



*Dealer Solutions*

## ***Scheduling For Success***

I am amazed how often I go into a service department and find how little time and effort has gone into setting up the service appointment schedule.

Our industry, and its technology, has come a long way from the days of using a pad of paper and a pen for scheduling the day's appointments. In fact, one of the shortcomings of today's technology is that many of today's appointment scheduling software programs are so sophisticated that they can confuse and overwhelm the very people they were designed for.

As a result, it is far too common for me to find that the current Service Manager isn't even the person who set up the appointment schedule. And, because it seems like such a mystery to figure out how it works, they simply leave it as it is—hoping it will work fine for them.

Hope, my friends, is not a strategy! This appointment making process is a critical step to keep your Technicians busy and your customers satisfied. It cannot be left to "hope". It requires a plan. It requires a process.

Whether your appointment process involves using the program built into your DMS, or you have a software program that your company uses, the first (and most important) step in the process is to think about how you want it to work. You need to see it in your mind so that you can describe it to those people who can, and will, assist you with getting it set up.

All the companies who offer appointment-making programs, have departments of people who are available to assist you. However, you are the one that needs to direct them on what it is you want the program to do. You need to be able to describe the controls you want to have and the limits you want to establish. Consider questions like: How many appointments can you take in a day? How many appointments can you take per hour? How many "waiters" do you want in an hour? How many loaners/rentals can you put out in a day? Once those components are clear in your mind, the experts can guide you through the steps of getting the setups in place.

As you go through the steps of setting up your appointment-making process, I have three things for you to consider:

### **1) Do the math**

You don't have to guess how much work you can handle in a day. You have the information available to you for you to calculate it. Your daily capacity should be determined based on the daily production capacity of your technicians.

## **2) Don't be too restrictive**

Remember, the controls you put in place are your response to your customers wanting to come in and give you their business. Having your controls dialed in too "tight" can make it difficult for your customers to receive an appointment based on what works best for them. Try to offer as much flexibility as possible for your customers to choose

## **3) Check it often**

This is not a "Set it and forget it" process. As the demands for your services change, your need to adjust your capacities change, too. View it as your way to control your inventory for your available hours in your shop.

**Make it your goal to become a "master" of your appointment schedule.**

**Rather than "hope" for a good day, schedule for it!**