

TaT Biz Strategy Checklist



| Financial control | YES or NO ✓ ✘ | Items I will work on ✓ |
|--|----------------------------|----------------------------------|
| 1. I have a financial dashboard in place to monitor Key Performance Indicators (KPIs) | | |
| 2. I have a 12 month Profit & Loss (P&L) forecast budget in place and regularly monitor our progress towards it | | |
| 3. I know our daily, weekly, monthly and yearly sales breakeven points | | |
| 4. I have a monthly management meeting where financial results are reviewed | | |
| 5. The business has a gross percentage margin target and I monitor actual results weekly | | |
| 6. The business has an average \$ sale target and I monitor actual results weekly | | |
| 7. I understand the difference between cashflow and profit | | |
| 8. I understand the difference between margin and markup | | |
| 9. The business has an up to date and functioning point of sale (POS) software program | | |
| 10. I know how to correctly access reports within my POS or accounting program. | | |
| 11. 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 | | |
| 2. I have a long term view of the value of our customers and know their lifetime value | | |
| 3. I calculate and monitor the acquisition cost of different marketing campaigns | | |
| 4. I have stopped marketing that doesn't work | | |
| 5. I have marketing strategies in place that generate us enough new customers. Marketing options could include: <ul style="list-style-type: none"> • 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 | | |
| 6. 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 ✓ |
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| 1. The business has an updated website with content covering common services and repairs | | |
| 2. I actively ensure that the website appears on page one for common Google search terms such as 'mechanic Crows Nest' | | |
| 3. Customers have easy access on the website to make online bookings and enquiries | | |
| 4. 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 | | |
| 2. The office is modern and is always kept neat and tidy | | |
| 3. All business awards and certificates are neatly displayed in the office | | |
| 4. No junk or personal items are left lying around the workshop | | |
| 5. Signage attracts customers to enter the office and not the workshop | | |
| 6. A documented cleaning roster is in place and is followed by the staff | | |
| 7. 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 | | |
| 2. I have reviewed the branding checklist and determined what material will be used | | |
| 3. 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 | | |
| 2. Customer details are updated after each booking | | |
| 3. The database management system is used to: <ul style="list-style-type: none"> • Send 24hr booking reminders • Send thank you letters • Send service and repair reminders • Send seasonal offers and business information | | |
| 4. Everyone in the database is contacted at least once every six months | | |
| 5. 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 | | |
| 2. All staff have been adequately training in phone handling procedures | | |
| 3. A phone script is incorporated into phone enquiry note pads | | |
| 4. The sale is always assumed, and staff never deliver a recommendation followed by silence | | |
| 5. The customer's name and phone number are always confirmed when taking a booking | | |
| 6. Staff always listen to a customer's enquiry before putting them on hold | | |
| 7. Lost phone enquiries are monitored | | |
| 8. The phone system can handle multiple calls | | |

| Customer service | YES or NO ✓ ✘ | Items I will work on ✓ |
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| 1. Documented customer service procedures are in place that staff follow | | |
| 2. All staff have been adequately trained in customer service procedures | | |
| 3. Customers are always greeted with a smile and by name if possible | | |
| 4. During the car drop off process staff ensure that: <ul style="list-style-type: none"> • 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 | | |
| 5. Customers are kept up to date on job progress and they are contacted when we promised to contact them | | |
| 6. Customer approval is always obtained prior to undertaking any repairs | | |
| 7. 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 | | |
| 8. Overruns on a quote are communicated to customers ASAP | | |
| 9. Customers are always thanked for their business and they are always walked to the front door | | |
| 10. Customer service feedback forms are in place | | |
| 11. There is a process for evaluating customer complaints and mistakes | | |
| 12. There is a system in place for monitoring and discussing reworks | | |
| 13. 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 | | |
| 2. All service staff have been adequately trained in sales | | |
| 3. Customers are always advised of what needs repairing and not just what they ask for | | |
| 4. Customers are presented with options to solve their problems | | |
| 5. The business aims for wallet share and not market share | | |
| 6. The sales pitch on common service and repairs has been documented | | |
| 7. The business sells benefits and value – not parts and labour | | |
| 8. A documented system is in place for following up quotes | | |
| 9. Business brochures detailing the full range of services are given to every new customer | | |
| 10. The business provides a full range of services that utilises the workspace and minimises seasonal fluctuation | | |
| 11. A range of vehicle services is offered at different price points for varying customer requirements | | |
| 12. The business has completed a Unique Selling Position (USP) and Guarantee Assessment | | |
| 13. The business has a documented guarantee and warranty policy in place that is clearly communicated to customers | | |
| 14. An annual competitor analysis review is performed, covering: <ul style="list-style-type: none"> • Strengths • Weaknesses • Value to customers • Prices • Range of services | | |

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| 15. Labour rates are regularly reviewed | | |
| 16. 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 | | |
| 2. The POS system has common service and repair descriptions pre-written to streamline the invoicing process | | |
| 3. Regular computer back-ups are performed and the data is stored offsite | | |
| 4. Invoices cover everything that has been performed on all jobs | | |
| 5. Invoices are always prepared prior to customer arrival | | |
| 6. Customers are always taken through their invoice and staff offer to show them any replaced or damaged parts | | |
| 7. 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 | | |
| 2. Well designed job cards are correctly filled out by all technicians | | |
| 3. A service checklist is in place that clearly displays what must be checked during a standard service | | |
| 4. Up-selling and cross-selling templates are in place to help technicians identify what needs repairing and not just what customers ask for | | |
| 5. Technicians document their start and finish times plus a recommended charge time on their job cards | | |
| 6. Technicians have access to each vehicle history via the POS or previous job cards | | |
| 7. Jobs cards are pre-prepared the night before | | |
| 8. 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 | | |
| 2. Booking times are confirmed with customers | | |
| 3. The booking diary process allows the monitoring of technician hours available, versus hours presold on bookings and carry overs | | |
| 4. A 24 hour reminder is given for the following day's bookings | | |
| 5. Customers are contacted when they are one hour late for their scheduled booking | | |
| 6. 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 | | |
| 2. A documented staff induction process is in place | | |
| 3. A documented staff appraisal system is in place | | |
| 4. All staff have training and improvement goals | | |
| 5. An up-to-date organisation chart is in place | | |
| 6. There are leaders in the business in key positions other than myself | | |
| 7. All tasks and duties have been allocated to someone via the responsibility schedule which is displayed for all staff to see | | |

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| 8. Documented job agreements and job descriptions are in place | | |
| 9. Staffing contingency plans are in place for when staff are away | | |
| 10. A documented incentive scheme is in place | | |
| 11. Policies covering annual leave, personal leave, bereavement leave and overtime are place | | |
| 12. The business complies with OHS requirements and systems are in place to identify any issues | | |
| 13. A staff social club is established | | |
| Staff meetings | YES or NO ✓ x | Items I will work on ✓ |
| 1. Regular team meetings are held, following a planned agenda | | |
| 2. A staff suggestion board is in place to encourage staff ideas | | |
| 3. Monthly management meetings are held with key personnel | | |
| Technician output targets | YES or NO ✓ x | 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 | | |
| 2. All technicians have output targets that are clearly displayed | | |
| 3. A staff scoreboard is in place that keeps staff informed as to their actual output results | | |
| 4. Labour output results are reviewed and discussed as a team each week | | |
| Credit control | YES or NO ✓ x | Items I will work on ✓ |
| 1. A documented credit policy is in place for staff to follow | | |
| 2. A documented debt collection policy is in place | | |
| 3. The business has access to finance solutions which can be offered to customers | | |
| 4. Where appropriate, customers are asked when they drop off their vehicle how they will be paying their invoice | | |
| 5. Invoices are always ready prior to customer arrival to reduce the temptation to offer credit | | |
| Tools and equipment | YES or NO ✓ x | Items I will work on ✓ |
| 1. A staff member is nominated to be responsible for equipment maintenance | | |
| 2. The proper location of all tools and equipment is documented | | |
| 3. A documented equipment maintenance procedure is in place covering damaged equipment, equipment maintenance and equipment purchases | | |
| 4. An annual tool and equipment review is carried out to ensure that technicians can work efficiently | | |
| Stock control | YES or NO ✓ x | Items I will work on ✓ |
| 1. A staff member is nominated to be responsible for stock control | | |
| 2. A documented stock control procedure is in place, including stock usage, stock ordering and stock returns | | |
| 3. An annual stocktake is carried out | | |
| 4. An annual supplier review is carried out | | |
| Insurance | YES or NO ✓ x | Items I will work on ✓ |
| 1. Adequate insurances are in place covering: | | |

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| <ul style="list-style-type: none"> • Workers' compensation • Public liability • Product liability • Business assets • Business revenues | | |
| Policies and procedures manual | YES or NO | Items I will work on |
| | ✓ ✘ | ✓ |
| <p>1. All key tasks and routines are documented in a policies and procedures manual. Procedures could include:</p> <ul style="list-style-type: none"> • 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 | | |
| 2. All documentation is regularly updated | | |
| 3. A process is in place to track and control all updates to documentation | | |
| 4. 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 | | |
| 2. An annual review and planning afternoon is held | | |
| 3. There is an ultimate goal for the business that details the owner's vision | | |
| 4. Three-year goals exist for the business | | |
| 5. 12-months goals and targets are in place for the business | | |
| 6. A planned exit strategy exists for the business | | |
| 7. Staff succession plans are in place for the business | | |