Walk Around Sheet
Keeping in Touch With Your Technicians

By Ross Atkinson
PROBLEM

Maintaining open, two-way lines of communication within your service department

A key part of customer service involves keeping your promises. Promises build trust, understanding, and customer loyalty, and customers will evaluate your business based on how well you deliver on the promises you make. Managing your technicians and keeping on top of what’s happening in your shop is an important part of keeping promises and having a successful service business, and you will enhance your customers’ experience by being able to provide honest, accurate quotes and repair times.

One factor working against this goal is that in general, your technicians are paid to complete their assigned service jobs and not necessarily to keep management informed of problems that have arisen, whether those problems are within their control or not. For example, if completion of a job is delayed due to a backordered part, is anyone going to be aware of this besides the technician and your parts department?

The best way to avoid this and similar situations in your shop is to keep your service supervisor “in the know” when it comes to the jobs your technicians are working on, allowing management to be proactive about dealing with any issues that may prevent work from being completed on time. This will provide the opportunity to take appropriate action to deal with the issue sooner, rather than later. That action might include notifying the customer of the delay and providing an updated completion date, or assigning additional technicians to the job to meet the promise that was originally made. In most cases, customers understand that unforeseen circumstances may arise that prevent the work from being completed as promised, and simply appreciate being kept in the loop with the knowledge that your service department is working on the issue in an expedient, professional manner.

Considering the obvious benefits of maintaining open lines of communication within your service department, what’s the best way that PFW IntelliDealer can help you accomplish this?

SOLUTION

The Walk Around Sheet

Embedded in the core Product Support – Service module of IntelliDealer, there is an application called Work Order Assignment, located within the Supervisor option. The purpose of this application is to assist with three main tasks within the service department:

- Assigning work to individual technicians
- Facilitating conversation between the service supervisor and technicians
- Updating work orders with the most current information available

The ability to facilitate a discussion between the supervisor and a technician starts with the production of a Walk Around Sheet, and the key to a manageable Walk Around Sheet is the assignment of a reasonable amount of work to a particular technician (no more than three or four work orders, or three or four days’ worth of work). Having a limited number of jobs assigned to the technician at any one time will also help them manage their workload, especially if they are using IntelliTech.

With a Walk Around Sheet, the idea is that the supervisor prints one off each morning, and uses it as a basis for a conversation with each technician regarding the jobs that are currently assigned. Determining whether or not the job can be completed on time and within the budgeted hours is the primary concern. If the job is not on schedule, and a judgement is made that it cannot be completed on time by that technician, actions can be taken to deal with this situation by, for example, extending the estimated completion date (notifying the customer accordingly), and/or adjusting the number of technicians (or amount of overtime) in order to get the job completed as promised.

To allow the service supervisor to have a knowledgeable conversation about each job with the technician assigned to it, the Walk Around Sheet (see sample image below) is designed to show key pieces of information, sorted in priority sequence. These include: work order number, model number, customer name, priority, downtime delay codes (DDC), start date, estimated completion date, hours worked, hours charged, and a brief description of the job. Additional room is left below each job listing so that hand-written notes and adjustments can be made by the supervisor.

After discussing individual jobs with the technicians and collecting and recording any changes or additional information on the Walk Around Sheet, the supervisor can take advantage of the Work Order Assignment screen to key any adjustments and update the work orders (without being required to edit each work order individually). At this point, decisions can be made with regards to contacting the customer and/or assigning additional technicians, as necessary.

By keeping in touch with technicians, and by keeping on top of the status of the current jobs being worked on in the shop, the service supervisor can more easily catch issues that may delay the completion of jobs and address them before those delays impact customer satisfaction. The Work Around Sheet is a key tool available within PFW IntelliDealer to help the service department provide the best customer service possible.
Koenig Equipment, Inc.

For a real-world example of how a dealership was able to make excellent use of the Walk Around Sheet process, let’s take a look at the experience of Koenig Equipment, Inc. Koenig is a John Deere dealer with stores in Ohio and Indiana, and began training its service teams on the use of the process in July, 2011.

Currently, at their stores they conduct two Walk Around sessions per day, both first thing in the morning and again soon after lunch. At their Ag stores (with longer work order times and more work order segments), the service manager conducts the morning session, with the lead technician doing the afternoon session as an update. In Koenig’s lawn and garden shops, the service managers perform both Walk Around sessions, as the afternoon work orders are usually different than those being worked on in the morning. Any editing of information is done by the branch administrative assistant, who also acts as a service writer.

When implementing the Work Around Sheet process, Koenig began with the stores that had the lowest performance in terms of managing the flow of work orders through their service departments. As Matt McConnell, Koenig’s Director of Service Operations, points out, “It was no coincidence that these stores were also the highest-volume locations, so an improvement at those locations could have a big impact on overall performance.”

And how did beginning to use the Work Around Sheet change things at Koenig? McConnell replies, “We observed some remarkable results.”

Specifically, their two worst stores (in terms of flow) achieved double-digit enhancement in revenue recovery (one from 74.5% and the other from 84.1% in the month that the Work Around Sheet process was implemented), with both posting revenue recovery of over 101% during the month that the training occurred. Both stores averaged about 95% through the rest of the year, and finished with double-digit improvements in their YTD averages. Even with only a partial, branch-staggered rollout of the Work Around Sheet process during the last four months of Koenig’s fiscal year, they were able to increase aggregate revenue recovery by 4.3% for the entire fiscal year, leading McConnell to point out, “Do the math for an entire year – it will blow your mind!”

In addition to gains in technician revenue recovery, Koenig was also able to reduce write-offs due to lost time. Says McConnell, “Before the Walk Around Sheet process was brought in (eight months into our fiscal year), we wrote off 2.13% of our labor hours, on average, across our 11 facilities. Following the introduction of the Walk Around Sheet, that number dropped to 1.28%. Had we introduced the process at all stores at the same time, I believe we could have gotten the average under 1%.”

Because the Walk Around Sheet process focuses on whether or not a job is on schedule (vs. the promised completion date) and on pace (vs. the estimate labor hours), Koenig is able to review both the expectations for the job as well as its actual progress to identify when additional work was needed, and when a technician was struggling with a difficult diagnosis or repair. “We always found these things out eventually,” says McConnell, “but now we discover them early in the process when there is still time to develop a recovery plan.”

Importantly, Koenig discovered that most of their lost time was caused by technicians performing more work than what was originally quoted. “We can now call the customer and get approval for the additional repairs, rather than performing the work and hoping to get paid for it in the end,” McConnell points out.

A further improvement made by Koenig was to add a parts person to the process, who accompanies the service manager during the Walk Around and answers questions about parts delivery timing or backorder delays. Says McConnell, “Having him involved in the conversation pulls our parts department into the process, and allows them to offer solutions. It also makes them aware of the sensitivity of the service schedule and motivates them to expedite a part required on a particularly sensitive work order.”

“It’s amazing what our people can do when they have the information they need to make decisions. In the end, it all supports the customer, by allowing us to deliver the quality we want while meeting deadlines.” - McConnell

Although Koenig’s service managers initially felt that the Work Around Sheet process duplicated steps they were already taking, they quickly discovered that a lot of details can slip through the cracks of a busy service department. In the end, they agreed that informed technicians and improved communication between everyone involved – the service manager, technicians, and customers – give better results. With that communication having improved in content, frequency, and quality, all parties are happier knowing that realistic expectations can be set, and met.
About the Author
Ross Atkinson sits on PFW’s Product Management Team as Director, System Architecture. With almost 25 years of experience with PFW, Ross’ focus is on the strategic development of the IntelliDealer DMS. Helping clients use the many “Hidden Gems” that the system offers is his passion!

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