

# Dealership Process Review and Customer Experience Scoring



**Online Version:** <https://www.lqexpress.com/LQExpressEntry/LQDealerProcess170914/index.html>

**Access from:** [www.liqqidservicemenus.com](http://www.liqqidservicemenus.com)

Dealership Name / Franchises	
City	State
Website	
Dealership Contact	
Email / Phone	
Date completed	
Completed by	

### Size and Staffing

# of Customer Pay Repair Orders	
#’s divided between main shop and	separate quick lube if applicable
# of Service Advisors	
#’s divided between main shop and	separate quick lube if applicable
# of Technicians	
#’s divided between main shop and	separate quick lube if applicable

### Basic Key Performance Indicators

Labor Hours per Customer Pay RO	
Goal	
Effective Labor Rate / Door Rate	
Goal	
Service CSI and Trend	
Goal	

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## Appointment Setting

How is Your Inbound Appointment Call Handled?					
Process	Score		Compliance		
It Depends	0	Poor	N/A	10	20
Advisors	30	Fair	30	40	50
Central / Outsourced BDC	70	Good	60	70	80
Dedicated Service BDC / Appointment Coordinator	100	Excellent	90	100	
<b>Score:</b>			<b>Compliance:</b>		<b>%</b>
<b>How are Appointments Set / Score x Compliance %</b> <b>Customer Experience = %</b>					

How are Appointments Set?					
Process	Score		Compliance		
No Appointment Necessary - Come in When You Want	0	Poor	N/A	10	20
Random - Soft/Same Time Multiple Customers	30	Fair	30	40	50
Specific Time - With Appropriate Spread	70	Good	60	70	80
Assigned to Service Advisor - With Appropriate Spread	100	Excellent	90	100	
<b>Score:</b>			<b>Compliance:</b>		<b>%</b>
<b>How are Appointments Set / Score x Compliance %</b> <b>Customer Experience = %</b>					

## Pre Appointment Preparation

Who Prepares the Pre-appointment Package?					
Process	Score		Compliance		
None Prepared	0	Poor	N/A	10	20
Central BDC	30	Fair	30	40	50
Dedicated Service BDC / Appointment Coordinator	70	Good	60	70	80
Assigned Service Advisor	100	Excellent	90	100	
<b>Score:</b>			<b>Compliance:</b>		<b>%</b>
<b>Pre-appointment Package / Score x Compliance %</b> <b>Customer Experience = %</b>					

Is There an Appointment Confirmation?					
Process	Score		Compliance		
No specific appointment confirmation	0	Poor	N/A	10	20
Via email / text / phone	30	Fair	30	40	50
+ general recommended maintenance	70	Good	60	70	80
+ specific maintenance + other based on history	100	Excellent	90	100	
<b>Score:</b>			<b>Compliance:</b>		<b>%</b>
<b>Appointment Confirmation / Score x Compliance %</b> <b>Customer Experience = %</b>					

## Primary Opportunity

Where does the Customer Arrive?					
Process	Score		Compliance		
Finds parking somewhere and walks in	0	Poor	N/A	10	20
Designated Service Department Parking – walks in	30	Fair	30	40	50
Pulls into covered Service Specific Valet	70	Good	60	70	80
Pulls into Service Department Drive-through Check-in	100	Excellent	90	100	
<b>Score:</b>			<b>Compliance:</b>		<b>%</b>
<b>Customer Arrival / Score x Compliance %</b>					
<b>Customer Experience = %</b>					

Is there a Walkaround?					
Process	Score		Compliance		
Customer comes inside - no Walkaround	0	Poor	N/A	10	20
Mileage check - Walkaround without customer	30	Fair	30	40	50
Walkaround with customer by Valet/Porter	70	Good	60	70	80
Walkaround with customer by Service Advisor	100	Excellent	90	100	
<b>Score:</b>			<b>Compliance:</b>		<b>%</b>
<b>Walkaround / Score x Compliance %</b>					
<b>Customer Experience = %</b>					

## Advisor Opportunity

When is a Presentation Made on Additional Maintenance Services?					
Process	Score		Compliance		
No presentation - only what the customer came in on	0	Poor	N/A	10	20
Part of Multi-point inspection recommendations	30	Fair	30	40	50
At write-up before going into the shop	70	Good	60	70	80
Part of Appointment Confirmation + at write-up	100	Excellent	90	100	
<b>Score:</b>			<b>Compliance:</b>		<b>%</b>
<b>Additional Maintenance Services / Score x Compliance %</b>					
<b>Customer Experience = %</b>					

How are Maintenance Services Presented?					
Process	Score		Compliance		
No menu / Generic paper menu	0	Poor	N/A	10	20
Vehicle / Year / Mileage accurate - service list + price	30	Fair	30	40	50
+ Need/Benefits of all due & past due services detailed	70	Good	60	70	80
and presented live with customer on monitor or tablet	100	Excellent	90	100	
<b>Score:</b>			<b>Compliance:</b>		<b>%</b>
<b>Maintenance Services Presented / Score x Compliance %</b>					
<b>Customer Experience = %</b>					

## Technician Opportunity

When is the Multi-point Inspection Performed?					
Process	Score		Compliance		
No inspection	0	Poor	N/A	10	20
After requested work is completed	30	Fair	30	40	50
Before prime item diagnosis	70	Good	60	70	80
After prime diagnosis - ¼ time for known outcomes	100	Excellent	90	100	
<b>Score:</b>			<b>Compliance:</b>		<b>%</b>
<b>Inspection Performed / Score x Compliance %</b> <b>Customer Experience = %</b>					

When and How are Needed Repairs Presented?					
Process	Score		Compliance		
No presentation	0	Poor	N/A	10	20
Reviewed at vehicle pick-up	30	Fair	30	40	50
Verbally as soon as results are received	70	Good	60	70	80
+ email / text with supporting Need/Benefit materials	100	Excellent	90	100	
<b>Score:</b>			<b>Compliance:</b>		<b>%</b>
<b>Needed Repairs Presented / Score x Compliance %</b> <b>Customer Experience = %</b>					

## Active Delivery

Who Deals with the Customer at Vehicle Pick-up?					
Process	Score		Compliance		
Customer goes directly to cashier	0	Poor	N/A	10	20
Advisor first then points them to cashier	30	Fair	30	40	50
Advisor remains with customer to cashier	70	Good	60	70	80
Advisor is cashier - walks them to vehicle	100	Excellent	90	100	
<b>Score:</b>			<b>Compliance:</b>		<b>%</b>
<b>Vehicle Pick-up / Score x Compliance %</b> <b>Customer Experience = %</b>					

What does your Active Delivery Look Like?					
Process	Score		Compliance		
Customer just pays bill with cashier	0	Poor	N/A	10	20
Advisor reviews work performed / inspection results	30	Fair	30	40	50
+ upcoming maintenance services	70	Good	60	70	80
+ sets the next service appointment	100	Excellent	90	100	
<b>Score:</b>			<b>Compliance:</b>		<b>%</b>
<b>Active Delivery / Score x Compliance %</b> <b>Customer Experience = %</b>					

## Customer Follow-up

Who does your Immediate Follow-up?					
Process	Score		Compliance		
No follow-up	0	Poor	N/A	10	20
Email / text thanking them for visit	30	Fair	30	40	50
+ phone call from BDC	70	Good	60	70	80
+ phone call from advisor	100	Excellent	90	100	
<b>Score:</b>			<b>Compliance:</b>		%
<b>Immediate Follow-up / Score x Compliance %</b> <b>Customer Experience = %</b>					

What Does Your Ongoing Follow-up Look Like?					
Process	Score		Compliance		
No follow-up	0	Poor	N/A	10	20
Generic email / text / snail mail about service specials	30	Fair	30	40	50
+ follow-up on specific declined/deferred services	70	Good	60	70	80
+ follow-up to set/confirm next appointment	100	Excellent	90	100	
<b>Score:</b>			<b>Compliance:</b>		%
<b>Ongoing Follow-up / Score x Compliance %</b> <b>Customer Experience = %</b>					

## Process / Compliance / Customer Experience Rating Summary

	Process Rating	Compliance	Customer Experience
Inbound Call			
Appointment Setting			
Pre-appointment Package			
Appointment Confirmation			
Customer Arrival			
Walkaround			
Maintenance Services – When			
Maintenance Services – How			
Inspection Performed – When			
Needed Repairs Presented			
Vehicle Pick-up			
Active Delivery			
Immediate Follow-up			
Ongoing Follow-up			
<b>Column Total</b>			
<b>Divide by 14 for Average</b>			

**Optional Detail: Financial Key Performance Indicators (KPI) - Customer Pay RO's:**

	Last Quarter	Last Month	Dealer Goals
RO Count	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Labor hours / RO	<input type="text"/>	<input type="text"/>	<input type="text"/>
Labor Door Rate	<input type="text"/>	<input type="text"/>	<input type="text"/>
Effective Labor Rate (ELR)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Labor Sales	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Labor Gross Profit	<input type="text"/>	<input type="text"/>	<input type="text"/>
Labor Sales / RO	<input type="text"/>	<input type="text"/>	<input type="text"/>
Labor Gross Profit / RO	<input type="text"/>	<input type="text"/>	<input type="text"/>
Labor Gross Profit %	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Parts Sales	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Parts Gross Profit	<input type="text"/>	<input type="text"/>	<input type="text"/>
Parts Sale / RO	<input type="text"/>	<input type="text"/>	<input type="text"/>
Parts Gross Profit / RO	<input type="text"/>	<input type="text"/>	<input type="text"/>
Parts Gross Profit %	<input type="text"/>	<input type="text"/>	<input type="text"/>
Labor & Parts Sale / RO	<input type="text"/>	<input type="text"/>	<input type="text"/>
Labor & Parts Gross Profit / RO	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Repair Order (RO) Analysis - Minimum 50 Customer Pay RO's**

	Results
• Percentage of One item repair orders	<input type="text"/>
• Percentage of RO's with a signed service menu attached	<input type="text"/>
• Percentage of RO's with a signed inspection report attached	<input type="text"/>
• Percentage of RO's signed by the customer	<input type="text"/>