



Understanding Your Customer Retention

- I. Course Overview**
- II. We are Living in a Different Era**
- III. Active Customers Attrition**
- IV. Understanding Total, Returning, New, and Best Customers**
- V. Why New Customer Retention is so Bad Nationwide**
- VI. The Referred Customer and Neutral Experience**
- VII. New Customer Revenue as compared to Returning Customer Revenue**
- VIII. Nationwide Analysis of Comparative Service Centers**
- IX. How to increase customer retention, the action steps, the process and Service Advisor “Best Practice”**
- X. The most common processes, action steps and keys of the top 10 Service Centers in customer retention that are 10 points better than their peers**
- XI. The key indicators to measure and manage customer retention and how to increase your retention by five percent in three months**

We are Living in a Different Era

The 1970s -> **Products**

The 1990s -> **Products plus Services**

The 2000s -> **Customer Centric**

Today ->> **Relationship Centric**

Our relationship with the customer has continued to evolve, with mobile devices, new technology, the way we tell our story, communicate and present our findings

All with the same goal in mind, building strong, trusting relationships, moving to being customer and relationship centric with technology

Fortune 500 Companies

In the last 15 years, 52% of the Fortune 500 Companies have disappeared

1955 – Average life expectancy 75 years

2015 – Average life expectancy 15 years

We now live in a vibrant consumer-oriented market economy, and we need to become more Customer Relationship Centric

The Fortune 500 companies disappeared because they lost focus of their core business, their best customers and services they provided

Returning Customers

Returning Customers are customers that have been to your service center before

These customers are the heartbeat of your business and should account for 70 to 80 percent of your monthly revenue

You see them multiple times a year, and it is your responsibility to continue to build strong relationships based on caring about them, the service needs of each vehicle, and being the people they trust for solving their transportation needs

The goal is to have your service advisors naturally discussing maintenance and future service, the best method of communication, and scheduling the next touch with each customer

Attrition of Returning Customers

Nationwide 30 to 40 percent of your returning customers do not come back

People move, purchase new vehicles, and try a competitor

Your customers are most likely doing business with multiple service centers, taking the newer car to the quick lube center or new car dealer, going to Discount Tire for their tire needs

People like convenience, trust is also important, how can you provide both

Are you servicing your customers newest vehicle?

- The average age of cars and trucks was 11.6 in 2016 as reported by RL Polk
- Quick lubes vehicle demographics are much different, 70 percentage of the vehicles coming in are six years old or newer, and the number one vehicle is usually 2 to 3 years old
- Tire Stores often offer free tire rotation, and flat repair, and typically have the highest number of visits per customer. With available maintenance techs and the focus on tires and oil service they make it convenient to do business
- Talking to your customers about their family of vehicles is an important part of building your relationships, and increasing vehicles per household

New Customers

New Customers come to your business by google search, google maps, and many other ways of advertising from community service, direct mail, newspaper, radio, drive-by, and referrals

Nationwide 60 to 80 percent of the first-time customer does not come back to your service center

Why is new customer retention so bad?

Many are not your customer – this number is around 20 to 30 percent depending on the offer that compelled them to come in

The Real Problem is a Neutral Experience

Most customers do not return because the experience was neutral, and the service was ok. If you combine the neutral experience and the wrong customer, that explains the high attrition numbers

Referred Customers

Referred Customers have a much higher expectation, then someone coming in off a google search or post card mail-out

They are easy to deal with, and sell; however, a neutral experience is not what they are looking for

They are easier to sell because they already had trust in the person that referred them, it is really important for your front counter to understand these are the people most likely not to come back, and these are the ones you want back

Think about when someone you trust, raves about a restaurant or movie, then you go and it was ok, you are actually a little disappointed

How are you going to wow them with the service experience?

A Neutral Experience is the real problem

New Customers

One-and-Done New Customers

Analyze one-and-done new customers and compare them to what brought them in

If you removed one-and-done first time customers, the retention of new customers with multiple visits should then be comparable to your returning customer retention

New Customer Revenue compared to Repeat Customer Revenue

After two years in business, a service center should have reached consistent month to month sales, with 70 to 80 percent of monthly revenue coming from returning customers.

New Customer Revenue being 20 to 30 percent of Sales

If new customer revenue is consistently over 30 percent of sales, you risk becoming reliant on new customers with unpredictable long-term consequences.

Combining a rock solid in-house customer retention marketing, along with the on-going new customer acquisition campaign provides consistent, sustainable monthly sales



New Customer Spend
20 to 30 percent of sales

Month over month customer spend compared to new customer spend percentage

Year	Month	Total Spent	Invoices	Total Cust	New Cust	Spend	Percentage
2018	9	\$132,705.01	392	357	95	\$36,020.57	27.14
2018	8	\$119,913.00	419	364	89	\$28,195.25	23.51
2018	7	\$125,578.64	393	333	77	\$33,377.71	26.58
2018	6	\$136,957.22	425	371	103	\$35,465.15	25.90
2018	5	\$123,827.52	410	366	91	\$27,154.82	21.93
2018	4	\$100,892.24	343	307	71	\$23,638.34	23.43
2018	3	\$105,795.41	384	343	72	\$16,750.04	15.83
2018	2	\$95,302.98	299	272	81	\$28,651.71	30.06
2018	1	\$119,604.53	373	332	73	\$23,622.31	19.75
2017	12	\$118,141.84	341	296	77	\$30,702.19	25.99
2017	11	\$121,372.75	347	310	74	\$24,008.62	19.78
2017	10	\$122,269.84	381	331	89	\$27,332.41	22.35
2017	9	\$107,064.40	380	317	81	\$22,579.14	21.09
2017	8	\$106,085.73	371	318	93	\$28,633.62	26.99
2017	7	\$115,921.92	400	339	101	\$35,499.94	30.62
2017	6	\$142,628.38	409	341	90	\$34,356.53	24.09
2017	5	\$121,573.01	350	305	72	\$26,479.33	21.78
2017	4	\$110,894.29	300	257	56	\$19,427.47	17.52
2017	3	\$90,600.59	303	264	75	\$22,957.96	25.34
2017	2	\$81,774.42	281	248	57	\$14,449.39	17.67
2017	1	\$98,817.06	303	262	79	\$27,050.08	27.37

Best Customers

“Best Customers” are defined as customers that visit 2 or more times and spend over \$250 during a calendar year, they include both new and returning customers

They typically have 4 or more visits per year, allowing you to continue to nurture strong relationships

As the core customers of your business they represent 70 to 80 percent of your sales revenue each month

Nationally 600 best customers represent a million dollars in sales revenue each year, so growing the number of your best customers has a direct impact on increased sales

Best Customers

One of the true indicators of how well your team is maintaining relationships is the attrition rate of the of Best Customers

Attrition should be 28 percent or less in the previous calendar year

People will skip a year and come back

People do skip a year before coming back; as you analyze retention rates year over year, you should find attrition rates decrease as you go back each year

Number of Vehicles per Household

Further analysis has shown service centers average 1.4 vehicles per household and your best customers average 1.8 vehicles, increasing the number of best customers each year is the best way to grow your business



Nationwide Customer Attrition Numbers

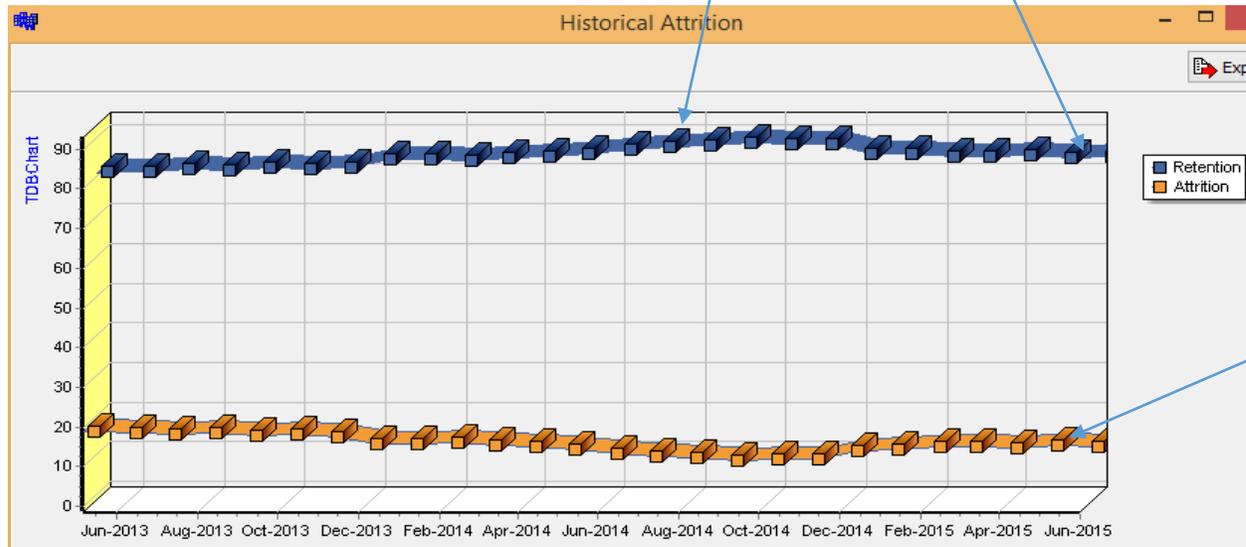
Percentage of customers that will not be back the following calendar year

Total Customers	45% to 55%
Returning Customers	30% to 40%
New Customers	60% to 70%
Best Customers	25% to 35%

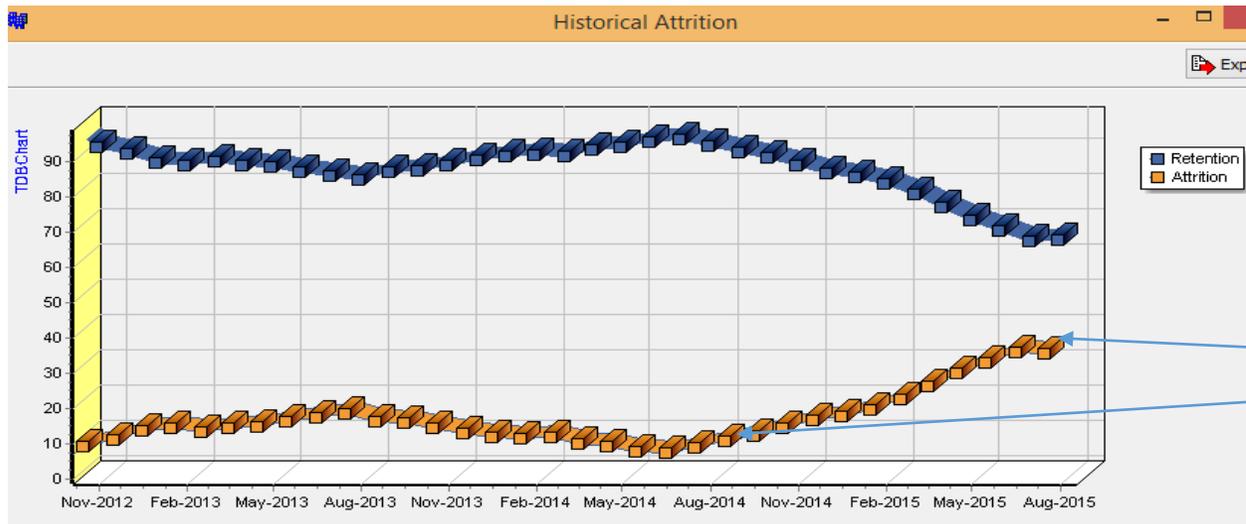
Percentage of sales revenue

Best Customers	70% to 80%
Returning Customers	70% to 80%

Active Customer Attrition is comparing the number of current customers each month to active customers 12 months previous



In-house marketing, building relationships based on trust, creates month over month consistent revenue and attrition rates under 20 percent



Higher revenue can mask a attrition problem – in this case a new aggressive service advisor with an much higher average invoice



When Attrition numbers are average, shops usually have little to no growth, and when there is growth it is because of new customer acquisition spend

Analysis by Year		Total Sales	Customer Info		Returning - New - Best Customers									
					Returning Customers			New Customers			Best Customers			
Service Center			Cust	Avg Inv	Goal 32% or less			Goal 60% or less			Goal 25% or less			
Number of Bays: 10					Cust	Spent	Avg Inv	Cust	Spent	Avg Inv	Cust	Spent	Visits	Avg Inv
Technicians: 4														
Advisors: 2														
2014		\$894,334	1,476	\$238	765	\$568,295	\$234	711	\$291,143	\$250	471	\$691,784	5.1	\$290
Last Visit was 2014			708		247			461			129		77% of Sales	
% of Lost Customers			48%		32%			65%			27%			
2015		\$922,750	1,353	\$262	774	\$660,745	\$253	579	\$262,006	\$289	454	\$676,525	5.1	\$308
Last Visit was 2015			616		236			380			134		78% of Sales	
% of Lost Customers			46%		30%			66%			30%			
2016		\$1,001,267	1,415	\$286	772	\$704,468	\$280	643	\$296,789	\$293	455	\$777,534	5.0	\$341
Last Visit was 2016			674		254			420			128		78% of Sales	
% of Lost Customers			48%		33%			65%			28%			
2017		\$1,085,128	1,680	\$284	806	\$649,116	\$273	874	\$430,014	\$303	535	\$860,572	4.3	\$379
Last Visit was 2017			891		304			587			179		79% of Sales	
% of Lost Customers			53%		38%			67%			33%			
Best in Class - Goal			48%		32%			60%			25%			

Total Customers

People skip a year and then come back

Returning Customers

Should be 70% to 80% of Sales Revenue

New Customers

Nationwide 60% to 70% do not come back, no matter how good the shop is

Best Customers

80% of Sales Revenue
4 or more visits a year
and have the lowest attrition rates

	Totals for Period				Returning Customers				New Customers				Best Customers			
	Customers	Sales	Avg Visit	Avg Inv	Customers	Sales	Avg Visit	Avg Inv	Customers	Sales	Avg Visit	Avg Inv	Customers	Sales	Avg Visit	Avg Inv
2014	2,695	\$1,622,414	2.95	\$204	1,374	\$1,229,908	4.31	\$208	1,321	\$392,506	1.52	\$195	941	\$1,329,055	5.99	\$236
Have Not Returned	1,096				316	76%			780				174	82%		
Lost %	41%				23%				59%				18%			
2015	3,075	\$1,803,517	2.82	\$208	1,613	\$1,336,790	3.92	\$211	1,462	\$466,726	1.61	\$198	1,105	\$1,469,166	5.47	\$243
Have Not Returned	1,251				393	74%			858				210	81%		
Lost %	41%				24%				59%				19%			
2016	3,481	\$1,884,379	2.70	\$200	1,881	\$1,450,762	3.65	\$211	1,600	\$433,616	1.58	\$171	1,214	\$1,548,558	5.20	\$245
Have Not Returned	1,528				564	77%			964				237	82%		
Lost %	44%				30%				60%				20%			
2017	3,705	\$1,996,910	2.58	\$209	2,120	\$1,514,450	3.36	\$212	1,585	\$482,460	1.53	\$199	1,296	\$1,608,482	4.83	\$257
						76%								81%		
8-14-16 to 8-14-17 12 months	3,585	\$1,952,876	2.65	\$206	2,026	\$1,491,885	3.48	\$211	1,559	\$460,990	1.56	\$190	1,226	\$1,561,344	5.10	\$250
Have Not Returned	1,679				655	76%			1,024				263	80%		
Lost %	47%				32%				66%				21%			

Total Customers

People skip a year and then come back

Returning Customers

Should be 70% to 80% of Sales Revenue

New Customers

Nationwide 60% to 70% do not come back, no matter how good the shop is

Best Customers

80% of Sales Revenue
4 or more visits a year and have the lowest attrition rates

	Totals for Period				Returning Customers				New Customers				Best Customers			
	Customers	Sales	Avg Visit	Avg Inv	Customers	Sales	Avg Visit	Avg Inv	Customers	Sales	Avg Visit	Avg Inv	Customers	Sales	Avg Visit	Avg Inv
2014	1,378	\$2,026,957	2.74	\$536	752	\$1,540,213	3.86	\$530	626	\$486,743	1.40	\$556	574	\$1,646,830	5.03	\$570
Have Not Returned	605				164	76%			441				119	81%		
Lost %	44%				22%				70%				21%			
2015	1,360	\$2,030,401	2.71	\$550	790	\$1,652,924	3.66	\$571	570	\$377,476	1.40	\$472	562	\$1,695,303	4.95	\$609
Have Not Returned	631				226	81%			405				128	83%		
Lost %	46%				29%				71%				23%			
2016	1,360	\$1,916,629	2.69	\$524	773	\$1,502,598	3.62	\$537	587	\$414,032	1.46	\$484	554	\$1,589,122	4.95	\$580
Have Not Returned	651				233	78%			418				117	83%		
Lost %	48%				30%				71%				21%			
2017	1,429	\$1,918,176	2.49	\$539	791	\$1,470,239	3.36	\$554	638	\$447,937	1.42	\$495	581	\$1,565,684	4.52	\$597
Have Not Returned						76%								82%		
8-8-16 to 8-8-17 2016 - 2017	1,321	\$1,973,069	2.71	\$551	781	\$1,567,005	3.57	\$562	540	\$406,064	1.46	\$513	583	\$1,645,175	4.71	\$599
Have Not Returned	680				274	79%			406				158	83%		
Lost %	51%				35%				72%				26%			

Total Customers

People skip a year and then come back

Returning Customers

Should be 70% to 80% of Sales Revenue

New Customers

Nationwide 60% to 70% do not come back, no matter how good the shop is

Best Customers

80% of Sales Revenue
4 or more visits a year
and have the lowest attrition rates

	Totals for Period				Returning Customers				New Customers				Best Customers			
	Customers	Sales	Avg Visit	Avg Inv	Customers	Sales	Avg Visit	Avg Inv	Customers	Sales	Avg Visit	Avg Inv	Customers	Sales	Avg Visit	Avg Inv
2013	916	\$861,837	3.82	\$246	708	\$771,554	4.49	\$243	208	\$90,283	1.57	\$278	361	\$744,558	7.19	\$287
Have Not Returned	251				144	89%			107				39	86%		
Lost %	27%				20%				51%				11%			
2014	849	\$873,543	4.06	\$253	672	\$766,582	4.65	\$245	177	\$106,961	1.80	\$336	368	\$772,314	7.16	\$292
Have Not Returned	239				133	87%			106				44	88%		
Lost %	28%				20%				60%				12%			
2015	1,004	\$905,564	3.71	\$243	699	\$746,026	4.52	\$236	305	\$159,537	1.85	\$282	412	\$789,484	6.83	\$280
Have Not Returned	261				127	82%			134				35	87%		
Lost %	26%				18%				44%				8%			
2016	1,100	\$983,158	3.72	\$240	783	\$778,940	4.39	\$226	317	\$204,217	2.08	\$310	441	\$845,069	6.75	\$284
Have Not Returned	340				171	79%			169				48	86%		
Lost %	31%				22%				53%				11%			
2017	1,089	\$1,102,382	4.06	\$249	831	\$971,138	4.68	\$249	258	\$131,243	2.07	\$246	436	\$929,080	7.25	\$294
						88%										
12-20-16 to 12-20-17																
12 months	1,090	\$1,104,946	4.04	\$250	830	\$974,864	4.66	\$252	260	\$130,081	2.08	\$240	444	\$931,327	7.16	\$292
Have Not Returned	400				249	88%			151				77	84%		
Lost %	37%				30%				58%				17%			
12-20-17 to 12-20-18	1,132	\$1,099,549	3.90	\$248	848	\$970,140	4.63	\$247	284	\$129,408	1.72	\$264	449	\$921,631	7.15	\$287
						88%								83%		

	Total Customers				Returning Customers				New Customers				Best Customers			
Pro Auto - MN																
12-20-16 to 12-20-17																
12 months	1,090	\$1,104,946	4.04	\$250	830	\$974,864	4.66	\$252	260	\$130,081	2.08	\$240	444	\$931,327	7.16	\$292
Have Not Returned	400				249	88%			151				77	84%		
Lost %	37%				30%				58%				17%			
Beachler - IL																
8-14-16 to 8-14-17																
12 months	3,585	\$1,952,876	2.65	\$206	2,026	\$1,491,885	3.48	\$211	1,559	\$460,990	1.56	\$190	1,226	\$1,561,344	5.10	\$250
Have Not Returned	1,679				655	76%			1,024				263	80%		
Lost %	47%				32%				66%				21%			
DuPont																
8-10-16 to 8-10-17																
2016 - 2017	2,623	\$2,604,786	2.94	\$338	1,523	\$1,928,853	3.81	\$333	1,100	\$675,932	1.74	\$353	1,199	\$2,185,281	4.94	\$369
Have Not Returned	1,124				433	74%			691				274	84%		
Lost %	43%				28%				63%				23%			
8-8-16 to 8-8-17																
2016 - 2017	1,321	\$1,973,069	2.71	\$551	781	\$1,567,005	3.57	\$562	540	\$406,064	1.46	\$513	583	\$1,645,175	4.71	\$599
Have Not Returned	680				274	79%			406				158	83%		
Lost %	51%				35%				72%				26%			
12-05-16 to 12-05-17																
12 months	1,937	\$2,258,349	2.99	\$390	1,229	\$1,655,255	3.79	\$355	708	\$603,094	1.60	\$533	777	\$1,825,359	5.34	\$439
Have Not Returned	1,008				493	73%			515				240	81%		
Lost %	52%				40%				73%				31%			
10-01-16 to 9-30-17																
12 months	1,817	\$1,372,723	2.28	\$332	919	\$946,136	3.04	\$338	898	\$426,586	1.49	\$318	682	\$1,066,438	4.00	\$390
Have Not Returned	923				328	69%			595				189	78%		
Lost %	51%				36%				66%				28%			
08/10/2018																
12 months	800	\$1,001,638	2.11	\$593	343	\$624,609	2.83	\$643	457	\$377,029	1.57	\$525	289	\$742,877	3.81	\$674
Have Not Returned	498				172	62%			326				111	74%		
Lost %	62%				50%				71%				38%			

Lost Customers

Lost Customers – defined as customers that have not come back in a calendar year

30 to 40 percent of the returning customers are not coming back

The reality is people move, purchase new vehicles, and try a competitor

Many times customers skip a year and then come back

Once they have been gone 2 years they are the hardest to get back

Marketing in the 8th month, to the returning customers that have not come back is a good way to help increase retention



Oil Service

Oil Service Follow-up

Tracking the next oil service due date on every vehicle you want back in your service center is one of the most effective ways to increase customer retention

45 to 50 percent or more of your closed invoices should have an oil service on them, we are not asking you to be a quick lube; just do enough oil changes to take care of your best customer

Are you doing enough Oil Services to take care of your Best Customers?

When you analyze the numbers, 600 best customers' times 1.8 vehicles equal an 1080 vehicles, 1080 vehicles times 2 oil changes a year equals 2160 oil services or 180 per month

Training your staff to look at the next oil service due on every vehicle, naturally and organically moves your service advisors to have maintenance and future service at the top of mind



Service Advisor “Best Practice”

Before the vehicle arrives – do your homework look up the previous history and recommended service, and build the relationship by showing you care about them and their vehicle

Understand and record the best method of communication for each customer

Verify the best method of communication to ensure a timely response, discuss how you will communicate for vehicle status, recommended service

Remember you are keeping them involved and telling a story, with the digital inspection and pictures, and estimate approval

Track the next oil service due date on every vehicle you want back in your service center

Timing the follow-up correctly for the next oil service is the easiest way to touch your customer, and increase visits and retention

Add up to 4 additional follow-up items to the oil service due date, items that are easily understood by the customer

Safety issues, state inspection, and other services should also be updated and tracked



Service Advisor “Best Practice”

When delivering the vehicle, educate the customer on how your service center will be doing customer care and maintenance follow-up

(Phone Call, Text Message, E-mail, Letter)

Schedule the next touch, this is one of the key components for increasing retention, building your relationship and enhancing the service experience

Customer Care and Oil Service Follow-up

In-house marketing has proven to create the highest retention of customers. The next touch should happen 3 to 4 days after the vehicle is picked up. Then another touch happens with oil and future service

The process is proven, and shows you care about the vehicle

- Customer Care 3 to 4 Day Follow-up – text message or personal phone call
- Oil Service Due Follow-up – text message and personal phone call works best
- Safety Issue Follow-up



Service Advisor “Best Practice”

Auto Apps Software is design around “Best Practice”

Ensuring each Service Advisor is fully engaged in reviewing their closed invoices for proper follow-up the next business day

In 10 minutes or less the Service Advisor reviews and updates their closed invoices for accurate follow-up.

Updating the next oil service due date, adding recommended service to that date, also updating vehicle and customer notes so anyone can do the follow-up

(This daily review process should take less than 10 minutes a day)



Attrition Numbers as a Baseline

Attrition numbers can vary for different reasons; it is important for you to know yours, and use the numbers as the baseline for improving customer retention

Best Customer attrition and number of best customers is the key indicator of how your relationships are currently doing

Factors that cause higher attrition rates

- College town
- Military town
- Communities where people that have winter and summer homes
- European only service centers

Factors that can mask potential retention problems

- Increased average invoice
- High new customer revenue



Managing and Measuring the Numbers

- Returning customer attrition – 38 percent or lower
- Best customer attrition – 28 percent or lower
- Number of best customers – increasing year over year
- Number of visits per best customer – 4 or more each year
- Percentage of oil service to closed invoices – 45 to 50 percent of your invoices should have an oil service on them
- Percentage of returning customer revenue – 70 to 80 percent of your revenue
- Percentage of best customer revenue – 70 to 80 percent of your revenue
- Number of active customers this month as to twelve months ago – with attrition at 20 percent or lower



Best of the Best in Customer Retention

The common ingredients for service centers with the lowest attrition numbers

- An in-house marketing program designed for increasing customer retention
- Educating the customer when the vehicle is delivered, how they will communicate with them on follow-up and future service
- Work with the customer to manage the future service and maintenance needs of each vehicle
- At delivery - schedule the next appointment
- At delivery - scheduling the next touch
- A natural focus on the oil and future service, fifty percent or more of their invoices include an oil service
- Having an written marketing plan that is managed and measured weekly
- Pro-actively calling or text messaging the customer when the oil service is due
- Pro-actively reaching out to customers that have not come back in eight months
- Active in the local community
- Active in charities and organizations that give back



Best of the Best in Customer Retention

The most important ingredient

The front counter – the people that are telling your story to the customer, they are relationship centric, care about the customer and communicate well

Key - people continue to do business with people they trust

Most of the staff serves and are generous outside of work

The number one reason people will skip a year

Neutral Experience

The number one reason customers don't come back

Attitude of indifference



Customer Centric

Most on your current software tools are Customer Centric, instead of Customer Relationship Centric

CHOOSE DATE AND TIME

First Choice

MM/DD/YYYY  HH:MM

Second Choice (optional)

MM/DD/YYYY  HH:MM

Please note that the date and time you requested may not be available.
We will contact you to confirm your actual appointment details.

Example of a Customer Relationship Centric Website and the First Time Visitor to the Church, they will leave feeling welcome and the people care about them and their family

Plan Your Visit – We are excited to meet you! Let us know you're coming! We'll have a leader ready to welcome you, answer your questions, and show you around our church home.

The Trinity Church website moves right like turning pages on a book, and the new person can tour the church and church community in the website, and sign up for a personal tour



THE
TRINITY CHURCH
SCOTTSDALE, ARIZONA

[NEW HERE](#) [WHO WE ARE](#) [CONNE](#)

Plan Your Visit

We are excited to meet you! Let us know you're coming! We'll have a leader ready to welcome you, answer your questions, and show you around our church home.





Moving into the next Era

Becoming both Customer Relationship Centric

- Move from being activity focused to customer focused
- Understanding the difference between Customer Centric, and Customer Relationship Centric
- Make it easy and convenient to do business with you
- New Customer Care Package that includes a tour of the Service Center
- A Vehicle Life Plan that is customer relationship centric, that is based on the needs of the customer and their vehicle
- Having the customer feel they are in control, by asking the right questions, when you call, is this a good time, “yes” do you have a few minutes to discuss your service needs
- Finding new ways to tell your story through interactive technology, making it easy to communicate, educate, and ask questions
- Interactive estimate that answers questions, allows the customer access to as much knowledge as they would like, and provides the ability to approve the recommended service electronically
- Interactive appointment scheduler – again giving the customer control of scheduling the day to drop the vehicle off, providing time slots for quick and convenient service so they can choose the day and time that works best for them

- **Insights Essentials with Key Profit Numbers (Cloud-based technology)** - on one screen you can manage and measure the key profit numbers that matter most, current work in progress, and profit reports let you manage the shop on your phone
- **Tech Connect with Time Management** - provides the technician a software tool to be more efficient and produce more labor hours
- **Service Connect with Priority per Vehicle** - increases Shop Productivity by prioritizing vehicles and managing labor hours to be delivered that day
- **Service Estimator** - solves quoting problem in R.O. Writer™ with approved and recommended jobs – click and unclick jobs to be sold – recalculates in a second with **PartsTech Connector** - the new technology leader in cataloging parts and looking up labor times, providing multiple suppliers on the same screen with pictures of each part
- **Parts Management** - allows tracking of parts through the whole service process, so everyone in service center knows the status of each part
- **Technician Dashboard** - provides a view all technicians on one screen for managing labor hour load and dispatching vehicles
- **Text Messaging with Quick Text** - enhances customer communications with all the key touch points of the service flow
- **Digital Inspection with Pictures** - increases the number of jobs sold and average invoice, pictures create trust and enhance the customer experience
- **Marketing and Follow-up** - increases customer retention and service center relationship with the customer, allowing you to create a Vehicle Life Plan for future service needs

Service Advisor															
All Advisors		Technicians		Follow-Up		Reports		History		Setup		Refresh		Parts Search	
Priority Hrs : 26.80		Carry-over Hrs : 26.50		Billed Hrs : 87.20		Pending Hrs : 68.10		Finished Hrs : 19.10		On Hold Hrs : 10.40		Expected In Hrs : 0.00		Search	
Work In Progress															
Invoice	Customer	Vehicle	Priority	Work Flow	Jobs	Hrs Billed	Hrs Pending	Technicians	Parts						
0018331	STEWART, PAUL	2000 CHET TAHOE	1		0 of 7 Finished	5.30	5.30	ROBERTO ACOSTA ROBERT OSTERCAMP	0 of 10 Available						
0018329	DAHL, TIM	1984 NISS 300ZX	1		0 of 2 Finished	1.00	1.00	TIM REIFSCHNEIDER							
0018310	GARVER, LISA	2006 FORD FREESTYLE	1		2 of 3 Finished	1.60	0.00	MIKE WILDE	0 of 2 Available						
0018316	MATOS, JANET	2004 CADT ESCALADE	2		1 of 7 Finished	3.70	2.70	ROBERTO ACOSTA	4 of 5 Available						
0018270	ORTIZ, JESUS	2006 FORT EXPEDITION	2		1 of 3 Finished	0.00	0.00	TIM REIFSCHNEIDER SHOP							
0018065	NOBLE, MARK	1958 FORD FAIRLANE	2		4 of 14 Finished	18.00	10.90	MIKE WILDE	5 of 24 Available						
0018326	LONG, MARTY	2007 HUMM H3	3		1 of 2 Finished	0.00	0.00	TIM REIFSCHNEIDER	0 of 1 Available						
0018322	MAGEE, VIKKI	2008 FORT EXPLORER	3		1 of 5 Finished	7.90	6.90	ROBERTO ACOSTA	3 of 6 Available						
0018254	COLE, CORALIE	2000 TOYT SIENNA	4		2 of 2 Finished	1.00	0.00								
0018320	CARRILLO, CHINO	2007 TOYT RAV4			0 of 5 Finished	26.50	26.50	MIKE WILDE	5 of 12 Available						
0018324	GOLDWING APPLIANCE	2012 FORT E250 VAN			2 of 2 Finished	2.60	0.00		2 of 2 Available						

Labor Hour Focused
Mange Priority and Carry-over Hours to be delivered that day

1. Priority Status of each Vehicle
2. How many Jobs are marked Finished
3. Vehicle Technician is Clocked Into
4. Labor Hours Remaining

- Click on Customer to **Text Message**
- Click on Vehicle to view **History and Service Due**
- Right Click on Vehicle and go to **Service Estimator**

Parts Management at a Glance
click and see status of each part

Insight Essentials
 Cloud-based Technology
 Key Profit Reporting Tool

Dashboard report

For the period 9/1/2018 through 9/30/2018 inclusive. 30 days during this period.



Sales Summary

Calculations based on Invoices with Sales

Service Sales	\$92,532.68	
Service Cost	\$34,878.48	
Service Profit	\$57,654.20	62.31 %

Total Finalized Invoices	157	
Invoices with Sales	147	
Parts-only Invoices	0	
Zero Invoices	10	
Average Repair Order	\$629.47	

Labor Sales	\$45,318.54	
Billed Hours	366.20	
Average Labor Hours per Invoice	2.49	
Effective Labor Rate	\$123.75	
Gross Profit per Hour	\$156.42	

Vehicle Hours (Time on Vehicle)	286.11	
Technician Efficiency	127.99 %	

Number of Labor Operations	879	
Average per Invoice	5.98	

Labor to Parts Ratio	1.12	
-----------------------------	------	--

Key Profit Numbers
 Manage and Measure
 Accurate Gross Profit,
 Average Invoice and Labor
 Hour Information

Service Estimator with PartsTech

Invoice 56895 09/11/2018

Paul Stewart
602-908-7170
paul@autoappsinc.com

2012 Toyota Corolla CE
JTMZK32V276009544
1.8L I4 DOHC 2ZRFE
Mileage 118,564

	Approved	Pending	Total
Labor	\$366.60	\$108.00	\$514.33
Parts	\$220.04	\$112.98	\$356.16
Sublet			
Shop Supplies	\$24.44	\$6.95	
Fee		\$4.00	\$33.96
Sub Total	\$611.08	\$231.93	\$904.45
Taxes	\$18.89	\$7.25	\$20.29
Total	\$629.97	\$239.43	\$924.74

Click and Unclick Service Jobs and they and new totals appear in seconds

	Parts	Job	Description	Billed Hrs	Pending Hrs	Tech	Price	Profit
Approved - Service Jobs				4.30	1.5		\$629.97	62.50%
	1 of 2	Cool	Water Pump Themostate Replace	2.50	1.5	James	\$434.99	55.00%
	2 of 2	Main	Oil Change Service	0.30		David	\$29.97	40.00%
	1	Diag	Diagnose no oil pressure	1.00		James	\$109.67	65.00%
		Diag	Cigarette Lighter not working	0.50		James	\$55.34	65.00%

	Pending Approval			Billed Hrs		Tech	Price	Profit
	1	Main	Cooling System Service	0.80		James	\$89.76	55.00%
	2	Main	Transmission Service	1.00		James	\$149.67	55.00%
	1	Eng	Oil Sending Unit - Replacement	1.20		James	\$209.56	62.00%
		Diag	Alignment	1.00		James	\$109.50	65.00%



Osborn's Automotive Inc
1001 S Pacific Coast Hwy
Redondo Beach, California 90277
310-698-5143
www.osbornauto.com

Digital Inspection with Pictures

- Recommend Service is flagged as Safety, Maintenance, Repair, Monitor
- Text Message or E-mail Customer

Multi Point

Inspected on	7/11/2016	Performed by	Jerry Smith
Customer	SCOTT OSBORN	Vehicle	2004 GMC Yukon
Repair Order	99999	License plate	5FQF995
		Mileage	137,812

Priorities

Safety: These items can contribute to dangerous driving conditions or breakdowns.

Drive Belts Problem 1 Qty

- Finding: Belt(s) are cracked/torn
- Recommendation: Replace belt(s)

Front Brake Pads (Resolved) Problem 2 mm

- Finding: Front brake pads are at or below 3mm
- Recommendation: Replace front brake pads

Front Brake Rotors (Resolved) Problem

- Finding: Front brake rotors are undersized
- Recommendation: Replace front brake rotors

Maintenance: These items are recommended to increase the life of your vehicle and to lower the cost of ownership

Engine Oil Condition/Level (Resolved) Problem

- Finding: Oil is dirty/contaminated
- Recommend Oil Change

Images

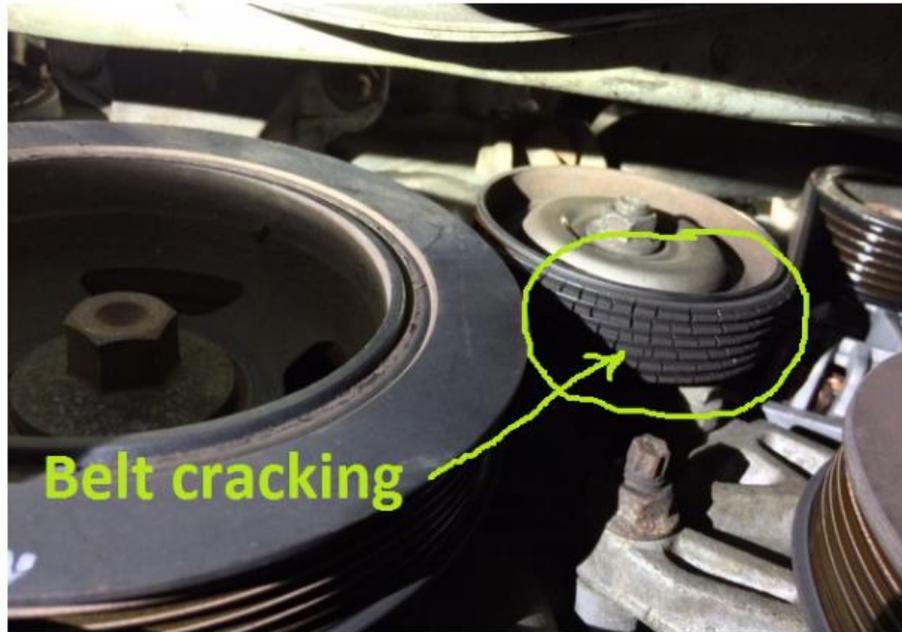
- Add unlimited pictures – edit and draw
- Increase Average Invoice



Keith was the Certified Technician working on your car today. He's been with us for over 20 years and knows how to keep a car well maintained and on the road.

Keith is certified in Hybrids, Brakes, Engine, Suspension, Advanced Diagnosis, European Cars and more. He takes great pride in his work.

Keith spends most of his free time riding his bike on the strand & working with charity events. We are very fortunate to have him!



EliteTM
PRO SERVICE

A PEER GROUP OF THE INDUSTRY'S TOP SHOP OWNERS

2019 Leadership Conference

Thank You!

