Monthly Checklist for Dealership Service Managers

“Good service is good business.”

* Weekly meeting with Service Writers
* Run Service Recap Report to review performance of each Service Advisor and compare labor against monthly goal
* Review Service sales goals with Owner or General Manager
* Run service productivity reports
* Run a report to identify Job Status by author
* Review unclaimed/unsubmitted Warranty in Warranty Manager
* Review unpaid or shorted Warranty in Warranty Manager
* Review paid Warranty by author in AR Report
* Ensure that customers are being updated on their service statuses
* Post Mechanic Efficiencies to recognize team performance

# Week 1:



* Weekly meeting with Service Writers
* Run Service Recap Report to review performance of each Service Advisor and compare labor against monthly goal
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* Run service productivity reports
* Run a report to identify Job Status by author
* Review unclaimed/unsubmitted Warranty in Warranty Manager
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* Ensure that customers are being updated on their service statuses
* Post Mechanic Efficiencies to recognize team performance

# Week 2:



# Week 4:

* Weekly meeting with Service Writers
* Run Service Recap Report to review performance of each Service Advisor and compare labor against monthly goal
* Run service productivity reports
* Run Repair Event Cycle Time (RECT) report to identify bottlenecks in your service department and benchmark performance against other dealers in your region
* Review unclaimed/unsubmitted Warranty in Warranty Manager
* Review unpaid or shorted Warranty in Warranty Manager
* Review paid Warranty by author in AR Report
* Run Financial Statement for departmental income
* Ensure that customers are being updated on their service statuses
* Do a lot walk and take inventory of units that haven’t been paid for and reconcile with Work Order statuses

Post Mechanic Efficiencies to recognize team performance



# Week 3:

* Weekly meeting with Service Writers
* Run Service Recap Report to review performance of each Service Advisor and compare labor against monthly goal
* Review Service sales goals with Owner or General Manager
* Run service productivity reports
* Run a report to identify Job Status by author
* Review unclaimed/unsubmitted Warranty in Warranty Manager
* Review unpaid or shorted Warranty in Warranty Manager
* Review paid Warranty by author in AR Report
* Ensure that customers are being updated on their service statuses
* Post Mechanic Efficiencies to recognize team performance



* Morning meeting with Technicians to identify challenges
* Review Technician daily schedule and make sure everyone is clocked into a Work Order
* Review Work Order counts in your Work Order Manager
* Is there a next step for each Work Order?
* Are there Work Orders with no required hours and no actual hours?
* Run Job Status Report
* Check if Jobs that are put on Pending Hold are being managed
* Are there Work Orders with all Jobs done? Do they need to be reset with times or closed out?
* Review Appointment calendar and make sure appointments are entered properly
* Review Technician timecards throughout the day
* At end of day, update Technician timecards with billable hours



# Daily:

**Service More Units and Speed Up Your Repair Event Cycle Time with IDS ServiceCRM**

**Text

Description automatically generated**

Ready to close Work Orders faster, improve customer communications, and increase the number of

units serviced at your shop each day?

Learn more at [**www.ids-astra.com/service360**](http://www.ids-astra.com/service360) or reach out at **1-800-962-7872** or [**support@ids-astra.com**](mailto:support@ids-astra.com)