan for both guys to be working the same boat It's really helped us clean tickets quicker.
- We do something similar, but we do a lot of our work at the boat in the water or on the lot. We use a team approach. It's helped train our techs and gave a good bump in efficiency.
- When possible, have one tech work on the entire ticket.
- When there's a job that our tech doesn't know how to do. Our shop foreman will work on the boat with him so he can learn and the two of them tag-team the boat and get it done quicker.
- Really know your techs skills. Review skills annually and build a training plan around the areas you need more guys trained in.
- "We spend far too much time with techs standing around trying to find out what we are doing. I think pre-organizing the night before will help a lot."
- We set aside an 'emergency' slot each day.

Repair

Problem: Almost daily the techs are working on one job but then some 'emergency' comes up and they get pulled off what they started. They are so frustrated its killing their efficiency.

Solutions:

- We used to do that a lot but then we decided to commit to the schedule one day out. If we have to pull a tech off a job, he gets paid \$100 from the department that initiates the 'emergency'. It has really helped!
- Emergencies get the next available slot after the tech is done with the current boat.
- No diagnosing by the service advisor! This can be tricky if the advisor has been a tech. Get the info on what the tech needs to do a proper diagnostic.

- We encourage customers to take pictures and video to save time and money when diagnosing.
- This winterization season we implemented a 'boat inspection' and listed everything the boat would need to be in top shape for the spring. It added over 20K of approved winter downtime work and will make a real difference for our small shop.
- Crosstrain other techs in the slow season on jobs they need to learn how to do.
- Our older most experienced tech was starting to slow down. We moved him into a diagnostic position and it's been great for him and us. Sometimes we give him a young tech helper and that helps them both.
- Prioritize the jobs in order of importance with everyone who's going to have an opinion up front so they can't come back and change it or say they didn't know.
- Customers who buy from us get priority and VIP shop rate.
- Designate one person for warranty work.
- Rotate techs as "Floater" – Floater takes 'emergencies' for the week.
- Have an apprentice work weekends (Friday – Sunday) when more emergencies happen to be available for the simple emergencies so the techs can focus on the jobs they're currently on.

Parts

Problem: They are rarely ready for the job – or some are but not all and we don't find out until the boats been moved and the work's begun.

Solutions:

- We have the diagnosing tech and parts employee both review the parts request list. Then we make a pick list and check things off as they come in. Once everything for the job arrives, they get an alert to dispatch. It's not perfect, but it's a lot better than it was.
- We had to bite the bullet and hire a dedicated parts person for our shop. We didn't think we could afford that position but it's actually added so much to our overall efficiency and parts sales being billed. If only we'd realized sooner!

- Crosstrain your parts personnel and have them spend some time at the service desk and with the techs. Once they saw the techs perspective, they got a lot better at streamlining parts for the jobs.
- Put more of the fast moving parts and parts needed for quick service in inventory.
- Be sure all parts orders are placed before we leave for the day and charge for the special orders up front.
- We have a board that lists all parts orders and when we expect them.
- Try to order from the same few distributors to maintain a good relationship in case we get in a tight spot and we need a favor!
- "Going hand in hand with scheduling, once the tech is scheduled for a weeks worth of work, make sure the parts are being ordered. Not every part can be ordered and received the next day (warranty, back-order, etc,) if that's the case move those jobs to the end of his week." (Yikes!)
- Pre-pull and stage parts.
- Additional staff to support pre-pull and staging.
- Track parts issues so we can see common things we should have on hand and adjust min/max in DMS to have a better idea of what we need to automatically reorder.
- Tech and parts should go over parts request together at the onset. This seems to happen after the parts get here. Need to get in front of it.
- Look at the schedule and move things you don't have all the parts for.
- Don't be afraid to charge the customer for expedited parts. Most are happy to pay more to get on the water by the weekend.
- Have a good relationship with other parts workers at other dealerships. Help each other out!
- We make the techs responsible for having all the parts ordered that he needs for the boat.

"We have an issue with not pre-planning and preparing the parts the day of the work."

"Some of our vendors warranty parts take weeks. It's really causing bottlenecks."

Quality Control

Problem: Our techs are pretty good about checking the work they did but a lot of times the boats have something else wrong with them entirely. Right when we should be getting the ticket closed out, we're putting it right back in the shop. It's hurting our comebacks and CSI.

Solutions:

- We have a check out sheet done by our maintenance tech. We don't call the customer until that comes back good. Customers really like getting that QC sheet and it helps us sell more and cover our butt!
- Walk around with the customer at beginning and end of the repair.
- We have our apprentice tech go over each boat before the customer gets there. We even have them crank the motors.

Detail

Problem: We try to leave the boats better than we got them - not a full detail but a courtesy wash. We wash them after the tech's done but usually have to do it again because the customers don't pick them up right away.

Solutions:

- We call the customer to schedule the pick up or find out when they're going to use the boat next for our marina customers. We schedule detail as close to that as possible.
- We have the detail crew take pictures when the boat is freshly done. The customer gets that with the text or email that the boat is ready for pick up. Helps if they don't pick it up right away - not our fault it isn't as clean because they waited.
- We stopped using the terms "Detail" and "Courtesy Clean". It was setting the expectations too high.
- Cover the boats after they are done.

Delivery

Problem: Customers think we're free storage. We can't get them to come get their boats. The lots a cluster and that's caused a host of other issues.

Solutions:

- We call the customer when the boat is ready and say "I want to make sure you don't get charged any storage fees and I'd like to get the boat cleaned up for you. When can I schedule your pick up date?" It's not 100% but it's working. They like that I'm looking out for them.
- We have them pre-pay the bill and let them know it's ready in the pick-up lot for their convenience.
- Let them know about what else the boat will need and encourage them to schedule it during the more convenient times so their boat is quickly ready to go in season.
- Implement a storage fee if not picked up within one week of RO close. (Several dealers mentioned this – prices between 15 – 75 per day) Most DMS have fine print to charge storage fees.
- We deliver it to them for a fee. Our customers are happy to pay to save themselves time.
- During Write-up get an understanding of when they can pick up.
- In by Monday out by Friday for quick jobs.
- We have the customers sign a form – promise to pick up within five days of the job being complete. When we call them they have to tell us what day they are picking up. If they don't show we call back and ask for a new date.