12 Days to Paperless

The Three Phases

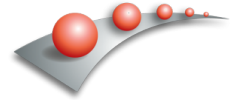| Day 1-4	Day 5-6	Day 7-12
Phase 1 (Inspections) ● Policy/Procedures implemented with employees ● Inspection Standardized ● Drop off process implemented ● All inspections emailed manually ● Enforce policy and procedures ● Retrain as needed	Phase 2 (Job Packages /Chat/Selling with Inspection) ● Review policy and procedures ● Practice digital communications ● Job Packages loaded into inspection sheet ● SF add on used ● Canned jobs adjusted ● Enforce policy of 100% estimates ● Sell using inspection report ● Retrain as needed	Phase 3 (Workflow) ● Review policy and procedures with employees ● MSOP Adherence ● Workflow Implemented ● Enforce policies and procedures ● Retrain as needed ● Paperless trial on day 9 ● Paperless day 10 ● Days 11-12 Refine
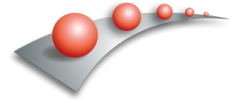
Phase 1 - Day 1-4 Inspection/Drop off Process (Building canned jobs in evening)

Day 1	Day 2	Day 3	Day 4
Shop Meeting ● Inspection Training and policy review ● Hand out inspection sheet change recommendation forms ● Drop off process practice Begin work for day ● Drop off script ● Inspections ● Editing/Emailing inspections End of day ● Collect inspection sheet change recommendation forms ● Make inspection sheet changes	Shop Meeting ● IMR ● Goals and plan ● Hand out inspection sheet change recommendation forms Begin work for day ● Proficiency exercise ● SA monitoring After work ● Collect inspection sheet change recommendations ● Make recommended changes to inspection sheet ● Build canned jobs	Shop Meeting ● IMR ● Goals and plan ● Hand out inspection sheet change recommendation forms Begin work for day ● Proficiency exercise ● SA monitoring After work ● Collect inspection sheet change recommendations ● Make recommended changes to inspection sheet ● Build canned jobs	Shop Meeting ● IMR ● Goals and plan ● Hand out inspection sheet change recommendation forms Begin work for day ● Proficiency exercise ● SA monitoring ● Goals Achieved After work ● Collect inspection sheet change recommendations ● Make recommended changes to inspection sheet ● Build canned jobs

Phase 2 - Day 5-6 (Canned Job Library is Pre-Requisite)
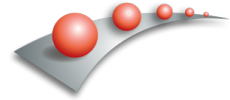
Day 5	Day 6
[Shop meeting](#) ● IMR ● Conditions and actions ● Chat/smart alert demo ● Submit test inspection ● Use add on ● Build estimate ● Role play selling with inspection sheet Begin work for day ● SA monitoring ● Use Add-on to import jobs ● Use chat / Smart Alerts ● Proficiency exercise as needed	Shop meeting ● IMR ● Role play selling with inspection sheet Begin work for day ● SA monitoring ● Use Add-on to import jobs ● Use chat / Smart Alerts ● Proficiency exercise as needed

Phase 3 - Day 7-12 - Workflow

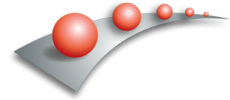| Day 7	Day 8	Day 9	Day 10-12
Shop Meeting ● IMR ● MSOP Review ● Explain critical factors of workflow ● Marking jobs complete ● Keeping work order open for vehicle being worked on ● Workflow walkthrough (Insp, est, approval, Work) Begin work for the day ● Dual work orders ● SA monitoring for MSOP compliance ● Enforcing Digital Communications	Shop Meeting ● IMR ● MSOP Review ● Explain critical factors of workflow ● Marking jobs complete ● Keeping work order open for vehicle being worked on ● Workflow walkthrough (Insp, est, approval, Work) Begin work for the day ● Dual work orders ● SA monitoring for MSOP compliance ● Enforcing Digital Communications	Shop Meeting ● IMR ● MSOP Review ● Explain critical factors of workflow ● Marking jobs complete ● Keeping work order open for vehicle being worked on ● Workflow walkthrough (Insp, est, approval, Work) ● Paperless Brief Begin work for the day ● Paperless ● SA monitoring for MSOP compliance ● Enforcing Digital Communications	Shop Meeting ● IMR ● MSOP Review ● Explain critical factors of workflow ● Marking jobs complete ● Keeping work order open for vehicle being worked on ● Workflow walkthrough (Insp, est, approval, Work) Begin work for the day ● Paperless ● SA monitoring for MSOP compliance ● Enforcing Digital Communications

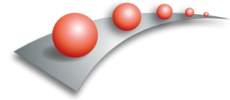**Boost Productivity and Average Repair Order**

Day 1:

T-1 Hours	Shop meeting (gather technicians and service advisors together, tear out copies of picture policies and inspection sheet change recommendation forms and pass around to all employees) Use the Day 1 Meeting Guide to conduct your meeting
T=0 Shop begins work	Begin work for the day: Execute drop off script relentlessly, inspect every vehicle to the standard, enforce the standard. - Shop owner positioned up front to ensure drop off script is being conducted and and reviewing every inspection with SA - Technicians inspect every vehicle to the standard - Drop off script, Inspect vehicles, Review inspections, reinspect if needed, review inspection again, email inspection to motorist. - Shop owner re-trains technicians on common errors observed while reviewing inspections
After closing for day	End of day No Actions

Day 2:

T-30 Minutes	**Shop Meeting** ● IMR - Review inspection metrics report for inspections completed on day 1 ● Goals and plan - Review goals for inspection metrics and reinforce the plan to achieve the goals. ● Hand out inspection sheet change recommendation forms to technicians ● Review what changes were made to the inspection sheet based on their recommended actions
T=0	Begin work for day ● Proficiency exercises if needed ● SA monitoring ● Re-training as needed
After closing for the day	After work ● Collect inspection sheet change recommendations ● Make recommended changes to inspection sheet ● Build canned jobs in SMS

Day 3:

T-30	[Shop Meeting](#) ● IMR ● Goals and plan ● Hand out inspection sheet change recommendation forms
T=0	Begin work for day ● Proficiency exercise ● SA monitoring ● Collect inspection sheet change recommendations
After Closing for the day	After work ● Collect inspection sheet change recommendations ● Make recommended changes to inspection sheet ● Build canned jobs

Day 4:

Phase 1 Goals Achieved

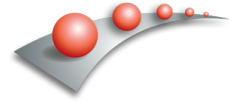| T-30	[Shop Meeting](#) ● IMR ● Goals and plan ● Hand out inspection sheet change recommendation forms
T=0	Begin work for day ● Proficiency exercise ● SA monitoring ● Collect inspection sheet change recommendations ● **Phase 1 Goals Achieved**
After Closing for the day	After work ● Collect inspection sheet change recommendations ● Make recommended changes to inspection sheet ● Build canned jobs

Day 5:

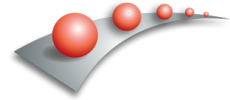| T-1 Hour	Shop meeting ● IMR ● Conditions and actions ● Chat/smart alert demo ● Submit test inspection ● Use add on ● Build estimate ● Role play selling with inspection sheet
T=0	Begin work for day ● SA monitoring ● Use Add-on to import jobs ● Use chat / Smart Alerts ● Proficiency exercise as needed
After closing for the day	Adjust Canned Jobs

Day 6:

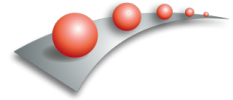|	
T-30	Shop meeting ● IMR ● Role play selling with inspection sheet
T=0	Begin work for day ● SA monitoring ● Use Add-on to import jobs ● Use chat / Smart Alerts ● Proficiency exercise as needed
After closing for the day	Adjust Canned Jobs

Day 7:

T-1 Hour	Shop Meeting using the Day 7 meeting guide ● IMR ● MSOP Review ● Workflow walkthrough (Insp, est, approval, Work) ● Explain critical factors of workflow ● Marking jobs complete ● Keeping work order open for vehicle being worked on
T=0	Begin work for the day ● Dual work orders ● SA monitoring for MSOP compliance ● Enforcing Digital Communications
After closing for the day	No Actions

Day 8:

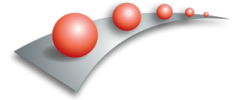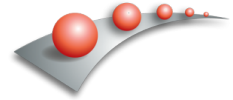| T-30	Shop Meeting
	- IMR - MSOP Review - Review critical factors of workflow - Review Marking jobs complete - Review Keeping work order open for vehicle being worked on
T=0	Begin work for the day - Dual work orders - SA monitoring for MSOP compliance - Enforcing Digital Communications
After	No Actions

Day 9:

T-30	Shop Meeting ● IMR ● Explain critical factors of workflow ● Marking jobs complete ● Keeping work order open for vehicle being worked on ● Paperless Brief
T=0	Begin work for the day ● Paperless ● SA monitoring for MSOP compliance ● Enforcing Digital Communications
After closing for the day	No Actions

Day 10-12:

T-20	Shop Meeting ● IMR ● Explain critical factors of workflow ● Marking jobs complete ● Keeping work order open for vehicle being worked on
T=0	Begin work for the day ● Paperless ● SA monitoring for MSOP compliance ● Enforcing Digital Communications
After closing for the day	No Actions