

Service Manager Seminar 32

Robert Datri-Laura Fluor-Ken Vicari

Circle BMW

Current Practices:

1, our first voice of the customer is the receptionist/cashier, they are trained to check history when making appointments, get as much information as possible, plus we use Xtime, which automatically checks and adds open campaigns. While checking history they will check to see if a certain advisor has always helped and assign to that advisor.

2, every morning I am the first one in, I check loaner availability, schedule and shop loading, at this point I make my first evaluation of the day to see what can be added and handled, of course we never try to turn anyone away. I analyze all night drops and check history and assign to the appropriate writer. We try to get all night drops written and back to dispatch before the door opens.

3, we have recently added a dispatcher full time, previously the foreman were dispatching, but due to the difficulty of BMW's and how busy the shop was, it was taking away from their performance so it was necessary to add. I know we talked about bottleneck, but with proper training this can be a smooth flow, dispatch can make or break the flow of the shop.

4, dispatch analyzes the jobs, checks for ones marked vip (returned in 90 days) and analyses whether or not a comeback, if so every comeback goes to one foreman only he diagnoses and makes daily reports on these, this way we can know if we have an issue without someone covering their tracks.

5, techs we try to give some latitude, my slogan is don't run a prison but it's not a country club!!! You must put in your 8.0 hrs at least but if they are a little late, I don't crucify! Tech shortage is real, and I feel slight things to boost morale always helps.

6, techs use an inhouse mpi, my favorite tool is the video, I have always sold more work on waiters by bringing the client to the car, this was we can bring the car to the client!! This is transparency for the client and accountability for the tech. this tool has shown the biggest improvement in upsells I have ever seen.

7, we have an inhouse system, for communication between advisor and parts, this was once a request has been sent for parts, and the job is sold, when the tech goes to the counter for parts they are waiting.

8, once the tech has completed and road-tested the car, it is turned back into dispatch and then the dispatcher determines if it needs to go to my quality control for a second road test. After this step the car goes to car wash, keys to advisor and now the advisor plans for the delivery.

Goals For Improvement:

1, reviewing the appointments made I see we can clearly get a little more detail while on the phone, information we receive is good, email, contact address, I do pull phone calls at times and review for training purposes.

2, advisors not always here early enough to complete night drops, in a timely manner and prepare for opening the door, BMW has a key reader, dcs page, and a system called Air. There is a lot to do to prepare for your first client.

3, making sure the proper jobs go the proper techs, and the minor jobs are dispatched in a timely manner.

4, making sure the vip and ro's have proper marking so all are aware of the status of the repair order, whether a comeback or possible buy back situation.

5, having everyone show up for their scheduled hours!!!

6, want a video used on all vehicle, even if an upsell is not needed or car is new, this way they know the process and know what to expect throughout the relationship!

7, my goal on our communication system is making sure no one deviates from the process.

8, making sure every car that needs Qc, gets one, this will catch any issues before the vehicle is returned to the owner.

Plans To Achieve My Goals

1, make a process where Bdc Supervisor reviews all appointments made and make necessary changes.

2, process where all advisors must show up at the appropriate time, or night drops may go to the advisors that are here!!!

3, I spot check dispatch all the time, I go through the jobs in the rack, and will walk through to different techs daily to see what they are working on. I also have my 2-foreman watching this daily.

4, process where the dispatcher looks at every ro. Checks the history which prints right on the hardcopy and makes sure it is properly marked if it is an issue.

5, every once in a while, I sit in our break room, which is also employee entrance right by the timeclock, look at my watch and comment accordingly.

6, I always have the Covideo master screen up, I spot check by picking ro# then looking for corresponding video. I will also watch the quality of the video.

7, I set a process, that every pna sent from parts to advisors, upsells and declines must also copy me on every email, on declines I then discuss reason and TO from there.

8. must make everyone accountable for there jobs, and follow all processes, I have advisors also watch for me, they make sure every comeback gets a qc, which is our policy.

Plans To Evaluate you changes:

1, my plans to evaluate my changes will reflect in hours per ro, gross profit percentage, every week when we do our payroll, we make a spreadsheet, showing actual time punches, proficiency, efficiency, and even analyze loss and opportunity for tech to make more which in turn we make more. I review time cards every week, watch for punch times and time on the clock, if need will

have discussion with that employee. I have been working for this company for 35 years, I feel I run a tight ship, this course has reminded me of things I may have put on the back burner and opened my eyes to thing we really need to focus on. And of course, the final evaluation will be watching the interactions of employees, seeing smiling faces, and feeling good vibes throughout the service department. Once this is achieved you will see a reflection on the bottom line!!!

Repair Order Analysis Summary Report

	Sales in Dollars	FRH's on RO's	Averages	Analysis
Competitive	\$ 4,362	÷ 32.20	= 135.46	FRH Average
Maintenance	\$ 18,995	÷ 103.10	= 184.24	FRH Average
Repair	\$ 21,433	÷ 110.50	= 193.96	FRH Average
Totals	\$ 44,790	÷ 245.80	= 182.22	Customer ELR
Target Labor Rate			170.40	Per FRH
Total Ro's in Sample	100	Difference		11.82 Per FRH

Cost of Labor

Total Cost of Labor	9542.99	÷ Total Sales	= 21.31%	Percent Cost of Sales
Total Cost of Labor	9542.99	÷ Total FRHs	= 38.82	Cost per FRH

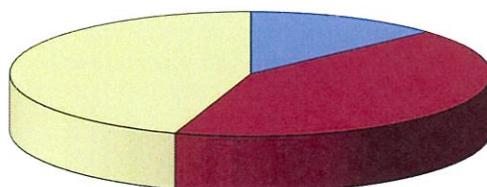
Repair Order Measurements

Total Labor Sales	44,789.95	÷ Total ROs	= 447.90	Avg Labor per RO
Total FRHs	245.80	÷ Total ROs	= 2.46	Avg FRH's per RO
Menu Sales		÷ Total ROs	=	Percent Menu Sales
Competitive FRHs	32.20	÷ Total FRHs	= 13.10%	Percent Competitive
Maintenance FRHs	103.10	÷ Total FRHs	= 41.94%	Percent Maintenance
Repair FRH	110.50	÷ Total FRHs	= 44.96%	Percent Repair
One item ROs	21	÷ Total ROs	= 21.00%	Percent One Item RO

Model Year Analysis

2023	2022	2021	2020	2019	2018	Older	Total
0	1	3	5	14	19	58	100
0.00%	1.00%	3.00%	5.00%	14.00%	19.00%	58.00%	

Labor Mix



■ Percent Competitive
 ■ Percent Maintenance
 ■ Percent Repair

Repair Order Analysis

Dealership				Competitive Labor		Maintenance Labor		Repair Labor		Total Cost of Labor	One Item Repair Order
RO Number	Year	Model	Mileage	Labor Sales	Flat Rate Hours	Labor Sales	Flat Rate Hours	Labor Sales	Flat Rate Hours		
6394107	2015	328	58,471	55.77	0.00	365.25	2.10			111.28	0
6394108	2019	x5	34,349	469.95	2.40					91.92	0
6394109	2017	x1	53,902	54.00	0.30					11.19	1
6394111	2014	328	110,134	54.00	0.30					10.59	1
6394112	2017	x3	53,175			242.12	1.40			55.72	0
6394113	2021	x3	9,865	55.00	0.30				0.00	10.59	1
6304114	2016	x3	89,329	65.77	0.60	876.10	6.10		0.00	197.68	0
6394116	2012	528	119,126			355.86	1.80		0.00	56.34	0
6394117	2013	535	46,849	55.00	0.50	171.91	0.90	556.16	2.60	159.20	0
6394118	2015	335	91,551	0.00		109.84	0.50	784.20	3.60	128.33	0
6394125	2019	x3	18,523	110.00	0.60	0.00	0.00	0.00	0.00	21.18	1
6394129	2015	328	101,299	58.17	0.50	521.81	2.80	0.00	0.00	116.49	0
6394136	2016	328	60,083	58.17	0.50	535.81	2.80	0.00	0.00	103.29	0
6304137	2018	330	25,751	48.39	0.50	183.95	0.90	0.00	0.00	57.82	0
6394139	2009	328	121,743			229.95	1.20	573.50	3.10	177.59	0
6394146	2016	x1	1,621	53.32	0.50	353.95	1.80	0.00	0.00	98.44	0
6394149	2014	535	167,205			0.00	0.00	363.91	1.80	56.34	1
6394157	2015	750	104,264	99.95	1.00	0.00	0.00	0.00	0.00	40.30	1
6394161	2022	x3	2,503	55.00	0.30	0.00	0.00	0.00		9.39	1
6364162	2021	228	5,242	55.00	0.30	0.00	0.00			9.39	1
6394215	2018	430	18,080			276.87	1.70			71.06	0
6394217	2012	x5	103,623			0.00	0.00	600.00	3.50	146.30	0
6394218	2019	530	35,164	102.00	0.60	0.00	0.00	0.00		18.78	0
6394223	2010	x3	135,874					1,115.01	5.70	238.26	0
6394227	2016	535	90,406	43.87	0.50	239.67	1.10			50.08	0
6394231	2014	640	60,790	43.87	0.50	239.67	1.10	237.00	1.50	128.03	0
6394241	2018	320	35,497			399.62	2.30			71.99	0
6394242	2018	x4	28,575	55.00	0.30					9.39	1
6394247	2019	330	35,714			161.00	1.30	380.00	1.80	97.03	0
6394249	2017	330	56,374			277.50	1.50			52.95	1
6394253	2017	x3	58,328	58.17	0.50	887.75	5.40	0.00		234.82	0
6394257	2019	330	35,714			161.00	0.90	0.00		28.17	0
6394258	2018	230	2,741	53.32	0.50	923.47	4.70	0.00		162.76	0
6394259	2018	x5	40,535	58.17	0.50	374.65	1.90			102.72	0
6394261	2013	x5	77,092					424.58	2.30	91.54	0
6394262	2018	750	46,659					189.95	1.00	42.30	1
6394267	2011	x3	207,290				0.00	299.79	1.50	57.45	0
6394268	2016	320	4,066	58.17	0.50	198.57	1.00			62.70	0
6394270	2006	530	93,156			323.36	1.70			53.21	0
6394271	2005	x5	71,393			341.91	1.80			71.64	0
6394272	2013	528	90,951	57.17	0.50	229.95	1.30	1,234.30	6.10	294.67	0
6394275	2005	325	100,773					569.85	3.00	119.40	0
6394279	2018	550	39,175	70.07	0.70					28.21	0
6394285	2012	x3	95,126	83.82	1.00					35.30	0
6394286	2018	540	34,848	125.00	0.70					24.71	0
6394291	2016	550	2,018	55.00	0.30					10.59	1
6394292	2018	m2	10702			0.00		663.11	3.00	126.90	0
6394293	2018	x3	27320	53.32	0.50	799.80	3.40			161.07	0
6394296	2011	328	150800	83.82	0.70	0.00	0.00			28.21	0
6394304	2019	x5	40278	49.75	0.50	175.76	0.80			40.69	0
ROs 1-50 Totals				2,304.19	17.30	9,957.19	53.20	7,991.36	40.50	4,184.00	12
Date of Study: Study Compiled by				C Labor		M Labor		R Labor		Total Cost of Labor	One Item Repair Order
				Labor Sales	Flat Rate Hours	Labor Sales	Flat Rate Hours	Labor Sales	Flat Rate Hours		

Repair Order Analysis

Dealership				Competitive Labor		Maintenance Labor		Repair Labor		Total Cost of Labor	One Item Repair Order	
RO Number	Year	Model	Mileage	Labor Sales	Flat Rate Hours	Labor Sales	Flat Rate	Labor Sales	Flat Rate Hours			
6394309	2019		540	47,625	100.52	0.80	0.00	0.00	325.00	1.30	74.13	0
6394312	2014	x1		81,007	163.62	1.10	0.00	0.00			44.33	0
6394328	2017		328	21,471		0.00	185.00	1.00			31.30	1
6394330	2016		535	52,922	238.95	1.20	0.00	0.00	0.00		48.36	0
6394335	2018		440	21,832	0.00	0.00	0.00	0.00	499.95	2.50	103.25	0
6394336	2019	i8		46,715	0.00	0.00	0.00	0.00	2,677.40	14.20	593.56	0
6394341	201		128	115,889	0.00	0.00	185.00	1.00	0.00	0.00	38.30	1
6394349	2019	x5		24,416	0.00	0.00	220.00	1.20	0.00	0.00	39.96	0
6394350	2013		528	106,890	55.77	0.50	276.45	1.40	0.00	0.00	59.47	0
6394352	2011	x5		90,812	152.06	0.90	0.00	0.00	0.00	0.00	28.17	0
6394355	2014	x3		77,547	0.00	0.00	151.47	0.90	0.00	0.00	28.17	1
6394356	2016	x5		47,001	0.00	0.00	49.95	0.50	0.00	0.00	15.65	1
6394359	2021	x5		16,150	0.00	0.00	99.95	0.50	0.00	0.00	15.65	1
6394361	2019		540	29,648	0.00	0.00	110.00	0.60	0.00	0.00	18.78	0
6394364	2019		530	20,429	0.00	0.00	0.00	0.00	647.50	3.50	144.55	0
6394365	2018	x5		52,949	0.00	0.00	55.00	0.30	0.00	0.00	12.39	1
6394367	2015		328	112,204	0.00	0.00	110.00	0.60	0.00	0.00	18.78	0
6394369	2008		328	35,931	0.00	0.00	0.00	0.00	368.95	1.80	56.34	0
6394379	2014	x3		148,304	0.00	0.00	573.78	3.60	0.00	0.00	143.28	0
6394380	2009		328	65,434	43.87	0.50	108.88	1.20	816.79	4.40	233.63	0
6394381	2005		645	131,756	0.00	0.00	0.00	0.00	929.28	4.50	181.35	0
6394387	2018		430	33,157	55.00	0.30	196.53	1.40	0.00	0.00	53.21	0
6394395	2015		528	23,722	43.87	0.50	183.95	0.90	0.00	0.00	43.82	0
6394399	2020		750	17,246	55.00	0.30	0.00	0.00	0.00	0.00	12.09	1
6394403	2020	x7		28,758	249.95	1.20	0.00	0.00	0.00	0.00	37.56	1
6394406	2019		430	8,783	53.32	0.50	355.86	1.80	0.00	0.00	94.99	0
6394410	2015	x1		70,004	0.00	0.00	504.79	2.90	0.00	0.00	102.37	0
6394412	2015		428	51,211	57.17	0.50	171.91	0.90	0.00	0.00	49.42	0
6394413	2016		750	53,403	0.00	0.00	0.00	0.00	64.50	3.50	134.05	0
6394414	2009	x5		87,258	0.00	0.00	0.00	0.00	329.53	1.50	46.95	0
6394418	2020		228	24,808	0.00	0.00	299.95	1.50	0.00	0.00	57.45	0
6394423	2020		850	21,675	110.00	0.60	0.00	0.00	0.00	0.00	18.78	0
6394428	2019	x3		56,960	53.32	0.50	428.91	2.10			81.38	0
6394430	2008		750	105,563	0.00	0.00	0.00	0.00	1,757.50	8.00	330.40	0
6394433	2011	x5		80,025	0.00	0.00	441.22	2.30	0.00	0.00	71.99	0
6394442	2018	x1		34,447	53.32	0.50	43.94	0.50	0.00	0.00	35.30	0
6394448	2020		740	40,436	59.75	0.50	405.00	2.90	0.00	0.00	106.42	0
6394451	2019	x5		38,673			220.00	1.20	1,469.32	7.60	275.44	0
6394458	2018	x3		4,183	55.37	0.50	0.00	0.00	848.11	4.00	140.85	0
6394460	2015		328	62,544	55.77	0.50	189.95	0.90	399.95	1.80	127.36	0
6394462	2018		330	21,502	53.32	0.50	385.37	2.00	0.00	0.00	103.25	0
6394463	2018		528	100,748	0.00	0.00	0.00	0.00	2,052.39	10.30	425.39	0
6394472	2018		320	36,510	95.00	0.50	0.00	0.00	0.00	0.00	20.15	1
6394474	2006		530	59,743	0.00	0.00	1,253.16	6.30	0.00	0.00	234.99	0
6394477	2013	x5		79,989	43.87	0.50	171.91	0.90	0.00	0.00	56.42	0
6394478	2018	x1		44,265	48.39	0.50	678.82	3.70	0.00	0.00	492.81	0
6394479	2016		328	65,608			340.00	1.80	0.00	0.00	74.34	0
6394481	2017	x1		45,380	50.67	0.50	456.41	2.10	0.00	0.00	91.78	0
6394495	2016	x5		71,086	53.87	0.50	185.00	1.00	0.00	0.00	46.95	0
6394500	2015		328	140,265	55.77	0.50	0.00	0.00	255.35	1.10	63.68	0
RO's 51-100 Totals				2,057.52	14.90	9,038.16	49.90	13,441.52	70.00	5,358.99	9	
Date of Study: Study Compiled by				C Labor		M Labor		R Labor		Total Cost of Labor	One Item Repair Order	
				Labor Sales	Flat Rate Hours	Labor Sales	Flat Rate	Labor Sales	Flat Rate Hours			

Repair Order Summary Report Analyzed:

1, I know the rule of one line repair orders, on this sample we were 21%, of course I analyzed, found out that many are single tire blow outs, with Bmw we also have Maint included for 3/36 for these vehicle typically there is nothing to service because all is included. So after I removed these cars, our percentage came down to about 12%.

Circle BMW SOST32 Qualitative SWOT Analysis

BOB DATRI

KEN VICARI

LAURA FLUOR

<p>STRENGTHS</p>	<ol style="list-style-type: none"> 1. Seasoned, knowledgeable associates 2. Good communication, teamwork & camaraderie in the shop 3. Service advisors maintain strong relationships with clients 4. Well maintained facility 5. Great leadership in the shop, respected foremen
<p>WEAKNESSES</p>	<ol style="list-style-type: none"> 1. Lack of communication between departments 2. Lack of tool availability & organization 3. Missed appointments and services 4. Insufficient customer information recorded in the system 5. Marketing for service is insufficient
<p>OPPORTUNITIES</p>	<ol style="list-style-type: none"> 1. Having strong service employees enables us to solicit more business since we know we can sell services and perform them effectively 2. Taking more complete information from clients and calling missed appointments and deferred services 3. Marketing to our large client base to service all of the off brands in the household 4. Launching a mobile service unit 5. Improving our processes between departments, ie. making sure we are not making promises in the front of the house that we cannot fulfill in the shop 6. Improving wait times at the parts counter and updating and organizing our tool room
<p>THREATS</p>	<ol style="list-style-type: none"> 1. Ignoring our weaknesses 2. When communication between departments is poor the client suffers so repeat business and referrals are at stake 3. Negativity among some of the associates 4. Service advisors taking short cuts can open the dealership up to law suits, create confusion in the shop and increase the length of time it takes in the warranty office

Objectives

1. Improve the efficiency in the shop
2. Alleviate frustration on the part of the technicians
3. Increase facility utilization, hours and profit in the shop
4. Decrease liability for the dealership

Strategies

1. Our tool machine is archaic and our tool room is too small, dirty and disorganized so we will start by having the room professionally cleaned and having the tool machine reprogrammed.
2. There is a lack of communication when things are promised to clients so we have to shed a light on our "we owe" process and communicated it to the sales department.
3. We are running about 50 off brand vehicles through our shop every month to sell on our used car lot so we have an initiative to bring in off brand vehicles for maintenance as well.
4. 2 of our service advisors in particular need some sales training to increase lines per their RO's.
5. Advisors and appointment coordinators need to feel empowered to bring additional clients in throughout the day.
6. Make sure that all RO's are closed every day and reopened if need be. Also, make sure that every RO has a signed hard copy on file.
7. Increase internal rate and pay ourselves first

Tactics

1. Call in an outside service to professionally clean our tool room. One of our techs who is out on family leave is able to re-program our tool machine
2. "We Owe" will be authorized by a manager after checking with the shop for viability, they will then be added to the DMS and a hard copy will be held in my service manager's office in a file.
3. Weekly check of all RO's to confirm signatures and close dates.
4. Marketing piece to go out to all sales and service clients for off brand maintenance (see next page)
5. Jen, the person who manages our appointment coordinators, will have them contact missed appointments and declined (deferred) sales. Also, service advisors will be given more autonomy to make appointments throughout the day.
6. Service shuttle will resume summer hours to accommodate seasonal clientele and relieve strain on loner fleet
7. Sales training will be required for service advisors.

CircleBMW DARE TO COMPARE!

Circle BMW is your destination to
maintain all your household vehicles
MULTIPLE HOUSEHOLD VEHICLE DISCOUNT AVAILABLE!

Establishment Name/Location	Pick up & Drop off*	Oil Changes*	Master Technicians	Automatic Car Wash	On Site Brake Repair	Local Shocks	Wash Wax Area	Cafe Lounge
Jiffy Lube	NO	NO	NO	NO	NO	NO	NO	NO
Goodyear	NO	NO	NO	NO	NO	NO	NO	NO
Pep Boys	NO	NO	NO	NO	NO	NO	NO	NO
Mo'vis	NO	NO	NO	NO	NO	NO	NO	NO
Costco Wholesale	NO	NO	NO	NO	NO	NO	NO	NO
CircleBMW	YES	YES	YES	YES	YES	YES	YES	YES

*Pick up and drop off only, nothing is in or out of the car. Oil change is subject to BMW.

(732)820-5589

CircleBMW.com

ACTION PLANNER 2022-2023

CIRCLE BMW SERVICE ACTION PLAN
 LAURA FLUOR SOST32

TASK	ROLE	COMPLETION DATE
CLEAN TOOL ROOM	Outside service /foreman/GM	June 1
CONTACTING MISSED APPTS AND DEFERRED SERVICES	Jen Caldwell, director of appointment coordinators/ assistant service manager	Immediately & recurring
SALES TRAINING FOR SERVICE ADVISORS	Trainer/ service manager	First training scheduled 05/16
"SHORE SHUTTLE"	Appointment coordinators	June 20 th -September 2 nd
NEW "WE OWE" SYSTEM	Sales/Service Managers and sales people	Already happening
OFF BRAND SERVICE MARKETING EMAIL TO DEPLOY AND FOLLOW UP CALLS	Marketing coordinator/ service manager GM	May 10th

MAY							JUNE							JULY							AUGUST							SEPTEMBER							OCTOBER						
M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S
					1				1																																
2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31												