|  |  |  |
| --- | --- | --- |
| **Financial control** | **YES or NO****✓ 🗶** | **Items I will work on****✓** |
| 1. I have a financial dashboard in place to monitor Key Performance Indicators (KPIs)
 |  |  |
| 1. I have a 12 month Profit & Loss (P&L) forecast budget in place and regularly monitor our progress towards it
 |  |  |
| 1. I know our daily, weekly, monthly and yearly sales breakeven points
 |  |  |
| 1. I have a monthly management meeting where financial results are reviewed
 |  |  |
| 1. The business has a gross percentage margin target and I monitor actual results weekly
 |  |  |
| 1. The business has an average $ sale target and I monitor actual results weekly
 |  |  |
| 1. I understand the difference between cashflow and profit
 |  |  |
| 1. I understand the difference between margin and markup
 |  |  |
| 1. The business has an up to date and functioning point of sale (POS) software program
 |  |  |
| 1. I know how to correctly access reports within my POS or accounting program.
 |  |  |
| 1. I understand how to read a basic Profit & Loss statement and Balance Sheet
 |  |  |
| **Marketing and advertising** | **YES or NO****✓ 🗶** | **Items I will work on****✓** |
| 1. The business documents and analyses the source of all new customers
 |  |  |
| 1. I have a long term view of the value of our customers and know their lifetime value
 |  |  |
| 1. I calculate and monitor the acquisition cost of different marketing campaigns
 |  |  |
| 1. I have stopped marketing that doesn’t work
 |  |  |
| 1. I have marketing strategies in place that generate us enough new customers. Marketing options could include:
	* Referral program
	* Staff rewards program
	* Google marketing
	* Editorials
	* Advertorial
	* Radio
	* Business brochures
	* Local newspaper adds
	* Mail box flyers
	* Business alliances
	* Host beneficiaries
	* Networking groups
	* Sporting club sponsorships
	* School promotions
	* Coupon booklet
 |  |  |
| 1. I have a bound business information pack that is used to win commercial and fleet work
 |  |  |
| **Website and online marketing** | **YES or NO****✓ 🗶** | **Items I will work on****✓** |
| 1. The business has an updated website with content covering common services and repairs
 |  |  |
| 1. I actively ensure that the website appears on page one for common Google search terms such as ‘mechanic Crows Nest’
 |  |  |
| 1. Customers have easy access on the website to make online bookings and enquiries
 |  |  |
| 1. The business is registered on common online directories
 |  |  |
| **Workshop, office and staff presentation** | **YES or NO****✓ 🗶** | **Items I will work on****✓** |
| 1. The business has clear and attractive signage clearly visible to passing traffic
 |  |  |
| 1. The office is modern and is always kept neat and tidy
 |  |  |
| 1. All business awards and certificates are neatly displayed in the office
 |  |  |
| 1. No junk or personal items are left lying around the workshop
 |  |  |
| 1. Signage attracts customers to enter the office and not the workshop
 |  |  |
| 1. A documented cleaning roster is in place and is followed by the staff
 |  |  |
| 1. There is a documented dress standard and uniform policy in place that staff follow
 |  |  |
| **Branding** | **YES or NO****✓ 🗶** | **Items I will work on****✓** |
| 1. The business logo is consistent across the business
 |  |  |
| 1. I have reviewed the branding checklist and determined what material will be used
 |  |  |
| 1. There is a documented branding process that staff follow
 |  |  |
| **Customer database management** | **YES or NO****✓ 🗶** | **Items I will work on****✓** |
| 1. The business has a computerised database management system
 |  |  |
| 1. Customer details are updated after each booking
 |  |  |
| 1. The database management system is used to:
	* Send 24hr booking reminders
	* Send thank you letters
	* Send service and repair reminders
	* Send seasonal offers and business information
 |  |  |
| 1. Everyone in the database is contacted at least once every six months
 |  |  |
| 1. The business has a regular newsletter that educates and keeps customers informed about the business
 |  |  |
| **Phone procedures** | **YES or NO****✓ 🗶** | **Items I will work on****✓** |
| * 1. Documented phone handling procedures are in place that staff follow
 |  |  |
| * 1. All staff have been adequately training in phone handling procedures
 |  |  |
| * 1. A phone script is incorporated into phone enquiry note pads
 |  |  |
| * 1. The sale is always assumed, and staff never deliver a recommendation followed by silence
 |  |  |
| * 1. The customer’s name and phone number are always confirmed when taking a booking
 |  |  |
| * 1. Staff always listen to a customer’s enquiry before putting them on hold
 |  |  |
| * 1. Lost phone enquiries are monitored
 |  |  |
| * 1. The phone system can handle multiple calls
 |  |  |
| **Customer service** | **YES or NO****✓ 🗶** | **Items I will work on****✓** |
| 1. Documented customer service procedures are in place that staff follow
 |  |  |
| 1. All staff have been adequately trained in customer service procedures
 |  |  |
| 1. Customers are always greeted with a smile and by name if possible
 |  |  |
| 1. During the car drop off process staff ensure that:
* the customer’s correct contact details are confirmed
* the scope of repairs is confirmed and the customer is asked if there are specific areas of concern
* the required pick up time is confirmed
* the repair and diagnostic process is explained to the customer so they have a clear understanding of what is going to happen as well as their financial commitment
 |  |  |
| 1. Customers are kept up to date on job progress and they are contacted when we promised to contact them
 |  |  |
| 1. Customer approval is always obtained prior to undertaking any repairs
 |  |  |
| 1. Prior to the customer arriving to pick up their car we ensure that they are clear on what work has been performed and the expected costs
 |  |  |
| 1. Overruns on a quote are communicated to customers ASAP
 |  |  |
| 1. Customers are always thanked for their business and they are always walked to the front door
 |  |  |
| 1. Customer service feedback forms are in place
 |  |  |
| 1. There is a process for evaluating customer complaints and mistakes
 |  |  |
| 1. There is a system in place for monitoring and discussing reworks
 |  |  |
| 1. There are quality controls in place to ensure work standards are maintained
 |  |  |
| **Sales** | **YES or NO****✓ 🗶** | **Items I will work on****✓** |
| 1. Documented sales procedures are in place that staff follow
 |  |  |
| 1. All service staff have been adequately trained in sales
 |  |  |
| 1. Customers are always advised of what needs repairing and not just what they ask for
 |  |  |
| 1. Customers are presented with options to solve their problems
 |  |  |
| 1. The business aims for wallet share and not market share
 |  |  |
| 1. The sales pitch on common service and repairs has been documented
 |  |  |
| 1. The business sells benefits and value – not parts and labour
 |  |  |
| 1. A documented system is in place for following up quotes
 |  |  |
| 1. Business brochures detailing the full range of services are given to every new customer
 |  |  |
| 1. The business provides a full range of services that utilises the workspace and minimises seasonal fluctuation
 |  |  |
| 1. A range of vehicle services is offered at different price points for varying customer requirements
 |  |  |
| 1. The business has completed a Unique Selling Position (USP) and Guarantee Assessment
 |  |  |
| 1. The business has a documented guarantee and warranty policy in place that is clearly communicated to customers
 |  |  |
| 1. An annual competitor analysis review is performed, covering:
* Strengths
* Weaknesses
* Value to customers
* Prices
* Range of services
 |  |  |
| 1. Labour rates are regularly reviewed
 |  |  |
| 1. Consumables charges are regularly reviewed to ensure they are covering actual expenses
 |  |  |
| **Invoicing and Point of Sale (POS)** | **YES or NO****✓ 🗶** | **Items I will work on****✓** |
| 1. Invoicing procedures are documented and followed by staff
 |  |  |
| 1. The POS system has common service and repair descriptions pre- written to streamline the invoicing process
 |  |  |
| 1. Regular computer back-ups are performed and the data is stored offsite
 |  |  |
| 1. Invoices cover everything that has been performed on all jobs
 |  |  |
| 1. Invoices are always prepared prior to customer arrival
 |  |  |
| 1. Customers are always taken through their invoice and staff offer to show them any replaced or damaged parts
 |  |  |
| 1. An allocated replaced-parts bin is available, so that parts can be easily shown to customers
 |  |  |
| **Job cards and job allocation** | **YES or NO****✓ 🗶** | **Items I will work on****✓** |
| 1. A documented job card process is in place that staff follow
 |  |  |
| 1. Well designed job cards are correctly filled out by all technicians
 |  |  |
| 1. A service checklist is in place that clearly displays what must be checked during a standard service
 |  |  |
| 1. Up-selling and cross-selling templates are in place to help technicians identify what needs repairing and not just what customers ask for
 |  |  |
| 1. Technicians document their start and finish times plus a recommended charge time on their job cards
 |  |  |
| 1. Technicians have access to each vehicle history via the POS or previous job cards
 |  |  |
| 1. Jobs cards are pre-prepared the night before
 |  |  |
| 1. A job progress board is in place that clearly displays who has been allocated what job and the status of each job
 |  |  |
| **Booking diary** | **YES or NO****✓ 🗶** | **Items I will work on****✓** |
| 1. A documented process is in place for staff to follow for taking bookings
 |  |  |
| 1. Booking times are confirmed with customers
 |  |  |
| 1. The booking diary process allows the monitoring of technician hours available, versus hours presold on bookings and carry overs
 |  |  |
| 1. A 24 hour reminder is given for the following day’s bookings
 |  |  |
| 1. Customers are contacted when they are one hour late for their scheduled booking
 |  |  |
| 1. If there are cancellations staff proactively try to bring future bookings forward
 |  |  |
| **Human resources** | **YES or NO****✓ 🗶** | **Items I will work on****✓** |
| 1. A documented staff recruitment procedure is in place
 |  |  |
| 1. A documented staff induction process is in place
 |  |  |
| 1. A documented staff appraisal system is in place
 |  |  |
| 1. All staff have training and improvement goals
 |  |  |
| 1. An up-to-date organisation chart is in place
 |  |  |
| 1. There are leaders in the business in key positions other than myself
 |  |  |
| 1. All tasks and duties have been allocated to someone via the responsibility schedule which is displayed for all staff to see
 |  |  |
| 1. Documented job agreements and job descriptions are in place
 |  |  |
| 1. Staffing contingency plans are in place for when staff are away
 |  |  |
| 1. A documented incentive scheme is in place
 |  |  |
| 1. Policies covering annual leave, personal leave, bereavement leave and overtime are place
 |  |  |
| 1. The business complies with OHS requirements and systems are in place to identify any issues
 |  |  |
| 1. A staff social club is established
 |  |  |
| **Staff meetings** | **YES or NO****✓ 🗶** | **Items I will work on****✓** |
| 1. Regular team meetings are held, following a planned agenda
 |  |  |
| 1. A staff suggestion board is in place to encourage staff ideas
 |  |  |
| 1. Monthly management meetings are held with key personnel
 |  |  |
| **Technician output targets** | **YES or NO****✓ 🗶** | **Items I will work on****✓** |
| 1. The business has a system in place that allows monitoring of individual technician hours invoiced and technician hours spent repairing vehicles
 |  |  |
| 1. All technicians have output targets that are clearly displayed
 |  |  |
| 1. A staff scoreboard is in place that keeps staff informed as to their actual output results
 |  |  |
| 1. Labour output results are reviewed and discussed as a team each week
 |  |  |
| **Credit control** | **YES or NO****✓ 🗶** | **Items I will work on****✓** |
| 1. A documented credit policy is in place for staff to follow
 |  |  |
| 1. A documented debt collection policy is in place
 |  |  |
| 1. The business has access to finance solutions which can be offered to customers
 |  |  |
| 1. Where appropriate, customers are asked when they drop off their vehicle how they will be paying their invoice
 |  |  |
| 1. Invoices are always ready prior to customer arrival to reduce the temptation to offer credit
 |  |  |
| **Tools and equipment** | **YES or NO****✓ 🗶** | **Items I will work on****✓** |
| 1. A staff member is nominated to be responsible for equipment maintenance
 |  |  |
| 1. The proper location of all tools and equipment is documented
 |  |  |
| 1. A documented equipment maintenance procedure is in place covering damaged equipment, equipment maintenance and equipment purchases
 |  |  |
| 1. An annual tool and equipment review is carried out to ensure that technicians can work efficiently
 |  |  |
| **Stock control** | **YES or NO****✓ 🗶** | **Items I will work on****✓** |
| 1. A staff member is nominated to be responsible for stock control
 |  |  |
| 1. A documented stock control procedure is in place, including stock usage, stock ordering and stock returns
 |  |  |
| 1. An annual stocktake is carried out
 |  |  |
| 1. An annual supplier review is carried out
 |  |  |
| **Insurance** | **YES or NO****✓ 🗶** | **Items I will work on****✓** |
| 1. Adequate insurances are in place covering:
* Workers’ compensation
* Public liability
* Product liability
* Business assets
* Business revenues
 |  |  |
| **Policies and procedures manual** | **YES or NO****✓ 🗶** | **Items I will work on****✓** |
| 1. All key tasks and routines are documented in a policies and procedures manual. Procedures could include:
	* Team overview
	* Opening procedures
	* Phone etiquette
	* Banking procedures
	* Filing accounts receivable
	* Timesheet and job card reconciliation
	* Work scheduling and job management
	* Write-offs policy
	* Point of sale transaction
	* Customer returns
	* Customer credits
	* Processing aged account payments
	* Debtor review
	* Purchasing and stock ordering
	* Receipt of stock
	* Entering supplier invoices
	* Stock purchased on credit cards
	* Supplier stock returns
	* Creditor review
	* Accounts payable end of month
	* End of day trading procedures
	* Workshop checklists
	* Management of work in progress
	* Quality control processes
	* Wages
	* Bank reconciliation procedures
	* End of month and end of quarter processes
 |  |  |
| 1. All documentation is regularly updated
 |  |  |
| 1. A process is in place to track and control all updates to documentation
 |  |  |
| 1. A documented exit strategy is in place for the business
 |  |  |
| **Planning** | **YES or NO****✓ 🗶** | **Items I will work on****✓** |
| 1. A business plan is in place for the business
 |  |  |
| 1. An annual review and planning afternoon is held
 |  |  |
| 1. There is an ultimate goal for the business that details the owner’s vision
 |  |  |
| 1. Three-year goals exist for the business
 |  |  |
| 1. 12-months goals and targets are in place for the business
 |  |  |
| 1. A planned exit strategy exists for the business
 |  |  |
| 1. Staff succession plans are in place for the business
 |  |  |