

# The Bullet Proof File

Presented by

**Mark Olson**



Your Partner in Collision Repair to  
Get it right the first time!



You are going to get shot at.  
Can your shop withstand it?  
Are your files bullet proof?



# Scenario - that will happen at some point

Imagine that you get that dreaded phone call/letter, get served or customer comes in that informing you there is an issue with a vehicle. Even worse, someone has been injured or killed. What you say and do next can have a big impact on your outcome.

- 1- Pull your file before you try an answer anything from memory.
- 2- Take detailed notes of the complaints that they have - and listen and take notes, there will be time for you to talk. If you are served, seek council. **Seeking council is good advice on anything major.**
- 3- Get the issue to a person of power (one that can make the financial decision)
- 3- If you can resolve easily with re-repair - do so. Even if you think you are OK, most calls we get from shops that try to deny small things, causes customers to hire experts that will find things. When this happens, there is a 99% that buying the vehicle is the best option.



# Forms - do you have them?

New User Registration: Sign Up | Login

RESOURCE CENTER

REGISTER FOR A COURSE

About MVP | Contact Us

HOME

EXPLORE OUR PROGRAMS

LEAN FOR COLLISION

BUSINESS COURSES

CONFERENCES

MARKET YOUR SHOP

TOOLS & SERVICES

ABOUT MVP



Charley Hutton  
Talks MVP  
See what Charley is  
saying about

the Value of MVP

## EXPLORE OUR PROGRAMS

Lean For Collision

Business Courses

Conferences

Market Your Shop

Tools & Services



## Market Your Shop

*Proven Approach for Growing Your Business*

In this rapidly changing world, new marketing technologies and the popularity of social media are impacting how consumers find and select whom they do business with. These technologies are transforming the way customers access information and form opinions. Today's collision center can no longer rely solely on traditional marketing techniques. Staying competitive will require a re-engineered sales and marketing strategy that takes advantage of the latest strategies, tools, and systems.

Back  
a Level

Get More Details  
Market Your Shop

Continue Explore  
Our Programs



### LEAN FOR COLLISION

Welcome

Green Belt Training

White Belt Training

Commercial Truck Green Belt Training

### BUSINESS COURSES

Welcome

Administration

Production

Fundamentals of Estimating

Advanced Estimating 2010

### CONFERENCES

Welcome

Agenda

Keynote Speakers

Breakout Sessions

Gala Dinner Entertainment

### MARKET YOUR SHOP

Welcome

Continuing Education (CE)

Precision Marketing Report

Marketing Courses

### TOOLS & SERVICES

Welcome

Layout & Design

Consulting Services

Rapid Improvement Workshops

Resource Center



body shop forms



Sign in

All Images Shopping Maps News More Settings Tools

SafeSearch

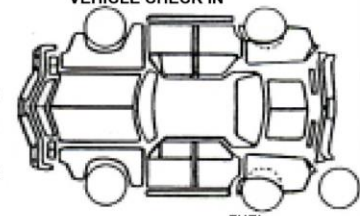
- customer information
- printable
- checklist
- intake
- authorization
- vehicle inspection
- template
- quality control
- pre rental
- detail
- insurance

# Authorization Form

- Customer is your client not insurance company
- May be part of check in form or stand alone
- Must comply with your state laws
- Are you scanning? - May need release to scan
- May need release to share information with insurance co.
- Check state laws on signature (wet or phone authorization?).
- Is person who drops off car authorized to sign (kids spouse etc.)
- Contact about additionals.
- Vary from state to state
- Test drive waiver?
- Vehicle insurance - or garage keepers

00000 US Highway 19 North  
 Clearwater, Florida 33761  
 Phone (000) 000-0000 Fax (000) 000-0000

State of Florida  
 Registration # MV-00000

CUSTOMER				HAT#				REPEAT REPAIR <input type="checkbox"/> YES <input type="checkbox"/> NO		DATE	
ADDRESS				MILAGE IN / OUT				JOB LINE NO.'S		LABOR RATE	
CITY				STATE		ZIP		APPOINTMENT <input type="checkbox"/> YES <input type="checkbox"/> NO		RETAIN PARTS <input type="checkbox"/> YES <input type="checkbox"/> NO	
HOME PHONE				BUSINESS PHONE				METHOD OF PAYMENT <input type="checkbox"/> CASH <input type="checkbox"/> C.C.		ORIGINAL ESTIMATE	
E-MAIL ADDRESS								<input type="checkbox"/> CHECK TYPE		\$	
								IF THE CHARGE FOR PREPARING AN ESTIMATE CANNOT BE DETERMINED		REVISED ESTIMATE	
								THE CHARGE WILL BE BASED ON:			
								<input type="checkbox"/> HOURLY <input type="checkbox"/> FLAT RATE <input type="checkbox"/> BOTH			
MAKE				MODEL				YEAR			
LICENSE				STATE		EXT. COLOR		INT. COLOR			
COLOR CODE		DSO		TRIM CODE		PROD. DATE		AXLE		TRANS.	
TIME IN		PROMISE TIME		PRE-APPROVED AMOUNT							
ADD'L PERSON WHO MAY AUTHORIZE WORK											
NAME				PHONE							
VEHICLE IDENTIFICATION NUMBER											
<b>CUSTOMER CONCERNS</b>											
<b>VEHICLE CHECK IN</b> <div style="display: flex; justify-content: space-between;"> <div style="width: 30%;"> <p><b>DAMAGE</b></p> <p>C-Chips            S - Scratch            D - Dent            M - Missing            T - Tear            G - Glass            Damage</p> </div> <div style="width: 40%; text-align: center;">  <p>FUEL</p> <p>E 1/4 1/2 3/4 F</p> </div> <div style="width: 25%;"> <p>KEYLESS CODE _____</p> <p>RADIO STATION _____</p> </div> </div>											
<b>TERMS: STRICTLY CASH UNLESS PRIOR ARRANGEMENTS MADE</b>											
<p>"I hereby authorize the repair work hereinafter set forth to be done along with the necessary material and agree that you are not responsible for loss or damage to vehicle or articles left in vehicle in case of fire, theft, or any other cause beyond your control or for any delays caused by unavailability of parts or delays in parts shipments by the supplier or transporter. I hereby grant you and/or your employees permission to operate the vehicle herein described on streets, highways or elsewhere for the purpose of testing and/or inspection. An express mechanic's lien is hereby acknowledged on below vehicle to secure the amount of repairs thereto." In the event sums are due and owing to the seller/dealer are not paid and this matter is forwarded to our attorney for collection, customer agrees to pay cost of collection including attorney fees.</p> <p><b>X</b></p>											
<p>PLEASE READ CAREFULLY, CHECK ONE OF THE STATEMENTS BELOW, AND SIGN: I UNDERSTAND THAT UNDER STATE LAW, I AM ENTITLED TO A WRITTEN ESTIMATE, IF MY FINAL BILL WILL EXCEED \$100.00.</p> <p>_____ I REQUEST A WRITTEN ESTIMATE.</p> <p>_____ I DO NOT REQUEST A WRITTEN ESTIMATE AS LONG AS THE REPAIR COSTS DO NOT EXCEED \$_____. THE SHOP MAY NOT EXCEED THIS AMOUNT WITHOUT MY WRITTEN OR ORAL APPROVAL.</p> <p>_____ I DO NOT REQUEST A WRITTEN ESTIMATE.</p>											
Signed: _____ Date: _____											
<p><small>NOTE: You will be notified upon completion of any diagnostic work necessary to estimate the cost of repair, or if the actual charges exceed the written estimate including any additional charges, by \$10 or 10% whichever is greater, not to exceed \$50. If you are so notified, you may orally or in writing authorize, modify or cancel the order for repair.</small></p> <p><small><b>CANCELLATION OF REPAIRS:</b> In the event the customer cancels the repair work, the vehicle shall be reassembled in a condition reasonably similar as when received unless the customer waives reassembly or the reassembled vehicle would be unsafe. The repair shop may charge for the cost of teardown, the cost of parts and labor to replace items destroyed by teardown and the cost to reassemble the vehicle.</small></p> <p><small><b>LIMITED WARRANTY:</b> The only warranties applying to the part(s) installed in accordance with this estimate and/or repair order are those that may be offered by the manufacturer. The seller hereby expressly disclaims all warranties, either express or implied, including any implied warranty of merchantability or fitness for a particular purpose, and neither assumes nor authorizes any other person to assume for it any liability in connection with the sale of products or service sold under the terms of this estimate and/or repair order. Parts and labor are guaranteed for 12 months or 12,000 miles, whichever comes first. Seller does not guarantee that the work performed in accordance with this estimate and/or repair order will correct any problem specified on the description of the complaint.</small></p>											
<p><b>STORAGE CHARGES:</b> No storage charges shall accrue or be due and payable for a period of 3 working days from the date you are notified that the work on your vehicle has been completed. After that date, the daily charge for storage of your vehicle will be \$15.00.</p>											
<p><b>Miscellaneous Shop Supplies and Hazardous Waste Disposal Charges:</b>  <small>*This charge represents costs and profits to the motor vehicle repair facility for miscellaneous shop supplies or waste disposal. [s. 559.904(4)]. The state of Florida requires a \$1.00 fee to be collected for each new tire sold in the state [s. 403.718], and a \$1.50 fee to be collected for each new or remanufactured battery sold in the state [s. 403.7185].</small></p>											

# Scanning Authorization Form Sample

## Pre and Post-Repair Diagnostic Scan Work Authorization Form

This diagnostic work authorization form grants [repair shop] permission to perform a pre and post-repair diagnostic scan on your vehicle as part of the repair process. By accepting this procedure, you acknowledge the terms and conditions listed below. If you choose to decline this procedure, you acknowledge the repair shop will not be held liable for problems with the vehicle that cannot be detected without proper diagnostic scans.

### Definition:

Pre-Repair diagnostic scan - this is a complete health check of your vehicle and provides the repair shop (and insurance company, if applicable) a complete report on the number of computer modules on board, as well as any diagnostic trouble codes (DTC's) that could indicate pre-accident and/or accident related damage. This essential step eliminates unnecessary delays waiting for parts and/or additional insurance authorizations, and identifies issues with the vehicle that could be missed without a pre-repair diagnostic scan.

Post-Repair diagnostic scan - this step ensures that all systems on your vehicle are in proper working order prior to delivery. It is important to note that the majority of DTC's do not result in a malfunction indicator lamp (dashboard light). Failure to perform a post-repair scan by trained professionals with factory scan tools significantly increases the risk that your vehicle may be returned with malfunctioning, or inoperable, safety and convenience systems. A post-repair diagnostic scan is the single best way to ensure that your vehicle is returned to pre-incident condition.

### Data privacy:

In the process of performing a diagnostic scan, [repair shop] will collect important historical vehicle data, including in some cases, the date, time and mileage of when a DTC was created. This information is helpful in understanding if a problem is accident related or pre-existing. It is possible this information will be shared with your insurance company. Your acceptance of this procedure grants [repair shop] permission to share this information with others, including your insurance company. No personally identifiable information is collected during the pre or post-repair scan.

### Disclaimers:

▫ Diagnosing vehicles has limitations. In some cases, modified vehicles may give false DTC's. [repair shop] and its employees cannot be responsible for omission or errors caused by the information provided, or not provided, by the customer. ▫ All work performed by [repair shop] will be in accordance with Original Equipment Manufacturer (OEM) specifications and defaults. This includes, but is not limited to, any repairs, calibrations, integrations, programming and set points as indicated by the OEM by way of their designated sources of such information. [repair shop] is not responsible for any damage that results from, or to, aftermarket parts, or modifications from OEM factory specifications. ▫ Variations between vehicles, according to the make model and trim level, may limit the information captured during a pre or post-repair diagnostic scan. ▫ Depending on the condition of the vehicle, and the extent of the damage, and other factors outside the control of [repair center], a factory scan tool may not see every system on the vehicle being scanned. ▫ [repair shop] is not responsible for any changes made to the vehicle after the vehicle leaves the shop.

While [repair shop] recommends a pre and post-repair scan on every vehicle, it is especially important to perform these functions on newer, highly optioned, heavily damaged vehicles. Failure to do so significantly increases the risk to the vehicle owner and occupants.


< Signature Page to Follow >

**Yes** \_\_\_\_\_ (initial) I accept having a pre and post-repair diagnostic scan performed on my vehicle, even if my insurance coverage does not pay for these procedures. In some instances, insurance coverage may not be determined until after the diagnostic scans are performed.

**No** \_\_\_\_\_ (initial) I decline having a pre and post-repair diagnostic scan on my vehicle, though they were recommended by [repair shop] and the need for them was explained to me. I understand [repair shop] will not be held liable for any hidden damage that could not be detected during the repair process as a result of not having performed a pre-repair scan. I also understand certain systems may not function correctly, or at all, following the repair, and it would be impossible to detect issues with those systems without a post-repair diagnostic scan. I release [repair shop] from all liability for any pre-accident issues, hidden damage or post repair malfunctions that would have been discovered, had I consented to having pre and post-repair diagnostic scans performed.



# Vehicle Check in Form (Intake)



**Your Company Name**  
123 Company Lane New York, NY 12345  
Tel. (123) 456-7890  
Fax. (123) 456-7890

Date \_\_\_\_\_  
 Truck No. \_\_\_\_\_  
 Trip No. \_\_\_\_\_

**Section A** (Must be completed by the customer or releasee of the vehicle)  
Customer hereby requests the broker to make arrangement for the transport of the following described vehicle from Origin to Destination with carrier selected by Broker and subject to the terms and conditions on back of this form.

**ORIGIN**

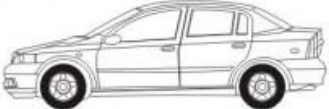

 Consignor: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City, State, Zip: \_\_\_\_\_  
 Tel. (Home): \_\_\_\_\_  
 Tel. (Work): \_\_\_\_\_  
 Cell: \_\_\_\_\_



**DESTINATION**

 Consignor: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City, State, Zip: \_\_\_\_\_  
 Tel. (Home): \_\_\_\_\_  
 Tel. (Work): \_\_\_\_\_  
 Cell: \_\_\_\_\_

**Section B** Bill \_\_\_\_\_ C.O.D. \_\_\_\_\_  
Check, cash or check or money order only

Car \_\_\_\_\_ SUV \_\_\_\_\_ Van \_\_\_\_\_  
 Year: \_\_\_\_\_ Make: \_\_\_\_\_ Model: \_\_\_\_\_ Color: \_\_\_\_\_ VIN: \_\_\_\_\_

B - BENT  
 BB - BUFFER BURNED  
 BR - BROKEN  
 C - CUT  
 CR - CRACKED  
 D - DENTED  
 F - FADED  
 FF - FOREIGN FLUID  
 G - GOUGED  
 L - LOOSE  
 M - MISSING  
 P - PITTED  
 PC - PUNCTURE CHIP  
 R - RUBBED  
 RU - RUST  
 S - SCRATCHED  
 SL - SOLED  
 ST - STAINED  
 T - TORN

During transport, vehicles and vehicle equipment may cease to properly through no fault of the transporter; the transporter will be responsible for damage directly caused by the driver; the transporter WILL NOT be responsible for damage NOT caused by Driver; is NOT responsible for any luggage left in the car.

I agree with the Driver's assessment of the condition of this vehicle \_\_\_\_\_ Initial  
 I agree with the terms and conditions on the back of this page \_\_\_\_\_ Initial

Driver cannot make proper inspection:  
 Night Time Pick-up \_\_\_\_\_ Initial Rain \_\_\_\_\_ Initial  
 Snow \_\_\_\_\_ Initial Dirty \_\_\_\_\_ Initial  
 Not DOT \_\_\_\_\_ Initial No Driving Test \_\_\_\_\_ Initial

**CUSTOMER'S SIGNATURE UPON DELIVERY**  
 The Customer/Consignor hereby acknowledges and represents that he or she has received this Vehicle in the same conditions as it had previously been delivered to transporters except as noted above, and hereby releases the Broker and Transporter from any claims for damage to the Vehicle. Will not honor claims made after driver's Signature.









Customer's Signature (Releasee) \_\_\_\_\_ Date \_\_\_\_\_

Customer's Signature \_\_\_\_\_ Date \_\_\_\_\_

## VEHICLE CHECK IN REPORT

Name _____		Date _____	Written By _____	
Address _____		City _____	State, Zip _____	Received _____ AM _____ PM
Business Phone _____		Home Phone _____		Promised By _____ AM _____ PM
Email _____		Cell Phone _____		Ins. Co. _____
Fuel _____ F _____ 3/4 _____ 1/2 _____ 1/4	Year _____	Make _____	Model _____	Ins. Phone _____
Odometer In _____		Odometer Out _____	VIN _____	Claim No. _____
				Adjuster _____

EXTERIOR CONDITION

O=Operational	D=Damaged	✓=No Visible Damage	M=Item(s) Missing	N/A=Not Applicable
R=Repairs Needed				

INTERIOR CONDITION				EQUIPMENT				
	LF	LR	RF	RR				
Door Panels	_____	_____	_____	_____	Radio Code	_____	Running Boards	_____
Seats	_____	_____	_____	_____	Radio / Antenna	_____	Mud Guards	_____
Console	_____	_____	_____	_____	Phone / Antenna	_____	Wipers	_____
Dash Board	_____	_____	_____	_____	C. B. / Antenna	_____	Spare Tire	_____
Headliner	_____	_____	_____	_____	Horn	_____	Wheel Covers	_____
Carpet	_____	_____	_____	_____	Sun Roof	_____	Wheel Lock	_____
Floormats (# of _____)	_____	_____	_____	_____	Power Windows	_____	Jack	_____
Radio	_____	_____	_____	_____	Power Locks	_____	Pinstripe/Paint	_____
Mirrors	_____	_____	_____	_____	Climate Control	_____	Windshield	_____
Interior Lights	_____	_____	_____	_____	Exterior Lights	_____	GPS	_____
					Cell Phone	_____	DVD Player	_____
					Alarm System	_____	Alarm Code	_____

PAINT CONDITION			
Excess Scratches	_____	Fade	_____
Checking	_____	Color Match Off	_____
		Excess Scratches	_____
		Checking	_____
		Overspray	_____
		Hail Damage	_____
		Acid Rain	_____

Notes: \_\_\_\_\_


\_\_\_\_\_

\_\_\_\_\_

We have recorded any damage on your vehicle that is unrelated to the authorized repairs. By having yourself and our representative review these areas together, we can both be assured of the best possible service. We have indicated each area of damage or blemish along with other miscellaneous items, please feel free to assist us while we fill out this form.

Inspected By \_\_\_\_\_ Date \_\_\_\_\_

Customer Signature \_\_\_\_\_ Date \_\_\_\_\_

Item # 605      White: Customer Copy      Canary: Repair Order File      MADE IN U.S.A. 



# Adjuster/Customer/Inspector Sign in

- 1- All adjusters/customers/inspectors need to sign in with a form that is a legal release of liability for injury, video recording, photographic recording and audio recording.
- 2- Name, company, representing, vehicle, time in, time out.
- 3- All must comply with Personal Protection Equipment (Respirators, dust masks, eye protection, skin and hearing)



# Running Log of notes

- 1- All conversations with customer
- 2- All conversation with adjusters
- 3- All conversations with parts vendors etc.

Can be done in a log fashion with management system for can be done in a simple word format then saved to electronic file.

Each entry must include date and time, and preferably the person making the entry.



# Internal notes

- All communications should be electronic or in writing.
- All supplemental requests from tech to office
- All responses to tech on supplement (approved / not approved) supplement form is fine.
- Parts arrival and backorder notes
- Anything written needs to be in the file



# Photos

## Minimum Stages

1. Intake photo entire car and interior
2. Photos of vehicle damage
3. After teardown and supplemental damage
4. Measuring system on vehicle
5. Measurements Initial and after each pull (of screen)
6. Hook ups
7. Test welds and destructive testing with RO number
8. Section and cut locations
9. Welding done and ready for paint - before primer
10. In paint before primer
11. In paint with primer masked before refinish
12. Initial spray out panel and all tints that were sprayed out with RO number
13. Painted before unmasked
14. Back in body
15. Final vehicle complete ready for delivery (entire vehicle)



# Tools and documentation aids



## 104 Roof Welds Missing



Arrows Mark Welded Roof Points  
On Original Honda Fit



Arrows Mark Glued Roof Separation  
On Accident Vehicle

# OEM Information

- Must be actual OEM information, not from supplier or general
- Can be Mitchell, Alldata, C1 - and OEM is best for repair
- Must be pulled at time of estimate and estimate written with information
- Must include all operations not just cut areas (resets, checks etc...)
- Signed off and reviewed as appropriate (Manager / Production manager / Etc.)
- Photograph put in file or scanned with signatures after job completion
- Must be followed and verified



# Product Documentation

- Anything specified by the OEM should be documented (photograph)
- Urethanes for windshields have expiration dates
- Adhesives have expiration dates
- Put a copy of paint mixing label in file (scan or photograph)



**EXPIRATION DATE**  
**July 7, 2018**





# Quality Control Forms /Systems

- 1- Do not make too complicated (keep it simple)
- 2- Can be Stage check
- 3- Can be peer review
- 4- We recommend doing by stage or grouping
- 5- Many variations to the process, have to customize for your shop.

**Biggest issue is not using system as designed,  
and the form is pencil whipped**



# Handwriting Check

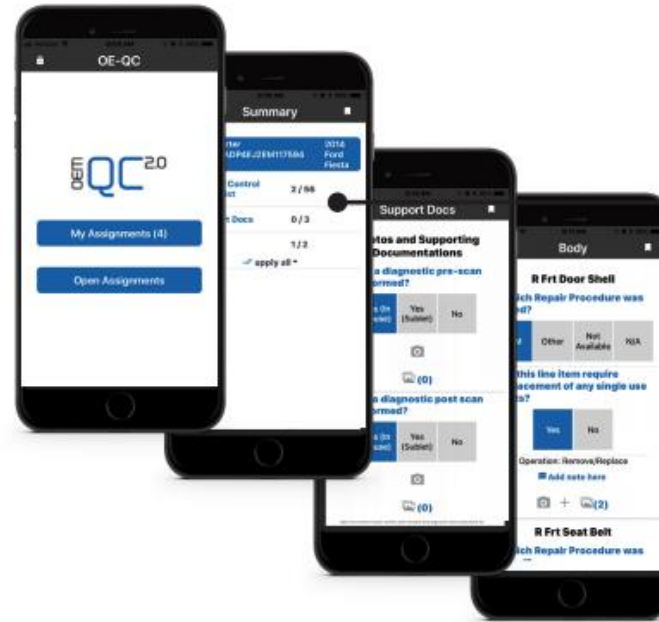
# Repair Documentation

By leveraging the Assured Performance Repair Documentation System you CAN:

- ✓ **Ensure** technicians are in fact following OEM Repair Procedures through photos and documentation providing proof of compliance
- ✓ **Confirm** technicians are pre-scanning and post scanning every vehicle with the ability to store valuable diagnostics
- ✓ **Audit** submissions by repair, line item, or labor category and approve or reassign based on the results
- ✓ **Document** and Print a data driven Certificate of Authenticity for technicians that used OEM Repair Procedures on 100% of the applicable line items during the repair

## ✓ REPORTING

Alerts, analysis graphs, charts and reports are automatically generated to help management integrate and have prominently displayed to help drive total quality assurance throughout the Certified business.



## ✓ TECHNICIANS USE THE SMART APP

- The technician finds their list of "jobs" waiting inside of their Smart App.
- The technician selects the "job" and follows a process of tap, tap, tap on their Smart Device to document how they repaired the vehicle and the OEM Repair Procedure they followed. Taking electronic images is as easy as taking a "selfie" or any pic!

# Repair Documentation

QUALITY CONTROL CHECKLIST SUMMARY		Checklist Completed:	52 / 52
BODY / STRUCTURAL / MECHANICAL		Checklist Completed:	13 / 13
PAINT / REFINISH		Checklist Completed:	13 / 13
BUILDUP/REASSEMBLY		Checklist Completed:	11 / 11
DETAIL/FINAL INSPECTION		Checklist Completed:	15 / 15
All Workorder Lines Completed	Test Paint	July 18, 2017 10:57:48	
No Visible Dirt Nibs or Tape Lines	Test Paint	July 18, 2017 10:57:48	
Interior Lamps Operational	Test Paint	July 18, 2017 10:57:48	
Vents Free of Dust & Glass	Test Paint	July 18, 2017 10:57:48	
Seatbelts Operational	Test Paint	July 18, 2017 10:57:48	

## Review Details Include



- ✓ Technician Documentation
- ✓ Additional Documents Uploaded
- ✓ Quality Control Checklist
- ✓ Ability to Review & Approve
- ✓ Ability to Reject or Reassign
- ✓ Technician Fingerprint
- ✓ Activity Timestamp
- ✓ Category Summary
- ✓ Repair Procedure Summaries
- ✓ Line Item Photos/Notes
- ✓ Line Item Reassignment



REVIEW- R.O. # 64532

Click summary to expand detail

**SUPPORTING DOCUMENTATION SUMMARY**    Techs: 3    Photos Uploaded: 6    Documents Uploaded:

Photos and Supporting Documentation:

VIN Photo:     Supporting Documents: 

Pre-Repair Photos:     Post-Repair Photos: 

Was a diagnostic pre-scan performed?    Tech: Haywood    Answer: YES    Diagnostic information    Was a diagnostic post scan performed?    Tech: Jablone    Answer: YES

**MECHANICAL CATEGORY SUMMARY**    Repair Procedure Used: OEM: 10/10    None Available: 00/10    None Applicable: 00/10

**BODY CATEGORY SUMMARY**    Repair Procedure Used: OEM: 10/10    None Available: 00/10    None Applicable: 00/10

**QUALITY CONTROL CHECKLIST SUMMARY**    Checklists Completed: 9 / 15

BODY CATEGORY SUMMARY		Category Photos:	Repair Procedure Used:	OEM: Other:	2	None Available: Not Applicable:	0	0
<b>Line Description</b>	<b>Operation</b>	<b>Procedure Used</b>	<b>Single Use Parts</b>	<b>Line Indicator</b>	<b>Photos</b>	<b>Notes</b>	<b>Technician</b>	<b>Reassign</b>
Hood Panel	Remove/Replace	OEM	No	Estimate			Test Body	
R Fender Panel	Remove/Replace	OEM	No	Supplement 2			Test Body	

# VECO Experts 10 Step Repair Process

- 1- Vehicle Scanning
- 2- Procedure at time of estimate
- 3- Structural procedures
- 4- Procedures followed
- 5- Proper welds
- 6- Proper corrosion protection
- 7- Proper use of QC sheet
- 8- Proper refinish
- 9- Proper use of intake SOP
- 10- Proper vehicle protection



# Discounts and Documentation

No matter how you fixed the car, it must be documented that way. If you use a price matching program, the final repair order that the customer receives and you have in your final file must say it is OEM. If there are customary charges that you charge customers, and choose to not charge it for what ever reason, simply put in a zero or n/c or something indicating you did it and did not charge for it. This goes for ALL not included items such as test drives, seat belt and safety checks, vehicle washing etc.



# Estimates and repair orders

- All lines on estimate reflect repair done to car
- Lines may be information only
- Lines may be listed and zero charge or listed as no charge
- If it is not listed then it did not happen (test drives, re torque, seat belt inspection, other required diagnostics).

The only difference between two repairs is what you choose to do for free - there is only one way to repair a vehicle.

Rex Dunn



# The Ultimate Goal

Imagine that something did go wrong with the repair and they called in someone like me, Mike Anderson, Kristen Felder or Larry Montanez. The first thing we would ask for is your file. AND, your file is all we should need to know everything that took place on that vehicle. Your file is your best defense in any legal situation. If your file is not complete, or has been pencil whipped, you will likely lose in a legal battle. This could cost you a lot of money, your business, your assets, and at a minimum your mental health.





# Data Storage

- Do not use estimating systems as your only source to keep files.
- Must have separate storage for data that is yours and yours alone not a 3<sup>rd</sup> party
- If you change management systems or estimating systems, you may not have access to your data.
- If you sell your shop, most sales are asset sales, and you are responsible for all repairs done in the past. If you do not have access to file, the car will be the only evidence.
- Some companies provide storage as part of the benefits of the program (Assured Performance Network).



# 3<sup>rd</sup> Party Agreements and Your Garage Keepers Insurance

- Every time you sign a 3<sup>rd</sup> party agreement, have your insurance company review the contract you are signing. You may be signing a contract that your insurance company will not cover. Also a good idea to run any contract by your attorney.
- Since you are attending this presentation - you can have your insurance needs looked at by an industry professional that understands the unique needs of the collision repair industry shops. David Willet of Intrepid Insurance.



# Basic File Elements to Have Documented.

- All communications internal and external
- All repairs documented following OEM- photos and documents
- Quality control forms, intake, pre-delivery & authorizations fully signed
- All blanks on forms filled out or N/A on them
- A check list of all file items to do a final quality check of file before closing file for storage.
- All photos taken of all stages.



# Thank You!



Mark Olson 206-227-7574

“Get it right the first time”

