

Reservation & Pre-Work Checklist

The objective of the Reservation & Pre-Work is to **Engage the Customer** with **Enthusiasm** while **Exchanging Information**.

Your actions here exhibit your professionalism and set the stage for a great experience for your customer.

Use the checklist below to remember what actions to take before the customer arrives for their appointment.

<input checked="" type="checkbox"/> ACTION	EXAMPLES
<input type="checkbox"/> Create detailed appointment when the driver calls	<p>Give options, such as:</p> <ul style="list-style-type: none">• Tuesday or Wednesday• Morning or afternoon• 9 or 11 <p>Collect the issue in <u>customer's own words</u> and read back to them word for word.</p> <p>Verify that customer is in your records</p> <p>Confirm <u>all</u> contact information</p> <p>Capture approximate mileage of vehicle</p>
<input type="checkbox"/> Pull Service Record and Transaction History	<p>Print out services performed on prior visits</p> <p>Print a pre-work order & attach the service record</p>
<input type="checkbox"/> Validate parts availability	<p>Confirm known parts/supplies are available or order for arrival prior to reservation</p> <p>Note other maintenance or repairs that can be sold while customer is here</p>
<input type="checkbox"/> Confirm appointment with customer	<p>Phone customer to confirm day/time and reschedule as necessary</p>

Want more detailed help with these concepts? Call DealerBoost at 512.507.9882 or send an email to support@dealer-boost.com to find out about our in-person coaching services.