



Other resources in step 8e:

- Sample planning diary

## Transform your booking diary into a planning diary

Most of the time-consuming and avoidable mistakes in a busy workshop can be traced backed to incorrect information recorded in the booking diary.

This is not surprising, because many of the diaries inspected in a recent TaT Biz review looked more like kindergarten workbooks than professional workshop diaries. Most diaries lacked information consistency, making it hard to plan for the incoming work.

Many workshops maintain a diary in the office and a white board or job allocation system out on the workshop floor.

For maximum efficiency, workshop managers should put a bit of effort into designing a written diary that plays the dual role of being a planning diary as well.

A planning diary includes the basic booking information but adds columns covering job planning and job progression. An example of a planning diary is available for download from the TaT Biz website at [www.tatbiz.net.au/resources](http://www.tatbiz.net.au/resources)

The planning has three broad categories:

1. Booking
2. Job preparation
3. Job progression

### Booking

The booking section is fairly self-explanatory and includes all the information gathered when taking a booking. Columns should be simple to navigate and column headings act as a reminder that the information should be filled in correctly.

Suggested columns are:

- Customer name (spell it correctly – that's very important)
- Phone number
- Vehicle model
- Job requirements
- Vehicle rego – so vehicle history can be retrieved prior to customer arrival
- Drop off time – to assist with daily planning
- Courtesy car required – if this service is offered

### **Job preparation**

The second section of the planning diary should include the routines that must be followed prior to the customer arrival. As each routine is completed, that entry can be ticked off, so everyone knows it has been done.

Suggested columns are:

- Parts ordered – do parts need to be ordered? Have they been ordered?
- Parts received – have the ordered parts been received?
- Job card prepared – has a job card been prepared?

### **Job progression**

The final section of the planning diary should include the administration routines that should be carried out for every customer. By requiring each routine to be ticked off on completion acts as a reminder.

Suggested columns are:

- Car arrival time
- Time required – when does the customer need the vehicle?
- Tech allocated – which technician has been allocated to the job?
- Progress call – has the customer been called for an update on job status including authorisation for the repairs and the budget?
- Called for pickup – has the customer been told that their vehicle is ready for collection?
- Invoiced – has the invoice been prepared?
- Picked up – has the vehicle been picked up?
- Overnight – is the vehicle staying overnight?

The planning diary example is designed to be printed on an A3 size sheet, to allow plenty of space for the insertion of information. Print out 30 copies and clip them together on the check-in desk.

When everyone is happy with it, the diary can be professionally printed in a bound book.

If a planning diary is correctly filled out all the time there should be a tangible improvement in workshop organisation and better staff awareness of the workshops schedule of work – fewer mistakes and far less stress will follow.

The place to start is [www.tatbiz.net.au/capricorn](http://www.tatbiz.net.au/capricorn).

*Just go for it!*