Shop Management System Buyer's Guide

How to Find the Right Shop Management System &
Take Your Auto Repair Shop Business to New Heights

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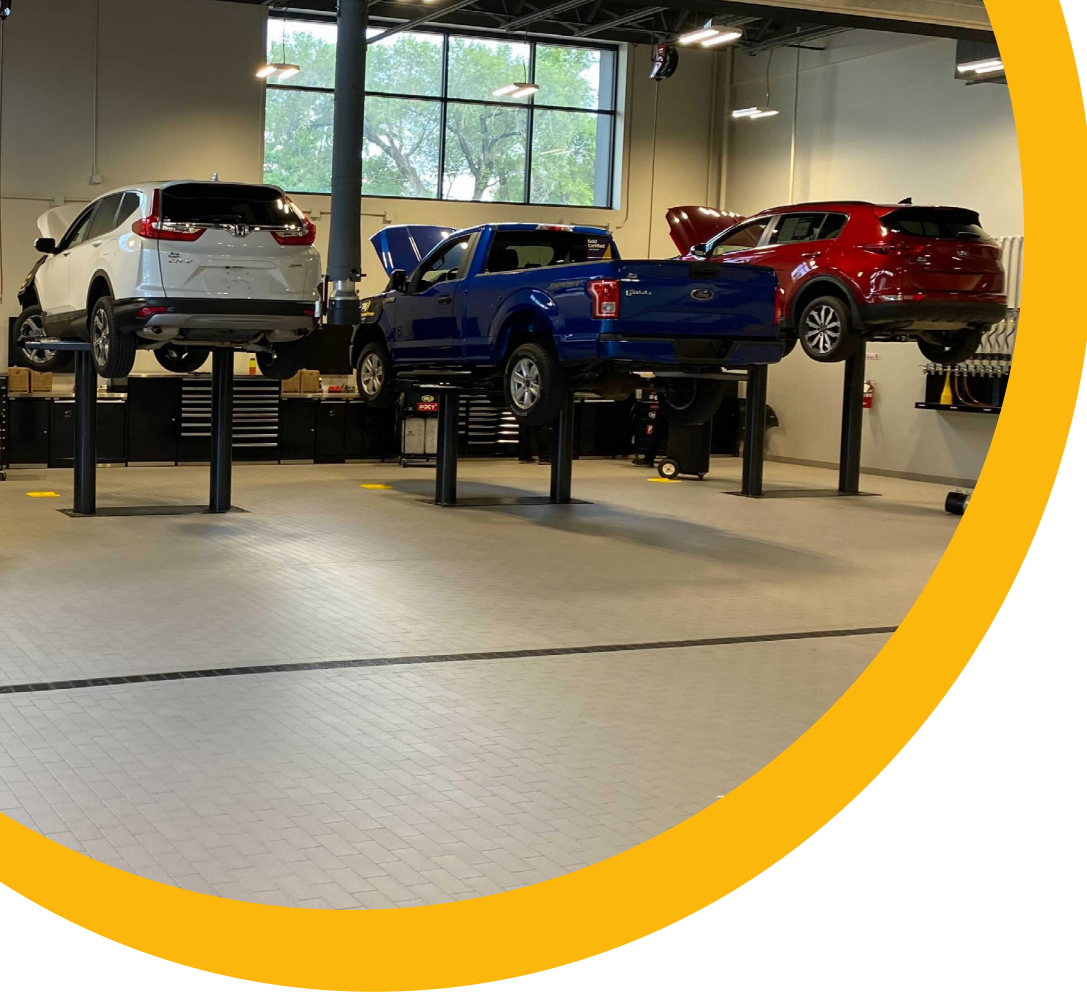
How do you and your team currently keep track of every car that comes into your shop, and where they are in the repair process? Maybe you or a shop foreman circles around the shop to check and see how repairs are moving along. Or maybe you rely on everyone scribbling updates on a whiteboard.

These methods can get complicated and ineffective pretty quickly. For one, they're prone to mistakes—what if, for example, a technician forgets to scribble down the latest status of a repair on the whiteboard? If that happens, a service advisor might not realize things are moving ahead of schedule and might turn down a walk-in customer.

These methods also take up a lot of time. If you circle around the shop for updates throughout the day, for example, that's time you could instead use to ramp up your shop's marketing efforts or grow your business.

Benefits of Using a Shop Management System

With a shop management system, you and your team gain more control over your shop's time. Instead of painstakingly getting disparate updates from around the shop, you all can check the status of each repair from any device connected to the internet.

Another advantage of using a shop management system is that your team will make fewer mistakes when it comes to giving customers status updates about their vehicles. Before contacting a customer, a service advisor can check the system to have a more accurate estimate of how much time is left on their repair.

A capable shop management system creates a streamlined process that ultimately leads to faster turnaround times, and, as a result, fewer missed opportunities.

Technicians and service advisors won't have to go back and forth giving each other updates; they can efficiently move through each repair, opening up the shop's schedule to take in more repairs. And the more cars your shop can take in, the higher your shop's Car Count and profit potential.

Questions to Ask When Shopping for a Shop Management System

When it comes to shop management systems, there are a lot of options
on the market, which can make it tricky to find the right one for your shop.
However, you can ask these questions to narrow down your search.

1. Is It Cloud Based?

You can't always be tied down to your shop. Say you need to take the day off to take your child to the doctor. Or perhaps your shop is expanding to a second location, and you're in back-to-back meetings to iron out the details. Maybe you want to book a ticket for a three-day conference for shop owners. Or even more exciting—you're jumping on a plane for a Hawaiian getaway.

By having a cloud-based shop management system, you can do all of those things without losing sight of what's happening at your shop!

With your data on the cloud, you can check in on your shop from afar, as long as you have internet access. For example, you can glance at ongoing repair orders while you wait in the doctor's office or airport lounge.

> "We are actively expanding our shop, adding an additional 2,500 square feet to accommodate four new bays. As we expand, it's critical that we have a cloud-based system that seamlessly grows with us. I can attend a twenty-group, meet with my business coach, spend time with my family, and still have access to my shop from my phone. Anywhere access gives me the confidence to let my staff grow into their roles."
>
> — Tekmetric user Andrew Minkler of Bavarian Motor Repairs

A cloud-based shop management system has other benefits, too. You won't have to worry about whether or not it plays nice with your operating system, or worse, losing all your data if there's a hardware malfunction. If you're a multi-shop owner, you can easily get all your shops up to speed on one system, instead of dealing with a siloed solution.

And because everything is on the cloud, you won't have to invest in an IT infrastructure (like having an onsite server) and the expensive IT support that's required to manage it. Take it from Tekmetric user Stephane Grabina of Excluservice—before Tekmetric, he was relying on a server and IT team. Adding it all up, he was "spending $1,000 a month!"

2. Does It Integrate With Other Systems?

You likely use other tools to propel your shop forward, such as a marketing platform to keep track of your leads and a parts ordering platform to quickly find parts.

If your shop management system integrates with these other types of solutions, you'll be able to manage everything from one place, creating a streamlined process for juggling all of these various tools. For example, while a service advisor is scheduling a repair, they can also ask the customer how they heard about your shop, and punch in an order for the necessary parts.

"Before we were on Tekmetric, I wasn't using any special program for customer retention. Now we use MyShopManager and integrate it with Tekmetric, which has worked well for us. It's really simple to manage our reputation and respond to our online reviews. I just log on in the evening and go through the list for both stores."

— Jim Brown of Speed Auto Repair

3. Does It Offer Customer Communication Tools?

It's important to reach your customers how they want to be reached. When researching any shop management system, check for the following features so you can streamline customer communication:

- **Text-to-pay**: the ability to text customers invoices that they can securely pay from their phones.
- **True two-way texting**: the ability to have text message conversations with customers within the software.
- **Digital vehicle inspections**: the ability to take photos and videos of vehicles and quickly send them to customers. No more dealing with oil-stained paper!

These features build trust with customers by keeping them in the loop throughout the repair process. They'll see that your shop cares about making sure they're informed every step of the way. These features will also help your shop save valuable time—service advisors will no longer have to scramble to get answers to customers by putting them on hold while they run to get status updates from the technicians.

> "Thanks to Tekmetric, we've gone fully paperless. We send every DVI, estimate, and invoice via text or email. It doesn't take us twenty minutes to write a quote anymore, so we have no problem writing up a quote anytime there's an opportunity to do so. We don't put it off."
>
> — Austin Blanton of Import Auto

4. Does It Offer Trackable Auto Repair Notes?

Every job and customer are unique. For example, one customer might always prefer dropping off their car in the morning whenever they need routine maintenance. Another customer might be busy during the middle of the day and doesn't appreciate being called on the phone during that time. By tracking these preferences in your system, you can ensure that you're providing excellent customer service to each customer.

These are just two examples of why the ability to add trackable notes to repair orders is invaluable.

With that information on hand, you and your team can stay on top of every repair and never miss a beat. Service advisors will be able to update details as needed and sell more work down the line. For instance, if a customer declines a job because it's not critical that it gets taken care of right then and there, the service advisor can note that in the system and then contact the customer when the issue starts to become serious.

> "It's so nice for the service advisor to be able to see the customer's notes and the technician's notes: the customer came in with this complaint. We addressed it. This is the problem. The technician also found this. And everybody can see that live, instantly."
>
> — Karl Roekle of Ultimate Auto Repair

5. Is It Backed by a Reliable Support and Customer Success Team?

Imagine this—it's 9 AM, there's an emergency job at your shop, and you're having a difficult time using the latest feature in your shop management system. You need to turn to someone who knows the ins and outs of the software for help, so you contact the company's support team. In a less-than-ideal situation, you'll have to submit a ticket and wait a few days for a resolution. Ideally, you can get on the phone with a support specialist, and they'll help you resolve the issue.

Any shop management system that keeps up with changes in the industry will provide regular updates, such as new features and bug fixes. That's why no matter how intuitive and easy-to-use a system naturally is, it's still vital that it's backed by a reliable, responsive customer success and support team.

A strong support and customer success team can:

- Resolve questions you might have about a feature in a quick manner, so you and your colleagues don't have to spend precious time figuring it out on your own.
- Listen to your feedback about existing features and evaluate what updates need to be made to improve the user experience.
- Help you with data migrations, as data migrations to a new system can be tricky.

Understand The Scheduling Cycle

To make the most of your shop management system, it's important to understand some best practices and methods for scheduling work. Let's start with a refresher on the four different scheduling stages in the auto repair industry: capacity scheduling, high-level scheduling, detail scheduling, and finally, scheduling adjustments.

1. Capacity Scheduling

This stage of scheduling is all about understanding your goals and your ability to achieve those goals. Begin by determining your shop's profit goal for a given amount of time—say, for a month. Then, work backward by using your shop's existing ARO and the average time of each repair to determine how many appointments you can book without hitting capacity. Is your goal realistic? Or do you need more resources?

2. High-Level Scheduling

High-level scheduling is when you or a service advisor starts to plan your shop's schedule based on jobs coming in the door. This is when service advisors begin filling out the calendar with jobs, and looking into the technicians they'll have on hand for a given day, week, or month.

3. Detailed Scheduling

This third stage involves assigning individual tasks to technicians and allocating the proper resources in a way that everything is evenly distributed. Typically, detailed scheduling happens after a customer approves the work, and the service advisor can begin assigning that work to technicians.

4. Scheduling Adjustments

It's a fact of life that things don't always go as planned. The first three stages of the scheduling process are about getting jobs lined up as smoothly as possible. But someone might walk through the door and say they need their repair ASAP, at which point you can check the schedule to see if anything can be moved around.
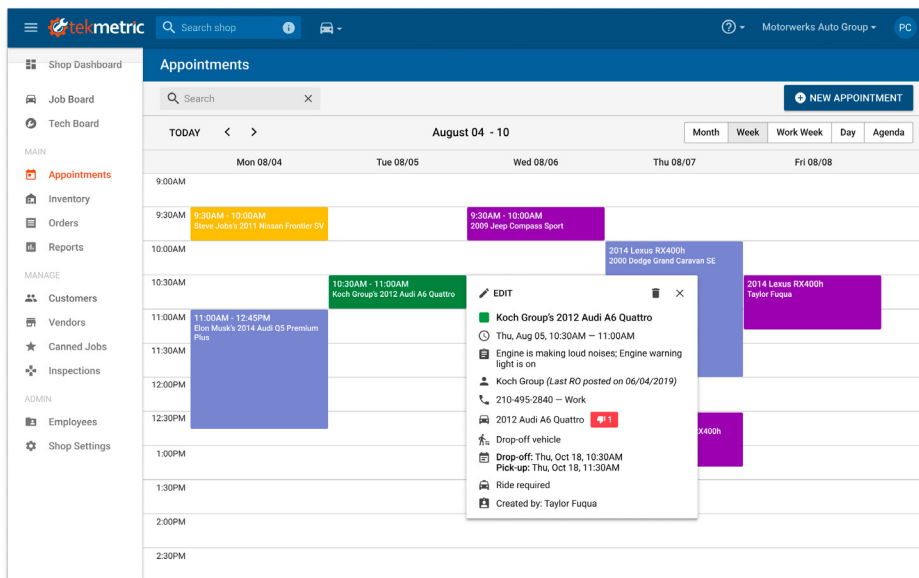
How to Assign Repairs on Tekmetric's Tech Board

Tekmetric makes it easy for service advisors to assign repairs and individual jobs to technicians by helping them visualize each technician's schedule. With this clean visual, service advisors can quickly determine which technicians are busy, and when they'll be free for more work. The starting point is with **Tekmetric's Tech Board** on the left column of the Tekmetric Dashboard. *Note: to access the Tech Board, employees need their Job Board permission turned on.*
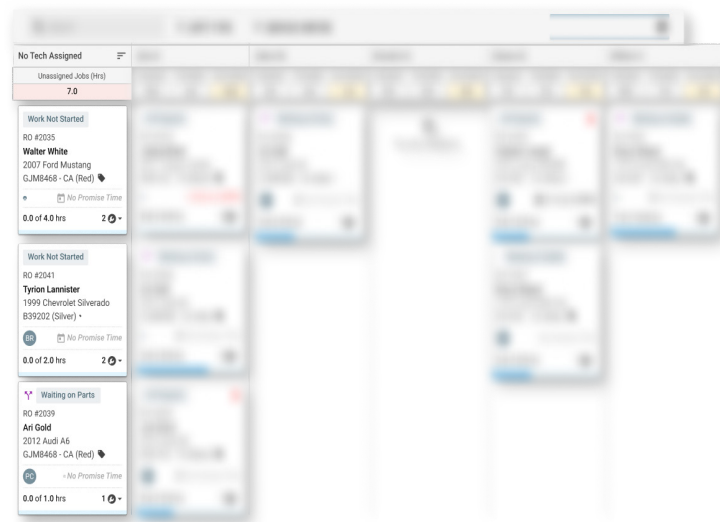
Step 1: Look Into Outstanding Repair Orders

After you set up your Tech Board by adding your shop's technicians and giving service advisors permission to access the Job Board, they will be able to log on and see a column on the left called "No Tech Assigned." This is a list of all of the outstanding repair orders at your shop waiting to be assigned to technicians. Service advisors will also notice a number on the lower right-hand corner of each repair order. This number represents the number of jobs within each repair order. By clicking that number, they'll see more details about each job, including the estimated hours for each repair.

Step 2: Get a Snapshot of Technicians' Workloads

Think of this step as the high-level scheduling stage. Your service advisors now have an understanding of how much outstanding work there is at your shop. To start assigning that work, they need to get a sense of each technician's current workload. To the right of the "No Tech Assigned" column, they'll see columns that list each technician, and three accompanying data points for each—their assigned hours, complete hours, and incomplete hours. With this data, service advisors will be able to see exactly what each technician's bandwidth is.

Step 3: Start Assigning Work

Think of step three as encompassing the detailed scheduling and scheduling adjustments stages. The service advisors now have a clear view into exactly what each technician is working on and what their availability is. With this information on hand, service advisors will then be able to designate outstanding repair orders—as well as line items within repair orders—to technicians who are free. To do so, they just go to each outstanding repair order, hover over the number of jobs on the right-hand corner, and start assigning work. They can assign an entire repair order to one technician, or assign individual line items to different technicians. And if they want to prioritize certain repair orders over others for each technician, they can do so by moving the most urgent to the top of each technician's column.
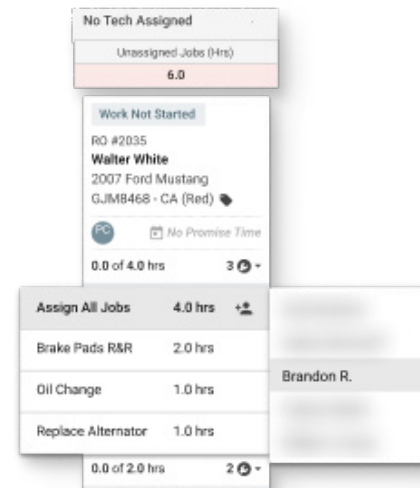
How to Configure Appointment Settings in Tekmetric

Tekmetric also makes it easy to **configure** your shop's appointment settings, so you and your service advisors can get a good grasp of your shop's daily schedule. To start, select "Shop Settings" from the left-hand column of the Tekmetric dashboard. Then, navigate to "Appointments" (the third tab).
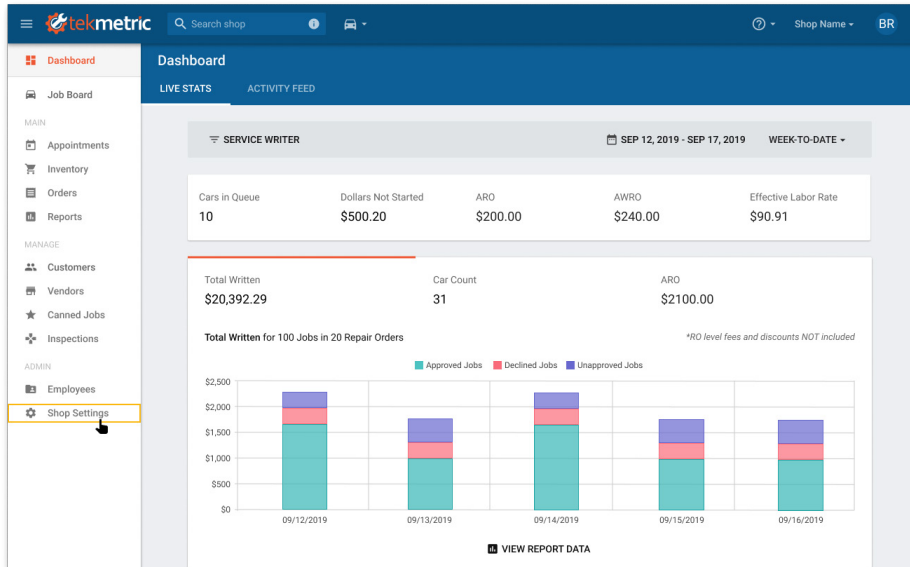

Step 1: Configure Your Daily Schedule

By configuring your shop's daily schedule, you can control the hours that the appointment calendar in Tekmetric shows for your "week" and "day" views. Simply select "Daily Schedule" and input your shop's "Day Start Time" and "Day End Time." We recommend starting and ending your day 30 minutes before and after your posted business hours. Then, set up your default appointment duration by entering the number of minutes you want to automatically appear in a repair order as the appointment time. You can always change this, as of course, some repairs take longer than others!

Step 2: Use Colors and Labels to Categorize Appointments

Next, you can use colors and labels to categorize appointments by going to the "Colors & Labels" section. For example, you can add each technician's name, and assign a unique color to them. That way, service advisors can quickly see who is working on what at a glance, and how many technicians are available for upcoming appointments.
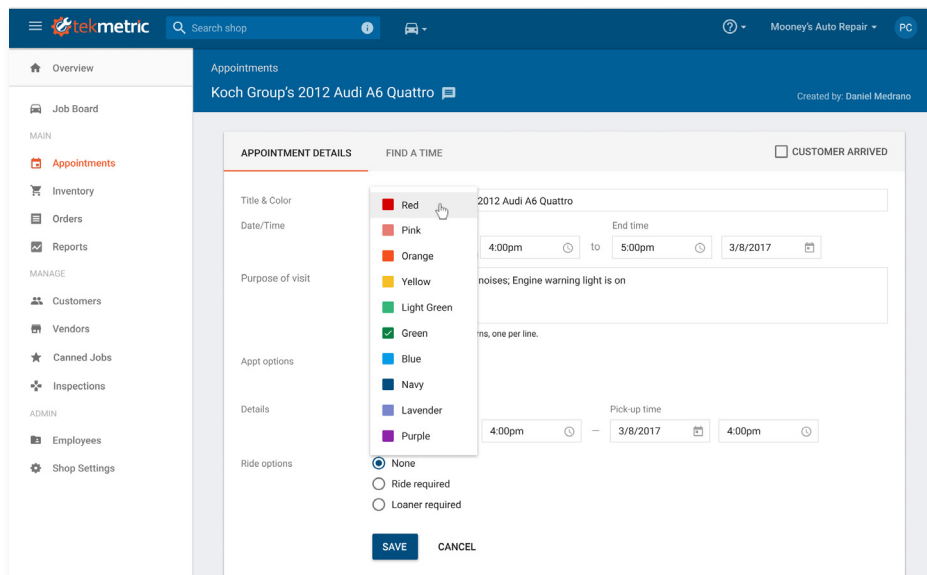
Step 3: Consider Automatically Scheduling Appointments With Each New Repair Order

Tekmetric gives you the option to automate the creation of an appointment with each new repair order. To do so, just go to the "Advanced Settings" section and check the box next to "Create appointment with each new RO."

Adjust Your Scheduling Process to Go Above and Beyond

Once you have your shop management system and basic scheduling process in place, you can make additional adjustments to enhance your shop's efficiency and reach new heights.

1. Add More Staff and Resources as Needed

As you navigate through scheduling cycles, you might find that business is rolling—and to meet those higher demands, you'll likely need to make adjustments to your staff and resources.

For instance, maybe word-of-mouth marketing has really worked in your favor, and you're getting an average of 20 new customers a week. This new influx of customers has obviously been good for business, but taxing on your shop's schedule, team, and resources. So, you might decide to hire two more technicians and two more service advisors to meet this increased demand. And given the increase in repairs, you'll likely have to reassess your current inventory and stock levels to make sure you have enough of the right parts on hand.

Perhaps you might even decide to extend your shop's working hours to accommodate the uptick in business. An additional hour of being open can go a long way for customers.

2. Streamline Customer Communication and Payment With Airtight Processes

It's no surprise that the majority of your customers are in a rush. Squeezing in a repair can be tough on their schedule, as they need their car to get to work, make it to that parent-teacher conference, and more. They don't always have time to wait at your shop for their repairs.

However, while they're out and about tending to their busy schedules, they don't want to be left in the dark, either. That's why it's essential that your shop has streamlined ways of communicating with customers via true two-way texting, text-to-pay, and digital vehicle inspections.

For example, if your automotive scheduling software has true two-way texting built into it, you and your team will be able to message customers directly from the system and have it be visible to everyone at the shop. That way, there's a lower chance of miscommunication.

3. Gather Customer Feedback on a Regular Basis

Customer feedback can help you address people's pain points with your shop, and as a result, take your shop to new heights. For instance, most of your customers could be annoyed that your shop is taking a bit longer than promised on each repair, and this could soon create a negative perception of your shop. Unless you survey customers on a regular basis, you'd have no way of knowing this.

Don't leave your shop's reputation and growth to chance. Be proactive, not reactive, by creating a customer feedback system and fixing gaps in the customer experience. After every repair, for example, you could have each customer fill out a short digital survey about their experience. From there, you could set aside an hour or so each week to evaluate the responses, identify pain points, and then take the necessary steps to rectify them. For example, if you find that you're too optimistic about times and promise times that your shop always misses, you can make it a point to under-promise and over-deliver.

Remember, of course, that sometimes negative feedback can be an outlier. You may not have to change your entire system or approach as a result. However, you should still strive to make it right with that customer.

Tekmetric: The Most Powerful Shop Management System on the Road

Tekmetric has got you covered every step of the way, providing a cloud-based shop management system that provides seamless integrations, customer communication tools, trackable auto repair notes, and a team that's dedicated to the success of your business.

Of course, seeing is believing. Ready to see for yourself how Tekmetric works? Schedule a complimentary chat today!

Book a Chat

tekmetric

SHOP MANAGEMENT SYSTEM