

Vehicle Check-In Checklist

1. The Greeting

The first impression is the most important part of the visit. The employee should:

- ☐ Stand up: Always rise to meet the customer. It shows respect and readiness to help.
- ☐ Smile: Use a happy, joyful tone of voice to make the customer feel welcome.
- ☐ Introduce themselves: Use the script: "Welcome to Master Auto Care! I'm [Name]."
- ☐ Open the conversation: Ask, "What brings you in today?" to understand their immediate needs.

2. Client Information

Accuracy in this section prevents communication errors later. The employee must:

- ☐ Confirm names: Double-check the first and last name.
- ☐ Verify spelling: Ask the customer to spell their name to ensure the database is correct.
- ☐ Update contact details: Confirm the physical address, phone number, and email.
- ☐ Source tracking: Ask, "How did you hear about us?" This helps the shop understand which advertising works.

3. Vehicle Information

The employee needs to record specific details to ensure the right parts are ordered:

- ☐ The Basics: Record the year, make, and model.
- ☐ Identification: Write down the VIN (Vehicle Identification Number) and the license plate.
- ☐ Mileage: Record the current odometer reading.

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4. Exterior Walk-Around & Photos

Photos protect the shop from false damage claims and document the vehicle's condition. The employee must take photos of:

- ☐ All four corners (front and rear, driver and passenger sides).
- ☐ Any existing scratches, dents, or cracks.
- ☐ The instrument cluster (with the engine ON) to capture warning lights and the fuel level.
- ☐ Fuel Alert: If the tank is under 1/4 full, the employee must get pre-approval for a \$40 fuel charge or have the customer add fuel.

5. Contact Preference

- ☐ To keep the customer updated, the employee should:
- ☐ Ask for the customer's preferred way to be reached (text, call, or email).
- ☐ Ensure this preference is clearly noted in the computer system.

6. Detailed Reason for Visit

- ☐ The employee acts as a "translator" between the customer and the mechanic.
- ☐ Customer's Words: Write down the problem exactly as the customer describes it.
- ☐ The "When" and "How": Ask when the issue started, how often it happens, and what the driving conditions are (e.g., "only when braking" or "only on the highway").
- ☐ The "Comeback" Rule: If the car was recently serviced for the same issue, ask if it happens when the engine is hot or cold and at what specific speed.

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7. Explaining the Health Check

Every car gets a "Health Check" (inspection). The employee should explain that the shop will check:

- ☐ Air and cabin filters, the battery, belts, and oil levels.
- ☐ DTCs: They will scan for "Diagnostic Trouble Codes" (computer errors).
- ☐ Transparency: Tell the customer that all findings come with photos so they can see what the mechanic sees.
- ☐ Authorization: Emphasize that no work will be done without the customer's direct permission.

8. Setting Expectations

- ☐ This step reduces customer anxiety by providing a clear plan.
- ☐ The Guarantee: Reiterate the "Your Approval Required" guarantee.
- ☐ The Timeline: Give the customer a specific time they can expect an update.
- ☐ Transportation: Ask if they need the shop shuttle and confirm the drop-off destination.

9. Authorization & Handoff

- ☐ Before the customer leaves, the process must be finalized:
- ☐ Legal: Ensure the authorization form is signed.
- ☐ Paperwork: Provide the customer with a copy of their estimate.
- ☐ Organization: Tag the keys with the Repair Order (RO) number and note exactly where the car is parked.

Final Touch: Send a "drop-off" text message to confirm the vehicle is in the shop's care.