The OMS Guide to victory is the manual to assist in helping us maintain the highest possible quality repair and creating the magical customer service experience with every visit. We've developed many procedures and rules to maintain a strong team and provide the structure for everyone working with and around Oceanside Motorsports to achieve their dreams.

The PDF version of this is updated once a month. This guide is constantly being updated on a daily basis so please inquire about any recent changes before referencing.

We rely on our team to keep the guide growing and relevant. We can all build a stronger foundation as a team vs individually.

A note from Neil - this book is like the NASA CCR for racing. You will win and lose races based on the information in the ever-changing rule book of racing. I study the rule book routinely to make sure I know the details when I need to know them. Sometimes the information will seem irrelevant until I'm faced with the situation. But when I'm faced with that situation there is no time to consult the rules. You have to know the rules by heart so you can act upon them instinctively. If you want to win, truly win in this business, you have to know the rules in which we win by.

- 1. Mission Statement & Fundamentals
  - 1.1. Mission Statement
  - 1.2. Fundamentals (17 of em as of 10/7/2021)
    - Consistency
    - Perfect the basics
    - 1.2.1. Be a Pro.
    - 1.2.2. Do the right thing.
    - 1.2.3. Make Quality personal
    - 1.2.4. Be detail oriented.
    - 1.2.5. Be curious.
    - 1.2.6. We are a training company
    - 1.2.7. Listen Generously
    - 1.2.8. Under promise and over deliver! Set the stage to amaze
    - 1.2.9. Keep it fun & Positive
    - 1.2.10. Look really really really good.
    - 1.2.11. Be punctual.
    - Take Responsibility - Own it
    - 1.2.14. Think first, work smart

1.2.15. Set expectations with clear accountability that are mutually understood.
1.3. Employee Acknowledgement
1.4. Customer facing mindset
1.5. Technician Mindset

2. Job Descriptions
2.1. Direct Report
Onboarding
Working Sales Manager
2.2. Working Production Manager
2.3. General Manager -
2.4. Front Service Advisor -
2.5. Rear Facing Service Advisor - Estimate & Parts Manager (Parts Guy) -
2.6. Client Coordinator (CSR)
2.7. Technicians - ALL
2.8. A+ Technician -
2.8a. A Technician -
2.8b. A- Technician -
2.9. B+ Technician-
2.9a. B Technician
2.9b. B- Technician
2.10. C+ Technician
2.10a. C Technician
2.10b. C- Technician
2.11a. Lube/ Inspection tech +
2.11. Lube/ Inspection Tech

Rear Shop Detailer/QC Manager
The Cars
The Shop
The Customers

Duties
2.12. Rear Shop Detailer -
Daily
Weekly
Monthly +
Projects
2.13. Marketing Manager
2.16. Bookkeeper/Admin -

3. Team Processes and Procedures
- 3.1. How to make a process
- Using Google Docs
  - How to expand a text box using google sheets
- 3.2. Weekly Production Score Board & Morning Huddle
- Car Wash
- 3.3. OMS Schedule
- 3.4. Keep it Clean Tasks
- 3.5. Four Things a Customer Should Feel When They Leave
- Accepting Tips
- Cradle to Grave
- 3.6. Using Google Chat to save time communicating
  - 3.4.1. Abbreviations to use:
  - 3.4.2. Turning Off Notifications in Hangouts
- 3.7. Problem Solving
  - 7.7. When we hit a snag
  - 4.1 Resource list
- 4.2. Tablets
- 4.3. Leadership Team -
- 4.4. Coaching conversation and Write-Ups
  - Coaching conversation
  - Write up -
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    - 2nd
    - 3rd
- 4.5. Mount and Balance cost
- 4.6. Cell Phone Policy
- 4.7. Employee cars left at shop
- 4.8. Storage Charges
  - 3.7.1. Rack storage fee's
- 4.9. Yellow flag -
- 4.10. Meatball Flag & Special Needs Cars
  - Special Needs Cars
- Red Flag
- 4.12. Look Really Really Good - Uniforms
- 4.13. Back up
- 4.14. Required Training
- 4.15. What's touched in a customer car?

4.16. In case of emergency the water and air shut offs
4.17. The OMS Book Club
Headlight bulbs and upgrades
4.18. E36 S50
4.19. Check Control Panels
4.20. Metal Recycling
4.21. Sublets
4.23. Oil cooler top off (Jace Porsche and Sweeney E92 M3)
4.24. When is a car really done?
4.25. Seat Belts
4.26. Pull all the cars out! No Campers!
4.27. Campers
4.28. Safety glasses required
4.29. Borrowing & Using shop tools
4.30. Where does all the filtered/distilled water go?
4.31. Fixing Equipment
Shipping/Sending stuff in the Mail
    USPS Flat rate boxes and shipping process
4.33. The upstairs parts index -
4.34. Fire Alarms
4.35. Saturdays
4.36. When the Internet is not working
4.37. Work OMS does not currently do (but we may sublet)
4.38. Permissible Services
4.39. Race Cars
4.40. Performance work
    1.8. Active autowerke tunes - procedure for doing them
4.41. Acceptable answers for a diag (from a technician)
4.42. OMS weekly meeting schedule -
    3.27.1. Schedule
    3.27.2. Morning pow-wow
    3.27.3. Weekly Team Meeting -
        ● Discuss current chapter of the book the team is reading
        Suggestion Box
    Tuesday Evening Meeting
    3.27.4. One on One's
4.43. Lifetime Oil Service
    3.28.1. FAQ's for lifetime oil service -
4.44. TOW TRUCK DROP:

4.45. Car Keys
4.46. Hiring Process
New Hire Checklist
Onboarding process
4.47. Differentials
3.32.1. Noisy Diffs -
3.32.2. Diff fluids -
3.32.3. LSD bolts inside diffs - e36
4.48. ToyToy Etiquette
4.49. When a customer is selling their car
4.50. Drinking water locations
4.51. Employee vehicles through shop
4.52. Employee purchased parts
Payment types
4.53. Employee cars left at shop
4.54. After hours pick up
4.55. Using the time clock
4.56. Driving a customer's car
4.57. The Wurth Bins -
4.58. Smog Inspections
4.59. Warranty -
0.1. The NEW Lifetime Warranty (under construction)
4.60. Warranty Work
4.61. Warranty Oil Leaks
4.60. Pick-up and Delivery Service
The OMS Scooter
4.61. Shop Zones -
4.62. Work Distribution
4.63. Test Drive
4.64. Test Drive Routes
4.65. Drugs, Alcohol, and Weapons
4.66. Customer Information
4.67. Towing services
4.68. Opening the shop
3.49.1. Pulling cars out
4.69. Closing the shop
3.50.1. Closing the main shop
3.50.2. Blocking the doors - The Robstacle-course
3.50.3. Closing the front of the shop

Front 333 Closing Procedure:
4.70. Arming the Alarm
    3.51.1. ADT PULSE APP
4.71. Closing + opening the doors
4.72. Loaner Cars
    3.53.1. OMS Loaner cars
    3.53.2. Loaner Car Board
    4.74. Employee permissions borrowing loaner cars
    0.17. Loaner Car Check Out Checklist
    0.18. Loaner Car Check In Checklist
    Loaner Maintenance
    4.75. When a loaner has a problem
4.73. Cooling System
    3.56.1. Cooling system bleeder screws
    3.56.2. Cooling system bleeder hoses
    3.56.3. Plastic Reservoirs
    3.56.4. Hose Clamps
4.74. How to reset a service light and when to reset
4.75. Marking a tire for a puncture or leak
4.76. Differential Break in Procedure
4.77. Brake Replacement
4.78. Inspection Recommendations
    3.60.1. Brake Measurements
    3.60.2. Brake Fluid Measurement
    3.60.3. Oil leak stage chart
    3.60.3. Coolant Leaks
    3.60.4. Bushings/suspension stage chart
    3.60.4. Flex Disk
    3.60.5. Recommendations based on mileage
    3.60.6. Tire measurements
    3.60.7. Other recommendations in inspections
4.79. The Verbal Contract
4.80. Unpackaging parts
    1.4. Opening Boxes
4.81. The Estimate QC
4.82. Adding ANYTHING to a workorder - Notify the SA
4.83. Where do the keys go?
4.84. Topping off oil within an inspection -
4.85. Quality Control Checks

3.85.1. Technician Quality Control Check -
Tech QC Quick Checklist
Tech QC - Detailed
3.85.2. Detailer QC
3.85.3. SA Final QC
Ticket QC
4.86. How to park a car
Key Tags and QC Checklist
4.87. Uniforms
4.88. After hours key drop
4.89. After hours shop use
4.90. Boundaries of side work
4.91. Blackstone oil analysis
4.92. Used parts
4.93. Comebacks
4.94. Loss Report -
4.95. When a lift or equipment has an issue or breaks
4.96. Pulling a car around front - checking for service lights
4.97. Using the OMS Daily Tracker
4.98. Customer Waiting/waiting in town
4.99. Shops we can refer customers to
4.100. BMW Sunroofs
4.101. BMW E30 keys
4.102. How To Fill Spare Gas Cans
4.103. How To change your default search engine back to Google

Front Service Team

8. Service Intervals / Maintenance
8.1. OMS Standard BMW mileage services - best practices - Mileage based services

9. Menu's
9.1. Oil Change Menu
How to order Oil Change Stickers
9.2. Inspection Menu
Inspection Clinic
"Not touched" recs in inspection
7.45. No start inspections
● Vehicle Health Check - Level One - Free
We top off fluids as part of every inspection and note how much we topped off - The parts guy is responsible to charging the correct amount to the invoice

● Vehicle Health Check - Multipoint - Level Two $196 ($98 discounted)
reasons a multipoint inspection should be used -
● Pre Purchase Inspection - In Town - $395
Pre Purchase Inspection - Out of Town
Pre Purchase Inspection - OFF SITE - $200
● Blackstone laboratories oil analysis - $72
5.25.7. Customer Waiting inspection
4.87. Quick inspection -
Post Repair Inspection
No Start Inspection
7.45. Notes & Recs
Tire Rotation
9.3. Diagnostic Menu
9.4. Detail Menu
9.5. Alignments
Alignments -
Every alignment adjustment that is touched gets marked. Mark the bolt and the adjuster.
Alignment Menu

5. Front Office Procedures
Physical Front Office
Coffee Bar
Bridging Into Maintenance Super Lite
Bridging Into Maintenance - Kind of Lite
5.1. The OMS Customer experience - Bridging into maintenance Workflow Process - Long
4.1.1. OMS Phone process
5.2. Voicemails
Overnight
During business hours
Appointment Requests
4.2.1. OMS Phone call examples
5.3. Leaving a message for a customer
4.3.1. OMS Value Propositions
4.3.2. The Preparation:
4.3.3. Setting the appointment/Reservation:
4.3.4. Appointment reminder
Vehicle Pick up and Delivery
4.3.5. The Drop Off:
4.3.6. Initial Greeting

- 4.3.7. Walk Around
- 4.3.8. Get Mileage, Check Warnings, Check Service Due
- 4.3.9. Drop-Off Checklist

5.4. Referral Report -

5.5. Source Report

- 4.3.10. Early Parts Order
- 4.3.11. Service Advisor Inspection
- 4.3.12. Distribute + Assign Tech
- The SA owns everything that goes out to the customer
- 4.3.13. Revised Estimate / ETA estimate update
- 4.3.14. Do it!
- 4.3.15. Mechanical work completed
- Quality Control Check
- 4.3.16. Customer Pick-Up
- 4.3.17. Exit Schedule
- 4.3.18. Referral Program Reminder
- 4.3.19. Review Request
  - 4.3.19.1. Reviews
    - 4.3.19.1.1. Review email script OMS
    - 4.3.19.1.3. Using Soapbox the get reviews

5.7. Alignment referral program

- 4.3.20. Yelp Messages
- 4.3.21. Pick-Up Checklist
- 4.3.22. Thank You Call
- Deposits
- How to manage cashflow with deposits
- 15.7. Discounting rules -
- Warranty Discounts
- 4.3.23. How'd we do?
- 4.3.25. Where have you been call
- Payments
  - 4.3.26. Partial payment to start a job
  - 4.3.27. Payments for afterhours pickups
  - 8.5. Applying payment to an Invoice
  - 8.6. Posting a payment in Mitchell
  - 1.5. Transactions over 10k
- 4.3.28. Aftermarket Warranty Company Info
- 4.3.29. Special Order Parts and Long Term Projects
  - ● 4.3.29.1. "Extended Stay OMS" Longer jobs, custom jobs, race cars etc.

5.9. Selling on the drop
5.10. Questions to ask after the estimate is built before contacting a customer
5.11. Billing a sublet -
5.12. Pricing for combined labor times
5.13. Information Data Charge
5.14. Military and BMWCCA Discount
5.15. Quoting an estimate to a customer
5.16. Digital vehicle check in process
5.17. Registration stickers on Loaners, customer cars, shuttles
5.18. The RO Cover Sheet
Ubers
    Picking Up Parts via Uber:
What car should I take?
5.19. Tires
    15.19. Billing Tires for a customer
5.21. Thank you call
5.22. Transferring phone calls within the company
5.23. Taking a message for Neil
5.24. Tracking Inventory Parts
5.25. PETTY CASH
5.27. Value Propositions
5.28. Answering the phone
    4.22.1. Holding
    4.22.2. Messages
    4.22.3. Diagnosis
    4.22.4. Price to diagnose
    4.22.5. Price on an oil change -
    4.22.6. Closing
    4.22.7. If they say no
    4.22.8. Customer supplied parts
    4.22.9. What's your labor rate?
    4.22.10. Performance Part Installation
    4.22.11. Another Price Question Script
5.29. Making Appointments
    4.23.1. Who can do what?
    4.23.2. How much time do we reserve?
    4.23.3. Diagnostic appointments -
        4.23.3.1. Questions to ask the customer related to a diag
    4.23.4. When to schedule

- 4.23.5. Reserving time for repairs after diag
- 5.30. The Referral List - Where do I send people to?
- 5.31. How To Bill A Lifetime Oil Change Plan:
- 5.32. The Lifetime Cell Phone
- 5.33. Thank You Cards
  - Visit Thank You Card
    - Thank you card recycling -
  - 5.33. New customer thank you card
- 5.34. Daily Deposits
  - Cash Payments
- 5.35. Sending a paypal Invoice
- 5.36. Taking on an appointment when we’re already booked
- 5.37. Dealing with an aftermarket warranty company
- 5.38. Ordering parts
- 5.39. Selling Tires
- Tire Patches
- 5.40. How to send a fax
- 5.41. Daily social media posts
- 5.42. Customer financing
- 5.43. Voicemail
- 5.44. Office Supplies
- 5.45. The Syd Experience
- 5.46. CUSTOMER FEEDBACK
- 5.47. How To Distribute Work
- 5.48. How To complete work with Tekmetric
- How to apply an overpayment or credit to an RO with Tekmetric
- Cash, Checks, and Payments
  - How to input bills and write checks in Quickbooks
- Money Management
  - Payment Rules
  - Credit Cards
  - Receiving Checks
  - Depositing Checks
  - Cash
  - Paypal
  - Venmo
  - Refunds
  - Writing Checks

6. Parts Guy - yes you get your own section!
- 6.1. Sourcing parts
- 6.2. RO terminology
- 6.3. Parts Slipping through the cracks
- 6.4. Special Parts
- 6.5. Parts returns
- 6.6. There are two returns columns. One is for items that are in process but not picked up by vendor. The second is for items processed AND PICKED UP by vendor but we haven't got our money yet. An RA even with $$ on it doesn't mean $$ in the bank.
  - PARTS WAITING FOR PICKUP
  - WAITING FOR $$ IN THE BANK
  - Parts returns shelves
- 6.7. Getting vendors to pick up parts
- Core Returns
- 6.8. Checking in parts - don't bypass Parts Guy
- 6.9. Brands to be careful with -

7. Shop & Technician Procedures
- 7.1. Five Foot Rule
- 7.3. Technician training sign off
- 7.4. Shop maintenance and cleaning
  - Monthly
- 7.5. Bay cleaning
- 7.6. No heavy trucks/cars on lifetime lifts
- How to find work.
- 7.7. Engine covers
- 7.8. Technician final review -
- 7.9. Sealants to use
- 7.10. Rod Bearings
- Installing Turbos
- 7.11. Installing front lips and other stick on body pieces
- 7.12. Fluids going in cars -
- 7.13. DPF DEF fluid process diesel oil change
- 7.14. Recycling oil filters
- 7.15. Puncturing oil filters
- 7.16. Intake boots with trans removal or other moving of the engine
- 7.17. Using the Welder
- 7.18. Torque sticks are required anytime installing wheels
- 7.19. Convertible tops and interior work - The white glove service

Convertible Tops, Mechanical Failures. Not Fabric Repairs
7.20. Comebacks after a service/ Lessons Learned -
Suspension components from aftermarket (aka ground control)
0.4. Clutch Fork Pivot Pins
0.6. Audi's and their plastic stuff
3.10. Double wrapping is not typically effective
Torque Converter Installation - 550 and 750i
Crankcase vent hoses and valves
13.14. Engine Priming
7.21. Underpanels / engine covers
7.22. Valve Jobs
7.23. Setting Smog monitors for customers
7.24. Special tools Etiquette
7.25. Oil Pump Nuts and Baffles
AC Services
7.26. Welding
7.27. How to flag tech pay units according to mitchell
7.28. Required technician production
7.29. Floor Mats
7.30. Seat Covers
How to use and tighten zip ties
7.31. Tighten it down
7.32. The alignment Rack
7.33. We do things the right way.
7.34. Verifying the repair
7.35. Head Gasket Repair
Cam Sensors and Oxygen Sensors
7.36. Oil Drain Vows
7.37. Verify the repair
The bluepoint tire fillers
7.38. Protecting radiators & other sensitive parts during disassembly & install - By Zach
7.39. Oil change
5.19.1. Special Procedure for some oil changes -
7.40. Oil Filters
Hood Latches
7.41. Alignment
7.42. Diagnostics
Diagnostic Check Sheets
Level One Diagnostic

- Level One Cooling System Diagnostic
- Flagging Diag
- 5.11. Diags with multiple codes
- We fix cars - Can we fix during the diag?

7.43. Waiter Oil Change
- 1.9. Names of parts

7.46. VW/Audi intake manifolds and other silly plastic things
7.47. Fuel Pump Replacement (7/21/22)
7.48. Alignment related suspension bushings
7.49. Exhaust locking nuts and other locking hardware
Hardware
7.50. Loading bushings when installing
7.51. Belts
7.52. Dead Batteries
7.53. Intake boots with trans removal or other moving of the engine
7.54. Spark plugs
7.55. Fender Mats
7.56. Batteries
- 5.32.1. Dead Batteries
- 5.32.2. Battery Replacement
- 5.32.3. Battery Charging
- 5.32.4. Batteries (AGM, Gel)
- 5.32.5. The battery tester -

7.57. Racking a car
7.58. How to replace a cabin air filter
- How to replace a cabin air filter

7.59. Old PartsHow to replace a cabin air filter
7.60. Engine air filter
7.61. Cooling system exchange
7.62. Injector retaining clips
Differential Speed Sensors
7.63. Clutch master and slave cylinders
7.64. Filling a manual transmission
7.65. Smoke Machine
- Maintenance Checklist

7.66. Aftermarket Components
7.67. Performing a brake fluid exchange with light reset
7.68. Clutch, Flywheel, Rear Main Seal replacement
7.69. Performing a mileage based service when there is a repair needed.

5.40.1. If we find a stage 3 oil pan leak during the inspection and we are changing the oil - do we change it?
2.5. When we fix a leaking component or seal
5.40.2. Cooling service based on mileage
7.70. Cooling System Electrolysis
7.71. Cooling System Electrolysis
7.72. Detent pins
7.73. Vacuum Pumps
7.74. Order of mechanical work
7.75. Underpanels, Fan Shrouds, and other missing/broken items in inspections -
7.76. BG Kits - GDI vs. intake cleaner???
7.77. Replacing Calipers -
7.78. Oil Leaks
7.79. Important Tech Resources
Great link for VW info - http://www.vaglinks.com/vaglinks_com/Docs/SSP/
M20 intermediate shaft bearings
s85 Bearing Clearance Explanation
E36 (M / Non-M) ASC Delete (Track only, not a policy)
7.80. Alignments
7.81. OMS Ride Height Adjustment

8. MARKETING
Customer Retention
My Shop Manager

10. Contacts and Referrals
10.1. Machine Shops -
4.1. Machine Tech
4.2. Car Quest Oceanside
4.3. HDS Car Quest Escondido -
Excellent machine shop for cylinder heads. Does not deliver

Richard Auto Electric
Rebuilds starters and alternators. Has electric diag data.
Valley Chain and Gear
Laramie would be my first choice but he hasn't been good about keeping a schedule lately so be sure to get details of if he can do it and when - 619-977-3738. All Purpose Manufacturing would be my next - the owner is a customer whos name is Orlando and his cell number is 760-828-04780. if you choose them they will produce a high quality product in a timely fashion but you have to be super dooper exact with what you ask for because they're not pros at

the car fab stuff. Next is Marks fab shop - don't know where he is located now but he's done a ton of fab for us that comes out real well - 619-952-9823

3. Parts

3.1. SSF - Nick

Northside - Kris

IMC

Shop Services

Scrap Guys

Oil Recycling -

1. Mission Statement & Fundamentals

1.1. Mission Statement

1. **We provide the absolute best *customer experience* (QBR) by providing the *highest quality repair* paired with *incredible customer service* at a *fair price* to ensure a *long term relationship*.**
    a. **Customer Experience - Imagine if our customers were intentionally breaking their car just so they can come back to our shop to experience our service. They should be so in love with our service that no matter what the cost they can't wait to come back. They know we are always on their side and will only do what is best for THEM. We educate the customer about proper maintenance so they can ensure an affordable long term experience with their car.**
    b. **Highest quality repair - There are plenty of great mechanics out there but only few have what it takes to work on our customers cars. It's the little things that separate us from the rest. Not only do we perform the most thorough inspection in town, recommending only what is needed to maintain the car to the OMS standards, but every repair is completed with the love and care it takes to provide our lifetime guarantee. We use factory hose clamps instead of aftermarket, We replace small clips and holders as needed. We can take any car we've previously repaired to ANY other shop and make their lead technician look like an amateur. BMWNA is knocking at our door asking "How did you do that?"**
    c. **Fair price - Don't mistake this for a cheap price. Cheap means cheap now and fix it again later at an additional cost. Fair price means every repair is done at our absolute minimum markup to keep the doors open and maintain a fair living for our employees. All of our prices are calculated from our exact cost and never artificially inflated.**

d. **Long Term Relationship - We’re here to stay. We have long term employees and long term customers. Every repair performed lasts a lifetime and our best practices are to maintain every car for a lifetime. Our lifetime warranty isn’t just a guarantee, it's our Promise - Our promise to always do what’s best for our customers, our employees, and our business.**

1.2. Fundamentals (17 of em as of 10/7/2021)

Consistency

Consistency is the key to a long term relationship with our customers and working family. Once we set the standard for service we have to live up to that every single time, no matter what.

Perfect the basics

The secret to success here is in the basics. Perfect them as a foundation then build from there.

1.2.1. Be a Pro.

Be a professional for anything you need to be. When working on something a professional knows everything about how it operates. Take the time to become a pro when you’re working on things you’re unfamiliar with.
Use and master your tools.

1.2.2. Do the right thing.

Work with integrity. We believe in complete transparency. Our customers and team workers deserve to know every detail about our service. When questioning the right thing to do in a situation ask yourself these questions, in this order

1. Is this what’s best for the customer in the long run? (reference “future guy”)
2. Is this what’s right for our company and culture?
3. Does this end with a satisfied customer experience? How can we be sure it does?

1.2.3. Make Quality personal

We take personal pride in the service we provide. Mechanical repairs, customer interactions, teamwork. We work on cars like it were our own mothers.

1.2.4. Be detail oriented.

Being precise in communication, scheduling, and measuring all lead to success in our team. Don't make assumptions. Assumptions typically lead to miscommunications and failure.

1.2.5. Be curious.

We must always be intrigued and eager to learn how stuff works. Knowledge is power and it takes a lot of power to continuously improve our team. We are a training company. We all keep an open mind to coaching and continually work to improve our skills. We must be careful to balance our curiosity and learning with using our skills for what we're already good at - We've still got to pay the bills so production work is what keeps us able to do research and learn as we go.

1.2.6. We are a training company

- We are always learning and sharing. Every day, every job we approach with open minds ready to accept the knowledge presented to us. Its OK to attempt a fix that's not guaranteed as long as we educate the customer as to our attempt. Our customers trust us to advise them on all the options and recommend our best option.

1.2.7. Listen Generously

Listen to understand others' needs. Put yourself in the other person's shoes and see the situation from their perspective. Ask yourself "Why" from their point of view and approach the situation with their best interest in mind.

1.2.8. Under promise and over deliver! Set the stage to amaze

1.2.9. Keep it fun & Positive

It is important to laugh and joke. We spend most of our lives here at work, so we might as well enjoy it!

1.2.10. Look really really really good.

Appearance counts. Your personal appearance, work station, work… everything you touch represents the OMS family- make it look really really really good.

1.2.11. Be punctual.

Be on time for work, be on time with customer updates, be on time with updates within our team

Take Responsibility - Own it

Identify what you don't know and find a way to learn it. Ask for what you need and take responsibility for your success. There is no room for victims in a high performance organization. [Responsibility Video]

1.2.14. Think first, work smart

Read the instructions, learn the system before diving in. Don't work harder or faster but work smarter and safer. This will lead to excellent productivity and a top quality product. Begin with the end in mind.

1.2.15. Set expectations with clear accountability that are mutually understood.

1.3. Employee Acknowledgement

Employee Acknowledgement

The OMS Guide To Victory describes important information about Oceanside Motorsports Inc., and I understand that I should consult the President regarding any questions not answered in the Guide To Victory. I have entered into my employment relationship with Oceanside Motorsports Inc. voluntarily and acknowledge that there is no specified length of employment. Accordingly, either Oceanside Motorsports Inc. or I can terminate the relationship At Will, with or without cause, at any time, so long as there is no violation of applicable federal or state law.

Since the information, policies, and benefits described here are necessarily subject to change, I acknowledge that revisions to the Guide To Victory may occur, except to Oceanside Motorsports Inc.'s policy of employment-at-will. All such changes will be communicated through official notices, and I understand that it is my responsibility to read and comply with the policies contained in this Guide To Victory and any revisions made to it.

X_____.

1.4. Customer facing mindset

Service advisor and front office staff are the face and the voice of the company. As the service advisor goes the company goes. When you approach your job it should be with an attitude of what can I do to help? Not how can I get done with customer so I can move onto the next task but how can I get this

customer to be as excited to be here as I am that they are here? How can I exceed this customer's expectations? How can I get the customer's needs and wants taken care of? Remember this customer's happiness with the process here will directly affect my paycheck, my coworker's paycheck as well as the businesses profitability. We are here for the customer they are not here for us. Service advisors attitude, approach and mindset should be to gain a customer's trust for life and to strive to always accept the next one in door or on the phone. Remember we are looking for customers for a lifetime. Anything less is not acceptable if we do not reach this ultimate goal we

have failed,

Read, understood and embraced. X_____

1.5. Technician Mindset

I am the do-er. I define, maintain, and improve the quality that we rely on. I understand that our team is only as good as our weakest player and I vow to work with my team to constantly improve everyone's skills and life. I approach every day with an open mind and willingness to learn. I communicate clearly and thoroughly with my team.

2. Job Descriptions

2.1. Direct Report

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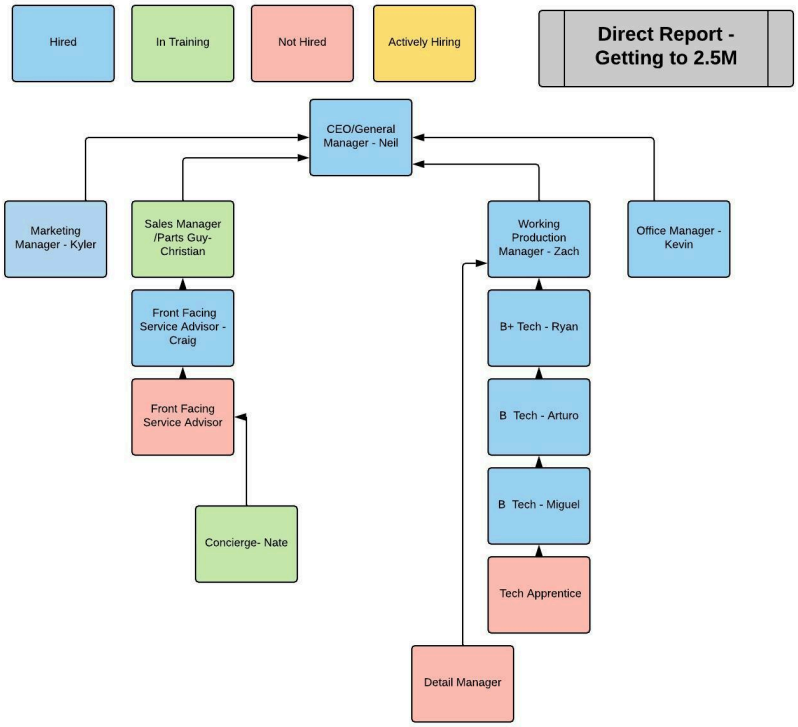
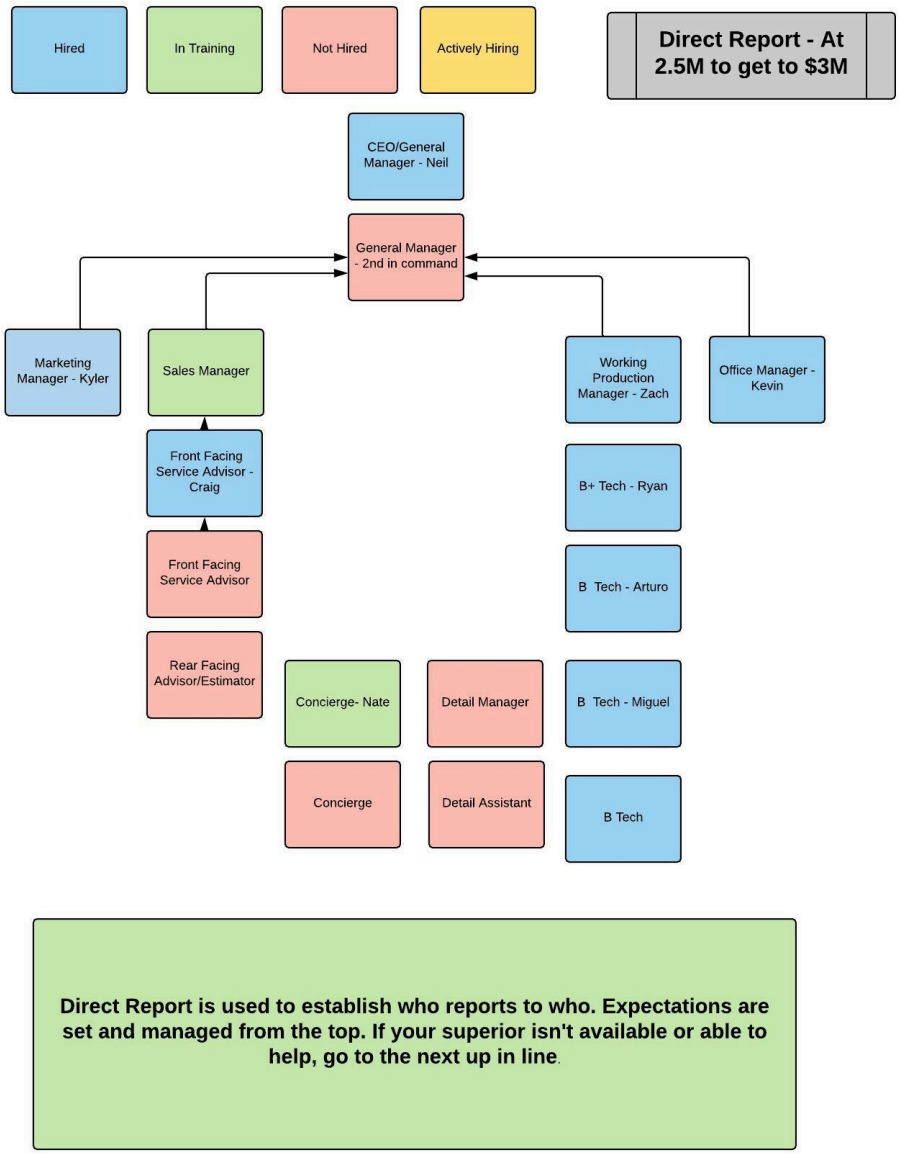


Direct Report is used to establish who reports to who. Expectations are set and managed from the top. If your superior isn't available or able to help, go to the next up in line.



Onboarding

Onboarding

Working Sales Manager

- Responsible for current Sales goals
- Do weekly one on one meetings with each team member below you on direct report
- Lead the morning meeting and other huddles
- Manage exit schedule process and audit weekly to ensure we are doing it perfectly (2-3 exit schedule appointments per car)

- Manage Maintenance rec process to be sure we are following it (currently nowhere to hide process)

2.2. Working Production Manager

- Teach. Teach. Teach. We are a training company and our foreman is responsible for building a stronger, smarter, and more efficient team - week after week. Your job for the most part is to teach and manage.
- Maintain shop productivity current defined goal (40 units per tech including production manager)
- Aid/perform diagnostics when necessary
- Aid/perform repairs and maintenance when necessary
- Maintain less than 1% comeback overall
- Perform weekly one on one meetings with all team members below you on the direct report
- Fill out loss reports as needed
- ~~Distribute and manage ro's to all technicians~~
    - This is a team effort involving the SA's and foreman. It's the foreman's responsibility to aid in work being assigned to the best suited tech based on skill set and schedule but OK for SA's to manage distribution for the most part.
- Solve problems and hang ups on technicians jobs while referring to the "when we hit a snag" process
- Ensure a final QC is done on all cars so there are no comebacks
- Aid in all diagnostics as necessary - according to test plans
- If diagnostic is performed by other tech they must review with foreman before submitting and there must be exact answers on what was done, what is needed to continue
- Manage weekly tech training sessions
- Manage individual tech productivity to meet the overall goal
- Meet with shop Manager weekly to discuss shop operations, improvements, and issues
- Manage recruiting new technicians so we always have the best techs around
- Ensure all inspections are accurate and detailed
- Manage Opening and Closing shop including pulling out and in cars
- Road test cars with customers for diagnostic symptoms
- Communicate with customers as needed for more technical information as requested

2.3. General Manager -

- Manage Banking
    - Distribute funds per Profit First percentages weekly. If income is insufficient consult with Neil on what accounts to fund.
    - Review daily bank accounts for insufficient funds/overdrafts
    - Maintain minimums in accounts -
        - Payroll $10,000
        - Vendor parts $5000
- Handle tax documents and follow-up
    - Pay state sales taxes monthly

    - Oversee all outstanding taxes due (2013 payroll taxes, 2015-17 sales tax) Check Mission Fed credit union for $500 2013 fed tax payment on the 15th. If not taken by the 20th, manually pay thru EFTPS.
    - Annual battery sales tax payment
    - Oversee tax audits
- Manage check writing
    - Track outstanding checks
- Process payroll
    - Enter daily hours for techs in spreadsheet from UAttend
    - Note hourly vs flag unit pay for techs, pay accordingly
    - Track vacation/PTO, update as anniversaries occur (see employee handbook)
    - Update health insurance amounts, if needed
    - Pay payroll taxes
    - Distribute 401K funds (Paychex retirement) File EFAST forms as required.

- Manage weekly 1 on 1 meetings with all employees
- Have weekly meetings with marketing and office manager
    - Manage marketing calendar
- Run and Manage the meetings
    - **Attent Morning Pow wow**
    - **Manager Meeting**
- Input weekly numbers and advise on wins and improvements
    - Invoice audits - mileage,vin, exit schedules, review CC
    - Review SA productivity and report
    - Review Tech productivity and report
- Arrange and manage Courtesy check clinics
- Manage training accountability for each role
- Hold shared chores accountable for - bump to office manager
- **Praise or Reprimand - Manage Loss Reports, redirects, and write ups**
    - **Loss reports and redirects can and should be written by anyone**
        - **They are submitted to the GM and kept track of**
    - **Write ups can be written by GM, service advisors, or anyone above anyone on the direct report**
    -
- Does the Quarterly review and planning
- Attends and contributes to 20 group meetings
- **Weekly coaching call**
- Manage customer feedback (WHUB calls, surveys, etc.)
    - Customer advisory group
- Make sure fundamentals are being followed
- Website
    - Ensure all content is up to date
    - Update pics and content to stay new and relevant
    - Handle updating photos and arranging photo shoots for new employees
    - Video on the about us page for each employee

        - Moz.com
            - Look at your competitions websites
            - What are they good at?
            - 15-20 mile radius
        - Join our team button and info etc on the about us page
        - Education tab on the website with info on true cost to own, cost per mile, maintenance services etc.
            - Customize true cost to own spreadsheet and upload it to website available for download
            -
        - How much is a diagnostic
        - Yelp, Google, and other sites
            - Keep pictures up to date
            - Information up to date
        - Create the marketing calendar!
- Track customer source
- Customer surveys
- Insert processes into guide once signed off by the team
- Keep guide updated and available for employees
- Misc
    - Process DMV vehicle registrations on time, if smog is required notify parts manager

TBC…… (9/15/22)

2.4. Front Service Advisor -

Maintain a 55% gross profit margin while working at 100% technician efficiency to meet all of our teams goals while maintaining 100% customer satisfaction - No pressure.

- $20k in sales for EACH front service staff is the minimum expectation. So a team of 3 (parts plus two service advisors) is responsible for $60k in sales weekly
- Track and recommend all preventative maintenance for every vehicle - remember we are a maintenance shop. Maintenance is the service advisors responsibility, repairs are the technicians.
- Answer the phone by the 3rd ring with the happiest greeting ever known (customers should be scared) - Whatever their problem is, you will fix it. That's why their calling - They have a problem and you are their knight in shining armor.
- Follow the customer experience process to 100% accuracy and commitment
- Print out Maintenance sheets/service intelligence sheets for each customer before they arrive and educate on it

- File all invoices once completed
- Follow up texts/etc.
- ~~Manage facebook and social media pages~~
    - ~~Maintain a less than 1 hour response time for facebook messages~~
    - ~~Maintain a less than 1 hour response time for Yelp messages~~

- Run the morning Pow-wow meeting - setting the expectation for units produced
    - Have the techs tell service team what they're doing
- Distribute work with aid from foreman
- Friday End of Day
    - Post all orders relevant to the current week - An RO that is OK to post is a job that has been completed or "most" of the work completed during that week. We post the order the week that the costs were incurred.
    - Print - Posted orders from the accounting tab of mitchell
    - Print out Tech Pay report from the accounting tab of mitchell
    - Print our detailed discount report and note explanation of any discount
- Maintain a super dooper clean front office
- Maintain a 5 star rating on all review sites
- Perform QC on all cars leaving OMS
    - Floormat, smudges, fingerprints, check the hood for prints, check interior of door for boot marks,

2.5. Rear Facing Service Advisor - Estimate & Parts Manager (Parts Guy) -

General navigation of commonly used software (ie. Tekmetric)

- Creating Estimates (comprehensive, dollar for dollar, ready to invoice)
    - Quote the best premium parts for SA to sell (provide the best service and highest warranty possible)
    - Build estimate that includes all maintenance items due as well as EVERY item of the inspection
    - Train front advisors on proper estimate building
- Maintain a 55% Gross profit margin
    - (tips: reduce VOR orders, shop around,)
- Maintain a relationship with all of our vendors
- Ordering parts when jobs are approved
    - Maintaining a tidy parts hot shelf (and labeled w/ names)
- Manage Core and Warranty parts
    - Make sure you get them back from the tech and process with the original vendor
- Return unneeded parts within 5 days of arrival
    - Verify returns have been processed and the money is in our pocket
- Managing the parts flow through the parts room

    - Maintain a super clean parts drop room
    - Keep Parts room organized
- Create employee Invoices
- Answer the phone after 3 rings if SA's do not pick up
    - Answer w/ the happiest greeting ever
- If a part is not returnable - It must be listed up for sale on Ebay - then it can be put on the shelf with a note saying its listed on Ebay
- Manage Inventory on a weekly basis
    - Barrels of oil, oil filters, BG fluids, Motul, Brake cleaner, EPC, wire brushes, super glue,
    - Stock but don't overstock
- Establish Menu Pricing
- Keep track of Parts Department repayment to Parts Operating bank account
    - Print last weeks parts report and decide if parts got repaid enough
- File Quarterly Invoices (vendor)
- Transfer / edit all technicians notes
- Organize upstairs parts
    - Used and new parts
- Monitor all RO's to catch any delays
- Adjust cost on all parts on invoices before they close
- Present and handle warranty companies (should be bumped to front SA's)
- Contact Asbury for oil recycle when needed

2.6. Client Coordinator (CSR)

Purpose - Get cars to the shop for service

The Client Coordinator is a position to assist in getting cars to the shop and making it as convenient as possible for the customer for this to happen.

Primary duties -

- Get cars to the shop
    - Pick up and deliver customer cars
        - Use a loaner
        - Uber
        - Leave a shop car, moped, or bike (moped/bike aren't currently approved but we're trying!)
    - Shuttle customer to home or office
    - Arrange uber for customer to home or office
    - Arrange rental car for customer

    - Get creative and use any means necessary to get cars for us to work on
- Perform appointment reminder calls & follow up
    - Call/contact each appointment 24 hours in advance to confirm appointment, what we're doing, and arrange any concierge services needed
- Call exit schedule appointments a week ahead of time to convert to appointment
- Use Kukui Follow up dash board to follow up with customers
    - Declined services
    - Lost customers
- Manage and produce the monthly newsletter
- Post to google twice weekly minimum
    - Use blog content
    - Shop updates
    - Service features
- Instagram/Facebook
    - 90% of posting to social media should be about our culture and what its like to work for OMS. Social media is for future employee recruitment and community involvement - its not about cars or service :)
    - Link posts from blog
    - Post story of shop happenings daily
    - Manage stories and profile content
    - Respond to messages
        - Most messages can be responded to by a service advisor if its technical info but try to handle what you can and its YOUR responsibility to make sure messages are returned in a timely manner
    - Post once per week minimum - Schedule these ahead of time
- Customer thank yous
- Referral program
    - Manage Material
    - Create contest
    - Keep track of customers to reward
- Maintain loaner fleet
    - Handle loaner scheduling
    - Maintenance
    - Check in and check out of each loaner
    - Loaner damages
    - Cycling of loaner cars in and out of service
- General support of front service
    - Scan all mail
    - Mobile deposit checks
    - Deposit cash at the Bank of Southern California (BOSC)
    - Manage petty cash - keep $100 in box for change and deposit all additional funds
    - Organize filing
        - File vendor invoices

- Move cars where needed
- Finalize services/QC on washed and done cars
- Perform check ins and walkarounds
- Answer phone calls and convert to customers as needed
    - SA's are first to answer
    - You and Parts Guy are backup
- Scan documents when needed
- Swag
    - Design, order, and sell super trendy swag
    - Manage the swag inventory
    - Ship when necessary
- Customer Experience (waiting areas)
    - Coffee cups :)
    - Edit and improve slides on the TV!
- Company Events
    - Car Shows
    - Womens tech clinics
- Keep all materials relevant, stocked, and up to date
    - Lifetime oil service brochures
    - After Hours drop envelopes
    - Key Tags
    - Thank you Cards
    - Photo project on the shop walls
    - Business cards
    - Do holidays BIG!

Morning Procedures:

- Ensure front office is beautifully clean and presentable for customers
    - Clean windows and desk
    - Refill coffee counter and fridge
    - Make sure desk looks tidy
- Turn TVs on and make sure our YouTube Channel is playing
- Look over calendar for the morning and prepare for early morning drop offs
- Hang "we are in morning tech meeting" sign on door before meeting

Daily Duties:

- Answer incoming phone calls (with a smile!)
    - SA's should be answering first but you are the backup BEFORE parts, GM, office manager, or Marketing

- Transfer calls to the appropriate member of staff when needed
- Take messages for customers if the person they need to speak to is unavailable
- Make reservations for customers in the calendar (make sure to always offer options for times of day/week, i.e. “would you prefer morning or afternoon/early in the week or later etc…)
- Ensure all necessary details are inputted into the calendar for reservation: Name, phone number, car details/details of issue they are coming in for
- Greet customers when they come into the shop with a smile and make them feel cared for
- Keep track of and answer Yelp inquiries
- Sign loaner cars in and out
- Keep track of loaner waitlist
- Sign cars in when dropped off (see ‘Sign-in procedures’)
- Sign cars out when picked up (see ‘Sign-out procedures’)
-
- Call customers to confirm reservations
- Monitor and respond to Facebook, Instagram messages for the company.
- Prepare thank you cards for customers
- Prepare customer birthday cards on the day they bring car in. File in appropriate month to send

Sign-in Procedures:

<u>For all same day ~~or waiter~~ oil service customers</u>
Follow the “Bridging into maintenance/ Customer Experience Process” - The only difference is the concierge does not quote pricing on any recommended items in the inspection. We simply review the inspection in detail and set up a follow up meeting with the service advisor if they are interested in further information and pricing - AKA “The 5 year plan”

  - Go out to car with them
  - Do not forget floor mat (seat cover if needed)
  - Check mileage and check all warning lights
    Walk around car and inspect for any minor body damages
  - If anything is found, such as minor dent in the body, suggest if they want an estimate to get it fixed
  - Build relationship with customer
  - Be friendly… compliment their car

- Make sure keys get given the right tag and are placed in the correct box, ready for the technician
- Sign cars into Mitchell and convert to order (american/asian cars make sure to input it as Lifetime job)

During Oil Service -

- Send inspection as soon as its completed
    - If there are any RED items we must notify the customer immediately and ask if we should plan to perform them today

Sign-out Procedures:

- Print invoice in advance so it is ready for when customers arrive, if possible
- Run through invoice/all charges with customer
- Explain what was done to their car
- Perform inspection review in detail
- Hand out next appointment reminders
- Hand out mystery coupons to appropriate customers to entice them to come back!
- Run over inspection report with customers, highlighting red and yellow issues and encouraging them to get them fixed
- Take payments
- Always thank the customer for their business!
- Mail out all thank you cards for customers signed out that day

2.7. Technicians - ALL

- Produce a minimum of 40 billable units in a 40 hour work week while maintaining a less than 1% comeback rate
- Keep their bays and benches clean
- Empty oil drains as needed (QC manager can help with this but it's the technician's responsibility to keep the drains empty enough to use for service)
- Pull cars out at the beginning of the day and in at the end
- Weekly cleaning assignment

Technician Training Path

Technician Training Path

2.8. A+ Technician -

1. Able to navigate multiple platforms of diagnostic software and equipment
2. Hybrid vehicles

3. Electric vehicles
4. Autonomous vehicles

2.8a. A Technician -

1. Advanced diagnostic abilities- mechanical, electrical, computer body control issues, noise, vibration, etc…
2. Internal and external engine, transmission, body control
3. Ability to use multiple scan tools
4. Picoscope
5. Oscilloscope
6. FLIR camera

2.8b. A- Technician -

1. Can proficiently perform all B level repairs
2. Can perform all levels of diagnostic to include basic electrical wiring and diagnostic electrical problems
3. Proficient in all major engine repairs
4. Is up to date on all aspects of current industry advancements and technology on diag and service procedures.
5. Can maintain 40 units per week or better productivity average as defined by the shop.
6. Willing to help other technicians as needed on diagnostics, repairs, services, and development.
7. Diagnose and repair convertible tops and sunroofs
8. Diagnose and repair air suspension systems
9. Thread repair & Bolt extraction

2.9. B+ Technician-

1. Ability to troubleshoot and diagnose medium to major items for mechanical/body control issues, driveability, noises, and vibrations.
2. Driveability issues minor to medium
3. Medium body control issues
4. Medium to major electrical repair
5. Engine , transmission, transfer case, replacement
6. Timing belts and chains
7. Water pump
8. Intake and Valve cover gaskets
9. Any bolt on repairs

2.9a. B Technician

1. Differential replacement
2. Brakes- calipers, brake lines, pads, rotors, etc…
3. Diagnose suspension noises
4. All outer engine accessory items
5. Shocks and struts
6. Minor transmission and clutch, cv axles
7. Hub bearing/ wheels bearings and seals
8. Serpentine belt and tensioners.

2.9b. B- Technician

1. Can proficiently perform all c level repairs and services
2. Can perform and operate required equipment to diagnose vehicles (MIL, TPMS, Coolant, Charging systems, etc…)
3. Can maintain 40 units or better average productivity as defined by the shop
4. Willing to help other technicians as needed on diagnostics, repairs, services, and development.

2.10. C+ Technician

1. Brake repairs and services
2. Complete alignments w/ adjustable shims/bolts. Primary and secondary angles/ diagnosis
3. Steering and suspension items
4. All outer engine accessory items
5. Minor transmission and clutches
6. Cv axles and bearings, seals
7. Fuel injection and air induction service.

2.10a. C Technician

1. Starters
2. Alternators
3. Radiator, thermostat, and coolant hoses
4. All basic services- Maintenance intervals(except timing belt)
5. Fuel filters
6. Install and pair new sensors

2.10b. C- Technician

1. Can proficiently perform all General service level repairs and services.
2. Is proficient in all under car repairs to include steering and suspension, brake repairs, wheel alignments
3. Can proficiently perform most underhood repairs and services to include belts, hoses, etc..
4. Light diag ability as to mechanical/ body and hooking up test equipment and or perform repairs I.E. charging system, coolant system, brake system, light electrical repair, diag ability to read codes and light troubleshooting.
5. Willing to continue any and all educational events to improve abilities and to further knowledge and skill level.

2.11a. Lube/ Inspection tech +

1. Reset tpms light
2. Install and rotate wheels
3. Air filters and cabin air filters
4. Wiper blades
5. Diagnose and replace batteries
6. Diagnose bent wheel and bad tire
7. Light repairs: battery hold downs, bulb replacements.
8. Complete alignments
9. Steering and suspension
10. Brake services
11. Ability to perform MOST fluid exchanges and maintenance services
12. Assist technicians with bigger jobs.
13. Train new technicians on inspections
14. Willing to continue any and all educational events to improve abilities and to further knowledge and skill level.
15. Complete ALL tasks on the apprentice assignment sheet Weekly and mark them off as they are completed.

2.11. Lube/ Inspection Tech

1. Safe use of lift and aware of all shop safety procedures.
2. Proper use of basic tool set
3. Ability to look up proper specs for oil, filter, and wheels torque specs.
4. Use shop computer (Alldata, ISTA, RealOEM, LMV, etc…)
5. Perform complete vehicle walk around and courtesy inspection
6. Tire rotations and torque wrench
7. Checking tire pressure (based on door placard information not the tire)

8. Complete understanding of tire markings and meanings.
9. Lube, oil and filter service and proper procedure for resetting oil light and installing sticker.
10. Complete ALL tasks on the apprentice assignment sheet Weekly and mark them off as they are completed.

Rear Shop Detailer/QC Manager

Your job is to make us look really really good.

The Cars

Wash every car - The car wash is one of the most important parts of our service. Our customers appreciate it and its how they can “see” the quality of work we do which is why it must be top notch. Yes its a free car wash but it's worth the thousands of dollars our customers spend here to maintain their cars.

The Shop

Each employee is responsible for keeping their own area clean but its up to you to take us to the next level. Certain shared areas must be maintained by you and you must always be working to elevate our cleanliness

The Customers

Another important reason our customers come to us is convenience. We schedule local shuttles for our customers to get where they need to go. You’ll get to know our customers well during these rides and you’re the face of this business. It's important you know our value statements and are always promoting the brand to our customers.

Duties

2.12. Rear Shop Detailer -

Wash and detail all vehicles as needed

- Shuttle cars where they need to go

- Clean bathrooms and maintain stock of towels and soap
- Wash towels as needed
- Maintain shop equipment and utilities (air hoses, reels, toilets, sinks, etc.)
- Purchasing for detail and shop supplies
- Clean exterior windows and waiting area weekly
- Manage oil, coolant, and scrap recycling

Daily

- Pre Morning meeting - Clean & Prep front office for customers
- Empty Break room trash
- Shuttle Customers
- Wash Customer Cars - make sure there's an air freshener!
- Sweep shop floors
- Mop the center shop floor
- Empty the shop trash cans
- Floor mats in all cars (keep an eye out)
- Monitor front parking lot - main spots have a walkway behind them and there's enough room for customers to show up and park

Weekly

- Clean Bathrooms (cleanest shop in SD!!!) twice weekly
    - Stock towels and toilet paper so there is more than enough for another week
- Empty wash water
- Keep the breakroom organized
- Check oil level in our waste oil container (this is located in the South West corner of the shop), schedule pick up when at 75%

Monthly +

- Change oil in compressor every 3 months
- Clean the glass panels etc. in the parts dept
- Clean wash water filters - man we need to improve this set up!
- Clean the white window frames between the two big shops/clean disco ball

Projects

- Paint wall by shop sink
- Magic clean all the walls!
- Water filter system

- New mesh on detail bay
- Redo the yellow lines!
- Fix the level sender on the oil waste container
- Paint oil drains with grey rustoleum paint
- Change the filter drain hose to not block the doorway

2.13. Marketing Manager

2.16. Bookkeeper/Admin -

- Manage Banking
    - Pay invoices not on autopay
    - Monitor ops spreadsheet to ensure all payments have gone through and are on time
    - Manage merchant services accounts/update annual compliance requirements
- Mail/Bills
    - Scan all mail and bills to digital folder

  Quickbooks
    - Enter daily sales summary, cash receipts, and posted order numbers from Tekmetric reports
    - Reconcile all accounts including BOSC, Mission Federal Credit Union, CapitalOne card, and PayPal, accounts monthly
    - Retrieve monthly business summary, sales summary, cash receipts by payment type, and parts sales by vendor reports*
    - Send notice to accountant when reconciliation is complete, by 10th of month. **Include the monthly reports*, as above, and PayPal statement** for the accountant.
- Budget
    - Prepare and distribute W2s, by required date in January of each year
    - Print New Hire Packet when employees are hired
        - Includes punch card etc.
        - **Enter New Hire Information on EDD website, Form CA DE34 <u>with in 20 days from hire date</u>**
    - Review contracts/equipment leases
- Taxes
    - Process sales tax payment monthly (don't be late!)
    - Process battery tax yearly

3. Team Processes and Procedures

How to add a shortcut to the GTV on your tablet

https://drive.google.com/file/d/1Pyilj22w0kXaj7xjwT4oZSWW_B_fUWPv/view?usp=share_link

3.1. How to make a process

Don't try and write a perfect process in one try. There should be a few revisions. I am most guilty of trying to produce perfect first drafts. Everyone's input is needed for our processes to be accurate and true. If you don't feel comfortable editing the processes, ask me privately for help and I'll train you individually. For our processes to work, they have to be used on a regular basis and edited as processes change & evolve. In the very near future, we will use these processes as a training tool. That is when their accuracy will be tested.

1. PUKE/Vomit on paper.
    a. This step must be written on paper/dry erase board.
    b. Brainstorm out loud.
    c. Everyone involved with writing the process should be a part of this.
    d. There's no bad ideas with brainstorming!
2. Organize the puke.
3. Write the process.
    a. Make sure to stay true to the title.
        i. Stay on subject.
        ii. Only 1-1.5 pages long.
    b. The process must be written in 3rd grade language.
        i. It must be easy to read.
    c. It must explain who is responsible for what.
        i. EX. The service advisor puts the keys with the workorder. Now the advisor is responsible for the keys.
        ii. EX. The technician enters the out mileage. The technician is responsible for the out mileage.
        iii. The process should set accountability.
4. Make a video! Screen record on the Zoom, watch the video below to see how to do this: https://drive.google.com/file/d/1_P80jvJdFAcwdySwh0lwrJm7p_yhtSXG/view?usp=sharing

If you're learning something, take notes. That can easily become a process. (Whether you're taking notes on paper or on Keep)

If you're helping someone learn something, remind them to take notes. That becomes a process.

The key is to get EVERYTHING written out in processes

1. Write the process directly in the guide (in the most relevant section)
2. Copy the process to another page to print it or print it straight from the guide
3. Bring to weekly team meeting and share with everyone
4. Have everyone sign off on the process
5. Enjoy having a structured team and not making mistakes twice :)

Using Google Docs

How to expand a text box using google sheets

https://soapbox.wistia.com/videos/Cnzf5KiVvP

3.2. Weekly Production Score Board & Morning Huddle

The weekly production scoreboard's purpose is to track and manage our weekly production and labor inventory. We set goals for each technician and for team totals then measure how much work we have sold vs. our goal. It is now obvious when we have too much or too little work in the shop. It's important that this is updated every morning with each technician and as a team. The morning huddle happens at 7:30am every morning - Service advisors will be ready with the days expectations for hours available. Technicians will arrive with all RO's (tablets) and clipboards to discuss.

Agenda for Morning meeting -

- Production Check in
    - Technicians
        - Each tech presents his/her hours produced
        - Service Advisors present the team total and verifies accuracy
        - Are we on track? What's the plan?
    - Service Advisors
        - Present dollars sold
        - Present dollars closed
- Schedule review

        - Each tech presents their schedule and adjusts as needed
            - The point of this is to prepare for any parts needs, snags, schedule conflict, special tools needs, or any questions about the jobs. This is the time to present to the team so they can advise on anything to look out for.
            - if there are ANY rollover jobs from previous day this should already be on the schedule and accounted for so service advisor can plan PRIOR to morning meeting
- Problem cars/campers
    - What's the plan? Next action steps?
- Review the list of cars in the shop and make sure nothings slipping through the cracks
    - Each service advisor has their car list printed from the WIP screen of POS system
- Equipment issues
    - What's the plan?
- Short and sweet, get to work!

3.3. OMS Schedule

Team meeting 7:30 everyday -
Ready to go, in uniform, tablets in hand. No reminder, this happens everyday.
Bring Tablets.

- Techs discus their schedule and present any scheduling issues or snags
- Production Manager review production board and units produced
- Make sure the Shop is ready to be worked in. Equipment where it should be, bays clean, benches empty

Team Lunch - Thursday 11:30-12:30pm - tables in middle of shop, lunch provided by OMS - Meeting starts at 11:30 SHARP! Food MUST be here by 11:30am

PTO/Time off Requests

Our goal is to be the best place to work with the best benefits available. We pride ourselves on offering excellent time off benefits and hassle free time off requests. Its important you plan ahead with your time off to make sure you get the time you need. It is rare we deny a Time off request but time off requests may be denied if:

- Too short of notice given

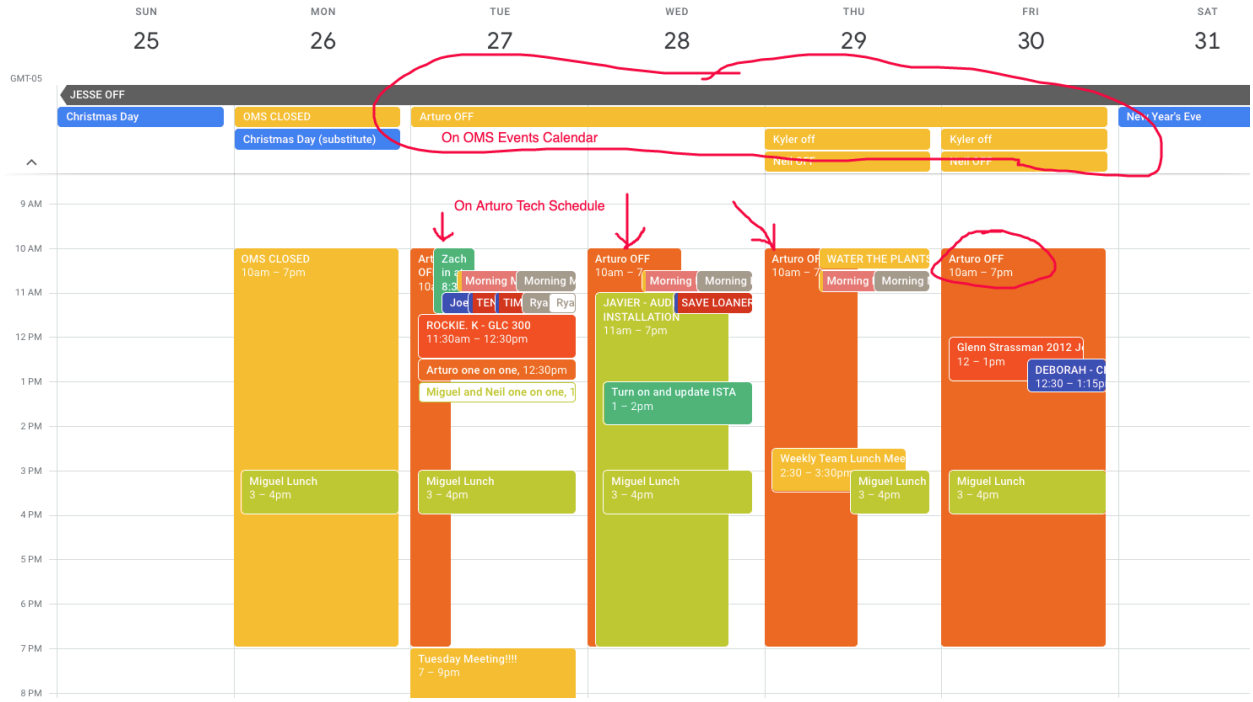
- Another member from your department is off on or around the same dates
- You are needed to work on a specific project
- You do not have enough PTO available

Request process

- Requests are currently done via email
- Email must be titled “Time off Request”
- Send email to
    a. Neil
    b. Your Leader
    c. Anyone else who should be in the loop
- Specify the dates requested
- Follow up if you haven’t heard back within 7 days

It is the General Managers responsibility to review and act on all time off requests on a weekly basis. If there is a conflict advise everyone involved and find a solution. In most cases we will approve the PTO request within 7 days.

- Once PTO request is approved
    a. Add an “event” to each day the employee is off
        - This goes on the “oms events” calendar
    b. If time off is for a producing employee (like a technician) you must also block off time on the tech schedule as to avoid any confusion



3.4. Keep it Clean Tasks

Breakroom Plus Tasks

3.5. Four Things a Customer Should Feel When They Leave

- ***When a customer leaves they should feel better than when they arrived***
- ***The customer should feel valued as a person and a customer***
- ***The customer should feel that they were well informed and the process was comfortable and transparent***
- ***People don't know what they're missing until they experience it***
    - ***Once they do know they expect it, everytime.***

Accepting Tips

Our official policy on accepting tips is this -
Politely decline once and say something like "we're happy to do what we do"
If the customer insists, accept the tip. It's rude to decline more than once. It's common for a customer to want to tip a detailer or technician - The service advisor can accept the tip and get it to the person it is intended for.

Cradle to Grave

Whenever possible a repair job should stay with the same technician that inspected the car and did the initial work.
Sometimes because of skill level or schedule we might have to share a job between techs but special care must be taken when this happens,

- New tech must review initial inspection and concur with findings
- New tech must review all notes made prior to performing any additional work
- A verbal conversation "the handoff" must be had between original tech and new tech
- It would be super cool to have the original tech check out the repair once its done (afterall you did discover the problem in the first place - might as well make sure its fixed!)

We've had issues that resulted in a sub par customer experience from bouncing between techs so please be careful when doing this and for the most part keep each job with the same techs and service team from cradle to grave

Customer Finance Options

Customers can apply for financing to pay for their repairs and service at Oceanside Motorsports. These are the plans we have set up -

Here's the main link you should use - https://oceansidemotorsports.com/financing/

These are the direct links to each financing platform
Get prequalified for a payment plan TODAY!

https://www.paypal.com/us/webapps/mpp/paypal-credit
Paypal has a great 6 months same as cash offer

You can share those links with the customer for them to apply for financing that can be used here. Same rules for payment at the time of service apply - meaning the car doesn't leave until the finance company pays us

3.6. Using Google Chat to improve communication and save time

Chat is our main form of communication within our team. It's required for us to answer messages within 20 minutes of receiving them.

It's required to have the app installed on all work devices and have the sound turned on. You should not be interrupted by chat messages but should be checking them frequently and responding as needed.

It's recommended you have the app on your personal phone.

When a conversation involves more than one person - create a space and label the space with the topic. Keep everyone involved in the communication.

3.4.1. Abbreviations to use:

Rn - right now, irl - in real life, af - as f*ck, tbh - to be honest, lmk - let me know, hmu - hit me up

Example -

Tbh, I'm hungry af rn irl. Lmk if you're getting food and hmu when it gets here lol.

3.4.2. Turning Off Notifications in Hangouts

https://drive.google.com/file/d/1K8RSaZC9s1Q_VAPmDb5FRkhDGL5Gvpu9/view?usp=sharing

7.7. When we hit a snag

When we have an issue during a repair there are a few important steps to take before inquiring with the manager.

1. Parts/Repair snags
    a. Alldata etc.
        i. Checks TSB's
        ii. Look at exploded parts diagrams
        iii. Create support ticket with alldata
        iv. Check LMV, Create a support ticket with LMV
        v. Contact BIMRS Group
        vi. Check identifix
        vii. Technician forums
    b. Google
        i. Search google for a description of the problem
        ii. Search google images for related pictures
    c. Dealer
        i. Get parts diagram from dealer
        ii. Ask shop foreman or technicians for insight
        iii. Double check the VIN number
    d. Tool Guy/Vendors
        i. Ask the tool guy
2. Special Tool snags
    a. Snap-on
    b. Dealer
    c. Rob Gleason
    d. Google
    e. Google Images
    f. Can we make it?
        i. Machine shop
    g. Can we borrow it?
    h. Ask another shop
    i. Start a group chat to problem solve
3. After all this - ask Neil

4.1 Resource list

4. Other shops/friends in the industry
    a. Ask another shop that specialized in the issue

5. Team
    a. If it's necessary gather our team and do a brainstorming session
6. We are all here to help each other out and work as a team but do your research first before asking others to do it for you.
7. Resources:
    a. RockAuto.com - Has detailed images and diagrams for all cars
    b. Wiki.rosstech.com - VW/Audi. Derek EGA
    c. Guided diagnostic via Autologic, alldata, AUTEL
    d. Shop key
    e. BMW TIS
    f. Honda tech, R3Vlimited

When Tekmetrics has an issue

1. Stay calm it's going to be ok
2. Reset the program
3. Submit a support ticket

Snag Huddle

A snag huddle can be called by any employee when brainstorming and problem solving could help our snag.

Start with presentation of relevant information

- Make sure all involved are present
- Start a chat to keep everyone on the same page moving forward

Brainstorming session

- There are no bad ideas here. Shooting down an idea disrupts the process so let the ideas free
- All ideas and thoughts are documented

Organize into priorities and next actionable steps

- Determine what idea(s) is most logical and most likely to fix the snag
- Document next actionable steps

Parts Save for investigation

All old parts must be saved in the used parts bin for a minimum of a week. If there's ever a concern with a car we worked on we need to pull all old parts from that car to be saved until the concern is resolved. When this happens -

- Remove parts from bin and put in bag with label
- Give to parts and establish a date to save them until
- Clearly mark the customers name and discard date on the parts

Example - We replaced worn engine mounts on a Toyota Celica and noticed an extra engine vibration after repair. We should immediately save the old parts (even if completely unrelated) for investigation purposes. The culprit ended up being a difference in the new mount vs the old mount but we had discarded the old mounts which made the troubleshooting process more difficult.

4.2. Tablets

Apple ID must either created using your OMS email or your personal. The password must be noted on file with Kevin so we can access if needed
Tablets never leave the shop except for test drives and shop related activities that require a tablet (like a remote PPI)

Yoga Friday

Yoga Friday is an employee benefit and I encourage all of you to participate. We love to promote personal health and Yoga and loosen you up before the weekend and help you stay flexible for the hard work you do. Yoga friday is team performance based, We have to hit the current week minimum goal to schedule the following week.

Yoga Friday is based on MLOP goal being hit. Current MLOP total sales expectation is $45k

4.4. Coaching conversation and Write-Ups

Coaching conversation

This is a conversation had when something could be better or a process is not being followed. There is no disciplinary action so long as the action item from the verbal is followed. Even though this is called a “redirect” this is still a written document that is dated with the date of conversation and signature of all involved

Write up -

1st

1st warning - review process not followed and determine action steps to avoid 2nd write up

2nd

At risk for termination - meeting is had with leadership team to determine exact action steps needed

3rd

At risk for termination or immediate termination at discretion of leadership team

Extended Warranty Claim Process

We are transparent with the customer and the warranty company about the condition of the vehicle including any modifications made

This is the process for handling an extended warranty claim. Think of the extended warranty as another method of payment. WE DO NOT ADJUST OUR LABOR, PARTS, OR PRICES FOR AN EXTENDED WARRANTY COMPANY. We do not allow anyone to supply their own parts, including extended warranties.

- Verify that ALL information that we have in TekMetric is complete and accurate (phone number, address, & email)
- Test the vehicle for the customer's concern/complaint.
- Prepare estimates <Link estimate preparation process>
- Get the customer's extended warranty information during write-up and make a copy for our records.
    - Staple the copy to the Repair Order
- Print an Extended Warranty Claim Worksheet
- Fill out the information on the worksheet
    - Enter the info into Mitchell's Vehicle tab
- In the Vehicle notes in TekMetric, enter the extended warranty information.
    - Warranty company name
    - Phone number
    - Fax number
    - Email address
    - Warranty start date
    - Warranty start mileage
    - Deductible
    - Duration of contract in time & mileage
    - Contract number

- Send (text or email) the inspection to the customer. On the phone, go over the customer's concerns, inspection results & estimates.
    - Explain that we will try and get assistance from the warranty company and that the customer will be responsible for the remaining balance.
    - TALK TO THE CUSTOMER BEFORE CALLING THE EXTENDED WARRANTY AND LET THEM KNOW HOW MUCH IT WOULD COST THEM IF THEY DIDN'T HAVE AN EXTENDED WARRANTY.
        - This helps the customer see what their contract is paying for.
- Call extended warranty.
- Each repair we are asking them to covered has to be a "customer concern"
- While on the phone with the extended warranty company, fill out the "Authorization Information" section of the worksheet
    - Find out how to submit for payment
    - Find out if the customer needs to pay before the warranty company pays
- Ask the warranty company to email the payment instead of faxing it if possible.
- If the extended warranty company makes an authorization, add the canned job "Extended warranty information" in TekMetric. Add the following information:
    - Auth#
    - Extended warranty total authorized
    - Customer total responsibility
- If the extended warranty declines or repairs are not covered, document on the Extended Warranty Claim Worksheet.
    - Include the claim number, if provided by the warranty company
- Contact the customer and let them know the amount that the warranty company is paying and what they are responsible for.
    - Confirm via text or email -
        - Price out the door
        - Price warranty company is paying
        - Price customer is responsible for
    - Once repairs are complete, Fax/email the completed and signed Repair Order with the required authorization number to the extended warranty company.

    - Inform the customer that the vehicle will be held until payment is received from their warranty company.
- Notify the customer that their vehicle is ready when repairs are completed and the payment has been received from their extended warranty.
    - **DO NOT RELEASE THE VEHICLE UNTIL THE BILL IS PAID 100%**

4.5. Mount and Balance cost

Balance .15 billed and .1 pay
Mount .10 billed and .1 pay

4.6. Cell Phone Policy

Oceanside Motorsports

POLICY/PROCEDURE

TITLE: **Cell Phone Policy**

PURPOSE: To alleviate distractions during work hours to ensure quality and timely repairs. Phone distractions are increasingly reported as a contributing factor to Workman's Compensation related claims. Phone distractions impact service times and are dangerous to both the employee using the device and fellow co-workers.

EFFECTIVE: March 1, 2012

1. Cell phone use includes all features of the cell phone including texting. Cell phones should be left at employee work stations in the OFF position or in their vehicle.

2. Employees may use their cell phone during their lunch break, once in the morning and once in the afternoon during a break.

3. Cell phones calls/texts are NEVER to be made/received while working on a customer's car. This policy has no exceptions and includes calls from the shop or from other employees.

4. If a vehicle has the potential to break down while on a test drive the technician will take the shop cell phone with them.

5. The shop cell phone is available and will be used for customer communications.

6. Employees are to inform family and friends of this policy. If an employee needs to be contacted they may call Oceanside Motorsports directly and you will be called to the phone or given a message if you are unavailable at the time of the call.

7. Employees that show disregard for this policy will be given two written warnings. If a third infraction occurs the employee will be sent home for a day without pay. Any subsequent infractions will result in a day off without pay. Continued disregard for this policy may end in employee termination.

I acknowledge receipt of the Cell Phone Policy. I understand and agree to its contents.

_____ _____

Employee Date

4.7. Employee cars left at shop

Employees are allowed to store one car at a time overnight. Car must be pulled out before the start of the work day so as not to be in the way of production and customer cars. Leave your car here at your own risk. Oceanside Motorsports does not express any liability for the car and is in no way responsible for any damage or theft.
If an extended stay is necessary you must first get permission from shop manager
Bench cleaning policy must be followed meaning the bench must be clear for customer car work

4.8. Storage Charges

https://oceansidemotorsports.com/storage-fees/

VIDEO - How to apply storage fee's with Tekmetric

VIDEO - Neil's take on storage charges.mp4

It's not our intention to charge people for storage, but we do need to use them to keep the customer cars moving through the shop efficiently.

Storage charges start 2 days after we've lost touch with the customer OR 2 days after presentation has been made.

Update 2021 - Because of parts shortages we will need to charge storage for any car left waiting for parts. This also applies to searching for used parts. We offer the option to tow the car to the customers house at their expense vs. paying us for storage. This has to be implemented because of the expected amount of cars waiting on parts.

3.7.1. Rack storage fee's

$350/day starting one day after presentation is made. We have to keep cars moving and a car tying up our rack is a major interruption of flow.

Cars stored out back (outside with zero liability)
$350/month or $30 a day whichever is lower

Cars stored Indoors (running only)
$60/day or $500/month
Cars stored indoors (not running)
$120/day or $1000/month
Lien sale starts as soon as we lose contact with customers or bill is not paid for storage (storage charges are paid on a weekly basis)

When to say NO

These are the OMS Non-negotiables. We say yes to so many things and offer so many ways to work with people but if you can't do these, we can't work together and have a successful relationship. Saying NO to these items protects our QBR of providing a totally amazing customer experience.

- Minimum of courtesy inspection
- Car Wash
- PPI Minimum if related to a sale
- Customer Supplied Parts

4.9. Yellow flag -

In racing the yellow flag means there's an incident on or near the track that could be a potential issue for you. As you pass the incident you are to stop racing but maintain an in control race pace as to not in danger any safety personal or cause an additional issue.

Examples of yellow flags are -

- I'm performing this job and there's something else that NEEDS to be done to ensure 100% customer satisfaction
- I'm performing a cooling system exchange and there is debis, stop leak, the wrong coolant in the system requiring a complete flush
- I'm replacing a worn belt but the brakes are at 2mm, metal to metal, or in the red in the inspection
- I'm putting this car back together broken or missing a maintenance item - communicate directly to the advisor. Our jobs as technicians are to put working components on a customers car so it leaves here in better condition than when it arrives. If we are ever in the position where we are installing a part that is not in working condition then we're doing it wrong. Within the workflow process we are to make a note in the RO, notify the team of the note, and put a sticky note on the RO(or computer monitor of SA) - all so we can notify the customer and advise to replace the broken part. In the case that we are putting this car back together using a broken part we are to bypass the process and go directly to the service advisor or customer (yes mr. Technician you can contact the customer if the SA is not available and the process has failed so far). "Are you sure you don't want to replace this worn driveshaft while its out of the car!?" We need the advisor and the customer to know how much of a priority and savings this can be to replace this part today while it's removed from the car.

"Are you sure you don't want to perform a differential service while the differential is out of the car!?

The Yellow flag means we keep the job moving but are cautious until the green flag has waived again (customer approved replacing needed items to save tons of money while they are in our hands)

4.10. Meatball Flag & Special Needs Cars

In racing the meatball flag is an informational only flag to let the racer know there is a potential mechanical issue with their car they need to have it checked out and fixed before they can continue racing

Meatball flags in our shop are pieces of information that could potentially cause our relationship with our customer to end poorly or require skills that are not within our strongset. Keep in mind we are a maintenance shop and we're the best at it. We are not a race car shop, motorcycle shop, super diagnostic shop (although we do possess diagnostic capabilities to promote our maintenance business). Some "Meatball Flags" we've had over the years are -

- My regular mechanic couldn't figure it out (start with level 2 diag)
- It's a race car
- Its not registered (meaning we can't test drive)
- Ever since it was built by -blank- its had this issue
- Customer supplied parts - **Not negotiable - do not accept**
- "I worked on it myself"
- It's a Jaguar, Saab, or other horrible car
- Aftermarket Parts Installed
- "I'm a yelper Elite"

Special Needs Cars

Maximum 2 special needs cars allowed in shop at a time! - The rest go on a waiting list

We take on special needs cars as our duty as a professional mechanic and to keep us on our toes however we must be careful about when, how many, and for what customers we accept these cars in. We've screwed ourselves in the past by accepting too many of these at a time or for the wrong customers. These cars typically require 110% of our resources for very little return. Protect yourself by underpromising and overdelivering, buy plenty of time, and quote high to set a fair expectation (multipoint, level 2,3,4 diagnostics, deposit up front). **These cars do not apply for the maintenance labor rate and are typically billed at a higher labor rate than normal.**

Special needs mirror hanger and sign on clipboard required

All quotes for special needs cars must involve and be signed off by the technician and anyone else involved before presenting to the customer

It is not our responsibility to store these cars while they wait on authorization or parts, we follow the storage rules very strictly with Special Needs Cars

Here's a list of cars that apply to this label -

- Modified 335i attempting to pass emissions
- Any Modified N54,N55,N63 (Can not diag or work on engines that are tuned!)
- Pre-90's 745i (or any 7 series really!)
- E30 M3, E28 M5
- Pre 1994 M series
- Race cars
- Any conversion car
- Pre 2000's Audi/VW
- BMW 8 series
- Audi V10
- Eurovan

Here's a list of jobs we shouldn't be doing -

- Any aftermarket parts that aren't from a main vendor that we can trust. Main vendors are
    - Bimmerworld
    - Achilles Motorsports
    - Beisan systems
    - AKG motorsports
- **ALL aftermarket parts must have a minimum of dealer parts margin**
- Any aftermarket part not sold by a trusted vendor listed above we will most likely not work with but can be requested through the GM for approval to use and install. We prefer not to use these vendors/brands -
    - VAC
    - BC coilovers
    - Condor Speed shop
    - Garagistic
    - CA Tuned
- Any adjustments or work with aftermarket parts that we don't know
    - Coilover adjustments especially on ones we didn't install or brands we don't support **(only brands we support are Ground Control, Bilstein, MCS)**
    - No Diagnostics on tuned cars or not legal cars
        - If a car (especially turbo) has a tune or tuner installed and it has a driveability concern or warning light on we must insist the tune be removed prior to us working on it. Most tunes or tuners get in the way of our diagnostics and some disable important features like misfire counters. If tune is removed prior to working on the car or we perform software

update to flash back to stock we are unable to reinstall any tune/tuner when finished.

- If you happen to be working on a car with performance modifications, tune, etc. make sure your hands aren't tied within a budget. Its already a big deal that we're working on a special needs car - there better not be a budget to work within or a special needs customer to work with in addition to their car.

- **Only AFTER this procedure has been followed (tune removed from car) we can diagnose the vehicle. Level two diagnostic must be quoted at a minimum and this only applies to BMW, Mini, Audi, VW - Any other cars with modifications can not be diagnosed for drivability concerns by OMS**

- Suspension modifications, Gauges, or any other aftermarket upgrade on anything **BUT** a race car.
  - Race cars have one purpose - to go fast. When you start trying to find a balance between performance and street use you run into a difference in opinion between the customer and what we feel is right. Especially with suspension its very hard to have a profitable job and a happy customer if you're balancing street use and performance. For this reason we only perform these upgrades on race cars. No promises can be made about ride quality and ANY adjustments or alterations after the fact need to be paid for by the customer.
- **No engine conversions (Grayson major loss) Send these to JMP**

- Don't get in the middle of these jobs -
  - ANY body shop work (especially involving paint)(seth major loss)
  - ANY clear film work (seth major loss)
  - No used cats ever, be very careful with aftermarket cats (e60 major loss) Let someone else break the law

Red Flag

In racing a red flag means STOP! (safely and near a corner worker station to await further instructions. It typically means something big has happened requiring immediate assistance on track.

We use the red flag for safety items needing to be done on a customers car

- Unsafe tires (in the red)
- Unsafe brakes - 2mm or major malfunction
- Chunks coming out of a belt
- MAJOR oil leaks
- Something major broken like an engine mount

Each employee has a collection of red flags that are attached to carabiners. When a red flag item is found on a car we

1. Clip the red flag to the key of the vehicle
2. Make a note on the RO of the red flag item
3. Notify OMS ALL of the red flag situation
4. Verbally tell the service advisor of the red flag
5. The service advisor is required to get an extra signature from the customer to be sure they are aware of the major issue with the car which could cause a breakdown, safety concern, extra cost incurred, or lack of an excellent customer experience.

Music

Please communicate with the team with what is appropriate.

Music must be PG13 rated, no offensive music, no swear words. Offensiveness and volume are the the discretion of the manager

Gloves

Gloves must be worn at all times while working on a car. Its important to protect yourself but also the overall cleanliness of the shop. Our fundamental “Look really really good” means we keep clean and gloves are required for this
Also see - the white glove service

4.12. Look Really Really Good - Uniforms

<u>OMS Uniform requirements</u>

- Everyone
    - We are a team and need to have the appearance of a united team with our uniforms. **It is required to only wear clothes with the OMS logo on them. Shirts, Sweaters, Jackets, Hats, Beanies are all available with the OMS logo and are the only garments allowed to be worn while on the clock at OMS.**

- Technician/detailers
    - Black or very dark grey pants or shorts. No logos or markings, no jeans.
    - If no OMS provided shirts technician will wear an OMS T-shirt or blank mechanic shirt until uniform shirts are provided. No other logo shirts/sweaters are allowed
    - OMS Shirts are provided to every technician and it is the technician's responsibility to keep them clean and presentable. You may use the OMS washer and drier
    - Shoes - Non-slip industrial shop shoes are required for technicians. Steel toe are not required but recommended
    - Uniforms must be kept clean and presentable at all times (no stains, wrinkles, or holes)
    - It is recommended to keep an extra set of clean uniforms incase of a spill so you can continue working
- T-shirts vs. Red Cap shirts - We allow t shirts for technicians during the summer on very hot days. We decide when this date is ahead of time. All remainder of time the red cap shirts are required.

- Service Advisor
    - OMS collared shirt with stain free pants. Khaki, black or denim acceptable - Shorts are OK in the summer -
    - Non-slip protective shoes in the shop

4.13. Back up

Any important files get saved to the drive. Files saved to computer are for same day use only - back ups!

4.14. Required Training

Each employee is required to complete a minimum of 4 hours of in house training per month. This can be done on the clock or at home and is paid training. Hours spent training will be paid per California laws as regular hours with normal overtime rules applied

Each training course must be documented on your training log and notes or a course worksheet must be provided.

Training flag time is paid for techs using the current calendar scheduling calculation when worked on the clock during business hours. After hours training is paid at your hourly rate according to overtime rules etc.

4.15. What’s touched in a customer car?

Seat back and forth per safety but we try not to touch any other settings
Make sure all the settings stay the same. Make sure their light settings are the same. If they’re on auto, leave them on auto. Mirrors may be adjusted if needed for safety.
Climate control - leave the temp the same for the customer and all fan settings. You can adjust the temperature and fan settings while working on the car but make sure they are put back the way they came in when you’re done.
We do not touch the radio other than to test the speakers on the test drive.

If you have to make adjustments that mess with the customers seat settings - Write a note in their thank you card letting them know you had to move them and we’re sorry.

Tire Storage

The tire storage rack is for temporary storage of tires and wheels. Each tire or wheel must be labeled with the customer name. This is not for long term storage except for the few spare wheels we have that are marked as such.

4.16. In case of emergency the water and air shut offs

- Compressor shut off is on the compressor in the container
- Water shut offs are under the sink in the employee bathroom on north side
- Main water for the building is at the curb side (not next to the building) at south east corner of the property - In the driveway near the metal pole.

4.17. The OMS Book Club

Purpose - To encourage reading and inspire conversations and change within our shop and positively affect employee lifestyles.

We will choose a minimum of one book per quarter (easy reads may add more within timeframe).
We will meet weekly on Wednesdays for team weekly meetings. One of our topics of the meeting will be to discuss the current chapter. One employee will be assigned the presentation of their takeaways of that chapter to the team. Each employee will write down their takeaways from the meetings

Headlight bulbs and upgrades

We do not do any work involving HID's, LED's, or other headlight/light upgrades. We've found it very difficult to have a positive customer experience due to the reliability of these products. Some are well made and we've used them in our own

4.18. E36 S50

Always replace the valve keepers on this specific year s50. They have a high failure rate

4.19. Check Control Panels

During check-ins and inspections we need to be checking "check control panels" for example E36 have the check control below the radio that will say "low coolant", just checking the dash isn't enough

4.20. Metal Recycling

We use CMS recycling to recycle our metal. We have to call them and notify them how many drums to trade out. They can always bring an extra drum that we can fill and return while they are here. The money we receive for this comes via cash a few days later and we use it for lunches and fun stuff.

They ONLY take the metal recycling drums, NOT the old parts bins (for saving old parts)

There are 4 drums total in the shop. 2 by each rear door. One is for Steel and one is for aluminum.

When the drums get traded out - KEEP OUR MAGNETIC SIGNS!

They like to come at lunch so make sure the drums are ready

CMS - (760) 741-6300

4.21. Sublets

We re-inspect every car like we did the work. We are responsible for the work that the sublet completed

Don't let muffler man or any other sublet vendor make us look like an idiot!

4.23. Advanced oil change with electronic oil level and/or oil cooler

We are filling the car up to "full" and not allowing the car to get to operating temp to allow oil cooler levels to take into consideration. This is a team effort between technicians and SA to ensure a positive customer experience. The technician must take the oil cooler and oil thermostat into consideration when filling oil. The SA must educate the customer on our process and the potential to have to add oil in 500 miles etc. also best to sell an extra qt of oil

Revision 5/13/21 after shipping Sobti 550i -
When performing an oil service or filling oil on a car with an oil cooler we must allow the oil cooler to open while the car is in our possession. We will verify this by using a temp gun to make sure the oil is circulating through the oil cooler. Once an oil cooler reaches 150 degrees its safe to say the thermostat is open. The car may have to idle in the shop or be taken on an extended test drive to ensure this. This requires our minimum appointment time of 8 hours and

ensures we have time to do this. This is what needs to be done to make sure we don't ship cars low on oil!

A method to get the oil temp up is to use a throttle stick to rev the engine at 2krpm for 20-30 mins

For vehicles with electronic oil level sensors its recommended to check the oil capacity before hand and its best to drain the old oil into a measured container so we know how much to put back in to start. Then we can top off to full being careful not to overfill. Sometimes if you use the oil capacity you can overfill the system because it doesn't take into account the oil still in the engine.
If engine does get overfilled its best to drain the excess from the oil filter cap (lower mounted caps like V10 M5 etc). That will drain .4/liter with each drain.

4.24. When is a car really done?

A few times we've had customers show up before their car is *actually* ready to leave. This happens in 2 cases -

1. Customers repair is done (usually a big one) We let them know of this and we'll be working on the detail and a few other small things. They say cool, maybe I'll pick it up next week. Then they show up the next day. Its our responsibility to be clear about the car being done done or not actually ready for pick up. In this case we should say "Sounds good, just make sure you give me notice so I can wrap up the car detail as the car will NOT be ready for pickup until you get back to me.
2. We call the customer with the diagnostic, they say they'll think about it. Then they show up (usually after the cars are all pulled in) to pick up the car.
    a. A customer assumes after our diagnostic that we pull their car out and have it ready to go for them. What they sometimes don't know is it may not be put all the way back together or we have it sitting on a rack waiting for authorization. It is our responsibility to be clear with the customer that the car will not be ready for pick up until we hear from them. "I understand you need some time to decide on this and that's no problem at all just be sure to let me know either way. Our technicians have some parts removed from the diagnostic that will need to be installed back if you choose not to do the repair." " I understand you need some time to decide on the repair, we close at 4pm is it OK if I don't hear from you to keep the car inside overnight?"

4.25. Seat Belts

Seat belts must be worn at all times while driving or riding in a car!

4.26. Pull all the cars out! No Campers!

Its super important especially while we're busy like today that we start our day with open bays. When you need a lift and they're all taken with campers it makes your job super inefficient. We need to work as a team to get the shop opened up - This means EVERYONE being on time and doing their part to open up the shop. Our team has a meeting every morning at 7:30am sharp to discuss the day's work and plan - all of the cars that are not currently being worked on will be pulled out so our bays are open for anyone to use - technicians shall have all cars pulled out before the team meeting so the shop is ready to rock after the meeting
If a car has not had any progress made after 3 days it is officially labeled as a camper and we must take action to keep the progress moving on that car.

4.27. Campers

We must maintain contact with the owner of every car in the shop on a daily basis. After 3 days if there is no movement within the workflow process the car is labeled as a camper and we must take action to get the car fixed or out of our shop. These snags are typically waiting on the customer or for us to figure something out. If it's waiting on the customer we politely inform them that we need to charge to store the car if they can't make up their mind. If it's waiting on us refer to the "when we hit a snag" worksheet.
We talk about all campers in the weekly team meeting a decide an action item based on the teams input

4.28. Safety glasses required

Safety glasses are required to be worn at all times by technicians or anyone in the shop. Safety glasses are provided by management upon request. We work in a dangerous environment and you only get one pair of eyes - please take care of them!

4.29. Borrowing & Using shop tools

Return them clean, organized, and in perfect working order
If you borrow a cutting wheel - make sure its new enough to use the next time. The tool should be ready to use when you need it
If you take a tool from the shop for personal or race car use, loan it to another shop, it needs to be documented. Please note who has the tool, and when it was taken from the shop, if possible a return date as well.

4.30. Where does all the filtered/distilled water go?

~~Please ask our water driver to drop the specified quantities at each water station. If more is needed at a station please update the guide~~

We have a fully funcitonal water filtration system now! Woohooo, reverse osmosis!!!

4.31. Fixing Equipment

Its a team effort maintaining and keeping our equipment in working order. As a general rule, if it takes 10 minutes or less to fix something you broke or found broke - fix it. Brag about it to your manager and you will be rewarded for keeping the shop maintained and in working order.
If you notice something not in working order or needing improvement notify the manager so it can be fixed. Don't let equipment go uncared for or working less than 100%

Shipping/Sending stuff in the Mail

USPS Flat rate boxes and shipping process

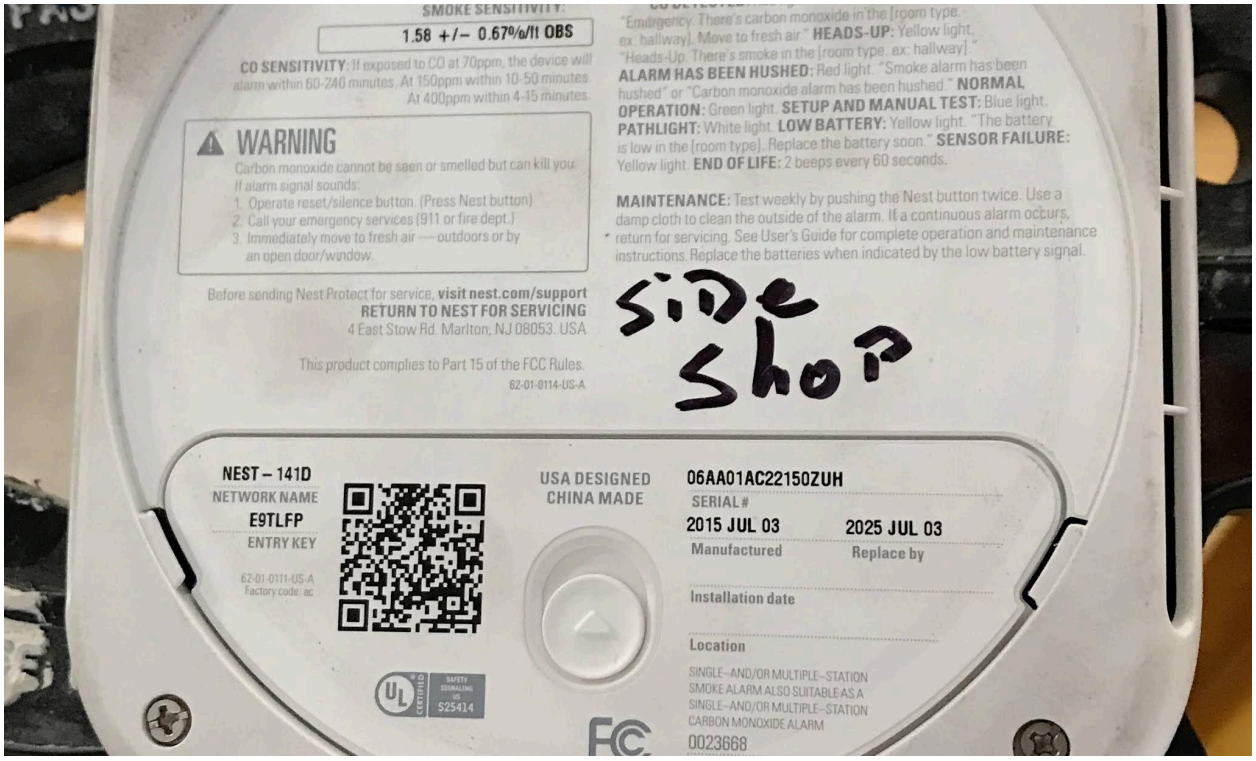
https://drive.google.com/file/d/1NU60iE-aI7U79Bvlole_K5t3ESGcX2Va/view?usp=share_link

4.33. The upstairs parts index -

~~Hung by the ladder - if you take something, edit the list. If you see something in a bin that's not on the list - edit the list~~
~~We try not to hoard parts but they do come in handy once in a while. They're only useful if you can find them efficiently so it's important this index is kept up to date. Thank you Arturo for the help creating this index!~~

4.34. Fire Alarms

Nest Protect uses an app - The alarm will test itself once a month between 11am-4pm


SMOKE SENSITIVITY:
1.58 +/– 0.67%/ft OBS
CO SENSITIVITY: If exposed to CO at 70ppm, the device will alarm within 60-240 minutes. At 150ppm within 10-50 minutes. At 400ppm within 4-15 minutes.
WARNING
Carbon monoxide cannot be seen or smelled but can kill you.
If alarm signal sounds:
1. Operate reset/silence button. (Press Nest button)
2. Call your emergency services (911 or fire dept.)
3. Immediately move to fresh air — outdoors or by an open door/window.
Before sending Nest Protect for service, visit nest.com/support
RETURN TO NEST FOR SERVICING
4 East Stow Rd. Marlton, NJ 08053. USA
This product complies to Part 15 of the FCC Rules.
62-01-0114-US-A
"Emergency. There's carbon monoxide in the [room type. ex: hallway]. Move to fresh air." HEADS-UP: Yellow light. "Heads-Up. There's smoke in the [room type. ex: hallway]." ALARM HAS BEEN HUSHED: Red light. "Smoke alarm has been hushed" or "Carbon monoxide alarm has been hushed." NORMAL OPERATION: Green light. SETUP AND MANUAL TEST: Blue light. PATHLIGHT: White light. LOW BATTERY: Yellow light. "The battery is low in the [room type]. Replace the battery soon." SENSOR FAILURE: Yellow light. END OF LIFE: 2 beeps every 60 seconds.
MAINTENANCE: Test weekly by pushing the Nest button twice. Use a damp cloth to clean the outside of the alarm. If a continuous alarm occurs, return for servicing. See User's Guide for complete operation and maintenance instructions. Replace the batteries when indicated by the low battery signal.
side shop
NEST – 141D
NETWORK NAME
E9TLFP
ENTRY KEY
62-01-0111-US-A
Factory code: ac
USA DESIGNED
CHINA MADE
06AA01AC22150ZUH
SERIAL #
2015 JUL 03
Manufactured
2025 JUL 03
Replace by
Installation date
Location
SINGLE–AND/OR MULTIPLE–STATION SMOKE ALARM ALSO SUITABLE AS A SINGLE–AND/OR MULTIPLE–STATION CARBON MONOXIDE ALARM
0023668
SAFETY SIGNALING US S25414

1.58 +/– 0.67%/ft OBS
CO SENSITIVITY: If exposed to CO at 70ppm, the device will alarm within 60-240 minutes. At 150ppm within 10-50 minutes. At 400ppm within 4-15 minutes.
WARNING
Carbon monoxide cannot be seen or smelled but can kill you.
If alarm signal sounds:
1. Operate reset/silence button. (Press Nest button)
2. Call your emergency services (911 or fire dept.)
3. Immediately move to fresh air — outdoors or by an open door/window.
Before sending Nest Protect for service, visit nest.com/support
RETURN TO NEST FOR SERVICING
4 East Stow Rd. Marlton, NJ 08053. USA
This product complies to Part 15 of the FCC Rules.
62-01-0114-US-A
MAIN SHOP
NEST – 7018
NETWORK NAME
L4LHB9
ENTRY KEY
62-01-0111-US-A
Factory code: ac
USA DESIGNED
CHINA MADE
06AA01AC271501PH
SERIAL #
2015 JUL 03
Manufactured
2025 JUL 03
Replace by
Installation date
Location
0023668
ISSUE NO.
SAFETY SIGNALING US S25414

4.35. Saturdays

~~Main goal is to be available to build relationships with new customers, allow Saturday drop off for work following week, Allow a more convenient oil service or light duty repair for Saturday customers~~

- ~~All work should be pre scheduled and parts here for the jobs~~
- ~~Technicians and SA's must be here by 8:30am to open up and be prepared for customers at 9am~~
- ~~The handoff - It's super important that SA's and techs discuss customers and cars coming in so our schedule runs smoothly. Saturdays have limited resources and have to be planned and executed perfectly~~
- ~~Don't forget to close out the credit card machine~~
- ~~Schedule needs to be set ahead of time for employees~~

4.36. When the Internet is not working

- Don't panic it's going to be OK
- Ask if anyone else is having issues
- Switch to our other network and see if that works
- Reset the router - located next to the time clock
- Reset the modem - located next to the refrigerator (unfortunately this shares a breaker with the toaster oven and sometimes pops)
- Reset the network switches - located everywhere
- Look at the indicators on all of these items to determine which is at fault
- Contact our IT guy

4.37. Work OMS does not currently do (but we may sublet)

- Tires - We use Discount Tire or San Diego Motoring and Accessories
- Alignments - We sublet specialty alignments like lifted trucks to Accurate Alignment or Oceanside Tire and Service. Do not use Jorge Alonso Services for alignments
- Smog Inspections - ABC Smog (He isn't very reliable) or Lightning Smog - Super reliable and very by the book.

4.38. Permissible Services

OCEANSIDE MOTORSPORTS IS ABLE TO PERFORM FULL MECHANICAL SERVICE ON ALL BMW, MINI, MERCEDES, VW AND AUDI MODELS.

OCEANSIDE MOTORSPORTS IS (at its own discretion) ABLE TO SERVICE OTHER VEHICLE MAKES BUT THE TYPE OF SERVICES ARE LIMITED TO:

- BRAKES
- MINOR SUSPENSION WORK
- DRIVE BELTS
- SPARK PLUGS
- MOST FLUID EXCHANGES
- MOST FILTERS
- WIPER BLADES
- LIGHT BULBS
- SOME GASKETS
- SOME TIMING BELTS
- TRANSMISSION ASSEMBLIES
- ENGINE ASSEMBLIES
- DIFFERENTIAL ASSEMBLIES

OCEANSIDE MOTORSPORTS IN NOT ABLE TO PERFORM THE FOLLOWING SERVICES ON OTHER VEHICLE MAKES:

- ANY BODY WORK
- HEAVY DIAGNOSTIC
- MODULE REPLACEMENT
- ENGINE INTERNAL WORK
- TRANSMISSION INTERNAL WORK
- DIFFERENTIAL INTERNAL WORK
- CODING/PROGRAMMING

We should stay away from working on any of these cars. They all require a specialist and that's not us.
Be very careful working on ANY Saabs, Jaguars, Anything English, Nissan 300zx, Dodge Neon SRT's, or other horrible cars

4.39. Race Cars

In the event we work on a race car or "out of the ordinary" vehicle where it will take much more time and precision than our standard repair work we will charge a labor rate equal to our diagnostic labor rate. We take great pride in this work and even with this labor rate we will probably still break even on it.
Added 10/31/17

Effective 9/10/19 since we didn't have the balls to charge the past race car labor rate we will at least charge like we do for the regular cars we work on. Race car labor rate will be a minimum of 1.3 times the tech paid units. Which as of this date comes out to about $190/unit.

4.40. Performance work

We are a specialized maintenance and repair company. We've found over the years that its best to stay away from these services because they do not fit into our (and our customers) success plan -

- ❏ Street performance modifications
    - ❏ This includes suspension kits, engine components, trim add ons, **aftermarket lights**
- ❏ **Customer supplied parts -** It never works out and sets up everyone for failure
- ❏

Tuning - We do not service or supply custom tunes. We can not diagnose any BMW's with aftermarket tuners on them. The tuners interfere with our diagnosis and usually end up being the problem in the first place

We do not have the equipment to do any tuning anymore - we've removed the temptation

~~We do install Active Autowerke performance software for stock and slightly modified OBDII cars provided they are for off road use only~~

~~1.8. Active autowerke tunes - procedure for doing them~~

- ~~❏ Any car we install a tune on must be an off road vehicle that is not registered for road use and it must be towed in and out of the shop~~
- ~~❏ All cars to be tuned must be in tip top condition and up to date on maintenance. We must complete an inspection first and pass the car before tuning.~~
- ~~❏ We always quote to keep the car for an entire day for active tunes (not including other work) We do not perform Active tunes on Holidays or Fridays or days that active is closed~~
- ~~❏ Updates on the programmer - Updates must be done before extracting ID. You MUST NOT update again until that tune is completed. If you do it won't work.~~
- ~~❏ Battery charger connected on programming mode (not a regular charger)~~
- ~~❏ NOTHING plugged into the USB ports (even the rear and glovebox) AKA ANY information device~~
- ~~❏ NO CD's installed in the drive (NAV DVD OK in older cars)~~
- ~~❏ Doors must remain closed during the entire programming process~~
- ~~❏ ALL codes must be read and documented prior to tune~~
- ~~❏ ALL codes must be cleared after the tune performed~~

4.41. Acceptable answers for a diag (from a technician)

With a diag answer -

1. This will fix your concern

2. This is the first step, will probably fix the main concern but we will need to continue testing after to be sure.

3. This is the first step and there will probably be more issues needed to diagnose

4. We have completed our level one diagnostic, here are the answers, our plan for level two is to do “A, B, C”.

Every diagnostic answer will be accompanied by a complete Parts and recommended labor list based on book times and further action steps if needed

4.42. OMS weekly meeting schedule -

Updated 8/17/19

3.27.1. Schedule

~~Tuesday 3pm-6pm - technician and Parts guy training (Bi-weekly)~~
Morning pow-wow every morning at 7:30
Thursday 11:30am-12:30pm Team Lunch Meeting
~~Wednesday 7am - service advisor training~~
MGMT meeting Tuesday 4pm-6pm

One on ones are individually scheduled - Its required that each employee have at least 1 one on one meeting per week with their direct supervisor or higher

3.27.2. Morning pow-wow

Every morning we have a Pow-wow to discuss current cars, cars coming in, campers/problem cars, and any other concerns. This happens at 7:30am. Technicians bring their tablets prepared to present their schedule and ask any questions needed to have a productive day. We review our units goals for the week and how we’re doing. If additional plans are to be made to produce goals - we make them.
Agenda for Morning meeting -

- **7:30-7:35 Morning motivation - 5 mins MAX**

- **7:35-7:38 Units produced check in**
    - **Each tech presents his/her hours produced**
    - **Service Manager presents the team total and verifies accuracy**
    - **Are we on track? What's the plan?**
- **7:38 - 7:50 Schedule review**
    - **Each tech presents their schedule and adjusts as needed**
        - **The point of this is to prepare for any parts needs, snags, schedule conflict, special tools needs, or any questions about the jobs. This is the time to present to the team so they can advise on anything to look out for.**
        - **if there are ANY rollover jobs from previous day this should already be on the schedule and accounted for so service advisor can plan PRIOR to morning meeting**
- **Problem cars/campers**
    - **What's the plan? Next action steps?**
- **Equipment issues**
    - **What's the plan?**
- **Short and sweet, get to work!**

3.27.3. Weekly Team Meeting -

- ~~Discuss current chapter of the book the team is reading~~
- Discuss wins from the previous week
- Update quarterly goals status
- Present newly created processes for GTV - team sign off
- Review suggestions and add to the board
- Discuss upcoming events
- Shoutouts

If you have to miss a meeting it is YOUR responsibility to receive the knowledge produced during the meeting and report to supervisor

If you miss a lunch meeting you must schedule time to review information prior to missing. You must also notify manager a minimum of 4 hours before hand

Suggestion Box

The suggestion box has turned fantastic results from employee feedback. We use the suggestion box for improvements you think would benefit us/you. Improvements to processes, procedures, tools, the shop/work environment, or anything else are all welcome and encouraged. When there is a request for an improvement the request should be directed to the suggestion box.

Each week the current suggestions are read to the team in the weekly meeting - These suggestions are all written digitally in the “meeting notes” of the google calendar slot for the meeting. Put the date above the current additions.

At the end of each 4 week cycle we vote on the “best actionable suggestion” and the creator of that suggestion gets a $50 gift card.

Suggestions are reviewed and plans to implement are created in the tuesday evening meetings if needed. Most suggestions can be implemented right away, don’t feel like you need to wait if its a good idea!

Tuesday Evening Meeting

Designate meeting referee to keep on track and note

Make notes of ideas and individual goals created to hold everyone accountable. We will try using a google docs again (neil will note).

Meeting Agenda

- Review previous week/ portal review (20-30 mins)
    - What did we do well?
    - What opportunities were missed?
- Review quarterly goal and note most recent averages (2 mins)
- Review phone recordings with Christain and team (15 mins)
- Review last weeks meeting goals
    - Did we get it done? Individual goals from the last meeting
- Turn suggestions into actions
    - Create spreadsheet to categorize
    - Assign tasks to complete the suggestions
- Monthly topic -
    - This month - MUST DO’s and SHOULD DO’s
- 10 mins per person - open forum

3.27.4. One on One’s

Purpose of one on one meetings with employees is to recognize their accomplishments and take a structured approach to improvements. Our employees are listened to and we can create processes to fix and improve any concerns in the shop

Each employee is scheduled for a 30 minute one on one with their manager. Most days these meetings can be kept to 15 minutes but we allow 30 minutes on the schedule as to not be interrupted.

Meeting agenda -

1. Dreams and goals review
2. What you do good!
3. Improvements
    a. Productivity report review
4. 2 current projects review
5.

4.43. Lifetime Oil Service

Lifetime oil service is charged out at 4x the cost of a regular oil service for the customer's vehicle at full price. No other offers or discounts can be applied to the lifetime oil service. If a customer is having their oil serviced the same day, that oil service can be applied to the lifetime (so for the cost of 3 more oil changes they can become a lifetime oil service member)
If a customer would also like to include BG services or Blackstone analysis into the lifetime deal we just multiply the service requested by 4 and charge it.
The lifetime oil service is charged as a sublet sale with the cost of zero. When an oil service is sold to the customer we charge it at retail then discount it down to zero for the customer. The service fee is added at each visit as a sublet sale with a cost of zero (the details of this are being worked out with our accountant and will be updated asap)
When a lifetime oil service is sold we create a memo in our POS system on the vehicle screen that will print to the order “lifetime oil service member”. Also note the service fee rate and what version of membership they signed up for. Our first members get a $10 service fee, later members are now charged a $13 fee and so on.

The oil change sticker is different for the lifetime oil service - We still note the recommended maximum miles between oil services **(typically 5,000)** but the date shows 4 months instead of 12 months. Be sure to schedule the customers next oil visit on the calendar for the same date chosen on the oil change sticker. This is typically best noted upon check in.

Lifetime oil service covers the base cost of the oil service unless special upgrades were purchased at the time. As of now (2023) our “normal” oil service includes a BG MOA additive for $20. This is not performed for free with a lifetime oil service but can be upgraded for just $20. Please do not give this additive away for free if not originally purchased with the lifetime oil service.

3.28.1. FAQ’s for lifetime oil service -

Can Jeremy (the clover guy), he wanted to know can he use one of his oil services from his lifetime oil change membership on his wife's 428i?
The service is per vehicle and can not be shared with another vehicle, but you can take advantage of our family discount of 20% off any additional lifetime oil services purchased per household. Your family

member will absolutely see the value of the lifetime plan and can save the additional 20% to make it even better

Writing it up

4.44. TOW TRUCK DROP:

When a car is dropped by a tow truck we must move it out of the alley immediately into one of our spots or the shop. That Alley is a shared space and delivery trucks need to drive through there during the day

4.45. Car Keys

4.46. Hiring Process

- Any inquiring employees get an immediate response to set up a phone interview
- Perform phone interview
    - Do you like this person?
    - Will they fit our company culture?!
- Team interview
    - It's important to get the teams input on ANY possible candidates. We've got to work with this person all day everyday, it's up to us to make sure they are an improvement to our team and will be personally successful on our team
    - Set a 2 hour window for the potential team member as to leave time for the tests and interview questions
    - We perform the bird test
    - We perform the wonderlic test
    - All employees must know chassis codes for BMW before employment
- All Employees are subject to 90 day probationary period

The Cart - Which one are you?
https://youtu.be/FQC5jnj68ko

New Hire Checklist

These links are not valid, this process used from FIWF

- Fill out application
- Give WiFi password
- Copy of driver's license
- Give a copy of their pay scale
- Get direct deposit information for payroll (DD Form)
- Give employee new hire packet
    - I9 tax form
    - W4 tax form
    - IT4 tax form
    - Ohio new hire reporting form
    - Emergency Medical Info form
    - Employee Emergency Contact Form
    - Health Insurance Rate Letter
    - Employee Information Form
    - Non-Disclosure Agreement
    - Phone Recording Authorization Form
- Add info to Mitchell
    - As a customer
    - As a tech
- Add info into Phone system Phone book
- Update shirt size in employee shirt size doc
- Add info into TVP for employee as advisor/tech
- Add info into Identifix
    - if tech, day one
    - If advisor, first week
    - Get login information
    - Do webinar training
- Add info into Gmail. Share with writer email and Jessica's email
- Add employee to Drop Box to access handbook
    - Go over comment & question process
    - Give employee handbook form
    - Set a date that employee will have handbook form signed and turned in.

- Give employee most recent smell test
- Go over Bug List meeting form
- Show BG University & Fluid application website

Fax the following forms to the accountant (Farson & Farson 330-494-2478)

- DD form
- W4 tax form
- Ohio new hire reporting form
- IT4 tax form

The Interview process -
Interviews with front end staff and techs
Techs take the technician test upon first interview

Once hired he is assigned a mentor.

Onboarding process

With new hire - MAKE A BIG DEAL ABOUT IT!

Meet and greet -
A great way to introduce and get to know each other is this -
Start with current employees and best to have something a little embarrassing for the something about yourself

- How did you get here to OMS?
- Why do you stay?
- Tell us something about yourself that most people don't know

4.47. Differentials

3.32.1. Noisy Diffs -

Twice now we've performed thousands of dollars worth of work to a customers car that required removing the differential to install rear subframe bushings. Both times the differential was noisy and did have a mention of the noise in the notes but both times we made the mistake of not notifying the customer. In both cases we were replacing other noisy components in the rear end that were the primary concerns (diff being secondary) and did not notify the advisor or customer that there was still noise coming from the rear end because it was "previously noted". In both cases the final test drive should have been performed and a conversation with the advisor should have been had. "Everything we did is working well but there is still a noise coming from the differential".

We created the Yellow Flag because of this exact situation - If you are knowingly installing a defective part back into a customers car you must make a big deal about it - confirm with the advisor, confirm within the team chat, even call the customer if necessary.

3.32.2. Diff fluids -

In diffs like Satakals (build by blanton) He recommends the Redline Shockproof gear oil which is a 75w140. This does not require the friction modifier unless it's the first breakin service (or within the first year) or if we're dealing with a chattering diff (typically not a concern in track cars). If the vehicle has a diff cooler it should run 75w140 strait gear oil redline. The lightweight oil is a bright blue color, if it turns tan it means its being overheated and we should look into cooling options.

To break in a Clutch Style differential, perform mutliple 90 degree soft turns (or figure 8's at low speed) until clutch chatter is gone. Drain the differential and fill it. Interval for fluid exchange after break in is 3-5k miles. Race cars require shorter intervals than normal vehicles of course. Redline 75w110

3.32.3. LSD bolts inside diffs - e36

When performing ANY differential or transmission service we must look through the drain plug to inspect the internals of the component. In some cars like E36 M cars and E30 LSD units the small allen head bolts that hold the LSD unit to the diff can back out. Its important we inspect for this by spinning the wheels and looking at these bolts. If they back out the diff blows up so its best we prevent this

3.32.4. Purchasing Differentials (and quoting!)

When purchasing any differential (let's say from Diffsonline or Bimmerworld), there are some unforeseen services that need to be quoted. Core cost must be on the invoice when it is sold (this is refundable). We must add the shipping of the differential to our shop (usually included in the cost of the differential) and most importantly shipping of the core BACK to the supplier. Along with these, we need to include break in time and required fluid exchanges. Also see note on fluid types and break in oils

Bathrooms

Goal - To have bathrooms that are surprisingly awesome and totally WOW's anyone who enters. It should be the cleanest and nicest part about OMS. The quality of this bathroom shows the quality of work we do in every other part of our business.

Employee & Customer Bathrooms

Daily

M	T	W	Tu	F

Wipe sink

M	T	W	Tu	F

Wipe toilet

M	T	W	Tu	F

Check supplies for stock

M	T	W	Tu	F

Soap

M	T	W	Tu	F

Hand towels

M	T	W	Tu	F

Toilet paper

M	T	W	Tu	F

Empty trash can

M	T	W	Tu	F

Mirror clean?

Weekly

Stocking

W1	W2	W3	W4

Paper towels full

W1	W2	W3	W4

Soap full

W1	W2	W3	W4

Toilet seat covers more than 5

W1	W2	W3	W4

On shelf above toilet (under sink in customer bath)-

W1	W2	W3	W4

4 rolls of toilet paper minimum

W1	W2	W3	W4

4 extra paper towel packs

W1	W2	W3	W4

1 extra pack toilet seat covers

Cleaning

W1	W2	W3	W4

Supply shelf above toilet wiped clean

W1	W2	W3	W4

Toilet Clean

W1	W2	W3	W4

Wall accent panel clean

W1	W2	W3	W4

Sink and faucet clean

W1	W2	W3	W4

Backsplash clean

W1	W2	W3	W4

Mirror

W1	W2	W3	W4

Floor clean

W1	W2	W3	W4

Plunger and toilet bowl cleaner operational and clean

W1	W2	W3	W4

Empty trash can

W1	W2	W3	W4

Note any upgrades needing to be made

Monthly (on 4th week)

- [ ] Clean ceiling light fixture
- [ ] Wipe walls up to ceiling
- [ ] Deep clean floor boards
- [ ] Clean rocks in customer bathroom sink
- [ ] Replace nice smelly reed diffuser (make sure there's 2 months worth in BS)
- [ ] Check stock of complimentary supplies (MS= main stock, BS=backup stock)(Refill MS as needed, replenish BS when at quantity listed below)
    - [ ] Mens deodorant - MS 3 BS 6
    - [ ] Womens deodorant MS 3 BS 6
    - [ ] Tooth brush/paste MS 3 BS 6
    - [ ] Mouthwash MS 4 BS 4
    - [ ] Tampons - assorted - MS 2 each BS 4 each
    - [ ] Lint rollers MS 2 BS 4
    - [ ] Hand lotion - MS 4 BS 6
    - [ ] Dry Shampoo - MS 2 BS 2

Any supplies needed for next time?

NOW TURN IN THIS SHEET TO NEIL

4.48. ToyToy Etiquette

Customer Bathroom -
Make sure it is clean at all times. The sink must be clean at all times

Advice from Heather Fischer - When you dry your hands - please use the paper towel to do a quick wipe of the counter/area

4.49. When a customer is selling their car

“We don’t sell cars here but if you send me the ad I’d be happy to share it with our customers and friends.”
We encourage our customers to ask more than blue book or market value because chances are it’s much better maintained than the other cars for sale since they’ve done such a good job maintaining their car with us.
We also encourage our customers to pass on our information to the new owner because our warranty still stands as long as the new owner maintains the car properly

Example phone script:

Hi Paul,

I’m not sure exactly what the value of your car is but knowing it’s condition and the amount of work you’ve put into it I think it is in above average condition so you should be able to ask more than any of the others like it are going for.

Be sure to brag about the work we’ve done having a lifetime warranty and give our contact to the buyer in case they have any questions.

Also send me a link to the ad once you post it so I can share it with everyone we know

Cheers.

4.50. Drinking water locations

~~Have the driver drop water bottles off next to the water dispensers. This way the bottles are easily accessible and we have a greater chance of all of our team members refilling the bottles when they go empty.~~

4.51. Employee vehicles through shop

1. Any work performed by OMS needs to be charged at retail. Even Neil's Mom pays full price :)

4.52. Employee purchased parts

Employees may purchase parts through Oceanside Motorsports at employee cost. Employee cost is the cost of the part with a $0 markup plus tax. Parts MUST be paid for the same week as ordered by cash or check. If paid by card there will be a processing fee for the credit card transaction of %3. If not paid same week a 10% markup will be added to the cost of the part per week. Only applicable to Parts from our standard vendors - any special order Parts should be ordered by the employee as to not use the Parts guys time. Special order parts MUST be paid in advance.

Payment types

- Cash or check is best.
- We can deduct from paycheck if you like
    - If this is done the invoice in made in Quickbooks and must be paid by "employee pay" as a payment type when closing the invoice
    - An invoice is opened up for the 2 week pay period applicable
        - The invoice is closed once the money has been deducted from the paycheck
        - Only one invoice open per employee at a time
- Card - We add a 3% charge for this
- Paypal - we add a 3% charge for this

If an employee purchased part needs to be returned, ,the return will be processed through part supplier, but no refund will be issued to the employee until the refund is received.

4.53. Employee cars left at shop

Employees are allowed to store one car at a time overnight. Car must be pulled out before start of work day so as not to be in the way of production and customer cars.
Leave your car here at your own risk. Oceanside Motorsports does not express any liability for the car and is in no way responsible for any damage or theft.

4.54. After hours pick up

If a customer requests to have their key locked in the car instead of the lock box that is ok so long as the key and car are secure. Keep in mind most newer cars will not allow you to lock a key in the car.

4.55. Using the time clock

4.56. Driving a customer's car

Don't mess with anything! You know how hard it is to find that perfect position of your car seat? Well let's make sure our customers are not inconvenienced with this. You ARE allowed to move the seat back and forward to allow for safe driving and clearance but for the most part don't touch anything else! Make sure the radio, setting, and seating position of the customer remain exactly how they were when they dropped off

4.57. The Wurth Bins -

They're labeled, please put items back where they belong. If we're out of something, please advise management so we can re-order.

4.58. Smog Inspections

Technically we are not allowed to be involved with smog inspections or smog repairs at Oceanside Motorsports. We ARE allowed to perform drivability diagnostic concerns etc. The BAR has stated that there is no punishment for performing these smog related repairs but technically these should be performed at a smog test facility. Be careful what we take on and how we work the work on the invoices please.

Any smog inspection sublet must be paid directly from the customer to the smog station. We CANNOT sublet the charge on our invoice but we can transport the car. Ways to do this are -

- Collect payment information from customer to give to smog station
- Pay cash or check made out to smog station
- Have customer pay smog buy directly

Smogs - make a labor line and take a pic of the smog for each test

4.59. Warranty -

0.1. The NEW Lifetime Warranty (under construction)

Our standard warranty on most repairs is 30 months or 30k miles whichever benifits the customer more
Lifetime warranty is available to our customers that are up to date on their maintenance and choose to maintain and repair their vehicles with us
Race cars - grey area warranty

The OMS Lifetime warranty relies on our relationship with the customer to properly maintain the car so it won't break. For this reason its required for OMS to perform all recommended maintenance on the vehicle to honor the lifetime warranty.

4.60. Warranty Work

In a warranty ticket we MUST get reimbursed for defective parts. The tech MUST give back all defective parts to parts guy so he may return them to the vendor to get credit

4.61. Warranty Oil Leaks

Effective 3/10/21 -Make sure your seals and gaskets will seal forever (which is what our warranty is). We understand it's not realistic for a seal to last forever which is why the business takes the financial responsibility after 30k miles or 3 years. Technicians are responsible for all warranty oil leaks under 30k miles or 3 years except for noted below.

Recommend replacing plastic and magnesium valve covers when a vehicle comes in leaking, this is the best way to guarantee the vehicle will not leak again. If customer replaces covers, as recommended, warranty is lifetime for customer (covered by shop) and 3 year 30K for technician liability (covered by technician.) If covers are not replaced there is a possibility that the seal will not hold for any extended amount of time. If declined, the warranty should be lower, 30k or 3 year for the customer, as the customer did not agree to proper fix at technician recommendation. Technicians liable for repair before 15k or 1.5year.

If a vehicle comes back leaking from a seal/cover that was replaced less than 3 years or 30k, it is the parts guys responsibility to check which brand gasket was used last, and to order genuine gasket immediately when the leak is verified. Do something different the second time around, add sealant, make absolutely sure the sealing surface is not deformed in any way.

Warranty on a maintenance item

We cover maintenance items under warranty for the length of time and mileage of the service interval. For things like transmission fluid and brake fluid exchange the warranty is pro-rated based on how long into the interval we are. Example is - Brake fluid testing at a high water content after a year of use. The expected life of brake fluid is 2 years so it lasted half of that and the exchange we perform today will last for another 2 years. So today we charge the customer for half of a brake fluid exchange so that they are paying for the second year but also not paying anything extra for a service done early.
Another example is transmission fluid. Lets say the pan gasket started to leak at 40k miles. Our interval is 50K so that last service made it 80% of its expected life. The customer would pay 80% of the transmission fluid service and we would cover 20% to cover the last 10k miles of its interval

4.60. Pick-up and Delivery Service

The OMS and Lifetime pickup and delivery service is designed to make the auto repair experience the most convenient as possible. ~~We charge a small fee of $10 for the~~ service and provide it to customers within the Oceanside and Carlsbad city limits - Some exceptions can be made.~~ Lifetime oil change club and happy car club members are exempt from the $10 fee.~~ ~~The customer has the option to take advantage of a~~

~~loaner car which is an additional $10 fee as described~~ within the loaner car process - Same exceptions of happy car club and lifetime oil service members applies to loaner cars.

When we pick up and deliver a vehicle we must be sure to go through every single step of the “Customer experience process/bridging into maintenance” As if the customer was here at our location. If we skip any step in this process we shortcut the customers experience and put ourselves at risk of disappointing the customer.

NEVER send more than one person to provide this service. Taking two people out of the shop is extremely costly and can negatively affect the teams achievement that day. These are methods we use to pick up and deliver customers cars -

- Leave a shop car at their home or office
    - Make sure there’s no street sweeping or other issues with where its parked. Sometimes we have to leave these cars for over 3 days
- Uber/Lyft
- RedCap shuttle on demand
- Scooter
- Bicycle
- Jog

1. Before leaving the shop be sure to have:
    a. An estimate for the customer to sign
    b. A floor mat and seat cover for their car
    c. A loaner agreement
    d. A phone to take pictures with and navigate
    e. A maintenance checksheet
2. Set the expectation with the customer for when you will be there, how much time they will need to spend with you (usually about 15 minutes), and how long we will need their car for. Typically the pickup and delivery service is used for oil changes and maintenance services so a same day turnaround is feasible. We always set the expectation to return the car at the very end of the day and prefer to pick up first thing in the morning.
3. ANY diagnostic work can not be promised for same day return. **We cannot pick up and deliver any cars with a drivability concern or other diagnostic issue that could cause damage by driving -** We highly recommend towing the vehicle in this situation or let the customer take the risk of driving it in. We can’t have a car fall apart or overheat while we’re transporting it back to the shop - As convenient as this service is, it's also a huge liability.
4. When arriving be sure to park our courtesy vehicle in a place it can be parked for more than a day if necessary.
5. If the customer's car is in the garage politely ask them to back it out for us - We are not allowed to operate the customer's vehicle in their garage.
6. Before operating the car we must record the mileage and take pictures of every corner of the vehicle with close up pictures of any previous damage

Pick up and delivery check sheet

- ❏ Loaner form - filled out completely
- ❏ Customer's Drivers license and insurance info
- ❏ Signed estimate
- ❏ Floor mat & seat cover
- ❏ Exterior pics
- ❏ Mileage before leaving

The OMS Scooter

We purchased a scooter to assist in pick up and delivery service. You MUST wear proper safety gear including helmet ANYTIME this scooter is used. This scooter is to be used for Business related activities only. It should be used for pickup and deliveries within a 3 mile radius. Bring the scooter back in the trunk of the customers car. Bring a fender cover or another protective cover to put under the scooter. Keep the scooter charged per the instructions at all times. DONT let it be dead when you need it!

4.61. Shop Zones -

4.61. Shop Zones -

Where does equipment belong? Do you ever spend valuable time looking for something you need? Like an oil drain, fluid sucker, or welder? Lets divide the shop into 5 color zones -
333 west is Orange
333 east is Blue
343 west is Green
343 east is Yellow
Front office is Pink
Alignment rack is Red

We use colored duct tape to mark equipment that belongs in each color zone. Each zone will have a list of equipment designated to that area

4.62. Work Distribution

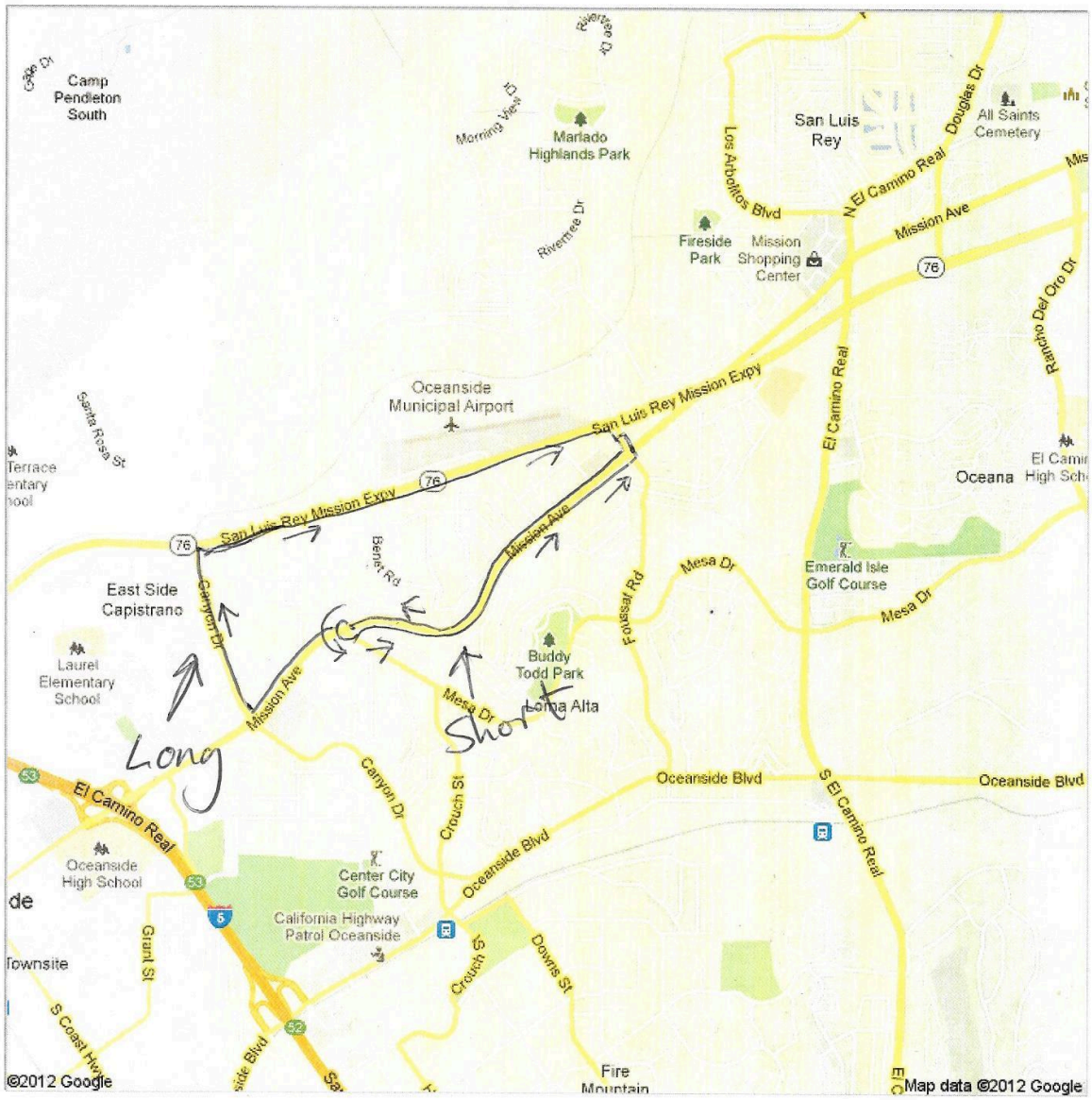
Work should be distributed within the team to ensure a quality repair and produce the most efficient result as a team. It's important to challenge our less experienced techs with work that will grow their skills so long as there is no risk of a comeback. We must be sure to keep our entire team working, not just one or two employees who can produce the fastest.

4.63. Test Drive

test drive procedure – standard operating procedure
Every car that is capable of being driven safely will be driven before bringing into the shop.
All vehicles should be analyzed for road-worthiness before test driving. Body damage, cracked windshields, bald or dangerous tires, ect, should be taken into consideration on this.
The service writer will provide warning of any known issues at delivery of work order.
If the car is in for any fluid loss issues, fluid levels should be inspected before starting or operating the vehicle.
The radio should be off during all test drives except for the brief moment just to ensure it works and no speakers are popping.
When starting the vehicle we should pay attention to the sound of the starter to help determine its health and the electrical systems ability to start the car.
We will also listen for noises during and shortly after start up that may indicate an engine, exhaust, flexplate, vibration, ect… with the vehicle.
Verifying brake pressure before shifting. Pedal firmness and anomalies should be noted before putting the vehicle into gear. If any safety concerns are present we should refer to fluid levels and determining if the vehicle is safe to operate.
During operation of the vehicle we will travel the designated route, in order for us to be found in the case of a failure. I recommend taking your phone with you on all drives. The only reason you should be on your phone during that drive is if you have had an issue with a vehicle and require assistance. If you are unaware of the present designated route. Please consult management for clarification.
After starting the drive we will perform the following in a safe manner:
Operate wiper and washers to verify working order and quality of blades
Check for vibration, roughness, or noise from the drivetrain and tires
Check for vibration, roughness, or noise from the braking system and note when it is present.
Check for vibration, roughness, or noise from suspension components and try to isolate area
Check cruise control operation if equipped
Check turn signal functions
Check for pull, wander, or other alignment issues
Check front and rear window operation, HVAC operation including modes, check door lock operation, and other accessories for proper function that are safe to operate during drive.
WE DO NOT OPERATE A SUNROOF OR CONVERTIBLE TOP UNLESS DICTATED TO DO SO BY CUSTOMER
Don’t use electronic ebrakes

After return to the shop we note any items from the drive on the courtesy check and initiate the in-bay portions of the courtesy check and follow ticket sop.
THIS SHOULD TAKE NO LONGER THAN 10 MINUTES TO COMPLETE

4.64. Test Drive Routes



Official test drive map.

We have recently added a quick test drive loop which is just a short drive up Airport road and returning on San Luis Rey road to the rear of the shop. This route is used only for Quick inspections.

Our Smog monitor set run is to Las Pulgas road and back. It takes about 30 minutes

4.65. Drugs, Alcohol, and Weapons

None of these are allowed at our location.

4.66. Customer Information

No customer information should be given out to anyone without prior consent of the customer. That means no previous records of cars to anyone other than the customer.

4.67. Towing services

Economy Tow	760-908-8000
S&R Towing	1-800-748-6686

4.68. Opening the shop

Opening the shop - We all assist in opening the shop starting at 7am. We have a team meeting at 730am to discuss plans for the day.

It's a team effort opening up the shop and setting the tone for a successful day. We should all share these opening duties and make sure we don't miss anything.

3.49.1. Pulling cars out

Everyone pulls cars out

Pull every car out - except cars with hood propped, on rack, or in **rack space**. Please communicate while pulling cars out.

Pushers go ~~against~~ the 333 rear wall for all pushers. We can not block the alley

Long term sitters go against 333 wall next to container -

Everyone helps until shop is empty unless their morning duties are priority (advisors most of the time)

Loaners go in front or on south side of 333 or on the street

Get to work

No cars in field

4.69. Closing the shop

3.50.1. Closing the main shop

Closing the shop - On a normal day we will meet at 4pm for team close up meeting. We will determine if anyone is staying late and which cars are leaving vs. staying. It is the technician/detailers responsibility to pull in all cars and lock up back shop. Service advisors are responsible for closing up and locking front of shop

Closing the shop is one of the most important team exercises - If we do it wrong we leave all of our investments in tools, equipment, and cars at risk.

- Ideally we will all be done with a successful day's work and close up the shop together. In this case we will all work together to pull cars in for a safe nights stay at Oceanside Motorsports. In most cases the service advisors will be closing out customers or prepping for the next day so they may not be able to help with this - If they are available, they will participate.
- If one or more technicians are staying late then communicate with them to arrange which cars to pull in and leave out. We all know how it is to work late and then have to pull in 10 cars - so let's make it as easy as possible for our teammate who's putting in those extra hours
- Fill up 333 rear shop first then the main shop
- No car may be left outside unless it is a OMS shop car or a car previously approved to be left outside. We always leave all cars behind the back of the shop locked inside the gate. We always prefer to pull all of the loaners inside but if there is no room they may be left outside.
- No car may be parked under another car
- Any car parked under another car will have plastic covering it to protect it from any oil spills - There is plastic wrap mounted on every lift and extra in the utility cabinet
- All Keys must be locked in a lock box. If left in vehicle Keys shall be left inside the vehicle in plain view - On the shifter or dash panel are acceptable. Please do not leave them on the driver or passenger seat. It is also acceptable to leave them on the windshield but never on the sunroof or any painted surface
    - **DO NOT leave keys in the ignition OR the lock cylinder**
- Anytime the shop is locked the keys MUST be locked in the lock box - no keys may be left in the cars or anywhere besides the lock box
- Walk around the shop to be sure there are no battery chargers, handheld lights, FANS, or any other accessories left on - We are especially looking for any potential fire hazards. A battery charger left on the **trickle charger** setting may be left on.

- Turn the compressor off using the switch panel at the rear of the shop
- The 3 main shop doors must be closed by technicians or detailers - see “Closing + opening the doors” procedure
- Your workstation shall be clean and ready for the next day's work before leaving - take care of your future guy
- Within 333 front there are 6 light switches that must be turned OFF -
    - Washer and Dryer room
    - Bathroom
    - Breakroom
    - Office
    - Shop lights
    - Workbench lights - These lights are on the remote below the main switches. Use the button labeled “All OFF” to turn them off
    - Exhaust fan - This is controlled with a remote mounted below the main switch panel
- Close the main door in 333 rear and turn off lights
- Close door to the container and lock (be sure lights and compressor are off)
- Close the gate and leave lock pointing inwards (be sure it latches) - See tech passwords list for code
- Close the main door for 343 rear - Be sure to latch the man door
    - If you leave out of the man door be sure to lock it! We’ve left this open before because it was assumed that it was locked
- The refrigerator room is on an automatic light that does not need to be turned off
- Turn off bathroom lights

3.50.2. Blocking the doors - The Robstacle-course

We block the doors in case of a break in as to deter anyone from taking anything large like a tool box or car.
This is for our technician and employee benefits. It is the technicians responsibility to insure all of their own tools in case of theft or loss
We rely on the door locks and alarm system but this is one more way we can prevent major property loss in the case of a break-in
Block all 3 large doors using an OMS owned car from the outside. The keys to these cars are locked in the safe every night.
In the case there is not an OMS car for one or all of the doors we will use a customer car INSIDE the door. The key will still be locked in the safe with the other “blockers” keys

The Safe does not automatically lock - the knob must be turned to lock the door so make sure the door locks!

Locks need to be on the inside of the door for exiting purposes in case of fire.

Door closing procedures

If any step of a door closing procedure is skipped it must be communicated and the responsibility passed off to another team member via the shop chat app.

3.50.3. Closing the front of the shop

- Turn off TV
- Turn off lights in Back SA office's
- Turn off lights in main office - Be sure to leave the outside light on (the right switch)
- Check Safe locked
- Check heaters/AC OFF (parts dept too please)
- Arm the alarm
- Lock the front door

Front 333 Closing Procedure:

- ❏ Close Big Roll Up Door (secure latches and pull chain)
- ❏ Turn Off Shop Lights
- ❏ Turn Off Office Lights
- ❏ Check glass door is locked (display is incorrect!)
- ❏ Close both office doors
- ❏ Turn Off Laundry Room Light (remote mounted on wall)
- ❏ Turn Off All Three Alignment Machine Switches

Rear 333 Closing procedure

- ☐ Close and lock gate
- ☐ Close main roll up door
- ☐ Lock both sides
- ☐ Check man door locked
- ☐ Turn off lights

Rear 343 Closing procedure

- ☐ Turn compressor OFF
- ☐ Turn hose faucet OFF
- ☐ Unplug detail equipment

- ☐ Unplug sump pump (plug on north side of door)
- ☐ Check Man door locked
- ☐ Close main roll up and lock on both sides
- ❑

4.70. Arming the Alarm

Enter your code and hit “AWAY” (which is also the #2 button). The alarm will beep for 45 seconds while you walk out. The alarm will not arm if a door is open or a sensor is not working. You must be sure you hear the beeping as you leave. The alarm beeps every second counting down and then stops. Wait to be sure the beeping stops after you’ve locked the door. If you are too late getting out the beeping will start over and count down to the alarm going off and it will go off.

3.51.1. ADT PULSE APP

Most employees have access to the ADT Pulse app. This app allows you to access the alarm system after hours. You can set the notification to notify you of an alarm or disarm after hours. Do not ever disarm the alarm from the app when not in the building.

4.71. Closing + opening the doors

4.72. Loaner Cars

We should have a welcome letter setting the expectation for the loaner. This can also have the what to do if our hoop-dee breaks down

PROCESS VIDEO:
https://drive.google.com/file/d/1EISAaHati3qrjBKbh05KQLpCwoybzOed/view?usp=sharing

3.53.1. OMS Loaner cars

- OMS Loaner cars are available to all customers over 25 years old who have current full coverage insurance and a valid driver's license.
- We try to reserve our loaners for customers who are part of our lifetime oil change or Happy car club memberships.
- Please be selective of who gets a loaner. Make sure it's someone who will care for it as if it were their car. Enterprise is around the corner for anyone who wants to be irresponsible with a loaner car

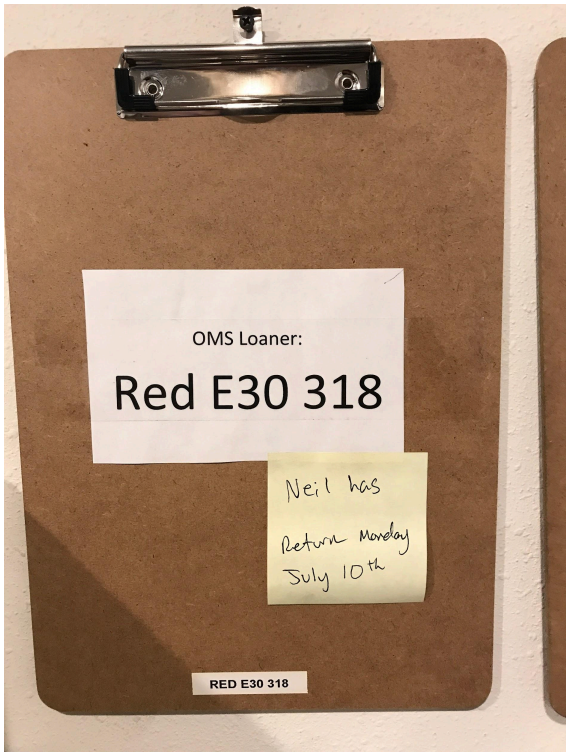
- All customers are required to replace all gas used while they have the car. The only exception is if they drive less than 10 miles in which case we don't charge or expect them to add fuel
- Loaners that are available and not INOP should be parked in the last spaces out front and ready to go. If they are not out front it's only for three reasons (out with customer, washed, or INOP).
- When a loaner is parked out front it is backed into the space like a customers car unless it is not ready to be loaned in which case it is pulled straight in
- **LOANER CARS MUST BE CHECKED IN/OUT DURING BUSINESS HOURS. NO AFTER HOURS PICK UPS OR DROP OFFS.** We are required to perform a complete check in and check out of the loaners in person as soon as they're dropped off.

3.53.2. Loaner Car Board

4.74. Employee permissions borrowing loaner cars

As an employee of Oceanside Motorsports you may occasionally take a loaner car home for the night as long as it is returned clean, with the same amount of gas, and before opening hours the following day.
It is required that you have a previously signed loaner agreement for yourself and you check out the car via the loaner board - the current method for this is to fill out a new loaner agreement anytime a vehicle is taken for after hours use. Employee must meet all minimum requirements of loaner program and have full coverage insurance
loaners if employee uses for personal use MUST be filled with gas everyday and 100% cleaned. The employee that uses the car needs to make sure the wash teams knows it needs to be cleaned. Service Advisors make sure at drop off that the gas is left where the customer took it and clean, Employees

should as well. (Loaners shouldn't be employees daily drivers)



0.17. Loaner Car Check Out Checklist

- ❏ Review loaner car quirks
- ❏ Record current mileage
- ❏ Record current fuel level
- ❏ Walk around with customer taking note of any dents/dings

0.18. Loaner Car Check In Checklist

- ❏ Check and record mileage
- ❏ Check fuel level - should be same as when checked out, if less we need to charge for it
- ❏ Any warning lights or services due?
- ❏ Customer belongings left in door pockets, rear seats, trunk?
- ❏ Any new dents or dings?

Any items needing attention should be noted and fixed as soon as possible. If there are any interior panels hanging please inform our detail department to re attach using spray adhesive. If needing to be replaced please ask shop manager for next action

Loaner Maintenance

Service Concierge is responsible for the timely maintenance of all loaners.

For routine oil services please take the loaners to a Valvoline or other reputable quick lube. This is cost effective but beneficial for a few other reasons -

- Our brand will be recognized by the crew and customers at the other shop
- Great networking opportunity
    - They'll know who to send cars to
    - They might want to work with us for their next job
- Always bring something to make the trip memorable for them like donuts, swag, etc. Get creative. Most of the workers we've seen at these oil change shops have a great attitude and we could be the next step in their career!

4.75. When a loaner has a problem

When a loaner has an issue it is imperative that it gets fixed as soon as possible so it can be returned to loaner duty.

1. Notify Service Manager of problem
2. Put an "INOP" Tag on the loaner board for that car. At this time the INOP tag is a post it note with INOP written on it.
3. The service manager must arrange immediate diagnostics or repairs. If there is important customer pay work already booked then it is acceptable to plan the loaner car for after that but the loaner car repair should not be delayed more than one day.
4. All loaner car repairs in excess of $500 (shop cost) must be approved by shop manager (Neil)
5. Final bill will be discounted to zero within Mitchel and invoice given to Melinda to charge appropriately within the company
6. Loaner car sales and costs do not affect the portal or GP numbers - They are a cost of doing business for the company

4.73. Cooling System

3.56.1. Cooling system bleeder screws

Bleeder screws must be replaced with EVERY cooling system repair or maintenance. These screws are plastic and weak. We've had multiple comebacks caused by these screws breaking after a cooling system repair so we replace them every time now. The screw must be recommended and ordered prior to repair

3.56.2. Cooling system bleeder hoses

When quoting and repairing a cooling system on a car with a plastic bleeder hose we ALWAYS recommend the replacement of this hose. These hoses are weak and brittle and can break just by removing them for regular service.

3.56.3. Plastic Reservoirs

We only use genuine plastic reservoirs.

3.56.4. Hose Clamps

We only use the genuine or Wurth style hose clamps. The hose clamps with the slits in them are cheap and can cause failures. If found on a customers car we recommend replacement and note them as “Red” in the inspection. This is a picture of an unacceptable hose clamp

4.74. How to reset a service light and when to reset

The service light gets reset when the required service is performed. If we did not perform all of the service requested by the car the light does not get reset. This is treated as a yellow flag and

it’s super dooper important we notify the customer that the service light will still be on unless we perform the remainder of the work. If we don’t do this the customer assumes we are a bunch of amateurs and forgot to reset the light - which is not the case right?

4.75. Marking a tire for a puncture or leak

When marking a tire for a puncture, leak, or object it's important to draw a circle around the object and ALSO a mark on the sidewall showing its location. The circle mark will wear off if driven so we need the sidewall mark too.

4.76. Differential Break in Procedure

There are a few different types of differentials and they all require a specific break in procedure to work best and last longest. Torsen LSD style differentials require a 10 mile then 1 hour cool down 3 times and then an easy 300 mile drive. Clutch pack style differentials break in requires a figure eight pattern to allow the fluid to reach all parts of the differential along with minimum 1 fluid change and then an easy 300 mile drive.

4.77. Brake Replacement

We always quote and replace brake set screws and any other necessary hardware (AKA hardware kit) with a brake job.

- Always drive the car to listen and feel brake performance
- Measure/verify needs to brake replacement. If you don’t know WHY we are replacing brakes - ask
- Verify your parts - open the boxes (see process for opening parts boxes)
- Check the brake fluid level - If its full, it might be too full, don’t let it overflow when brakes are removed
- Disassemble brake components cleaning all surface areas that contact another component with a wire brush, then ,lubricate those components
- Check all caliper bushings, clean, and lubricate, Lube slide pins
- Put brake paste on the contact areas of new pads, spray anti-squeel to back of pads
- Adjust hand brake when doing rear brakes.
- Chamfer brakes always on squeal service, or with unknown pad compound. (technician discretion) Round pad if necessary
- Blue lock tite on all caliper bolts and slide pins
- Replace and lubricate rotor set screws

- Check all fasteners by hand before putting wheel back on
- Check condition of sensor (mounted correctly, broken, chaffed wires...etc)
- Clean rotors before installing (check for oil on rotors), This is not necessary on coated rotors
- Inspect hardware before reinstalling
- Install rattle clip securely
- Replace wear sensor
- Pump brakes before starting
- Reset brake light
- As with any repair - take a step back, close your eyes, and retrace your steps since the beginning to be sure everything is put back together, all hardware is tight, and the customer's concern is corrected
- Bedding brakes- slow speed braking, medium speed braking, high speed braking. Do not warp brakes by setting ebrake while brakes are hot. Make sure brakes are not smoking before giving back to customer. Make sure not to immediately wash wheel after test drive(brakes still hot)
- Install brake service mirror hanger

4.78. Inspection Recommendations

3.60.1. Brake Measurements

We measure the brake pads with a brake pad depth gauge with EVERY inspection. We recommend them as follows:

All Measurements are from the inner brake pad - measured from the back

- **3mm or less** - Due now! To avoid potential brake problems and failure we recommend we perform a brake service today
- **4mm-6mm** - Due soon. Based on our best practices we recommend replacing the brakes today to avoid potential brake issues or failure. If not performed today we will re-inspect brakes 30 days from now
- **7mm-8mm** - The brake pads are good at this time but we recommend re-inspecting in 6 months or 7K miles
- **9mm-15mm** - Your brake pads are OK at this time.

- **Rotors** Major Warp/At or below minimum thickness
- **Rotors** Minor warp/lip/scoring

When recommending ANY brakes (red or yellow) we must measure the rotor thickness and diameter for quoting

3.60.2. Brake Fluid Measurement

We measure the brake fluid water content with a fluid tester with EVERY inspection. We don't only look for water content in brake fluid - if its dirty - recommend it!

We recommend them as follows:

- **4% +** - Due now! To avoid potential brake problems and failure we recommend we perform a brake service today
- **3%** - Due now. Based on our best practices we recommend replacing the brake fluid today to avoid potential brake issues or failure. If not performed today we will re-inspect brake fluid 30 days from now
-
- **2%** - The brake is still within marginally acceptable range at this time but we recommend re-inspecting in 6 months or 7K miles
- **1%** - Your brake fluid is OK at this time.
- **0%** - Perfect!

3.60.3. Oil leak stage chart

- Stage 1 – Dusty
- Stage 2 – Wet (Red if under pressure ie. OFHG)
- Stage 3 – Dripping

3.60.3. Coolant Leaks

- Stage 1 – Residue
- Stage 2 – Wet
- Stage 3 – Dripping

3.60.4. Bushings/suspension stage chart

- Stage 1 - Minor Surface cracks/No play
- Stage 2 – Cracks/Play/leaking hydraulic fluid/Leaking Grease

- Stage 3 – Major cracks/ Major Play / Major leak of hydraulic fluid/Bushing missing/ Major safety hazard / Tear

3.60.4. Flex Disk

- Stage 1 - Minor Surface cracks/No play
- Stage 2 – Cracks
- Stage 3 – Major cracks/ Major Play /Major safety hazard / Tear

3.60.5. Recommendations based on mileage

- Green - The service is not due at this time or within 6 months/7k miles
- Yellow - The service is due/past due based on mileage
- Yellow - The CBS data shows the service will be due within the next 6 months or 7k miles
- Red – The CBS data shows the service is past due

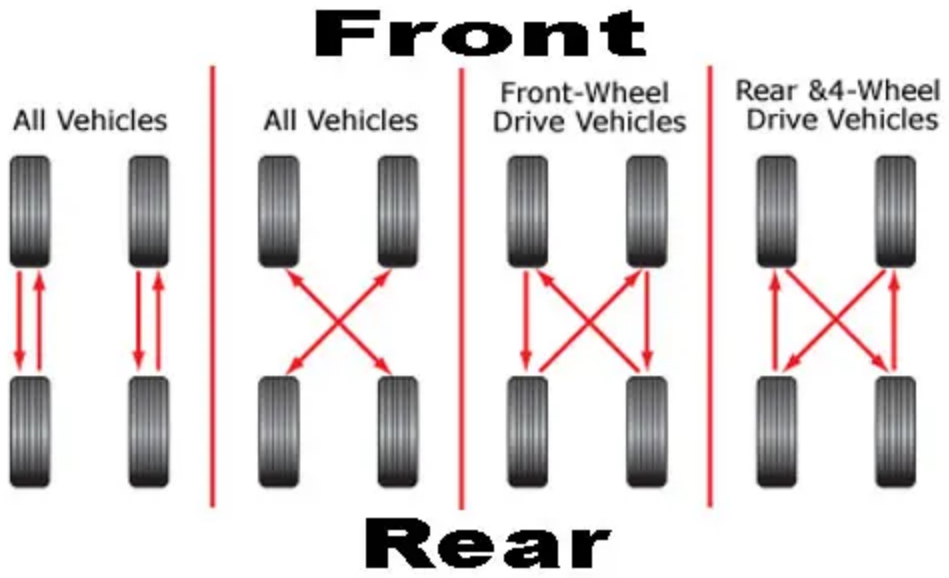
3.60.6. Tire measurements

Any tire marked Yellow or Red - You must note the tire size or take a picture of the tire size so it can be quoted. The tire depth should be measured on every inspection (all four individually). A technician will measure the tread depth from the lowest part of the tire.

- Green - 5+mm
- Yellow - 2mm-4mm
- Red – 0mm-1mm
- Any sidewall defect

3.60.6.5 Tire rotation

Tire rotation on vehicles with a matching full size spare that is accessible.



- TIRE ROTATION WILL NOT BE DONE ON TIRES THAT MEASURE 3MM OR LESS!!!!! ILLEGAL!!

3.60.7. Other recommendations in inspections

- Check engine light on - We always scan the code during the inspection
- Oil Change Past Due
- Oil change sticker missing
- Coolant color other than OEM - Mark Red - BMW's after F30 can have green coolant and it be genuine. We should check history to make sure its not a universal green coolant and recommend an exchange based on mileage anyways but in those models green coolant is not an automatic RED anymore
- Service due or maintenance light on - you MUST notate what it is on for.
    - Maintenance due within 7500 miles - Check the maintenance light and it is going to come on within the next 7500 miles or before the next oil service recommend it as "Due soon based on mileage"

Battery testing

If any battery tests lower than the CCA its rated for we recommend something be done. If the slip shows charge low but battery health good - then recharge the battery first UNLESS the battery is over 5 years old in which case we recommend it to be replaced due to age.

Our battery test will say "Good and Recharge" when a battery tests low but in most cases the battery should be replaced at that time.

- If battery health tests lower than 70% that is to be marked RED and recommended today.

- Anything less than 100% health mark YELLOW

4.79. The Verbal Contract

- 14.87. After the estimate is complete, the Service Advisor will have the technician review it and make sure they both agree the estimate is accurate and how long it will take to complete. This is also the opportunity for the SA to learn about the repairs/maintenance needed and ask any questions needed to present to the customer.
- 14.88. With ANY diagnostic or customer concern these questions to be asked by the technician, Parts Guy, and finally the SA before quoting or presenting diagnostic results. Be sure to document all research done and steps taken.

1. 14.89. Will this fix the customers concern?
2. 14.90. Is there anything else it could be?
3. 14.91. Is there any other further testing that can be done to be sure?

- 14.92. If there is something the technician does not agree with, the two need to decide the best course of action to proceed. That may result in a change in the estimate or in training to help the tech see a better way to repair the vehicle

14.93. Important Note: If an agreement cannot be reached, it is the Service Advisors responsibility to report this to the Service Manager for them to resolve

- 14.94. Once there is and agreement established, the Service Advisor can now sell the job

- 14.95. After the job is sold, the Service Advisor is to set the completion time based on the estimated time, and how much time has been spent on the job already. The total job time is put on the Google calendar with the total units in the comments line. Service advisor also adds a reminder to his schedule for the halfway follow up and the next customer communication. The technician and Service advisor are to agree on completion ETA before the job is started.

14.96. Important Note: If an agreement cannot be reached, it is the Service Advisors responsibility to report this to the Service Manager for them to resolve

- 14.97. Half way thru the job, the Service Advisor is to check on the progress of the vehicle to make sure the technician is on schedule and there are no surprises. It is encouraged the technician self manages this and notifies the SA of any delays or concerns before the halfway point Refer to “The Work Flow” Process, for specific details
    - 14.98. All parts have arrived, boxes have been open, and verified to be correct and complete

- 14.99. There is nothing additional needed (Example: additional diagnosis, broken or rusty bolts, Shop Supplies not expected, or additional parts)
- 14.100. The technician is not delaying the repair and letting valuable time slip away (example: time spent on the phone, computer, or tool truck (any distractions) or the job is over his head (he may need assistance or the job may need to be reassigned))

- 14.101. If the technician does need assistance or the job needs to be reassigned, it is the Service Advisors responsibility to resolve the issue responsibly and swiftly. If he cannot, he needs to refer to the Service Manager for assistance

- 14.102. If there are parts issues the Parts Guy is to immediately deal with it as to not delay the work flow any longer then needed

- 14.103. Once we establish the status of the vehicle and any needed course correction is made, it is the Service Advisors responsibility to contact the customer and update them. Refer to “The Work Flow” Process, for specific details

14.104. Important Note: If more sales are needed, the Service advisor needs to discuss that with the customer now. The Service Advisor is to create a loss report immediately (why was there anything missed?)

14.105. Important Note: If any delay holds up production more than 15 minutes and there other vehicles to be completed, it is at the discretion of the Service Advisor to decide whether or not to move the vehicle out of the bay and bring in another to keep the work flowing. If the issue has been passed on to the Service Manager this decision is now his

4.80. Unpackaging parts

Don’t rip the box incase we have to return it
Do not discard of box or packing material until car is finished and working - in case we have to return it
Always be aware of any cores needed back in the original packaging

1.4. Opening Boxes

When opening boxes keep them neat and clean. Dirty parts cannot be returned and cause headaches for Parts Manager. DO NOT let your inner T-Rex come out when opening a box for a part.
Also, keep parts boxes until repair is finished and the car is out the door. Not being able to return a part because we lost the original box sucks.

4.81. The Estimate QC/ Technician Sign off

Tech sign off on quotes

All Special needs cars - Present RO to technician prior to presenting to customer

All Cars - During inspection - If the tech notices a job needing to be done that could have a quoting issue - Make a note - “See tech for labor” or recommend an appropriate labor time to ensure accuracy

4.82. Adding ANYTHING to a workorder - Notify the SA

If a technician, parts manager, forman, or other service advisor modifies anything on a ticket belonging to anyone else they must notify the ticket owner of the change. The point of this is so the communication can get to the customer before the vehicle is picked up. In the case of ordering “surprise” parts the technician/parts manager may order the parts and put them on the ticket (as to not delay the job) and notify the SA after. We prefer not to add more than $100 of surprise parts to a ticket as we may have to pay for them if the customer does not approve. In the case there is a part that is needed that exceeds $100 please confirm with SA as the order is being placed.

The communication happens when the parts are ordered - Also part numbers and prices should be noted at this time.

4.83. Where do the keys go?

Keys for all cars that are parked out front (even in front of Lifetime) Go in the Main North Eastern Box.
Keys for all cars parked in the eastern spots on the south side of the building (lifetime) go in the front lifetime box - located in the south eastern side of the shop
Keys for all cars parked South of the container in the back go in the south western box. Keys for cars parked on the south side of the building in the 3 western spots go in this box as well.

Cars parked in the detail bay, against neighbors wall, or anywhere else in the rear of the shop go in the north western box (rear of main shop)

4.84. Topping off oil within an inspection -

We top the oil off during an inspection as a courtesy to the customer. We do charge for the amount topped off and that must be noted on the “Engine oil” line of the inspection. Do not top off if you are about to drain the oil please.

We do not top off oil on M cars during inspection because they can use a very specific oil and need the customers permission (unless we have a history of an oil change)

On Cars with thermal oil level sensors we check the oil while performing the courtesy inspection. If it’s above a half (within the acceptable level) we do not top it off. If it’s at or below a quarter then we add .25 liter

4.85. Quality Control Checks

3.85.1. Technician Quality Control Check -

It is the technician's responsibility to fix the car correctly, verify the repair, and clean up the area you worked in. The car must be ready to ship after the tech QC. The car will always leave cleaner than they came in and there’s no evidence of us working on it other than it being cleaner.

Tech QC Quick Checklist

- ❏ After the repair - Take a step back, close your eyes, retrace your steps, and make sure we didn’t miss anything - This is the most important step!
- ❏ Verify the repair - Did we fix the customer's concern?
- ❏ Look over the entire ticket
  - ❏ Are all labor lines performed?
  - ❏ Were any parts not used or not installed on the car?
  - ❏ Is the CUSTOMER'S CONCERN fixed?
  - ❏ Any notes that need to be updated?
    - ❏ All repair lines must have notes about the outcome. Is the concern fixed? Is there anything additional needed in relation to this job?
- ❏ Is the inspection complete? If it was a no-start we’ll need to complete the inspection

Tech QC - Detailed

- ❏ View the car from the customers eyes - “are my concerns fixed?”
  - ❏ Fenders wiped down?

- ❏ Under the hood -
    - ❏ Are the engine covers wiped down?
    - ❏ Does it look like the best mechanic ever serviced this car?
    - ❏ Any loose connectors, debris, zip ties, tools?
    - ❏ All Fluid Caps on?
- ❏ In Car
    - ❏ Is my interior clean?
    - ❏ Oil change sticker have correct info?
    - ❏ Service warnings reset? (so they won't come on within 6 months or 7k miles)
    - ❏ Any warning lights that are on - the customer is aware of right?
    - ❏ Thank you Card neatly placed and signed
    - ❏ Radio works
    - ❏ Shoe marks on door panels
- ❏ Area of repair
    - ❏ Look directly at the area of repair
    - ❏ If we performed suspension or alignment take a quick drive to make sure the customer's concern is taken care of

3.85.2. Detailer QC

- Thank you Card?
- Service Lights still on?
- Registration stickers?
- Warning lights off?
- Any driveability concerns?

3.85.3. SA Final QC

Intent - The SA Final QC is to ensure top notch quality of work and a totally amazing customer experience. It's our last chance to make sure the product we are about to deliver is awesome.

- ❏ Thank you Card (Disinfectant bottle during covid)
- ❏ Cleanliness - no finger prints/foot prints
- ❏ Look at area of repair
- ❏ Engine Cover Wiped
- ❏ Service lights still on?
- ❏ Warning lights off
- ❏ Oil Change sticker correct
- ❏ Test drive the vehicle!
    - ❏ Start the engine, make sure all the lights go out!

Ticket QC

- ❏ When ticket is complete go through each and every line to be sure each job is marked complete in autovitals.
- ❏ Review any notes written during repair and present them to the customer. These can be very important notes and its important everyone reads them
- ❏

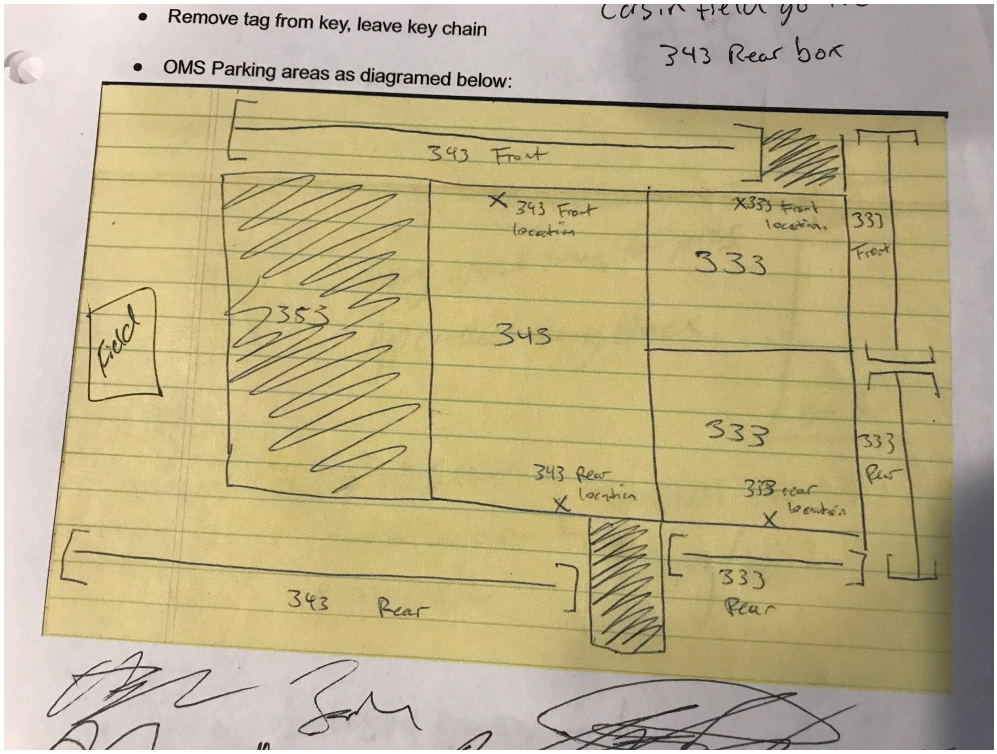
4.86. How to park a car

<u>OMS - HOW TO PARK A CAR OUT FRONT</u>

- Back in perfectly straight between the lines in an authorized parking spot
- Leave at least 12'' between the car and the curb
- Make sure the clock is set
- If finished and ready for pick up - remove floor mat. If it's a rainy day, leave a new mat for customer
- Make sure thank you card is signed and sitting on the dash with the logo facing forward
- Install sunshade or car cover if inside vehicle
- Be sure there are no fingerprints or evidence of work being done inside or outside the car
- Always hand keys to Service Advisor if the customer is present. Don't hand to the customer without approval from SA
- Remove tag from key, leave key chain

- **DELIVERIES PARKING - THE TWO SPOTS ON THE SOUTH SIDE OF THE BUILDING MARKED DELIVERIES ONLY - NEVER PARK CUSTOMER CARS HERE. We leave these spots open for parts drivers, deliveries, and Tool Trucks**

- OMS Parking areas as diagramed below:



Key Tags and QC Checklist

We currently make our own key tags using Avery 5388 Index Cards - FILE HERE

- ❏ **The tech and service advisor Initial on the line when the QC or check in is completed**
- ❏ **The Key Tag/ QC Checklist is stapled to the final invoice once completed**

4.87. Uniforms

Fundamental 1.2.10. Look really really really good.

Appearance counts. Your personal appearance, work station, work… everything you touch represents the OMS family- make it look really really really good.

<u>OMS Uniform requirements</u>

- Technician/detailers
    - Black or very dark grey pants or shorts. No logos or markings, no jeans.
    - If no OMS provided shirts technician will wear an OMS T-shirt or blank mechanic shirt until uniform shirts are provided. No other logo shirts/sweaters are allowed
    - OMS Shirts are provided to every technician and it is the technician's responsibility to keep them clean and presentable. You may use the OMS washer and drier
    - Shoes - Non-slip industrial shop shoes are required for technicians. Steel toe are not required but recommended
    - Uniforms must be kept clean and presentable at all times (no stains or holes)
    - It is recommended to keep an extra set of clean uniforms incase of a spill so you can continue working

- Service Advisor
    - OMS collared shirt with nice Black or grey slacks - Shorts are OK in the summer -
    - Non-slip protective shoes in the shop

Hot/Cold Weather

You must wear uniforms within specification no matter what the weather is like. OMS provides all clothing needed to work comfortably in all weather conditions. If you don't have what you need please plan ahead for the upcoming temperatures so we can order what you need. There is zero exceptions for non-OMS branded clothing, hats, jackets, beanies, etc.

4.88. After hours key drop

Info for customer - Info Envelopes are located on the window to the right of our front door. Please fill out all the information you can, seal keys in envelope, and then drop envelope through slot in the bottom right hand side of our door. We will give you a call when we arrive on the next working day.

We must call the customer within 30 minutes of opening to let them know their car is safe and get a clear understanding of what we are doing today. It's important we still build the relationship and follow the bridging into maintenance process even though the customer is not physically here.

Check in photos must be taken as soon as possible and in the exact spot the customer left the car before we do ANYTHING. In the case where a car is dropped after hours but we still move the car inside (ie. Saturday when someone is here or in the evening) - Check in photos MUST be taken before moving the car.

4.89. After hours shop use

- Anytime we disable alarm, Text Neil first. Also let him know when leaving. The prefered method for this is the OMS all chat via hangouts
- Only employees allowed in shop. Others may be allowed but previous permission MUST be requested and approved **SUSPENDED DURING COVID starting March 2020- NO ONE ALLOWED**
- Any cars worked on must be close family or friends. Absolutely no paid side work or customer cars are allowed.
- No alcohol or drugs allowed while working in the shop - ever.

4.90. Boundaries of side work

Employees are welcome to work on their friends and families vehicles after hours. It must not interfere with normal workflow whatsoever and all of the same rules apply to working in the shop. No one except for current employees are allowed to work in the shop

In order to use the shop for ANY personal benefit (working on personal projects, storing personal items, or working on any type of side work) You must be at your production goal based on the 4 week average. Side work is a distraction and you can't afford to do it if you're not productive for our team at work.

4.91. Blackstone oil analysis

VIDEO - Oil Analysis

Taking a blackstone oil analysis - pays .2 units

1. We take an oil sample on every BMW ///M engine with every oil change. If you are about to drain the oil on an M car, Race car, or N55/N63 and don't see a line for blackstone oil analysis confirm with the service advisor that we are skipping it.
    i. We highly recommend the analysis on any turbocharged vehicle as well especially the BMW V8 turbo engines
    b. If we are performing an engine cleaning kit (BG) It is OK to run the cleaner prior to taking the sample. The cleaner does not affect what blackstone does
2. Grab a blackstone oil sample kit located on the oil filter shelf
    a. The kit consists of a sample container, small piece of absorbent mat, small plastic bag, oil data slip, and a mailing case.
3. Open the drain plug and start the draining process into a waste oil container
4. Wait 5 seconds then use the sample container to take a sample. Fill the sample container almost all the way up.

5. Wrap the sample container with the absorbent mat and seal it in the plastic bag
6. Fill out the data slip with the following information -
    a. Engine make
    b. Engine model
    c. Mileage on engine
    d. Mileage since last oil change
    e. The UNIT ID

i. IMPORTANT - The unit ID is the customer's last name followed by the last 7 digits of the VIN

7. Wrap the data slip around the sample (already in the bag) and seal the shipping container.
8. **Take a picture of the handwritten slip before putting it in the bottle and attach to labor line**
9. **Take a picture of the shipping label on the labor line for the sample**
10. Give it to the service advisor along with a high five
11. Discard the blackstone interval sticker - we use our own OMS oil change stickers

https://drive.google.com/file/d/13pkMPAM4UShQOpEVY_brcgcBZ_BO8eWf/view?usp=sharing

Service Advisor

1. Verify all information above has been written correctly
2. Place a return label on the shipping container
3. Make sure the mail man/woman knows to take it
4. When we get the sample results immediately forward the report to the customer with the good news (hopefully!) as well as our recommendation after the test. This is a crucial step because we must guide our customer vs making them read the sample results. If there are ANY elevated levels we should recommend a shorter oil change interval or other appropriate action.

4.92. Used parts

We do not prefer to use any used or customer supplied parts but in some cases that is the best option for the Customer like when installing a used engine.

It is VERY important that we thoroughly inspect the part when it arrives and we take pictures of it. In the case we get a used engine be sure to spin the engine before doing anything else. We do this while the delivery driver is still here

4.93. Comebacks

- Comeback Policy -
    - We don't have comebacks.
    - Immediately notify manager and owner
    - Requires 2 techs to inspect
    - Complimentary level one diagnostic

<u>Comeback Report</u>

This is to be filled out ANY time a car has an unexpected comeback no matter what the fault is.

RO#
Date -
Customer -
Car -
Service Advisor -
Technician -
What happened?

How could this have been avoided?

What steps are needed to ensure this doesn't happen again?

What else can we do better?

Attach copy of RO and any other relevant documents

4.94. Loss Report -

This report is filled out any time we have an issue where we caused the customer an inconvenience or we cost the company money - https://forms.gle/ozkTiQJKpNsLecFM6

1. Report printed immediately when issue occurs
2. Filled out with all relevant parties during service
3. Given to shop manager to review and categorize appropriately (determine action plan)
4. Shop Manager to carry out action plan

4.95. When a lift or equipment has an issue or breaks

4.96. Pulling a car around front - checking for service lights

~~4.97. Using the OMS Daily Tracker~~

~~*When updating this process please also copy it to the file within the "OMS Daily tracker" Folder in google drive~~
~~The daily tracker is an incredibly important tool used to keep our ARO where it needs to be, keep our doors open, and fulfil our dreams.~~

- ~~The daily tracker is to be filled out during the week as estimates are sold~~
- ~~On Monday we finalize the previous weeks daily tracker and verify all numbers against our final posted orders from the previous week. The posted orders, daily tracker, and portal data~~
- ~~The file called "Master OMS Daily workflow tracker.xls" Is the master file and must not be edited unless its a final change -~~ ~~https://docs.google.com/a/oceansidemotorsports.com/spreadsheets/d/1xigZfUa_Umw2wHkFY41FJRjvhHIIo8fFmtyN3UQdWKw/edit?usp=sharing~~
- ~~Click "File > Make copy" Then label the copy with the date starting Monday of the current week. Make all weekly inputs on the dated copy file.~~
- ~~Required info to input is -~~
    - ~~RO #~~
    - ~~Miles~~
    - ~~Estimate $~~

~~The estimate amount is the amount we estimated and recommended to be approved with this visit - This should consist of all preventative maintenance recommendations and every item from the courtesy inspection. Its our job as relationship builders and educators to customers to communicate with them as to what is most important to them. Using the E90 water pump as an example - Not every customer will even consider doing this preventatively. We MUST educate every customer on the importance of the water pump but we don't want to risk scaring them away if we insist on a $2k cooling system repair. If it's a customer that is not interested at all in the water pump then we shouldn't include that portion is the amount estimated.~~

    - ~~Discount - We don't discount unless we are warranting something, A coupon, or made a mistake but we need to keep track of it.~~
    - ~~Sold $ - How much is the total ticket?~~
    - ~~Technician - Who worked on it?~~

~~AF - Arturo Frausto~~
~~ZF - Zach Flynt~~

- ~~Hours sold - Total units sold on the ticket~~
- ~~The remainder of the information is not needed at this time.~~

4.98. Customer Waiting/waiting in town

~~Also See Customer waiting inspection~~

~~Notify "OMS ALL" group on hangouts of customer waiting car~~

~~Pull the vehicle around to back within 5 minutes of customer showing up (after written up by SA) SA does this or delegate it to someone else.~~

~~Turn emergency flashers on for the entire visit to inform everyone of a customer waiting~~

~~Use a RED key tag to label customers key.~~

~~Customer waiting oil service to be done within 2 hours of appointment time (Up to 3 hours?)~~

~~Customer waiting PPI to be done within 4 hours of appointment time~~

~~It is very rare and a bad idea to do any customer waiting diagnostics.~~

~~If the car changes status while here (now the car is staying for more work) change the key tag color and turn off flashers etc.~~

4.99. Shops we can refer customers to

~~JA Services - Performs diagnostics and repairs on all makes and models - Diesel specialist - (760) 722-7267~~
Gearheads - Do it yourself shop - (760) 544-6181
Discount Tire Co -
Oceanside Transmission (760) 722-7176
Well Built Transmissions - (760) 722-7007

4.100. BMW Sunroofs

Do not open ever.

4.101. BMW E30 keys

For all BMW E30's -
Do not ever use the key in the driver door. Only unlock and lock the car by using the trunk lock. Ask supervisor with any issues or questions

3.9.1 Employee RO

4.102. How To Fill Spare Gas Cans

https://drive.google.com/file/d/1rdxBqUHwLHUkVNgJxG_-y_MIomZPrOFR/view?usp=sharing

4.103. How To change your default search engine back to Google

https://drive.google.com/file/d/1OsRGPVPJmFLoJhvdshBKa_BXy_dDEJ8q/view?usp=sharing

Front Service Team

8. Service Intervals / Maintenance

8.1. OMS Standard BMW mileage services - best practices - Mileage based services

- Synthetic Oil Service —5,000 miles/ 12 Months
- Synthetic Oil Service - Mini - 5,000 miles/ 12 Months
- Synthetic Oil Service - ALL Turbo Cars - 5,000 miles/ 12 Months
- Synthetic Oil Service - ALL ///M Cars - 3,000 miles/ 12 Months
- Tire Rotation - 5,000 miles/ 12 Months
- 44k Fuel system cleaner - 5,000 miles/6 Months
- Cabin Air Filter - 15,000 miles/ 12 Months

- Brake Fluid Exchange — 30,000 Miles/ 2 years
- Coolant Fluid Exchange - 30,000 miles/ 2 years
- Power Steering Fluid Exchange — 30,000 Miles/ 2 years

- ❏ Engine Air Filter — 15,000 Miles/ 1 year
- ❏ Transmission Fluid and Filter Exchange — 50,000 Miles/ 5 years
- ❏ Transfer Case Fluid Exchange - 50,000 Miles/5 years
- ❏ Fuel Filter - 50,000 miles/ 5 years
    - ❏ If fuel filter is not serviceable we perform BG fuel system cleaner service
- ❏ Differential Fluid Exchange — 50,000 miles/ 5 years
- ❏ Drive Belts, Tensioner, and Pulleys - 50,000/5 years

- ❏ Water Pump and Thermostat Exchange — 60,000 miles

- ❏ Spark Plug Replacement —
    - ❏ All Models non-turbo - 75,000 miles/ 20 years
    - ❏ 4 Cylinder Turbo Spark Plugs - 30,000 miles/10 years
    - ❏ 6 Cylinder Turbo Spark Plugs - 30,000 miles/10 years

- ❏ Ignition coils - 60k miles
- ❏ Air Induction Service — 15,000 miles
- ❏ Batteries - 5 years
- ❏ *Direct Injection GDI Service - 15,000 miles
- ❏ A/C Service - 1 year
- ❏ Shocks and Struts - 100,000 miles
- ❏ Radiators (plastic) - 120,000 miles
- ~~❏ Oxygen Sensors - 120,000 miles~~
- ❏ Rod Bearings (BMW M cars) - 60,000 miles
- ❏ Tires - 6 years
    - ❏ Spare tire - 6 years
    - ❏ Trailer tires - 5 years

9. Menu's

9.1. Oil Change Menu

OMS Menu Pricing

Stock Part Numbers and some menu pricing

How to order Oil Change Stickers

https://drive.google.com/file/d/1-MgjHxCJB4g9ONPIsxdtjG0Qh7L9xjSi/view?usp=sharing

9.2. Inspection Menu

Minimum level one inspection is mandatory on every car and needed to provide %100 customer satisfaction. The ONLY exception for this is if its a car we are doing a single service on from another shop (example - TNT or Collision alignment) - In this case we do a quick inspection.

Inspection Clinic

[VIDEO - Inspection Clinic]

“Not touched” recs in inspection

The only reason something should be marked as not touched is because the car is not equipped with it

7.45. No start inspections

If an inspection is done on a no start and the driveability portion is skipped. We must add a note so that it can be completed after the no start fix.

- ### Vehicle Health Check - Level One - Free

The Courtesy inspection is the most important part of what we do at Oceanside Motorsports.

- Explains to the customer any issues their vehicle may currently have
- Explains to the customer any issues they may need to take care of in the future.

The inspection is done on EVERY car BEFORE any work is completed except for a no start concern in which the no start diagnostic comes first, then immediately after the inspection will be done.

We top off fluids as part of every inspection and note how much we topped off - The parts guy is responsible to charging the correct amount to the invoice

We gauge oil leaks from a stage 1 to 5. We typically recommend leaks be fixed at the time of inspection when they are recommended at a stage 3. Some customers will choose to take care of a leak preventatively at a stage 1 or 2 but it is not crucial until at least a stage 3. This is

different for a cooling system or pressurized oil leak (like OFHG or powers steering pressure hose). A stage 2 cooling system leak should be fixed immediately.

The “Vehicle check in” Section should already be filled out from the service advisor that checked in the vehicle prior to the technician receiving the ticket. If it is not, the technician must perform that portion of the inspection

Follow through the inspection assigned to you and thoroughly evaluate every line.

Follow this guide for brake measurements. We measure the inside brake pad on every car (or whichever is lowest). The inside brake pad typically wears down quicker so this is the most accurate way to measure the brake pad. In the past we’ve measured brakes incorrectly at 4mm and the customer went metal to metal within 2 days - it is VERY important that we measure and recommend brake parts accurately.

Making a measurement with rotors with a large lip - subtract the measurement of the lip from the brake measurement - THIS MUST BE NOTED THAT WE DID THIS

- Detailed mechanical inspection
- Check all lights
- Check & Measure tires and brakes
- Pictures of any needed items, some pics of items in green
- Required pics regardless of color
    - All 4 tires - Check tire dates, if yellow or red note or take pic of tire size
    - Brake fluid tester
    - Cabin and engine air filter- If it can be accessed with no/minimal tools
- Includes battery and charging system test.
- Torque wheels to oem spec. If loose or problem mark appropriate color and note the issue. If torque to spec already - mark green.
        - **THIS IS AN INCREDIBLY IMPORTANT STEP - ONLY MARK GREEN IF YOU CHECKED WHEEL TORQUE AND THEY’RE TIGHT!**
    - If wheel covers are installed we are not required to check the wheel torque. If the wheel torque is not checked for any reason we mark it yellow and note “not checked due to covers”
    - If wheel locks installed - check the available lugs, mark it yellow, and note what we checked/ did not check
    - Lug covers or hub caps are the only reason we do not check wheel torque. If non standard lugs are installed we still check torque and have the adapters here for those lugs.
    - VIDEO - Why we check wheel torque every time

- ## Vehicle Health Check - Multipoint - Level Two $98

The multipoint inspection includes all of the same items of the courtesy inspection but is much more thorough and specific of all components needing attention. For example within the multipoint we will specifically identify all individual suspension components that have play like “Front left control arm ball joint stage 3 play, front right inner tie rod has stage 2 play” Versus “Front suspension has play and should be further inspected”

reasons a multipoint inspection should be used -

1. A car that will require more than a level one to give a totally awesome inspection and details about the cars condition (a hoopty per say)
    a. This should be offered as a paid inspection upgrade. If the customer declines they are most likely not going to be concerned with the items of a detailed inspection anyways so the courtesy inspection you do doesn’t have to be as detailed as a normal courtesy inspection. You still have to note everything but instead of pointing out exact oil leaks and suspension issues you can take a pic and note “oil leaks present - recommend further inspection” or “many suspension components are worn - recommend further inspection”. The inspection in this case will still be awesome and give the customer a taste of what our service is like and hopefully at their next service we can do a full multipoint
2. You can’t EVER do a multipoint in place of a PPI. If the sale of the vehicle is involved, it MUST be a PPI. There is so much more involved in an inspection during a transfer of ownership and we’ll make sure they get the value out of it.

- Includes checking pressure and condition of spare tire
- Multipoints will typically require a minimum of 40 pictures
- Includes all items in level one
- Needed for cars with many issues needing a more detailed inspection
- Needed for most cars 20+ years and older
- Required on special needs cars

- ## Pre Purchase Inspection - In Town - $395

Our Pre Purchase inspection is like our multipoint inspection but also looks at areas of the car important to know about before a customer buys the vehicle. Anytime we perform an inspection and there is a sale in process we are required to perform this inspection. We (and the customer) can not afford to miss something important during a car purchase so it's imperative we perform

the full pre purchase inspection. This inspection is primarily focused on mechanical issues and although we do inspect the exterior it does not go into detail about paint condition and accident history.
The Pre Purchase Inspection includes -

- Minimum of 60 pictures
- Checking for any current or pending codes and advise
- Checking if monitors are run and vehicle is ready for smog
- A video summary by our staff to send along side with the inspection
- Paint condition and recommendation from our detail staff
- Super Ultra detailed mechanical write up
- Visual inspection of chassis for evidence of previous damage
- **Test all interior buttons and functions**
- Includes inspecting and replacing oil filter when necessary (included in menu price)

In an effort to get the customer to return for future work we offer their next oil change for free (at a future service)
If the customer does not purchase the vehicle their next inspection can be half off

Pre Purchase Inspection - Out of Town

- $595
- This inspection includes many more pictures to show all details to a buyer who will not see the car before purchasing

~~Pre Purchase Inspection - OFF SITE - $200~~

~~In the rare case a car can not come to OMS for an inspection we can perform the inspection at the dealership or shop car is being sold at. We do warn customers that we are capable of a much more thorough inspection in our shop but still offer the remote service if needed. We charge a minimum of $200 extra depending on travel and the format may be slightly different depending on our technical capabilities at the time. We will still provide tons of pictures and information about the vehicle.~~

- ## Blackstone laboratories oil analysis - $72

  We recommend this along with any pre purchase inspection - results do take a few weeks to come in though.

5.25.7. Customer Waiting inspection

Also See Customer Waiting Process
The goal of this process is to give the service advisor a head start on building the estimate as well as getting additional work approved before we've been able to go through our entire workflow process

The customer waiting inspection process may be used whenever necessary and best for efficiency. An example of this would be if you had 4 cars that all needed answers and inspections asap to get the day started
In a customer waiting inspection there are no steps from the original process that are skipped, we just change the order to help with workflow. In this case you are to rack the car, perform a visual inspection without using the tablet and make notes of all important items that should be brought to the customers attention. Give this information immediately to the service advisor written on a piece of paper or hangouts so he/she can provide a timely update and start building the estimate for recommendations. If the car is being diagnosed you may then proceed with the diagnostic and provide answer needed. After this is done you may proceed with any other work on the RO (like an oil change) followed by a detailed digital inspection
The service advisor will use this head start of information to get additional work approved if possible. It also allows us to have a conversation about the cars needs before the customer is leaving. It's much easier to get additional work approved if they've only been waiting 20-30 minutes versus at the end of their 2 hour waiting period. The service advisor will use any means necessary to accommodate the customer like offering a ride or loaner car. If that is not a possibility we will exit schedule for as soon as possible to perform the needed work.

4.87. Quick inspection -

A quick inspection is designed for cars returning for work within **30 days or 1,000 miles.** It should be rare that we are doing a quick inspect in place of a courtesy/level 1
It can also be used for cars from another shop like TNT or Collision alignments. This does not apply to race cars or any cars taken on track - A very thorough inspection must be done on these vehicles being pushed to their limits.
Groupon cars get a real inspection, not a quick inspection. We only quick inspect cars from other shops because those shops aren't the customer bringing the car in. Groupon customers are.
Quick inspection is done in place of an inspection and at the same time it would normally be done (before service work or immediately following a diagnostic). The technician must perform a complete visual inspection but does not have to re-do the tablet checklist. Any additional or updated items MUST be noted and addressed.

This inspection should take 10 minutes and check at least these items -
Brakes
Tires
Fluid levels
At least one thing

Post Repair Inspection

Any ticket with 20+ units of work or has been here for over 30 days will include a post repair inspection. The purpose is to verify concerns have been corrected, but also allows the SA to

educate on what future items should be addressed. An additional labor line will be added and a separate inspection will be performed.

It is also acceptable to copy the inspection and update the lines that we have repaired

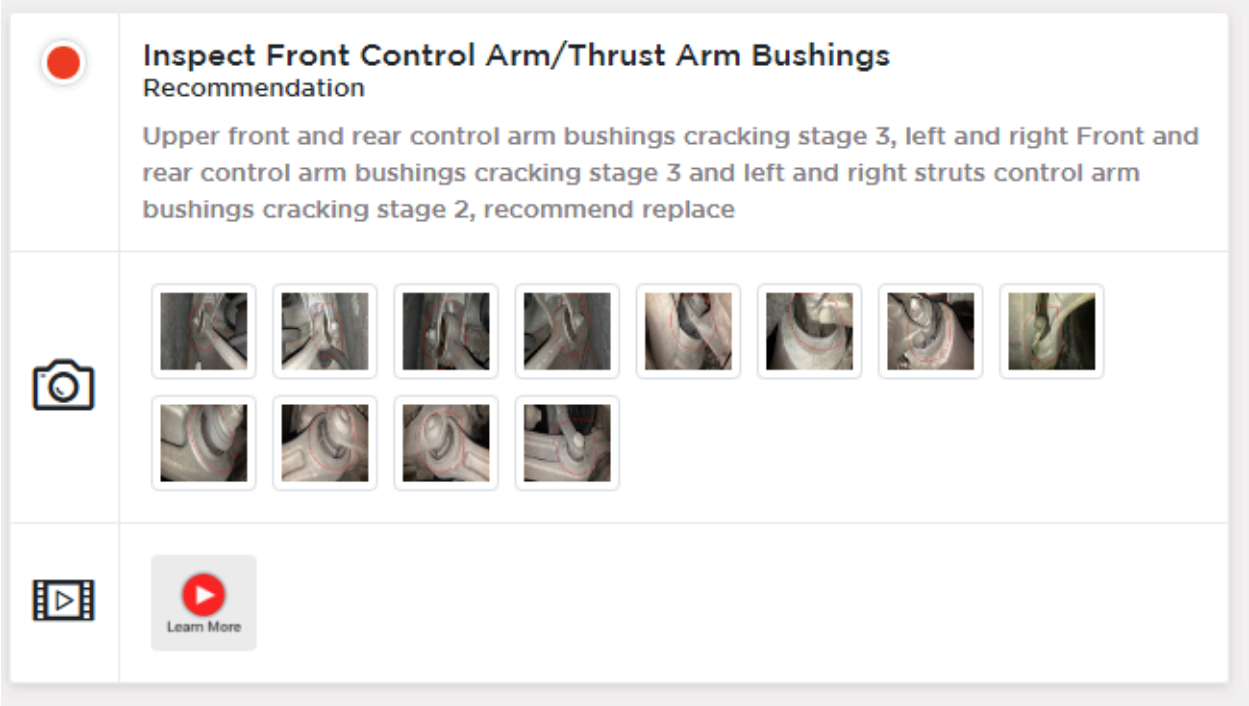
No Start Inspection

Inspection performed with everything that can be noted minus the road test items. Its required we perform a COMPLETE inspection once the car runs

Either this or we find a way to stop forgetting to perform the second half

7.45. Notes & Recs

Notes state what the problem is, Recs state how to fix it. With every Note there must be a recommendation. For the example below we noted all of the bushings worn but because this is an Audi which we know needs the control arms replaced along with the bushings - the recommendation should have been to replace the control arms with bushings installed. Our estimator estimated just the bushings when we should have estimated the front control arms



Replacing bulbs within an inspection

We replace bulbs as a courtesy to the customer when they are easy to access. A general rule is if it takes more than .2 we quote it ahead of time.

Note which bulb you take on the inspection so we can charge for it. No HID/LED bulbs apply to this. This is for brake light, running lights, etc.

If you change a bulb within an inspection make sure you note that you did it and mark it yellow vs. red

The cost of the bulb goes on the inspection line charged to the customer

Tire Rotation

In addition to any other service where the vehicle is on the lift we charge .25 units - This is only for vehicles with no wheel locks - wheels locks would require an additional charge.
On its own with no other service on the lift the charge is .5
Wheel covers, lug covers, and hub caps should be taken into consideration and we should charge additional for this. This MUST be quoted ahead of time and is the service advisors responsibility to quote accordingly - Oversize and specialty vehicles will also require an additional charge

Cars with Autostart

It is extremely important to disable autostart features on cars equipped with it. We can't have a car starting unexpectedly especially while working on it. You must find the proper method for disabling this feature before servicing a car equipped with it.

Tesla

Teslas must be put in service mode at all times while at our shop. This dissables the customers ability to operate the car and view the cameras

How to put Tesla in Service mode -

https://drive.google.com/file/d/1dUaU2IMAVoqCdHzDFw2Y4pSIpItHYFY-/view?usp=share_link

9.3. Diagnostic Menu

"The most expensive repair you can do is the one you don't need."

We take great pride in our diagnostics and can save our customers tons of money by diagnosing the problem correctly to avoid spending the customers money on parts they do not need. The diagnostic is the most important part of any repair and is itemized separately from repairs. Diagnostic investments are not applied towards repairs.

Check engine light scan / Complete car code read - $35

- We are happy to scan any check engine light with a code reader and advise. This does not determine the cause of the issue but will give some information about the problem and advise the next course of action (usually diagnosis)
    - Note - It is not recommended to clear the light because it stores valuable information needed to properly diagnose the issue in the future

Level One Diagnostic Test - ranges from $70 - $300

- Most issues can be diagnosed thoroughly within our level one diagnostic budget.
- Level one includes inspection and diagnosis of customers concern to pinpoint the exact issue and recommend a course of action
- Can take up to 4 hours
- Each separate issue requires its own dedicated diagnostic time

Level Two Diagnostic Test- Additional $300 on top of level one diagnostic (most also require $80 repair verification OR monitor set)- Needed if:

- Any modifications relevant to the issue
- Any intermittent concerns that may not be present at time of diagnosis
- Any readiness monitor issues (typically needed for smog)($80 monitor test drive needed)
- Needed for very complex issues where disassembly and in depth component testing is needed
- Any car with previous repairs attempting to fix the same issue will need to start with a level two (Car coming from another shop or repairs at home) **Required to start with complete level two approved before tech gets the car**
- Most cars manufactured before 1996 do not have advanced diagnostic capabilities and are higher priced due to additional labor procedures involved in extracting codes from computer.
- Driveability issues that require car to be driving or loaded require level two diagnostic to determine cause correctly - includes chassis ear hook up if necessary
- warning light has been on for over a month
- If vehicle has more than one of the above reasons for level two - **Required to start with complete level two approved before tech gets the car**

Smog Monitor test drive/extended test drive - $105

- This charge is for setting the smog monitors. Its nice to have quality control manager perform this but in some cases the technician will be required to do this
- The customer is usually welcome to do this drive for us (if smog concern) but we offer this service as a convenience to the customer
- This is required for any major repair work and should be quoted as part of the original estimate
- Required for all oxygen sensor and monitor related repairs

Fluid Leak level one Diagnostic Test- $80

- Visual inspection and diagnostic to determine leak origin and advise

Fluid leak level two Diagnostic Test- $250

- Under car pressure wash of leak area then monitor leaks to pinpoint source
- Includes fluid dye if needed
- Needed if there is fluid everywhere and cleaning is necessary to determine source of leak

A/C Level one Diagnostic Test & Service - $250-$325

- Includes evacuate, vacuum test, recharge if no leaks, and oil compressor.
- Check power at compressor if needed
- Level two diagnosis required if vacuum test fails or if A/C still inop after level one

A/C Level two Diagnostic Tests - Additional range of$35-$250

- Use AV Dye and black light to determine the cause of any freon leak
- Use A/C sniffer to determine the cause of any freon leak
- Electrical tests for components in A/C system

Key inop diagnosis - $202

- Recommend new key to be purchased if no spare available. Most key issues are the key itself and it is a good investment to buy a key before diagnosing

9.4. Detail Menu

Oceanside Motorsports Detail Menu

Exterior Upgrade - $99

- **includes exterior hand wax**

1 unit

Interior Upgrade - $99

- **shampoo floor mats and interior spot cleaning**
- **Needed for pet hair or kids**

1 unit

HeadLamp Restoration - $215

- **Takes old yellow looking headlamps and restores them to new condition!**
- **Adds a protection layer to last longer**
- **Lifetime Warranty**

2 units

Quicky Healamp Resto - $99

- ***Takes some old yellow looking headlamps and restores them to a like new condition***
- ***1 year warranty***
- ***.6 units***

7.80. Alignments

Alignment Menu

Toe and Go -
Starting at $80
.5 units
Set the toe to factory specifications and basic camber adjustment

4 wheel alignment -
Starting at $160
1 Unit
Set Camber, Caster, Toe, and any other adjustments for factory alignment specifications

4 Wheel Performance alignment
Starting at $232
1.5 units
Any car with aftermarket adjusters or modifications

4 Wheel Luxury Alignment
1.5 units
Starting at $232
Recommended for cars requiring factory weight specifications to be used

Race Alignment - **Starting** at $310
2 units - mostly used for race cars with aftermarket adjustments
Weight the car to the driver's preference

~~Corner Balance - **Starting** at $310 - Race alignment required on top of this.~~ NO MOAR

- Every alignment price is a starting price and may go up based on condition and vehicle adjustments needed
- Jeeps with a solid axle will most likely require an additional 2 units and should usually be sent to an alignment specialist like Accurate Alignment
- 4/25/19 add - Whenever a subframe is dropped an alignment needs to be recommended
- Converting in to degrees - https://robrobinette.com/ConvertToeInchesToDegrees.htm
- No other cars on the alignment rack for service - We try to keep this rack available for alignments
- **DO NOT ALIGN ANYTHING WITH ADAS (self driving, active cruise control)**

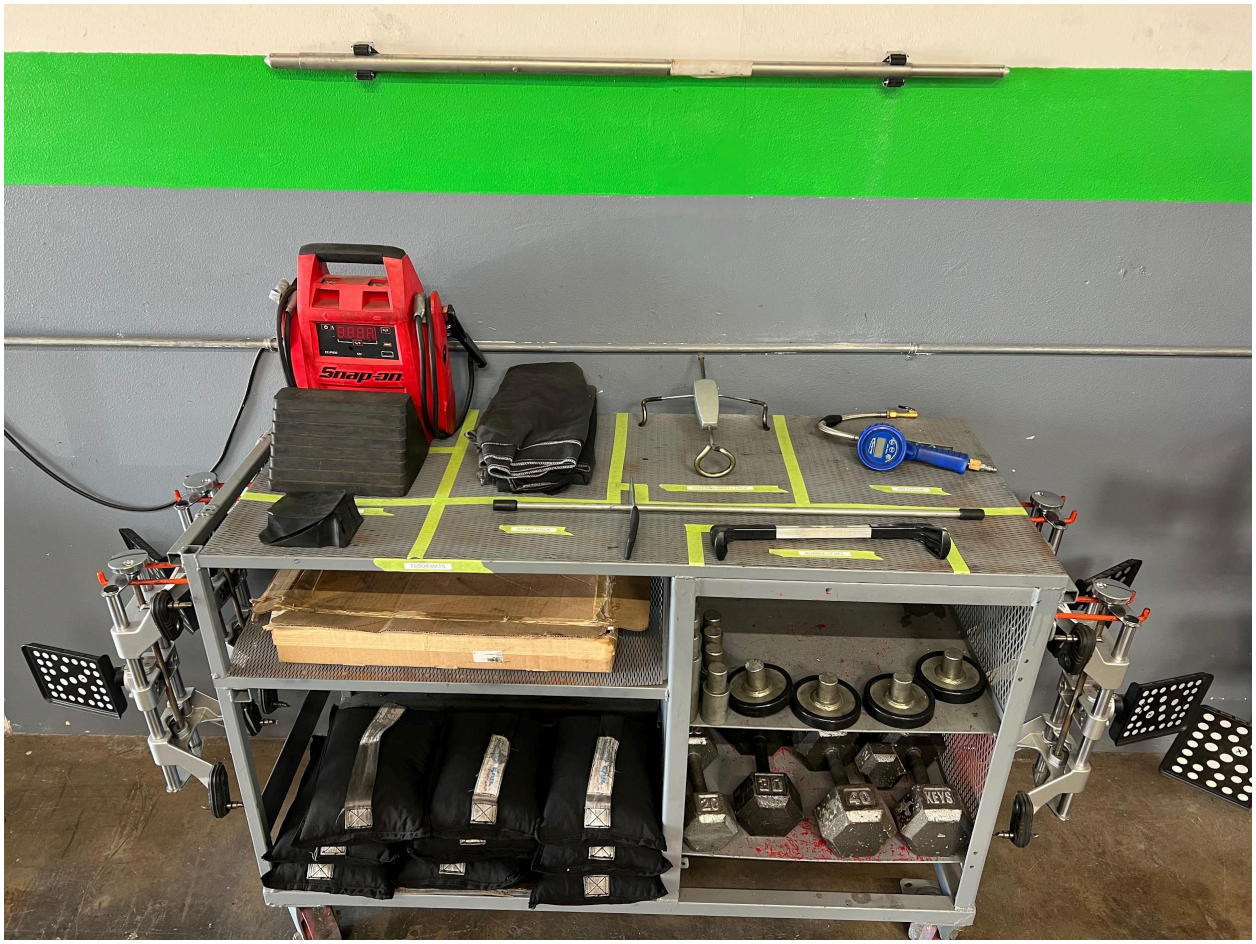
- The locks are air released - watch carefully when lowering to make sure one doesn't catch. This will damage the rack and can be very dangerous

Alignment Checklist

- Perform preliminary test drive to verify concern
    - Pulling is usually a caster concern
- Car should have a full tank of gas
- Make sure all the turn plates are locked before driving on rack
- Honk horn and use mirror or a spotter to pull onto the rack, watch for lower cars - don't let them get caught on the rack
- enter customer first and last name - don't skip this! Make sure the report shows the customers info and we can look it up later
- Scan VIN into machine - if scanner inop VIN and car info must be input
- Take into consideration the driver weight and car use
- Check and adjust tire pressures to manufacturer spec (info located on inside of driver door)
- Use wheel chocks to avoid car from rolling
- Install weights as needed per spec
    - Be sure to use padding, board, etc. to avoid damage or marks on seat
    - do not leave weights in overnight, they can mark the seat
- Lift must be on locks so it is level while aligning
- If there is an issue, special adjustments needed, or more complicated alignment needed the tech must immediately notify the SA
- If specs seem like customer prefered a custom alignment previously, notify SA to ask customer if we should align to factory spec
- If during an alignment you can not adjust within specification - immediately notify the service advisor with what needs to be done to adjust within specification
- Ride height measurement is not required to be entered but you MUST enter the "ideal" ride height as presented by the machine
- If you make major adjustments you have to do the roll back procedure again before performing final adjustments
- DO NOT ALIGN ANYTHING WITH ADAS (self driving, active cruise control)
- Every alignment adjustment that is touched gets marked. Mark the bolt and the adjuster.
- For wider cars - align turn plates to wheels so we don't run over the arrows and bend them
- When finished put pins back in
- Turn computer and both sensors OFF after each alignment

Alignment machine tools

Keep them clean, organized, and in their labeled location



5. Front Office Procedures

Physical Front Office

The front office represents our entire shop to the customers. It must be kept to the highest standards of cleanliness and represent a professional mid-high end repair shop. It should feel like the waiting area of a high end hotel, not an auto repair shop.

Front office cleaning checklist

https://docs.google.com/document/d/1L7d9_-bMg8QtPSIf3SDI6uSI6YglR16AqycT_bKaEOg/edit?usp=sharing

Coffee Bar

The coffee bar will be stocked and clean at all times. We start the day with the water and coffee pods full (refill as needed).

Coffee Mugs - Clean OMS branded coffee mugs are available for customers to use and take at all times. We keep a stock of minimum 20 cups below the counter.

Water bottles - We stock 2 cases of these as back up. We leave them in the SA office and they offer the water to customers. Craig has an Fing system, don't F with it.

Backup supplies - We will always have 2 weeks of supplies in the cupboards below. This gives plenty of time to restock and we will never run out of anything. Restocking is the responsibility of the Sales team but shopping is typically done by the office manager.

TV's - Its important to always represent the OMS brand. The TV above the coffee bar will be playing the "all oms videos" playlist on youtube. The TV above the door will always be playing the slideshow managed by the marketing department.

Don't run out of stuff

We've found the only way to make sure we don't run out of stuff is to write a note on the last one to be given to the person responsible for reordering.

Example - Thank you cards - we use about 40 a week and it takes about 10 days to get the reorder in. We save 300 cards aside (leaving plenty of extra time) and write a note on them that "These are the last cards! You must bring this note to Nathan to reorder!". Then when we go to take the last cards its very easy for you to take that note and get it to the right person.

Same process for -

- Hand soap
- Mechanic hand soap
- Printer paper
- Oil filters
- Toilet paper
- Hand towels

Front office TV

Signed into neil@oceansidemotorsports.com account using the oceanside motorsports profile.
Plays the "All OMS videos" playlist

Bridging Into Maintenance Super Lite

Bridging into maintenance super lite

Bridging Into Maintenance - Kind of Lite

Bridging into maintenance Lite

5.1. The OMS Customer experience - Bridging into maintenance Workflow Process - Long

The customer's experience at Oceanside Motorsports is as important as the quality of the repair to their vehicle. If you think about it a happy and properly educated customer is so much more likely to buy maintenance and return for more. Also if in the rare case there are complications with the repair they are so much more likely to be understanding and still happy if the proper relationship is built. If any of these processes are skipped we open ourselves up to be taken advantage of and a potentially unhappy customer. When these processes are followed and executed properly a customer of any personality type can be educated to maintain their car correctly saving them money and hassle.

4.1.1. OMS Phone process

How to change the phone recording:
https://drive.google.com/file/d/1WaNY50he_vtCAqrhLt0zeRRjpOPqOVNz/view?usp=sharing
How to download a phone recording for training:
https://drive.google.com/file/d/1B7IModzJlaYBMy9Dt12xJfNy6Dtzim0m/view?usp=sharing

5.2. Voicemails

Overnight

Any new customers or customers needing service will get an immediate response before 8am. If possible it is best to call but in most cases there is only time for a text message prior to opening. The message looks like this -

HI Jim, I got your message and I'm more than happy to help with your car. I will give you a call back this morning between 8 and 9 to get everything taken care of. I do have an open appointment at 9:30 if that works for you just let me know so I can make that reservation.

The purpose of this is to set the expectation for when the customer will hear from us as well as invite them to get the balls rolling to bring their car in.

During business hours

Missed calls or voicemails left during business hours must be responded to immediately. If you are absolutely slammed you may send a text to any missed call letting them know you're in the middle of something and you'll call right back (set an actual time frame, be specific). This also opens up the text line of communication.

The primary responsibility for this is the CSR but if unable the Service Advisors must do this in the same timeframe.

Missed calls come through as an email notification, voicemails are the same. The maximum allowed time to respond to a voicemail is 30 minutes. Most new customers or price shoppers will immediately move on to the next option for service so its important we get right back to them - They could be the next best customer.

Appointment Requests

Appointment requests can be made on our website and many other platforms. Our system allows for a customer to make an appointment for 8am the following day even after we've closed. This means we must always check these requests by 7am so if we are unable to accommodate the appointment we can contact them to rearrange. Most cases we can confirm the appointment right away. The 7am appointment confirmation lets the customer know we are on our A game!

4.2.1. OMS Phone call examples

5.3. Leaving a message for a customer

It's so important we follow up with customers when we say we will. If you call and it goes to voicemail it's important you leave a complete message for the customer and set the expectation for next actions or the next point of contact. If they're voicemail is not set up or you feel they will not know you reached out - Send a text message. You can also use email, facebook, or smoke signals. Regardless - don't let the customer wonder what is happening or stop by/call for an update at a time that we might not be available.

4.3.1. OMS Value Propositions

4.3.2. The Preparation:

~~We prepare a customer welcome packet for each customer before they show up. The package consists of an envelope with their name on it and model of car printed on the label. Inside the envelope are two pieces of paper: One with our maintenance intervals and recommended mileage services, the other with after hours emergency contacts, introduction to the Happy Car Club, and other recommended businesses around Oceanside like The Flying Pig.~~

~~Have a maintenance check sheet filled out with all recommendations and previous services performed - If they declined these last time we need to show them that they are still important. This maintenance sheet is not a booklet kept in the customers glove box - If they don't have one, create one for them. We should also keep a copy of this but only in case it's lost.~~

Ask Neil about his experience at the Olive Boutique hotel.

4.3.3. Setting the appointment/Reservation:

~~We use the "OMS shared phone log" within google drive to take down all of this information - Info that is needed - (entire phone log) Full name, phone number, exact vehicle, mileage, concern~~

1. We record the appointment information using the "Appointments" Calendar in Google Drive. The appointment must be set with a specific time customer is dropping off. Information needed is:
    - Special arrangements needed - Shuttle, Uber, Loaner, Waiter, New Customer, Needs car same day
    - Customer First and Last name
    - Customer Phone Number
    - Car year, make, model, **mileage**

        - **License Plate** or VIN - Plate is preferred since its easier to get over the phone
    2. If the customer would like a reminder call a day before the appointment put another appointment for us to call them with their name and phone number
    3. We want to be sure to schedule them to drop off for a time when we have reserved time for them - which is why we like to call these reservations instead of appointments. Schedule appointments so we have reserved time of at least 15 minutes to get them checked in and on their way. This sets the expectation for the customer to spend a few minutes with us so we can take care of all of their concerns and also allows time for us to talk about maintenance and our process for maintaining their car.
    4. Once the appointment is made reserve time on a technicians schedule appropriate for that job according to “who and when to schedule” procedure.
    5. It is the service advisors responsibility to review these appointments a minimum of one day in advance to be sure we have everything prepared for the customers visit

4.3.4. Appointment reminder

1. The service advisor will call or text all customers at least one business day prior to their appointment. The purpose for this is to confirm the appointment (don’t want our techs standing around waiting) and to make any arrangements needed for the customers drop off.
    a. Ask them if they’ll be needing a ride or rental car.
    b. If its a visit that could possibly turn into an overnight stay notify the customer so they can start to prepare for that
    c. Ask any follow-up questions related to the job
2. Once customer confirms - edit the appointment on google calendar so that it states “Confirmed” prior to any other info so it can be seen clearly. This makes sure that the customer only gets one call and notifies everyone that the car will for sure be coming in for service

Vehicle Pick up and Delivery

We offer a vehicle pick up and delivery service within a reasonable mileage radius to make our service convenient for customers. This service is ONLY for vehicles that are safe to operate and should only be used for maintenance visits (no warning lights, noises, leaks, etc.).

The walk around and vehicle check in happens wherever we pick up the car from. This time walking around the car should also be used to build the relationship with the customer. Doing this check in typically requires bringing your ipad and having it connected to the internet via hotspot on your phone.

Everytime we pick up a car we get a signature authorizing work.

4.3.5. The Drop Off:

Questions to have answered upon drop off (refer to drop-off checklist at bottom):

1. **Estimate approval - How much is it?**
2. **Estimated time of completion**
3. **Can we keep the car if we get additional maintenance/Repairs approved? (Do you need it back today)**
4. **Are there any dash lights on?**

If the car is dropped off after hours we must follow the same process, get the same answers, and give the same information to the customer. It's just done remotely instead of in person. Example - The walk around "Mr. Jones I noticed when I checked your car in that your check engine light is on - how long has that been on for?"

4.3.6. Initial Greeting

1. They pull up in front of our door and are looking in - Give a friendly wave, acknowledge them confirming they are in the right place. If you can't help them immediately kindly say "I'll be right with you". A customer decides if they like you or not within the first 5 seconds of meeting you. People do business with people they like - make sure they like us! Don't let them feel awkward, make sure they know they're in the right place and we're here to help with their needs. Now that we've got the window tint on the windows our front office is much less welcoming than before so when they peep their head in - we've got to be the most welcoming people ever.

2. Grab a customer information sheet/Check in sheet with maintenance interval check sheet, and Floor Mat. (Customer welcome package) and meet them by the door. Great them with a friendly handshake and a warm genuine smile.
3. Match emotional intensity, establish common ground, and find out why they are here - Let them know they've come to the right place
4. Invite the customer out to the car to check it in and get the mileage

4.3.7. Walk Around

5. Perform a walk around being sure to note any damage, missing center caps and so on. Using your tablet check in - **Take pictures** of every side of the car paying special attention to any damaged areas. If there is any body work noted ask if they'd like us to get an estimate from our body shop for that. Same goes for wheel scuffs, dents (PDR guy), and especially needed detail concerns (Help out our detail department!)
6. Note if they vehicle has wheel locks - If so ask the customer where the key is
7. Look for things to talk about with the customer such as: Stickers, License plate frames, bumper stickers, child seats, and so on. Make note of any items that would be great to remember at their next service - kids names, hobbies, etc.
8. Ask questions like how do they like their car? I always start by complimenting it (color, condition, model, etc.) which usually leads into them telling me about it. How long have they had it and how long would they like to keep it? It may not look like much to you but this is **their car** and most likely the second biggest investment they've made. I like to brag about how high of miles our loaners have and they're still reliable nice cars.

4.3.8. Get Mileage, Check Warnings, Check Service Due

9. Get their keys and start the car to get the mileage, wait for all the warning lights to go out and if they don't go out, comment on them and ask if the customer would like you to check into them further?
10. Check their keys for other car keys - "Oh do you also have a Honda? Who maintains that? Did you know we work on those too? Keep us in mind for your next oil service."
11. Check the cluster or I-drive for any needed services at the time or coming up within the next 7,000 miles - remember most people only want to see us twice a year for a 7,000 mile service. Check CBS for ANY needed services within the next 7k miles. A customer

does not want to leave our shop then have a maintenance due light come on a month later - It is our responsibility to recommend these services today or exit schedule them so the customer is not inconvenienced by a warning light.

    a. It is very important we note damage or any lights that are on while the customer is there before we start the service.

12. Ask about the alignment of the vehicle - Does it pull to either side? Is the wheel off center? Is getting the most life out of their tires an interest of theirs?
13. Look at the oil change sticker and see who is changing their oil, if it's not you then express to them that you would like to take care of all their car care needs
14. Based on the mileage, highlight the maintenance interval sheet and let them know we are going to be looking at those items during our courtesy inspection. Is there anything else we should be looking at while inspecting the vehicle
15. After doing this they will not be surprised that we are giving them an estimate for any work found - Advise them we'll have an estimate for everything we recommend as well as any other items they'd like addressed.
16. On your contact sheet make sure that you have a good contact number/email and establish a time that you will be contacting them about the inspection/update on their car. "Will you be available at this number at 1:00pm to review our inspection and estimate with me?"
17. It is just as important to set the expectation for pick-up. If the concern is possibly something we will need to keep overnight it's up to us to ask if that'll be OK at this time. Diagnostics or pretty much anything requiring ordering parts usually requires an overnight stay.
18. Ask the customer if they have everything they need. Always remind them to grab house keys, garage door openers, or anything else needed for their day. Most customers are never without their car keys or garage openers - It's inconvenient for a customer to have to return for these items and it happens more than you realize. We always prefer to take just the car key and leave the customer with the rest of their keys.
19. Create the Estimate
    a. Write the RO with every detail needed to set up the job for success. **Update the promise time** (this is the update promise time) and make any special notes like - "Needs to be done today" or "Customer does not want fragrance used in detail".

    b. Enter Source - Where did this customer come from? If a referral be sure to mark the customer who referred them
        i. We use the “referred by” to track the original customer source and the “Source” section to explain what caused this most recent visit
    c. Enter written by
    d. Enter exact mileage
20. Write very clearly on the RO what time you’ll need it back from the shop then circle the time with a highlighter. If you need to have an update to the customer by 2pm then you’ll need the RO and inspection back by 1pm at the latest so the estimate can be built in time to update the customer - Keep in mind the time our parts manager takes his lunch
21. Use the recall lookup button on Tek to check for any open recalls

4.3.9. Drop-Off Checklist

We should have all of this information at drop off before starting work on the car! Before the technician has the ability to get in the car for the first time in a given visit, the following are needed:

- ❏ Customers main concern
- ❏ Inspection Review (if current customer) Inspection Introduction if New Customer
- ❏ Estimated $ for visit (signed)
- ❏ Mileage based services review (new and returning) - Service Intelligence
- ❏ Walk around with pictures (Digital Check In) - Interior Wipe Down -
- ❏ Enter Mileage and VIN - This information is captured on the checkin (tablet) then transferred to
- ❏ Mileage/service lights
- ~~❏ Take cover photo~~
- ❏ Estimated pickup time set with customer
- ❏ Set the expectation for update and inspection review
- ❏ Source of customer entered
- ❏ RO assigned to technician using Tek
    - ❏ Inspection Line added (every RO!)
- ❏ ALL notes and comments from customer put on the RO so they van be viewed from the tablets
- ❏ Label which parts are which, so the tech doesn't have to look it up on computer.

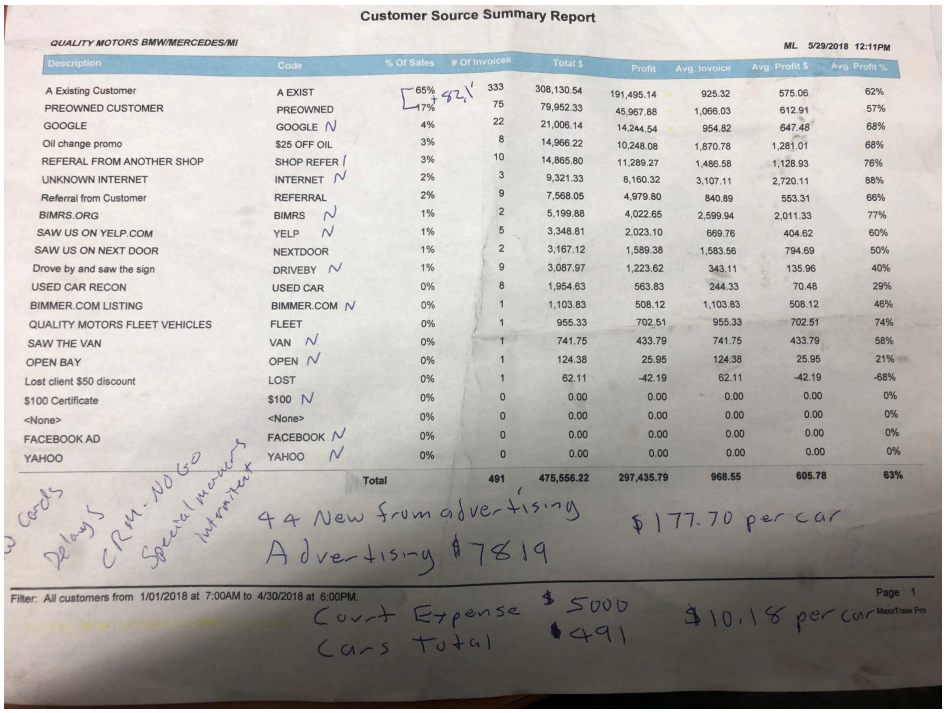
5.4. Referral Report -

Should be tracked monthly?

“Referral - invoice sources report”

5.5. Source Report

Source report is to track where our customers come from (what kind of advertising) Its required to track 100% of incoming customers. This report is reviewed weekly by the shop manager. It is the service advisors responsibility to have 100% of customer sources input and the shop manager to determine which source of advertising is best suited. The source report should track exactly what campaign or special brought the customer in as well as the ARO and profit for each source. From this you can calculate your cost per car based on what you spent on advertising



Customer Source Summary Report

QUALITY MOTORS BMW/MERCEDES/MI — ML 5/29/2018 12:11PM

Description	Code	% Of Sales	# Of Invoices	Total $	Profit	Avg. Invoice	Avg. Profit $	Avg. Profit %
A Existing Customer	A EXIST	65%	333	308,130.54	191,495.14	925.32	575.06	62%
PREOWNED CUSTOMER	PREOWNED	17%	75	79,952.33	45,967.88	1,066.03	612.91	57%
GOOGLE	GOOGLE	4%	22	21,006.14	14,244.54	954.82	647.48	68%
Oil change promo	$25 OFF OIL	3%	8	14,966.22	10,248.08	1,870.78	1,281.01	68%
REFERAL FROM ANOTHER SHOP	SHOP REFER	3%	10	14,865.80	11,289.27	1,486.58	1,128.93	76%
UNKNOWN INTERNET	INTERNET	2%	3	9,321.33	6,160.32	3,107.11	2,720.11	88%
Referral from Customer	REFERRAL	2%	9	7,568.05	4,979.80	840.89	553.31	66%
BIMRS.ORG	BIMRS	1%	2	5,199.88	4,022.65	2,599.94	2,011.33	77%
SAW US ON YELP.COM	YELP	1%	5	3,348.81	2,023.10	669.76	404.62	60%
SAW US ON NEXT DOOR	NEXTDOOR	1%	2	3,167.12	1,589.38	1,583.56	794.69	50%
Drove by and saw the sign	DRIVEBY	1%	9	3,087.97	1,223.62	343.11	135.96	40%
USED CAR RECON	USED CAR	0%	8	1,954.63	563.83	244.33	70.48	29%
BIMMER.COM LISTING	BIMMER.COM	0%	1	1,103.83	508.12	1,103.83	508.12	46%
QUALITY MOTORS FLEET VEHICLES	FLEET	0%	1	955.33	702.51	955.33	702.51	74%
SAW THE VAN	VAN	0%	1	741.75	433.79	741.75	433.79	58%
OPEN BAY	OPEN	0%	1	124.38	25.95	124.38	25.95	21%
Lost client $50 discount	LOST	0%	1	62.11	-42.19	62.11	-42.19	-68%
$100 Certificate	$100	0%	0	0.00	0.00	0.00	0.00	0%
<None>	<None>	0%	0	0.00	0.00	0.00	0.00	0%
FACEBOOK AD	FACEBOOK	0%	0	0.00	0.00	0.00	0.00	0%
YAHOO	YAHOO	0%	0	0.00	0.00	0.00	0.00	0%
	Total		491	475,556.22	297,435.79	968.55	605.78	63%

82%

Cards
Delays
CRM-NO GO
Special memes
Internet

44 New from advertising
Advertising $7819
$177.70 per car

Filter: All customers from 1/01/2018 at 7:00AM to 4/30/2018 at 6:00PM. Page 1

Court Expense $5000
Cars Total 491
$10.18 per car

4.3.10. Early Parts Order

22. If there will be a time constraint or you want to get a head start on the estimate notify the parts manager to get started on any preliminary estimate or parts ordering.

4.3.11. Service Advisor Inspection

23. The service advisor completes the first portion of the inspection form marking any lights on dash, damage or recommendations to exterior, and based on mileage services
24. Use Carfax maintenance to find records of maintenance performed

4.3.12. Distribute + Assign Tech

25. Based on skill level needed, time available, and schedule determine the best suited technician to perform initial work. We try to keep each ticket to the tech that started the work but sometimes based on schedule or skill level needed the ticket will be handed off later. Based on customer concern determine which diagnostic plan would be recommended to start with.
26. Give the work order to the Technician. Be sure to tell him of any special circumstances or needs (would you like a look over when inspection is complete?). the CC is done before any other work except a no start condition in which the inspection is completed immediately after the diagnostic of no-start concern. Inspection must be completed with road test etc. as soon as car runs and drives. Courtesy check process
    a. Set the time expectation for entire ticket or individual items
        i. Set a reminder for yourself to check up at this time
    b. Does this interfere with anything else technician has at the moment? If so, readjust if necessary
    c. It's important to make this interaction personal. Its up to you (the advisor) to make sure this car is properly serviced and its important to give the technician a background story about what the car is used for and the importance of our service. The technician will use this information to make appropriate recommendations for service. Example - A car used as a sunday brunch car has different urgency for recommendations than a car used to drive cross country
27. The work order is returned to the Service Advisor after the diagnostic/initial work and inspection are done, If there is additional work already approved (like a diag+brake job) the technician may continue working on the service work but must get the inspection and initial concerns answers back to SA.
28. When the RO is returned to the front it will be complete with the following -
    a. All parts needed to fix the diagnostic or customers concern
    b. Labor estimate for fixing diagnostic or customers concern
    c. Detailed write up with information of tests completed and relevant information to show the customer what they've spent their money on.

    d. If there is additional diagnostic needed (now or after repair) it must be noted along with any other recommendations (Example would be under car cleaning after major oil leak repair)
    e. Any additional information given to the front office will only help move things along quickly and profitably for everyone. Part numbers and labor times are not required for inspection items but can be very helpful at times.
29. The Service Advisor looks over the car to be sure the inspection and diagnostic are thorough and accurate. The Service Advisor verifies work needed and asks technician for any special circumstances where additional parts or labor will be needed for quoting - Examples of this would be:
    a. Rust that could cause a delay or additional parts during repair
    b. Extra gaskets that may be needed
    c. A special labor time that may not be accurate

The SA owns everything that goes out to the customer

The advisor has more control over the profit in this business than Neil does. Master the profit model so you can be successful.

You, the service advisor, must review the entire inspection, estimate, and all recommendations. You OWN everything that the customer see's. If the tech and parts guy give you awesomeness to present to the customer then you and your team are responsible for presenting that awesomeness to the customer. You are the final line of quality control so if you get SHIT from our tech or parts guy it is up to you to make sure the SHIT doesn't make it to the customer.

4.3.13. Revised Estimate / ETA estimate update

30. Send the CC to the customer as soon as possible. They should be expecting it and excited to look at it. When the CC is done by the tech the parts manager is notified. The inspection is then put next in line to build the entire estimate. The estimate is built in a timely fashion with the Mileage based recommendations, customer's concern, and courtesy check.. Maintenance estimate can be built before the CC is completed (and even before the customer shows up). We estimate EVERYTHING to give the customer an honest understanding of the condition of the car and give them an opportunity to fix it all and become a happy car club member.
31. ~~**Editing Inspection Photos**~~

~~Parts Manager must edit 30% or more of the photos added to the inspection to show the customer what is wrong with the car more clearly. Most customers are not car savvy and it needs to be clear what the picture is showing. Include a picture description where necessary~~

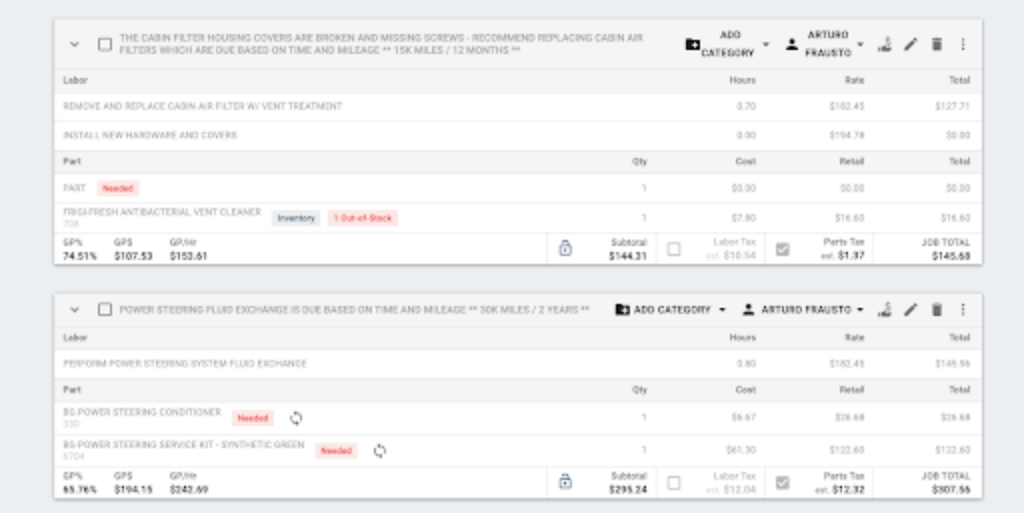
This is suspended until feature is available with TekMetric

32. As soon as the estimate is built the parts manager notifies the technician to look over and suggest any corrections then notifies the service advisor that estimate is done. The advisor then sends the CC and contacts the customer (call, email, text). If you've done a good enough job of educating the customer and building the relationship with them you should be able to text the dollar amount needed and an ETA for completion.
    a. Rules for creating estimates
        i. Cannot use the term R&R (it must be spelled out)
        ii. Use a 1.3 X bump for all labor times. This accounts for inspection time, warranty concerns, misquotes, etc. The labor guide is just a guide and we've found that the 1.3 bump brings it to a fair rate for the repairs needed.
            1. Maintenance jobs do not get bumped past book based on this percentage
            2. Batteries don't get bumped
33. If the customer is on the property then use show and tell to gain trust. In most cases we will send the inspection to them via text or email then follow up with a phone call to review the inspection. From our conversation at the drop the customer should not be surprised with the maintenance recommended on the CC.
34. Always make sure the customers main concerns are covered in your presentation FIRST. Link any maintenance items to repairs needed and anything related to their main concern. Ask for and hold the line on the sale and go after the big pile three times before breaking down the work into smaller piles but **<u>never discounting</u>!!!**
35. Anytime we are presenting the answers to a diagnostic or a customer's concern we must also have the inspection - The inspection is PART of the level one diagnostic. We diagnosed a car last week that had bad coils. The inspection was not done and when we performed it we found it empty on oil. The inspection MUST be performed along with a diagnostic. It's the technicians job to perform the inspection along with the diagnostic, it's the Service Advisors/Foremans job to make sure that happens. We can not give the customer all the information necessary if we don't present the inspection and not presenting the inspection ensures we will ONLY do the minimum repair possible. We

cannot disservice our customers by not giving them a thorough inspection and understanding of their car

36. What's Not Allowed (Service Team)

    There are a few key points during the sales process that we cannot skip.

- Graying out estimates **for any reason** (Exception: quoting premium / standard jobs. One can be grayed out) The customer has to approve / decline every estimate
- Checking in customers **INSIDE** (You need to go out to the car to have the conversation and plant seeds. Pop the hood, point out brakes and fluid services. Ask the important questions.
- 

37. You should have scheduled communication with the customer based on us setting that time earlier with them but if we are not able to get ahold of them be sure the vehicle is ready to pick up at the time we've set with the customer. Even if the car needs additional work that we've found during the inspection - they still might show up at the time we've scheduled earlier.
38. If we have not heard back from a customer before leaving we want to be sure to update the other front office staff of the situation and give them every detail of the presentation in case they are left to present the ticket.
39. ~~When the revision is sold be sure to clean up any irrelevant revisions so only declined work is left as a revision See "Revisions within Mitchel" process~~
40. Now that the revision and additional work is approved we have these details:
    a. Customer has been quoted ENTIRE dollar amount including tax, diagnostic, buffer. Remember - People hear what they want - If you say it'll be an additional

$700, they hear $700 total. Don't let us look like the asshole by not quoting the entire amount.

b. Customer knows exactly when their car will be completed and we've arranged other options for their transportation if needed. Same concept here - Customers hear what they want. If you say "I'll have an update on our progress by tomorrow end of day" They hear - "My car will be done tomorrow by the end of the day" so it goes like this - "Based on what we're repairing for you it looks like I'll need to keep your car for two more days which will mean it will be ready to pick up on Friday. I will have an update for you on our progress tomorrow just to keep you in the loop and confirm our pick up time for Friday afternoon. Do you need a loaner or anything if you're without your car until Friday?"

c. Set a reminder to contact customer at the time we've told them we would

41. Work Approval - Send the total amount authorized via text or email along with the ETA for completion. Its so important that this is written and clear between the customer and us. We must get a reply back from the customer approving the entire dollar amount before starting any work. Verbal approval is not enough! Print text message conversations that have approvals in them and attach to final invoice

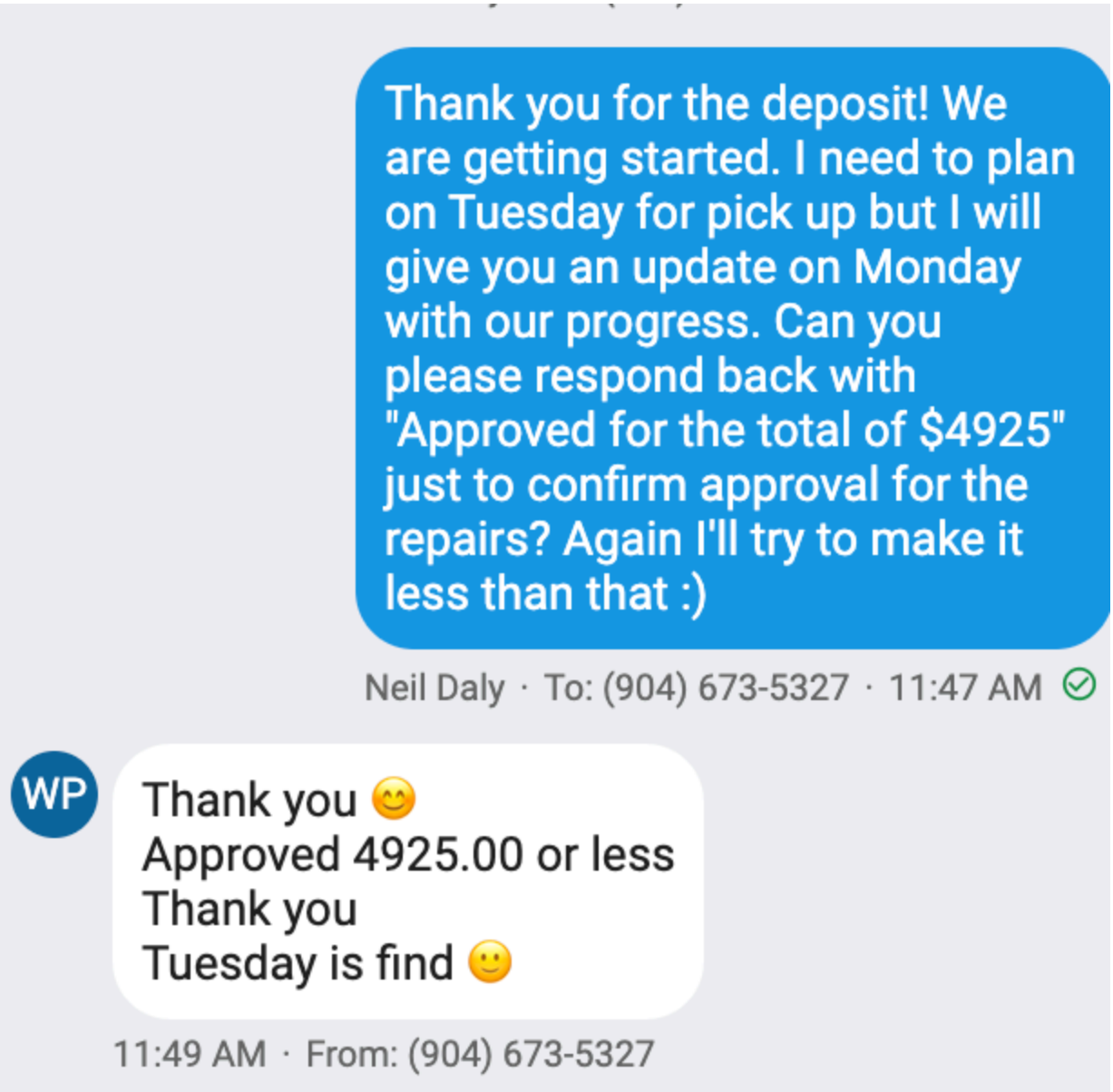
    a. Any estimate over $1,000 must have a signed estimate. Methods for this are -

        i. In person

        ii. Email so customer can sign and send back (a clear picture of the invoice is OK)

        iii. Send a docusign or Adobe sign - This is the prefered method as its the easiest and most secure for the customer

        iv. Send a text "Hi Customer, Thank you for choosing us to repair your vehicle. The total we discussed for repairs is $5,000, can you please text back with "approved" so I can get started on the work?

b. 

4.3.14. Do it!

42. Order parts or have parts manager order parts (RO goes to parts manager)
    a. Be sure to get an exact ETA for parts arrivals and write this on the RO for the technician to see
43. Distribute Ro to appropriate technician - This is a monumental hand off - The ticket is sold, the parts are on the way, this is what we're here for, Lets fix this car! Conversation with technician looks like this -

    a. Based on the ETA for parts and work approved is the ETA I've estimated appropriate and I can expect the car ready to wash by that time?
    b. Do you have everything needed to set yourself up for success?
        i. Parts
        ii. Special tools
        iii. Repair instructions
44. Technician - look over the ENTIRE RO, make sure you have all the parts you need, labor times look correct. Envision your future guy doing this job and think "what snags could he hit or what else could he need?" Make sure we're not missing an important job on that car that should be sold along with your repair. If the ticket was diagnosed or inspected by another tech be sure to follow the "cradle to grave" process and review the inspection/diag before starting work
45. At this point the ticket is sold and cannot be modified for any labor discrepancies or parts left out. Anything needed at this time is typically on us. We can't call the customer back and ask for more. If there is an error on the ticket that should be noted and saved as a can job we can make an amendment to quote the job appropriately for next time
46. Open the boxes
    a. As parts come in open the boxes to inspect for correctness and any damage. Its important the technician open the boxes and view all parts needed prior to starting the job. Take care of your future guy by finding any missing parts or incorrect parts prior to starting the job. All boxes must be opened upon receiving them by the parts manager and then the technician.

4.3.15. Mechanical work completed

47. The work is done, all the labor lines are completed, and all the parts have been installed on the car (All boxes checked) The technician is responsible for making sure the car makes it to its next destination - Wash, Alignment, Smog, Tires, Extended test drive. Be sure to set ETA expectation with the next responsible person. If the car needs to leave by 3pm and its 2pm - the detailers need to know this. If its cutting it close feel free to put the hazards on to simulate a "waiter" status
    a. EVERY CAR gets test driven after repair

48. The repair order is returned to the SA as soon as the mechanical repairs are completed and an updated status & ETA are communicated to the SA
49. When the detail is completed the keys are put in the appropriate box and completed status is communicated to the SA (in person, note stuck directly in center of monitor, Hangouts)
50. Service advisor performs a final QC making sure the car is in a suitable condition to be shipped and it's cleaner and better than it was when it arrived
    a. Thank you card
    b. Engine bay clean
    c. Area of repair clean
    d. No marks on floor mats, kick panels, seats, etc.
    e. No evidence (except for the car being cleaner) that we worked on it
    f. Clock is set
    g. Service reminders reset
    h. Oil change sticker installed and accurate

Quality Control Check

See QC Check process - https://docs.google.com/document/d/1MLn9Yd4HEXHMYrxnFq60tkgcV5W6e_EatTEDJkTr0Fs/edit#heading=h.n9n8ad11fb4d

4.3.16. Customer Pick-Up

51. Before the customer arrives we've set up -
    a. 2 appointment cards - one for declined work, one for their next oil service (see below)
    b. Final Invoice to review
    c. Inspection to review what we've performed and declined items
52. When we cash out the customer we let them know which maintenance schedule we did today and let them know which one is coming up and go to the next big one and let them know when it will be due to give them time to get ready for it.
53. Leave a nice note on the invoice - "Thank you!"
54. If there was a buffer used we discount the buffer so the ticket is lower than we quoted (customers love this)

55. We go over all work completed and why it was important to do these services today. Even though it's already done we still need to educate the customer on why they spent their money on these items today and why they chose to do it with us.

4.3.17. Exit Schedule

[How to format exit schedules on the Google Calendar]

We exit schedule the next appointment with an appointment card and let them know we will call them a few days in advance to remind them. Do not staple the card to the invoice, it must be separate!

56. We exit schedule any declined work for an appointment within 6 months, preferably less than 3 months - We recommended it today because it is due **today**. Most exit schedules for recommended work will be within 3 weeks.
    a. Methods for incentivising this return visits are -
        i. Appointment Card
        ii. Appointment card with discount
        iii. Mystery Envelopes (please use these for declined services, not just oil changes etc.)
        iv. Detail upgrade when service is performed
        v. Next oil service FREE for PPI customers

    b. This service is put on the "Exit Schedule" Calendar for the date we've set on the appointment card
57. We exit schedule for future mileage based maintenance work. If they got an oil change today they will get an appointment card for their next oil service based on their driving style AS WELL as an appointment car for declined work needed
    a. This service is put on the "Exit Schedule" Calendar for the date we've set on the appointment card
58. Exit schedule their warranty maintenance service - This is the maintenance service that's due to keep the parts we replaced today under our long term warranty - If we replaced a water pump it's important they perform a cooling system exchange in 2 years - If they replaced a power steering hose it's important they perform a power steering fluid exchange at the correct mileage
    a. This service is put on the "Exit Schedule" Calendar for the date we've set on the appointment card

Appointment card

Minimum stocking 100 cards
Stocking level 500 cards
Reorder - Vistaprint using theteam@oceansidemotorsports.com login

Use for all exit schedules and appointments

$20 off appointment card

Use to incentivise keeping the appointment for a repair or maintenance item like -
Air filter
Cabin air filter
Oil change
Alignment

Mystery Envelope

The mystery envelope is a fun and effective way to get customers to return for needed work.

- Mystery envelope only used for declined repairs over $500
- Mystery envelope must have an expiration date no more than 90 days from today
- Note what service it is for and $$ amount expected
- Mystery envelope must be sealed when given to the customer
- Can only be opened by service advisor at the returning visit for the service we exit scheduled for (can't be used for a diagnostic or something else that breaks).
- Stocking level is 200, Minimum stocking level is 100
- CSR responsible for maintaining stock

How to make mystery envelope

Purchase supplies from Amazon -
Cards with printed coupon inside envelope - Avery 5371
Envelopes -
https://www.amazon.com/gp/product/B07232T3H2/ref=ppx_yo_dt_b_search_asin_title?ie=UTF8&psc=1
Outside label for envelope - Avery 18163

Use the avery online app for printing. The files are saved using the office@oceansidemotorsports.com login

4.3.18. Referral Program Reminder

59. We remind them about our referral program and give them a few referral cards
    a. If you refer me a customer I'll give you $40 OMS dollars AND we'll give your friend another $40 OMS dollars when they come in
    b. Each referral gives you one entry into our referral contest - The winner for the year gets one of our grand prizes :
        i. $500 in OMS dollars
        ii. A year's worth of oil changes
        iii. An arrive and drive experience in our race car
        iv. A Tandem Skydive with GoJump Oceanside
        v. A 52'' Flat Screen TV
    c.

This is another good opportunity to keychain mine

4.3.19. Review Request

60. We ask them if they'd be willing to leave a good review for us and let them know we'll be sending an email or text with the link to our google and yelp page. "It would mean the world to me if you could leave me a review online. I'm sure you checked our reviews before coming here and it's important to us so more people like you can find us to service their car"
61. Make sure we send the review request from the right business!! Lifetime and Oceanside Motorsports have different review requests.

4.3.19.1. Reviews

4.3.19.1.1. Review email script OMS

Title - Please leave a review for us

Hi,

If you could take a minute to write a quick review about your experience at Oceanside Motorsports it would mean the world to us. I'm sure you check reviews before going to a new business and your review could send another customer our way to experience our service.

Link to Google (The most important for us):
https://www.google.com/search?q=auro+repair+bmw+92058&oq=auro+repair+bmw+92058&aqs=chrome..69i57.11781j0j4&sourceid=chrome&ie=UTF-8#q=auto%20repair%20bmw%2092058&tbs=lf:1,lf_ui:2&safe=off&rflfq=1&rlha=0&rllag=33199405,-117311933,5550&tbm=lcl&rlfi=hd:;si:10824666446575662090

Link to Yelp: http://www.yelp.com/biz/oceanside-motorsports-oceanside

Link to Facebook: https://www.facebook.com/OceansideMotorsports

4.3.19.1.3. Using Soapbox the get reviews

- We use Soapbox to send a review request to every customer after each visit
- Feel free to use the laminated sample to show the customer what they'll be receiving and how to use it. If they're waiting here have then do it while they're waiting and give them an extra special high five for helping new customers find us with their review!
- You can access the site at this address: https://soapboxratings.com/login
- Your login credentials are in the passwords doc
- Be sure to bookmark this and have it open with your new browser pages
- Enter the customer's First name only so its more formal as well as their phone number - Click "Send" and you're done!
- Don't use the enter button to submit (it doesn't work)
- Click here for screen shot samples to show customer

5.7. Alignment referral program

Develop this referral program to incentivise other shops to send us alignments
Discount tire -
$100 gift card to start the program given to manager, he can re-gift
Each referral gets them $20 gift card which after 5 referrals gets them a $100 gift card to OMS

~~4.3.20. Yelp Messages~~

~~Yelp response time -~~

~~**We must maintain a less than 1 hour response time for yelp message requests. It is expected that we treat all incoming messages from yelp like a phone call so they get attention right away. If we are busy it is OK to respond with a message saying we'll get right back to them with a complete response.**~~

~~**Neil takes responsibility for answering yelp messages after hours. Most of the time he will reply with a "thank you for contacting us, we will reach out to you as soon as we open the following day**~~

We have messaging dissabled on Yelp currently. If they want to get ahold of us they can call, and they do.

4.3.21. Pick-Up Checklist

All of these items should be done during customer pick-up! If not done in person they still need to get done.

- ❏ Review work completed and why they chose us to perform the work
- ❏ Educate on next recommended action item
- ❏ Exit schedule for next declined service
- ❏ Exit schedule for next maintenance service
- ❏ Exit schedule their warranty maintenance service
- ❏ Remind them about our referral program and how important referrals are to us
- ❏ Review request - Let them know we'll be sending them a message with links to our review sites. Remember Google is the most important, followed by yelp and facebook

4.3.22. Thank You Call

62. The next day or day after we call them and say thank you - a mailed thank you card or personal email works too - as long as they get ONE of our thank you methods

Deposits

Any ticket over 2K requires a deposit of half of the total ticket OR the sale of the parts - WHICHEVER IS HIGHER
Any special order parts must be paid for in advance

Special order parts - will be labeled on the estimate as "deposit required"

Deposits on the clover machine -
We use the clover machine to deposit into our "SOP" account (special order parts). This money goes directly into the account via next day funding (as long as processed before 3pm) and then

can be spent via the “SOP” debit card on the parts or sublet needed. We use this to separate these typically larger expenses out of the operating accounts and to avoid distributing the money as income.
In the case where you’ve taken a deposit on a special order part (like a transmission) or high dollar amount ticket in which parts will be purchased from one of our primary vendors (SSF, Northside, BMW, Worldpac, IMC) using the clover machine you must notify the office manager so she can transfer those funds as needed. In any other case these funds will be spent via the SOP debit card.
We should use the clover machine for:
Taking a deposit on any ticket over 2k - then notify the office manager
Any special order parts

It is OK to take a deposit via tekmetric

How to manage cashflow with deposits

When deposit is taken a “deposit slip” must be filled out. Information on this slip is -

- The amount _____
- Date _____
- What vendor/type of part
- Who done it
- What machine deposit was taken on

1. SA takes deposit and fills form out best you can
2. Mark paid in POS system
3. Hand ticket to Parts Manager
4. Ticket then goes to office manager to transfer funds as needed

15.7. Discounting & Refund rules -

Refunds

It is EXTREMELY rare that we will need to process a refund to a customer. In the event of a refund where you are giving the customer money back or refunding their card - **You must obtain prior approval from Neil.**

Discounts

We build all of our pricing based on our costs with just enough room to cover the overhead and a fair living for our employees. We do not have room to discount. If you need to make up for something or add in a perk - use the detail upgrades.

Any discount MUST have a coupon listed in the discount name - **DO NOT TYPE A CUSTOM REASON -** All discount reasons are pre set and you'll mess up the reporting if you modify any of them. If there's not an applicable discount reason please get with your team leader. Its very important these reasons are accurate.

No other discounts allowed

Any discounts given other than coupons/Menu must have a prior approval from Neil and noted on the discount approval log (Neil)

Warranty on a maintenance item

We cover maintenance items under warranty for the length of time and mileage of the service interval. For things like transmission fluid and brake fluid exchange the warranty is pro-rated based on how long into the interval we are. Example is - Brake fluid testing at a high water content after a year of use. The expected life of brake fluid is 2 years so it lasted half of that and the exchange we perform today will last for another 2 years. So today we charge the customer for half of a brake fluid exchange so that they are paying for the second year but also not paying anything extra for a service done early.
Another example is transmission fluid. Lets say the pan gasket started to leak at 40k miles. Our interval is 50K so that last service made it 80% of its expected life. The customer would pay 80% of the transmission fluid service and we would cover 20% to cover the last 10k miles of its interval

Warranty Discounts and repairs

Anything over $300 needs manager permission (AKA Neil)

Request for approval must be made via google chat or in person and if unable to contact for approval the next in line on the direct report may make the decision. Response via google chat must be received within an hour otherwise executive decision will be made. BTW I would also appreciate a text if it's going to be expensive (neil). Think with your own wallet, any discount comes from our bottom line and is impossible to make back up. Imagine any discount as if you are handing the customer that cash from your wallet because that's exactly what we are doing anytime we discount anything.

The service advisor spill tab - **NO LONGER EXISTS -** Lets make sure we believe in what we're charging and we wow our customers in other ways.

If its a tech comeback warranty or an oil leak the original tech must perform the job again along with any other related items. If the original tech is not available another tech will perform the service and we will deduct the units from the original tech to pay the available tech.

Warranty Discounts

In the event of a possible warranty concern its important to do our research to make sure it is a valid discount.

- ❏ Has the component been maintained BY US to our maintenance standards?
- ❏ Did anything else cause it to fail
- ❏ Are you sure its the exact same failure as the first time we fixed it?
- ❏ Be sure to ONLY warranty the broken part and not anything additional that should be customer pay
- ❏ If its a part failure - work with our vendors to cover our labor for replacement
    - ❏ Submit claim with Technet or Napa to cover our labor
- ❏ Tech comeback - deduct the units as required

Discounts must always have a description in Tekmetric. YOU MUST USE A PREWRITTEN DISCOUNT REASON, never type or change any of these! These are the only reasons allowed -

- Lifetime Oil Service
- Menu Price Adjustment
- Comeback - part failure - WITH reimbursement
- Comeback - part failure - WITHOUT reimbursement
- Comeback Tech install or quoting mistake - *TECH NAME HERE*
-
- Estimate created improperly
- Free diag post repair for similar concern
- Emergency car count
- Very rare special circumstance
- Training
- Shop Cleaning/Improvement
- Planned Marketing discount
- Shop Tool (not billed to customer)
- Groupon
- Uber Ride
- Past Tech - Comeback tech install
- *Service Advisor Name* Comeback or Quoting Mistake
- Overpayment from past RO (this is used to carry forward payments)
- Multipoint inspection upgrade (OK for advisor to upgrade to multipoint without charging)
- Employee oil change

Times we've made warranty mistakes in the past -
We diagnosed a car for ac inop on one side of the dash. We fixed the blend door, AC worked fine. Car came back 3 months later with a similar concern. We tested and the blend door was functioning but the AC charge was low and leaking from the schrader valve. We assumed it was

our fault and discounted the $444.03 ticket. This was not a warranty repair and customer should have paid.

volvo that required the timing belt to be removed to replace the water pump. We first replaced the water pump at 166550 miles and it came back leaking at 219542 miles. This car was due for a timing belt replacement every 30k miles so it was actually waaaaaaaayy past due (also our fault for not recommending). We should have charged for the timing belt replacement and warrantied the water pump seperately. Instead we paid for the whole job and our customer got a free timing belt.

We discounted $1560 when the discount should have been $412.54 for just the water pump

For ANY warranty concern the component MUST be maintained by our maintenance standards. This means to warranty a water pump you have to perform a cooling system exchange with the same quality coolant that we use at our interval of 2 years, 30k miles

If a caliper is seized that we replaced previously we will have to pay for brake pads. If the brake pads are at 6mm though they are more than half worn on a wear item. The customer should be responsible for half of the cost of brake pads because we'll be installing brand new ones. The customer will save money because we will take care of the install labor as part of the warranty repair

4.3.23. How'd we do?

63. Shop Manager (Neil) performs minimum of 5 "How'd we do" calls each week. It's important to hear from our customers how we can improve their experience

4.3.25. Where have you been call

64. Then the rescheduling calls to get them back in and start it all over again
65. If that did not work we do the 12 month - How have you been call.

Payments

See "Deposits"

See "Money Management"

4.3.29. Special Order Parts and Long Term Projects

Any special order parts ordered for a vehicle must be paid by the customer before ordering. Items like Keys are not returnable and must be paid prior to ordering. Another example of a

special order part would be a headliner. In the case the customer cancelled we would be stuck with the re-stocking fee and or the entire parts charge.

- 4.3.29.1. “Extended Stay OMS” Longer jobs, custom jobs, race cars etc.
    - Disclose these rules to the customer prior to service. We prefer to keep the payment information on file. We notify the customer prior to charging their card.
    - When we start the job customer will pay the total for all parts needed at retail
    - Any parts added to ticket will be paid by Friday on a weekly basis
    - We will charge total labor used on a weekly basis to the customer based on the tech hours produced
    - If we are unable to charge the balance due we will have to put work on hold and start storage charges

5.9. Selling on the drop

Most of the time to quote a customer a cost to repair we will need to inspect and diagnose the concern before knowing an exact price and ETA. In some cases it is appropriate and encouraged to set an estimated price for repair on the drop. This is most suited in a situation where tear down is required to confirm a repair - like a window regulator. When diagnosing a concern like this we are required to quote the customer a total cost for tear down then reassembly if repair is not approved (per california BAR).

If a customer comes in with a concern like a window regulator where its clicking or stuck (something we see all the time) and we’re 90% sure its a regulator - its a good idea to quote the cost of the regulator before getting started. The customer appreciates this because we have a fairly accurate estimate and know a total price before getting started (instead of just $200 to figure it out). Its SUPER IMPORTANT to inform the customer that this is a guess as to what’s wrong and we will be disassembling to determine if there are any additional/different repairs needed that could be more or less than we quoted.

The benefits of this are -
Gets the approval before work is started so we can R&R as efficiently as possible
Gets parts ordered asap

The downsides are -
Allows for repair to be declined before verifying concern (what if the real repair is cheaper than what we’ve guessed at) Which is why its important to quote the complete job but also what the minimum out the door could be (just the R&R). “If it is the regulator like I’ve guessed our bill will be around $600 but if I find that it's just a clip or more affordable repair it could be closer to the $200 range. Either way I will inform you as soon as I know and get final approval before proceeding with anything more than $200” This is not always needed but for a more skeptical

buyer its the way to go. It makes sure they know they're in control, the bill could be $600 but it's a minimum of $200 no matter what.
Allows for confusion if repair is much more expensive than what we've guessed at. This is why it's super important for the customer to know that it's a "guess" and either way we're only going to repair what needs to be repaired and we're not going to charge them twice for anything. This doesn't usually happen but it's important to be aware of it so we don't get the "you said it would be $600"

5.10. Questions to ask after the estimate is built before contacting a customer

Can any of this be combined to save the customer money and time? Are there any additional repairs or maintenance upgrades we should do at the same time?

Are there any additional items needed for these repairs? Clips, gaskets, hardware?

Does all of this labor look correct for what we're recommended?

How long will this take once approved and we have parts? - Setting the ETA

Will this fix the customers concern?

Will there be additional diagnostic needed?

5.11. Billing a sublet -

Parts must be separated and taxed from labor - Windshields and tires

5.12. Pricing for combined labor times

When combining labor times to save the customer money we have to be clear about how much the customer is saving and how much more it will be if we don't perform it at the same time.

DO NOT DISCOUNT THE LABOR TIME
Instead - add a labor line with a negative quantity to reflect the discount. This way it is very obvious where the saving came from and can not be accidently sold at a massive discount in the future. For a discount of a labor line use the title - "combined with other service" So if you're combining replacing engine mounts with replacing an oil pan and the labor savings is 1.5 units less than the labor time for the mounts along you would create a negative labor line for -1.5 for "discount for replacing engine mounts at same time as oil pan gasket"

5.2. Special Labor Times

In most cases these labor times will be used regardless of what the book time says

- Most menu services like alignments
- Oil Change - .5 (except specialty and 06+ M cars which are 1)
- Wiper Blades - .1
- Complete premium brake jobs - 2 units -

~~5.13. Information Data Charge~~

~~Retrieval of electronic service information including diagnostic aids, technical service bulletins, recall and warranty information from your vehicles manufacturer. Access to on the line databases and other electronic resources to assist in efficiently diagnosing and repairing your vehicle =~~

~~This charge is charged to every customer. Price is based on what we pay for subscriptions (alldata, identifix, mitchell, etc.) and the average number of cars we see~~
We don't and can't charge this.

5.14. Military and BMWCCA Discount

We offer a complimentary level one detail upgrade valued at $99 to every military, firefighter, law enforcement, and BMWCCA member. The $99 can also be credited towards any other detail service

5.15. Quoting an estimate to a customer

When quoting our estimate to a customer they need to be informed of:

1. The work being performed
2. The value of the work being performed
3. When the repair is expected to be finished (Under promise, Over deliver. Pad the completion time, They will be stoked when the car is finished early)
4. The EXACT "Out the door price" or total repair bill
    i. Pad the estimate – Add 10% buffer to estimate for misc. expenses
        1. If none of the 10% allowance is used, remove the pad from the final bill. The customer will be very happy to see their bill is less than quoted.

5.16. Digital vehicle check in process

5.17. Registration stickers on Loaners, customer cars, shuttles

We will check registration stickers upon every service, check in, and check out.

The customers registration sticker will be checked as part of the check in process

5.18. The RO Cover Sheet

Link to document - https://docs.google.com/a/oceansidemotorsports.com/document/d/11WGQxfNl7fYAebQY54WRck6JkHbiolAwChJHaNeOYCg/edit?usp=sharing

The RO coversheet is meant to be a checklist for all necessary actions that need to happen before a ticket is finally complete. It includes a tech, foreman, and service advisor sign off for quality control check. It then becomes a check sheet for actions that need to happen after the car leaves like review request sent, exit schedule appointment set, thank you call, and how'd we do call.

When a repair order is complete and the vehicle is picked up the RO cover sheet it stapled as a cover sheet to the repair order packet and put in the weekly invoice stack.

On Friday these invoices are divided up between the service advisors as a to-do for the Thank you Call - See thank you call process

After the thank you call has been made the RO packet goes into the "Manager Review" stack. The Store manager will perform the how'd we do call, perform RO audits, and make sure all of our boxes are checked

Now the RO packet can be filled in the customers folder for review at a later date if necessary

Ubers

Uber replaces our old "shuttle". We used to offer a local shuttle service. Sometimes we would go outside of our shuttle distance for a special circumstance but most of the time it was within Oceanside or Carlsbad.

Now we use Uber which is more affordable and sometimes more convenient. Our cost of the uber must be accounted for on the repair order as a "sublet"

The cost of the uber is a cost to the business and the service we provide (comes out of our GPD) so make sure if you're ordering a $60 uber your ticket is high enough to cover it.

General Uber budget per ticket (both ways) is $25

Picking Up Parts via Uber:

10/15/2020

1. Schedule uber w/ pick up at location of part and drop off at our shop
2. As soon as the ride is accepted by driver, message the driver and say “hey I have you picking up parts from my supplier and *this is who to talk to* (very specific information as to who to talk to and what they’re picking up) (package quantity, etc)
3. Contact the vendor and let them know that Uber driver will be picking up the packages. Give them the drivers name, car type, and eta.
4. Add your personal phone number to get connected when the uber has arrived.

Scheduling an Uber for parts pickup

In this video I accidentally scheduled for a rider pickup vs. delivery but it still worked I just had to specify to the driver he was picking up parts vs. a person

What car should I take?

All cars are listed in order of which to take first

Running an errand -

1. Mary Beth
2. Gordo
3. Rave4 (use this if you’re moving parts or large things)

Loaner purposes -

1. High Mile

    a. Give to a customer to promote convenience with additional work needed during service
    b. Give to a customer in case of a warranty concern (on us) to promote convenience
2. Mericle 535i
    a. This loaner reserved ONLY for lifetime oil service members
    b. It should be planned to only be out for the single day of that service for a customer. We plan lifetime oil services one per day max in order to be sure the loaner is always available.
    c. This loaner should not be used for long term services (over one day) so it may be available for lifetime oil services

Leaving a car at someones house -

1. Mary Beth
2. Gordo
3. Rave4 (this should always be the last to leave!)

Shuttling a customer

1. Rave4
2. Mericle 535i
3. High Mile
4. Mary Beth
5. Gordo

5.19. Tires

15.19. Billing Tires for a customer

We are happy to take care of tire purchase for a customer if it's more convenient for them. We do charge a $15 per tire transport charge for us to take the wheels and tires to the tire shop. We must use a minimum of 20% markup when billing tires on top of that.

If we are buying the tires from Discount tire and would like to purchase the road hazard protection (recommended) its best if we use the customer's credit card directly to discount tire so it stays on the customer's account if they ever need to use the road hazard. In this case we just charge the $15 tire transport charge and our customer gets our cost on the tires.

We try to do this just as a convenience as we’re not set up to sell tires all day long.

5.21. Thank you call

The thank you call is performed 2-3 days after the customers repair is completed. The purpose is just to thank the customer and not to “check up” on the vehicle. It should go like this -
“Hi Jeff, I just wanted to call and say thank you, I know there are lots of mechanics for you to choose from and it means so much that you’ve chosen me. I wish you an awesome day and I’ll see ya next time!”

5.22. Transferring phone calls within the company

When LIF shows up on your caller ID - it is an incoming transfer from the Lifetime phone. Answer the call with - thank you for holding, this is NAME.

5.23. Taking a message for Neil

Most people calling for Neil just need car repair work that you can help them with. So when they call we need to make it clear that we’re happy to connect them with Neil but to get a timely response or work done on their car, they’ll need to talk to YOU.
Try phrases like -
I’d be happy to connect you with neil but is there anything I can help you with regarding your car?
Neil typically returns calls on tuesdays, can I help you with something in a more timely manner?
He is not available at the moment but I can help you. (saying it like this is very effective for getting customers to talk to you)
If they are getting transferred to Neil explain that you’ll transfer them over and he tries to return all calls on Tuesdays
Don’t assume someone is a telemarketer because they won’t give you any information. We’ve once cut off a government agency trying to contact Neil and instead of calling again they took all of the money from our bank account! They did not say where they were calling from.

5.24. Tracking Inventory Parts

Anytime something is sold that we purchase from master one fasteners or other bolt vendor we use the part number “HARDWARE”

Anytime a tire related cost is sold we use the part number “TIRE”

Anytime a battery is sold we need to bill the $1 battery fee and the part number is “BATTERY”

Anytime an electrical connector, wire, fuse, etc we use “ELECTRICAL” as the part number

Oil must have the vendor assigned to each “part” as National Petroleum.

5.25. PETTY CASH

If you use petty cash leave a receipt with date, amount, & purchased item, even if it's only on a sticky note

5.27. Value Propositions

- ➔ Lifetime Warranty
- ➔ We only fix what needs to be fixed
- ➔ We will not waste your money on repairs you don't need
- ➔ Loaner Vehicles
- ➔ Personal Courtesy Shuttle
- ➔ Digital inspection send to your email that includes pictures of any needed items so you get to see what our technician sees to make an informed decision
- ➔ Detail upgrades free for military and BMWCCA members
- ➔ Financing available
- ➔ Early and Late drop of hours
- ➔ Best trained technicians who we train in house
- ➔ We bake the best cookies!
    - ◆ If you keep it fun and somewhat unrelated to car repair it shows how different we are.

5.28. Answering the phone

See common questions asked by customers and our responses here - [Common questions asked]

We have to be polite AF on the phone. This is usually our first impression for a customer and if we mess this up, we'll never have the opportunity to show them how awesome we are.

1. **Take a breath and smile**
2. **Thank you for choosing Oceanside Motorsports. ARE YOU READY FOR THE BEST AUTOMOTIVE EXPERIENCE OF YOUR LIFE!?! My name is Chris, Who do I have the pleasure of speaking with today? https://www.youtube.com/watch?v=7XNFYBB1j_Q&t=198s**
3. **Thank you for calling (Customers name), again my name is Chris. How can I provide you with excellent service today?**

Slow Down! Be memorable!

- What is your **friendliness factor**?
- ***Paint the positive image*** with your voice

4. **I would be more than happy to help with that! I will need to get some information about the car. In case we get disconnected please tell me your phone number.**

4.22.1. Holding

"**Are you willing to hold briefly?**" WAIT UNTIL THEY SAY YES! (No click!) Check back with the caller before ***30 seconds*** and ask if they are willing to continue to hold or if it would be better to call them back.

4.22.2. Messages

Always offer to take a message

"Let me have your name and number and I'll be sure he gets your message."

4.22.3. Diagnosis

First: listen to their concern!

"It sounds to me that there could be a number of issues causing that problem and I think it would be best to diagnose the concern to make sure we don't waste money on any unneeded repairs - wouldn't you agree? In that case I'd like to schedule an appointment to see your car in person so we can find out exactly how much the repair will cost. Once we know that we can repair the vehicle and our repair has a lifetime warranty - What works better for you, Morning or afternoon?" (ALWAYS give two options so it's easy for them to make a decision.)

4.22.4. Price to diagnose

Based on what you've told me I believe it would be best to start with our level one diagnostic. This diagnostic costs between $100-$230 depending on how in depth the issue is. This diagnostic takes us about 4 hours and when we're done we will know exactly how much and how long the repair will take. We know that the most expensive repair you can do is the one you don't need so we are going to be absolutely sure that we only spend your money on what you actually need. (Closing statement)

4.22.5. Price on an oil change -

You've already got the customer and vehicle info from the greeting conversation

You've called the right place for that service because every time you have your oil changed here we perform a super thorough inspection that is all digital, goes to your email, and includes pictures of any worn items - so you get to see exactly what our technician sees.

We wash and vacuum your vehicle and can also offer a ride anywhere you need or a rental car.

This service takes us a minimum of 4 hours and costs less than $160.

4.22.6. Closing

We do have appointments available tomorrow or any day after, Is morning or afternoon better for you? (Always give two options)

4.22.7. If they say no

OK, no problem (customer). Our schedule is filling up so I'll save a little time for you on our schedule tomorrow and touch base to see what works with your schedule, just let me know how I can help. (You already have their phone number, put it on the schedule to call them tomorrow)

4.22.8. Customer supplied parts

We've found that to provide 100% customer satisfaction we can not install customer supplied parts. Almost everything we do has a lifetime warranty on it so to provide you with the best service experience possible I would need to use our parts. I think it would be best to inspect your vehicle before going any further, would you be willing to come by for an inspection and to meet in person?

In the rare case we are considering installing their parts - or if you need them to come by to build the relationship further - "Come by and let me see what you have, we'll work it out and get your car fixed". I've used this many times in the past to just get a customer to come by and see what we're all about. Once we had a customer ask for a price to install his coilovers. When he came by they were cheap crappy coil overs. Because he was at our location we were able to talk enough about what he actually wanted and turned out to be a great customer who returned the coil overs and spent over 10k with us in that one visit.

4.22.9. What's your labor rate?

We build our service estimates by the job instead of charging you by the hour, We put a lifetime warranty on our repairs and we don't work very fast s

4.22.10. Performance Part Installation

We've found that to maintain 100% customer satisfaction we need to start any performance part inquiry with a performance evaluation. This ensures the car is ready for upgrades and we are doing the best and most affordable service for you and your car. The performance evaluation is $75 and is all digital including pictures of any needed items.

4.22.11. Another Price Question Script

"You know, John, that's a great question. Clearly price is important to you. Am I right? (Yes, price is important to me.) John, I get this question a lot, and over the years, I have seen more often than not, what the customer is asking a price for, is usually not what the vehicle actually needs. That's why most of our customers have found it best to bring the vehicle in for a complete and accurate estimate. And while you're here, you will also receive a complimentary car wash. Would you like to bring it in at 3 this afternoon, or would you prefer 8 tomorrow morning?" John, I'm guessing you're looking on Google or some other search engine. Hopefully you're reading all the reviews, and that is probably why we're one of your first calls. As you call around and talk with the other shops, be sure to keep in mind that we give a three-year unlimited mileage warranty. No shop can beat our guarantee! Also we have a free shuttle if you need it, and can even provide you with a loaner car. We have a Concierge Service as well, where we can pick up your vehicle at your home or place of business, and bring it back to you when it is complete. Be sure to ask the other shops you call what their warranty is, and if they provide any of those services. Oh, and don't forget the free car wash. Lastly, John, it is important to me that you get what you need, so if you have any questions at all, even if you decide to use a different facility, please feel free to call me back and I will be happy to answer any questions you may have. Again, my name is (your Name). I really do appreciate the opportunity, John."

After the appointment is booked:

"John, it can get very busy in our office in the morning. We know how valuable your time is. Most everyone wants to get in as early as they can and get on their way as quickly as possible. This is why we have reserved times set aside for each of our customers. This ensures we can get you in and out quickly and efficiently. Would 8:15 or 8:25 work better for you?"

Ask:

Who referred you to us today?

5.29. Making Appointments

4.23.1. Who can do what?

4.23.2. How much time do we reserve?

Diagnostics - 4,
Alignment - 2 units on the tech schedule, 4 hours to the customer (minimum, best all day) (More depending on alignment pay time for special vehicles)

4.23.3. Diagnostic appointments -

We reserve time for diagnostic and depending on what repair is needed we can have it completed by the following day unless more extensive work is needed. Diagnostic appointments should generally be a minimum of at least keeping the car overnight - but never less than an 8 hour appointment time.

4.23.3.1. Questions to ask the customer related to a diag

Is your car due for smog? (Can be asked along with diag answer)
How long has it been happening for?
Any driveability concerns?

4.23.4. When to schedule

NO appointments Friday except oil service (only in the morning) and scheduled to 50% capacity. Drop off reservations should be made in 15 minute increments per advisor. (Concierge is advisor for oil services, Service advisor is advisor for all service and diag work) Each can only schedule 1 appointment every 15 minutes. We attempt to have all drop offs between 8-9am.

4.23.5. Reserving time for repairs after diag

In some cases we can save estimated time for a repair on our schedule. This is done for customers we know who will get the work done and is done at the service advisors discretion. This must be saved on the tech schedule as “Pending Oil pan gasket replace pending diag”

5.30. The Referral List - Where do I send people to?

The referral list is all of our trusted vendors and referrals of where to send customers to. Sometimes we're not the right choice for what they're looking for so here are some people we've done business with or researched via google - Please update these with notes about services and our experience with these vendors

5.31. How To Bill A Lifetime Oil Change Plan:

- Plan is the cost of a regular oil service X4 for the lifetime. Same with any add one - cost of the add on X4
- Total cost of plan charged as a sublet
- Service charge is charged as a sublet. Service charge is $10 plus the $3 disposal fee that's charged on every invoice.
- Bill the oil service at full retail then discount the total of the parts and labor off the ticket

~~5.32. The Lifetime Cell Phone~~

~~At the moment the lifetime phone is being shared with the OMS phone. The OMS phone rings using verizon one talk, The lifetime phone rings using the original Iphone ring.~~
~~When the phone rings with the iphone ring it must be answered as the lifetime phone - " Thank you for calling Lifetime Automotive, My name is BLANK, How may I help you?~~

~~The sales process is the same as Oceanside Motorsports with two exceptions -~~

1. ~~You must use the name Lifetime Automotive because it is considered a separate business~~
2. ~~Be VERY careful taking on any kind of diagnostics. Lifetime Automotive is a preventative maintenance specialist. If it seems like a light diag and you want to have the opportunity to work on the car then feel free to bring it in, just make sure the customer knows that if it does turn into a more complicated diagnostic that requires any special equipment that we may need to refer them elsewhere (JA Services). In this case the only charge would be for our inspection (which I would brag about).~~
3. ~~**No matter what** - be sure to pitch our value propositions during the phone call. I don't care if this customer is trying to order a pizza - by the end of the phone call they should~~

~~know we have a lifetime warranty, free pickup and delivery, loaner cars available, and the most affordable long term maintenance plan available!~~

5.33. Thank You Cards

Visit Thank You Card

Every car gets a thank you card at every visit. The card is signed by the technician and all checkboxes are checked on the QC sticker by the tech or service team

Purpose - Signing this thank you card is your written sign off that the work you've done on this car is to the highest standards. Our customer has put the ultimate trust in allowing us to service this car and we respect and acknowledge that trust. This signature is my stamp of approval for the work that I've done

Thank you card recycling -

sign it again and leave a nice note. If there's still a thank you card in the car from the previous visit. Add your own touch and sign it again (unless it is dirty)

5.33. New customer thank you card

New customer thank you card -

We send a thank you card to every new customer within 30 days of their first visit. Preferably a week after they leave.

It will be a clean thank you card (no fingerprints) sealed in an envelope by our OMS wax stamp seal. Their name and address will be hand written on the envelope and our return address sticker + stamp attached.

Inside - "Hi John, We know there are plenty of options for mechanics to service your Audi and we really appreciate you choosing us! - Oceanside Motorsports"

"Hi John, Thank you so much for choosing us to service your Audi, it means the world to us!"

Print report of new customers in Mitchel using the thank you card report. Select the date range being sure not to overlap with the last run of thank you cards. Select print address labels for the report so the single report will show the customer's full name, address, and vehicle type

5.34. Daily Deposits

We must deposit all money collected every day. Cash flow is king and putting the money in the bank daily is important.
Office Manager typically takes all payments received to the bank when they leave. Any payments taken after they leaves must be deposited by the service advisor or he/she must delegate to another team member. Use the deposit card and be sure to count all money before leaving the shop. You are responsible for making sure the money gets to the bank and is put in our account. If the deposit is checks only you may use mobile deposit.

Cash Payments

Cash payments must be given directly to the office manager OR put directly into the cash box below the cash organizer. If put in cash box you must notify the office manager it is there. Cash must be deposited as soon as possible. In most cases it's imperative we put the cash in the bank the day it was received however if the payment is taken after 4pm and General Manager approves the deposit to be delayed it may be deposited the following business day.

5.35. Sending a paypal Invoice

A paypal invoice can be sent to a customer that needs to pay an invoice. It is the prefered method of payment for after hours pick up or any other time the customer will not be present. A paypal invoice can be paid by a customer's paypal account or can be paid via credit card and no account is required for the customer.

5.36. Taking on an appointment when we're already booked

5.37. Dealing with an aftermarket warranty company

Claims must be customer complaint
Everything needs to be diagnosed
The warranty company never covers 100% of the bill
Warranty can't know about any modifications
****OMG ADD THIS: Warranty companies are looking for pre-existing issues to decline claims. (i.e.- Oren Mason m3. We submitted for Rod Bearing and Engine mounts, because the

customer drove less than 500 miles and purchased the warranty 9 days prior, the warranty company denied the claim.) We need to set the expectation with the customer about the FINE PRINT of the warranty. ***WE need to familiarize ourselves with the warranty!!!!

Napa Warranty Process

- **Limited Warranty**: NAPA POWER EQUIPMENT PRODUCTS warrants its products to be free of defects in workmanship and materials for the useful life of the product (the "Warranty"). If a NAPA product fails to comply with the Warranty, NAPA will repair or replace the defective product free of charge. The Warranty is subject to the additional terms, conditions and limitations set forth below.
- **Warranty Claims for Professionally Installed Products**: For any NAPA product that was originally installed on equipment by a dealer or other professional installer that fails to comply with the Warranty, in addition to repairing or replacing the product free of charge, NAPA will also reimburse the customer for reasonable labor charges incurred to replace the product and other similar incidental expenses incurred as a result of the failure of the product to comply with the Warranty. Labor will be calculated based on the installer's posted shop rate that is competitive with their local market rates. The original work order along with the original invoice and a copy of the new re-work order must be provided to NAPA to file a claim for reimbursement of labor expenses.
- **ALL PROFESSIONAL INSTALLER WARRANTY CLAIMS MUST BE SUBMITTED IN ACCORDANCE WITH THE FOLLOWING PROCEDURE**:
    - **WITHOUT LABOR CLAIM** – The dealer must return any allegedly defective NAPA product to the distributor from whom it was purchased for analysis. The product shall be tagged with the NAPA part number, date of purchase and the alleged cause of failure. The distributor will then forward the product to NAPA with a request for credit. If NAPA determines that the part failed to comply with the Warranty and otherwise qualifies for Warranty coverage under the terms hereof, NAPA will issue credit for the product to the distributor. The distributor will reimburse the dealer. NAPA will not issue credit for any products that are not returned to NAPA. Products not manufactured or distributed by NAPA will be held for disposition for 30 days.
    - **WITH LABOR CLAIM** – All warranty claims for which reimbursement of labor is sought are subject to prior authorization. Please call 217-324-9428 to discuss any such claim with a NAPA representative. In order to process all claims quickly and efficiently, the following must be shipped directly to NAPA via a traceable and insurable method (i.e. UPS, Federal Express, Registered U.S. Mail, etc.):
        - 1. The allegedly defective product and any related damaged parts.
        - 2. A written estimate detailing the following information:

        - a. A complete list, including part numbers of all products required for the warranty repair.
        - b. The shop labor rate and a breakdown of the time required for the repair.
        - c. The year, model and serial number of the warranted engine or drive.
        - d. The name and address of the distributor the products were purchased from.
        - e. The name, address and phone number of the customer.
    - 3. The original work order or receipt detailing the initial installation of the allegedly defective product. 4. Any receipts detailing additional expenses. Failure to provide required documentation and information may void all or part of the Warranty coverage.

4.3.28. Aftermarket Warranty Company Info

Put phone number, fax, policy number in the “vehicle notes” section of POS
Once approved write all details as a “note” on the Ro including itemized amounts approved, anything declined, auth #, and fax # or email for payment

5.38. Ordering parts

Before quoting a job to a customer, the service advisor should speak with the technician about the accuracy of parts on the estimate as well as labor time. Make sure we are not missing additional gaskets/clips/fluids etc.

A parts request form must be used for every part requested by the technician. It is the responsibility between the technician and the service advisor to make sure all parts on the RO are accurate.

When ordering parts that do not need to be here immediately or general stock items, go to Worldpac and in the top left corner near the "Product #" line & "catalog" button there is a "Stock Order" button. Click this to see the "stock" prices on parts. The prices shown are lower and can offer some savings or make your margin that much higher. Just remember these will be at least a day out, sometimes more. Keep that in mind when making a stock order.

5.39. Selling Tires

We typically like to use the customer's own payment info to purchase tires so that it stays under their account with discount tire for the road hazard. The customers get our special discount on tires and we charge a $15 fee per tire to take them up there.

Tire Patches

Don't do it. Leave it to a tire shop. Too much liability and if we touch a tire another tire shop won't touch it after.

5.40. How to send a fax

https://drive.google.com/file/d/1w0UPUrCf2JBMvP32bpzNYfcYFhQvFV7U/view?usp=sharing

5.41. Daily social media posts

Google Posts:

1. Use quotations for google search terms, use 3 of them "why is my car pulling to the right?" Quotes are for what other people would actually type into google
2. When choosing an image, use google search but make sure to check in image tools "labeled for reuse
3. Post to more than everyone. Post directly to other groups - BMW etc.
4. Share the post to different communities like BMW etc.
5. When posting to facebook and twitter use the Google plus link. Bitly.com - shortens link, if you have an account you can track how many people click the link. You want to funnel everything through google
6. "BMW Service Vista" in quotes
7. Use Google Trends
8. Have all employees plus one or like all of the posts

5.42. Customer financing

Paypal credit
https://creditapply.paypal.com/apply?guid=U9ZA028C34&assetId=PPCSEM&gclid=EAIaIQobChMIve7e1byZ4gIVQRx9Ch0IAwUCEAAYASAAEgLRH_D_BwE&gclsrc=aw.ds

Navy-Marine Corps Relief Society
https://www.nmcrs.org/

They cover EVERYTHING needed to make car reliable and finance it over the customers term in the military.
They will only finance if its their only vehicle

5.43. Voicemail

Hello and thank you for calling Oceanside Motorsports. We are currently assisting another customer. Please leave us a message and we will get back to you right away.

Hello and thank you for calling Oceanside Motorsports. We are open Monday through Friday from 8:00am to 4:00pm with early and late drop off hours. If you need to have your car towed here please contact Empire Towing company at 760-721-1062. Please leave us a message and we will respond as quickly as possible.

5.44. Office Supplies

Where are the stamps located?

They are in the supplies cabinet in the parts office in a drawer labeled "Envelopes, return labels, and stamps" Most office supplies are in this cabinet or the front office cabinet...or ask Office manager

How to find printer paper?
https://drive.google.com/file/d/1ihQ__YWu0XVJnwCt7qOQvS1KLlnEglZC/view?usp=sharing

How to order oil change stickers?
https://drive.google.com/file/d/1-MgjHxCJB4g9ONPIsxdtjG0Qh7L9xjSi/view?usp=sharing

5.45. The Syd Experience

We’ve learned a lot from Syd over the years and anytime he has given us feedback we have grown as a company and are able to offer even better service to the rest of our customers. We use the term the Syd experience as a “VIP” customer term because special care needs to be taken with the entire process as well as the nice ass cars he brings us.

- Most of his cars have a car cover in the trunk. It is a nice soft cover, do not use the hard plastic cover - This is only for rain. The cover gets set on the trunk then rolled out over the top of the car to the front, then folded out to either side. This method ensures the least risk for scratching the car. Taking off the cover must be done in reverse order.
- We start with a multipoint inspection on ALL cars regardless of mileage. Being thorough is how we have success with the Syd experience
- Estimates include the complete repair with related items and anything required to get the job done the first time correctly.

5.46. CUSTOMER FEEDBACK

When we get promoter feedback from Frederick

Reach out to the customer and ask them to leave a review

5.47. How To Distribute Work

https://drive.google.com/file/d/1ak7qvGxxfpqEhRnwh7OYK9Wjov3okZHs/view?usp=sharing

5.48. How To complete work with Tekmetric

https://drive.google.com/file/d/1JZe_R7t1JWmZVNMWfmarU_Iui0pKTEXh/view?usp=sharing

How to apply an overpayment or credit to an RO with Tekmetric

Video - How to apply an overpayment or credit to an RO with tekmetric

Cash, Checks, and Payments

How to input bills and write checks in Quickbooks

Quickbooks how to write checks and input bills

Money Management

Payment Rules

- Payment must always be received prior to a car leaving - No matter what
- Always apply payment in POS system immediately when receiving the payment
- To receive payment or handle money you must have received the proper OMS training and be signed off to do so
- All deposits go into the Income account

4.3.27. Payments for afterhours pickups

Must be completely processed before we leave. You can’t leave an open invoice on a car and leave it outside for a customer. If they take the car and don’t pay, we are screwed.

Credit Cards

- You must have received current PCI compliance training and understand the rules/laws about credit card handling
    - You can only take payment from the owner of the card, we need the authorization from the person whos name is on the card
- Always use the POS system to process payments, If there is a problem notify the manager according to direct report and use a backup option (like manual input or paypal)
    - If you do not personally take the payment, do not apply or post a payment to the POS. You have to make sure the cash will be in the bank before applying it in POS so consult with your leader
- When accepting a one time use card - usually emailed from a warranty company
    - You MUST only charge the amount specified. In most cases once you charge the card it becomes void and will not be able to be charged again
- If a card doesn't get accepted do not try charging it over and over and DO NOT try charging different amounts to see what will go through - This flags the processing company and can put ALL of our deposits on hold for suspicious activity
    - You may try the customers card a second time for the same amount but contact them to get the situation handled
        - Most declines are due to the customers daily amount being exceeded and they need to call the number on the card to raise the limit for the day

1.5. Transactions over 10k

Best to split them up but call the merchant processor to let them know. We've had times when they've held the funds because we didn't let them know. The number is posted on the machine.

Receiving Checks

- We prefer not to take checks. They are risky and a hassle. Please use your best judgment when taking a check from someone - If it bounces we have no recourse and we lose the money.
- All checks must be deposited the day we receive them
- Checks must be written clearly and include -
    - Written out to "Oceanside Motorsports" exactly
    - Signed by customer
    - Exact amount number clear and legible
    - Exact amount written clearly and legible
    - Today's date - no post dated checks
    - Name on check is the customer's name

Depositing Checks

- We prefer to use mobile deposit for checks so we don't spend time running to the bank. This must be done using the bank app and according to their rules.
- You must endorse the back of the check per bank rules
    - This is usually stated within the app for deposit
    - Usually you need to write something like this - "For Mobile deposit at bank of socal"
    - Make SURE the check goes though and gets processed by the bank
    - Mark on check - "Deposited (todays date)" so its clear its been deposited
    - Put in file for deposited checks to be shredded the following week
- All checks are deposited into the Income account

Cash

- All cash must be deposited to the bank the day we receive it
- When receiving cash notify your leader of the amount and put in the cash box
- leader is to deposit cash that day
    - All deposits go to the Income account

Paypal

- Paypal can be used to accept payment
- When accepting a paypal payment you must manually apply the payment in POS system
    - Only apply the payment or release the car once the payment has been received
- Paypal puts a 30 day hold on amounts over $2500 so we prefer to take larger amounts on the normal card machine
- When a paypal payment is received you must notify the leader so we can transfer the money to the income account

Venmo

- Venmo can be used to accept payment
- When accepting a Venmo payment you must manually apply the payment in POS system
    - Only apply the payment or release the car once the payment has been received
- Venmo may put a 30 day hold on amounts over $2500 so we prefer to take larger amounts on the normal card machine
- When a Venmo payment is received you must notify the leader so we can transfer the money to the income account

Refunds

- Refunds are rare but sometimes necessary
- You MUST notify the leader of any refund to be given prior to giving it
- If you're refunding a deposit you may only do so once you receive the alternate payment
    - Example would be a customer who left a deposit for a warranty company repair - You can only refund the customer once we've received the payment from the warranty company

Writing Checks

- Our goal is to write as little checks as possible
- If you write a check to a vendor more than once a month you must create a weekly account with them so we can process their payments like all other vendors
- Check must be signed by an account signer only
- We have checks for multiple accounts - Make sure you're writing the check out of the correct account.
    - Most checks will be written from our "Vendor parts" account
    - Checks must be written using Quickbooks online - never hand written
        - In the case of a failure or emergency you can hand write a check but you must notify the leader and send a picture of the check to leader AND the Money manager

6. Parts Guy - yes you get your own section!

6.1. Sourcing parts

Here are some resources for finding hard to find parts. Remember parts guys are a huge help here and can save us tons of time while trying to find parts.

- Google -

Try typing the part number or other numbers into google. Recently I was looking for a MAF (main part # had been ground off) so I typed in some numbers from the MAF followed by MAF or mass air - 1626202 MAF
Try using the image search option - A Lot of times an image will lead me to the correct page with the information I need.
Along this search for the MAF it clued me in that it was a Ford MAF so I typed in "Ford MAF" to google and halfway down the page I found a picture of what I was looking for. The picture was on a page of a "how to clean your maf" and it gave the exact model of truck it was for. Typed that all into world pac, verified by the image, and ordered the part.

- Posting the information and pics of the part to a technicians forum or facebook group would absolutely yield results.
- Sending information or a picture to our parts guys and other shops would also be helpful

6.2. RO terminology

- Economy - Cheap (12k miles / 12 Month Warranty)

- Standard - good (30k miles / 30 month warranty)

- Premium - Best (Lifetime Warranty, w/ proper maintenance)
-

6.3. Parts Slipping through the cracks

One way costs can slip through the cracks is with email invoices. It is the parts guy's responsibility to make sure that ALL parts are billed and our costs are accounted for correctly. Parts guy will not archive emails with receipts until the costs have been checked and billed correctly (just like the paper filing). Be sure to include shipping costs! Bimmerworld sends a separate email for shipping cost. If anyone else receives an email with an invoice in it they are to forward this to parts guy immediately.

6.4. Special Parts

This is the high output version of the external fuel pump for E28 and E30 - **0-580-254-044**

6.5. Parts returns

Return any parts not used within 5 days of being ordered. We've lost tens of thousands of dollars over the years from parts not being returned.

6.6. There are two returns columns. One is for items that are in process but not picked up by vendor. The second is for items processed AND PICKED UP by vendor but we haven't got our money yet. An RA even with $$ on it doesn't mean $$ in the bank.

PARTS WAITING FOR PICKUP

Any part waiting for pick up MUST have a copy of the RMA or original receipt placed here as well as on the part (unless there are two copies)

Any part placed on this shelf must have a date on it (when it was placed here) and there must be a date on the RMA

Parts can only stay here for 5 days MAX

WAITING FOR $$ IN THE BANK

Any part that has been returned MUST have a matching invoice or RMA showing the exact quantity returned, date returned, and cost.

We file this RMA into the correct vendor slot in the “WAITING for $$ files”

When the weekly statement comes in we match any credits on the statement to their RMA and verify they are for the correct amount. You staple the RMA to the weekly statement and file it in the long term files

We check these “Waiting for $$ files” on a weekly basis to follow up on any credit not received

Parts returns shelves

Current Week parts returns - we’ve called or requested once

Last weeks parts returns - We call everyday for parts here over 5 days

Parts returns from 2 weeks ago - We call every 2 hours to get parts picked up - Use the “getting vendors to pick up returns process”

6.7. Getting vendors to pick up parts

Start with an email/phone call/etc - set a reminder on the schedule or “snooze” function to remind you to follow up if no response

On the second day with no response, forward the email or call and bug em.
Some vendors will say “sure next time we are in the area we’ll pick it up” This is not acceptable especially if its not one of our daily delivery vendors. If they won’t pick ip up on their own we will

force them to come here by ordering an oil filter or other small part. When they show up let them know we don't need the part but we have a return for them.

There are other ways to get parts returned that hopefully don't require us to drive the parts to the vendor but if we have to drive the parts to the vendor - drive the parts to the vendor!!

a. Ing proce

Returns Bins Labeling

Put things here when a part needs to be returned

Put invoice or RA here when we are waiting to get the physical part to return

Put invoice or RA here when the return has been requested and part is waiting to be picked up

Put invoice or RA here when the part has been picked up and now waiting for credit

Put invoice or RA here when credit has been deposited (staple proof of deposit to original RA or Invoice) THEN submit to GM

Core Returns

A Core is a part we need to return to the vendor in place of the new part (usually for them to rebuild again) Common parts with cores/ core charges are -

- Steering racks
- Catalytic converters

- Power steering pumps
- Air conditioning compressors
- Transmission
- Engine
- Differential
- DME - engine computer

It is best practice to keep the core part until we verify fitment and operation of the new part

The core charge is the customer's responsibility to pay. Deposit amount for the RO/parts must include the core charge. All cores will have a core charge associated with them. It's important to note this and put it on the invoice when quoting. If for some reason the core from the vehicle is not returnable (super damaged or missing) the customer is responsible for this charge.

The core MUST be returned in the same "new part" box undamaged. Some cores are not accepted if not in original box.
When processing a core -

1. Make a labor line stating the need for a core to be returned (techs don't see it unless its a labor line)
2. Mark the new part box with a "Core" tag
    a. Verbally communicate with the technician the need for the core return
    b. If using paper clipboards mark the cover sheet with "CORE" nice and bright so everyone see's it
3. Make sure its packaged correctly and will not leak oil and make sure its returned following the "parts return" process - DO NOT LET CORES SIT AROUND!
4. Do not remove the $$ for the core off the invoice until the core is returned - Then follow parts return process to make sure we get the credit (this one slips through the cracks easily)
    a. In cases where we will not get the core credit until after the car has left (like a differential for diffsonline) the customer does not get credited the core charge until we get it back.

Ordering Oil filters

For oil filters we regularly use - order them by the case. To do this email the part number to your parts rep and ask for a case and for them to adjust the price down per unit.

Oil filters we do not use more than a case in a 2 year period please only order a few at a time

6.8. Checking in parts - don’t bypass Parts Guy

Any parts dropped off must go through the parts manager. If a check is needed from the office manager make sure the parts invoice makes it back to Christian to the part can be billed correctly. If parts manager is not available when parts arrive we must notify the parts manager of parts arriving by sending a message, leaving the invoice/parts on his desk, or another form of communication

6.9. Brands to be careful with -

No URO parts and MAVAL- MAHLE Standard - HD is ok, no autolite

Lower degree temp switch for e36 - `61318376440` also - **61 31 8 361 787 depending on year**

7. Shop & Technician Procedures

7.1. Five Foot Rule

Anytime you are within 5 feet of a customer or anyone around OMS give them a friendly smile and hello.

Anytime you walk into the office or past a customer greet them kindly

7.3. Technician training sign off

Our structure for training technicians on individual jobs takes 3 steps.

1. Educating - do the research and watch a teammate perform the job learning the correct way to do it, the incorrect way to do it, and any mistakes that can be made along the line
2. Interactive training - The trainee will perform hands on repair with guidance from fellow teammate. This step can be completed multiple times
3. Final sign off - The trainee performs the entire job from start to finish with supervision from a tech B or higher with experience on that job. If the supervising tech steps in at all the test is failed and considered another interactive training. All steps in the procedure must be followed as well as all other applicable rules (checking parts, inspection, eye protection, etc.)

a. In the event there is no current procedure for the test we will create the procedure prior to the final test

7.4. Shop maintenance and cleaning

Monthly

Lube and clean filters for air lines. Main airline, both drive up racks
Check lift studs
2018 Technician Cleanliness/Organization Update
Introduced 1/11/17
Final Implementation by 1/19/17
We rely on social media posts to promote our business and our new social media management company will be dropping by to take pictures and create content on a regular basis. It's more important now than ever to keep the shop clean and organized. We are constantly complimented on our cleanliness and customers feel more comfortable leaving their pride and joy in our possession knowing it won't get lost or damaged in our shop.

Work Benches - The OMS work benches are for use to put parts and tools on while working on a car. These benches are not used for ANY sort of long term storage of anything. When there is a car in the bay the bench may be used to store needed parts and tools for the current job. When there is no car in the bay the bench must be COMPLETELY empty and awaiting its next job.
Tool Boxes -
All non-apprentice technicians are required to have all the tools necessary to perform the needed repairs at OMS and to keep them organized within their tool boxes. A limited amount of decoration and chargers are allowed outside the storage area of the tool box but all tools must be retained within the tool box.
Special circumstance technician storage -
We understand that some needed tools and equipment can not be contained within a tool box at all times. Some of these items would be Jacks, Jack stands, jump starter packs, stands, etc. These are allowed to be stored in an organized fashion.
We may allow special storage circumstances for technician projects but this must be pre approved and exact guidelines set before this is allowed.

Teammember Stations -
"Everyone sweeps the floor" - Steve Jobs

It takes our entire team to keep our ship afloat and sailing stronger than any other ship. It's up to everyone on our team to take action when we see something needing attention. Clean your station, clean someone else's, fix something that needs to be fixed - It all comes around.

These are the guidelines set for technician stations but these are not limitations to individual responsibilities - You get out what you put in.
Zach - Responsible for front half of 343
Rene- Responsible for rear half of 343
Justin - Responsible for front half of 333
Arturo - Responsible for rear half of 333

Other positions -

Christian- Parts Kingdom and Upper parts storage
Austin - Front Office and Front of business
Johnny - Detail Station outside, Detail shelves inside, Front office inside and out (with Austin)
Neil - “Bonus Lift”, Lifetime Office
Kevin- Kevins’s office of awesomeness

The Bathrooms & Kitchen Area -
It's our team's responsibility to keep the bathrooms stocked and cleaned. We will do a deep cleaning on a weekly basis but upkeep between that is necessary by everyone.

We will have a rotating schedule for deep cleaning on a weekly basis and your task must be signed off by a manager when completed. If an employee is absent on their week the duty will be filled by the next in line. We use this document as the checklist for team cleaning tasks - https://docs.google.com/spreadsheets/d/1KnO68SidXpo7e1a3rSYX3p9g_FOwk8I4B92RuVRIawk/edit?ts=5d12a407#gid=368424543

We hand out the individual tasks during the team meeting on wednesday and they are due back prior to the meeting starting the following week. We keep track of this using our employee chore chart.

7.5. Bay cleaning

When there is no car in your bay the bench will be completely clear of all tools and parts. A clean bench equals productivity and organization.
Benches
All employee belongings to be kept within their tool box in a neat and orderly fashion. Tops must be clean and organized
A storage bin may be used to house parts where the car is removed from the bay. The bin must be labeled with the car info and an expected date for reassembly. No other parts or bins are allowed on the bench when a car is not in the bay. ANYTIME there are parts stored for a car there must be a DO NOT SHIP label in the car
Nothin goes on the windowsills. Ever.
Special permission can be granted for oversized personal equipment but must be done so in writing from a manager
Top off fluids may be kept in bay but must be clearly labeled with a tech name and type of fluid. These will be kept in a designated spot that is labeled
Mop buckets will be cleaned with fresh solution before leaving
Each bench shall have one large and one small drain pan to be cleaned after each use
Wood blocks may be kept on bottom of benches in a labeled container
Vacuums May be kept on the bottom shelf of bench labeled with their station number

How to find work.

Sometimes we'll have a snag in our day that causes an open portion of a tech schedule. Sometimes the service advisor isn't available or can't remember what needs to be done so we use this process to make sure we keep producing and keep our techs paid!

1. Check the tech column on the Tech View of TVP
    a. There's an indication of billed units that haven't been produced yet. If there's a number there, chances are there's work to be done. (Sometimes this work is waiting on parts)
    b. Open each ticket and find lines that haven't been flagged - can we do them now?
2. Check the "Waiting to distribute" column on TVP. This work is usually waiting for an available tech or a part to arrive
3. Message the OMS ALL "Hey I'm at a stopping point and need a job for about 3 hours, anyone got anything I can help with?"
    a. Also personally asking the other techs
4. Walk around - Are there any problem cars or campers that we can get moving? Management will hook you up for fixing a camper
5. OMS Vehicles or loaners
    a. Do any of them need work?
    b. Review past inspections for work not completed yet, Neil is a pretty easy sell :)
6. Training!
    a. Knock out some training and get paid for it!
7. Cleaning
    a. We'll always hook you up for doing a deep cleaning of a shop area or maintaining/improving equipment

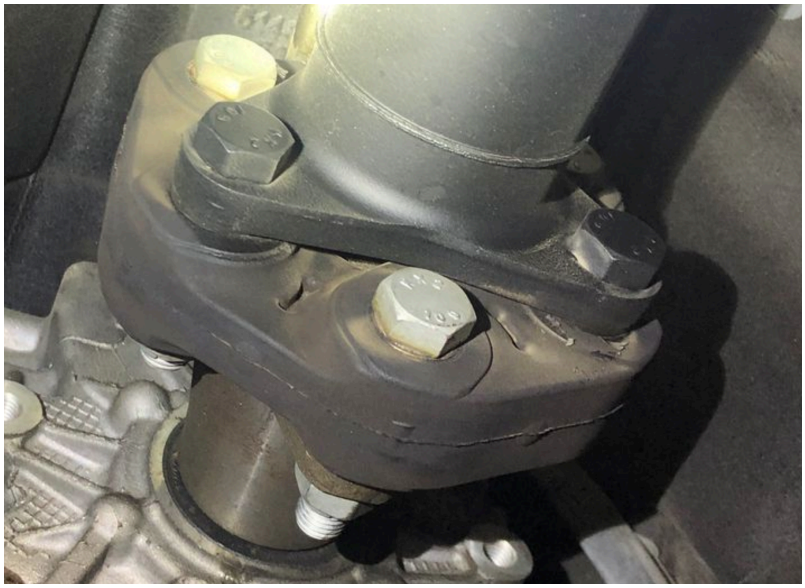
Its our Goal to keep techs producing paid work but this process can help when there's a gap that needs to be filled.

Flex Disk/Guibo Orientation

OMS policy -
It is important the arrows point towards the flange the disk is bolted to. The direction of the bolt through the flex disk does not matter as long as its the correct hardware with locking nuts.

If hardware removed we are to replace the locking nuts every time and the bolts if required to do so by the repair instructions.

If a flex disk is installed backwards and put into use it must be replaced with a new one installed correctly.



7.7. Engine covers

ANY car that comes into our shop will leave with a clean engine cover. This is the technician's responsibility and shows the customer the level of care we took during any service

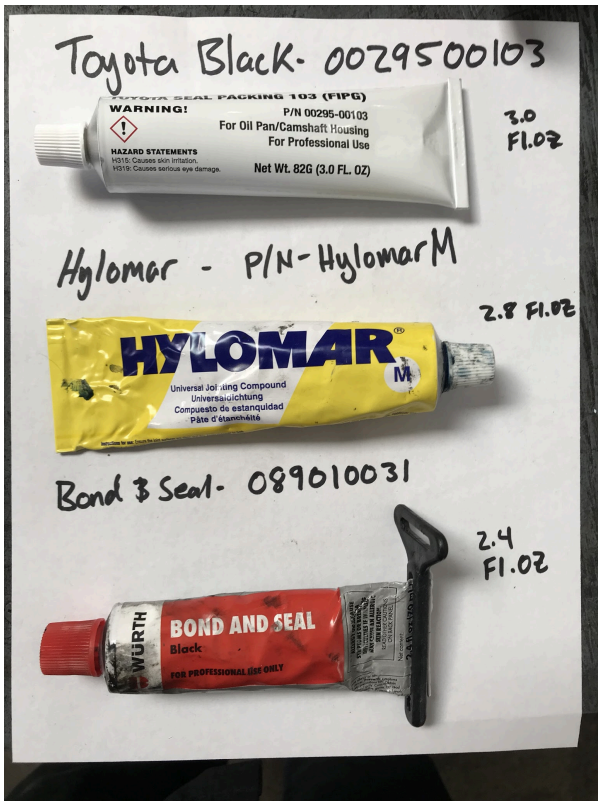
7.8. Technician final review -

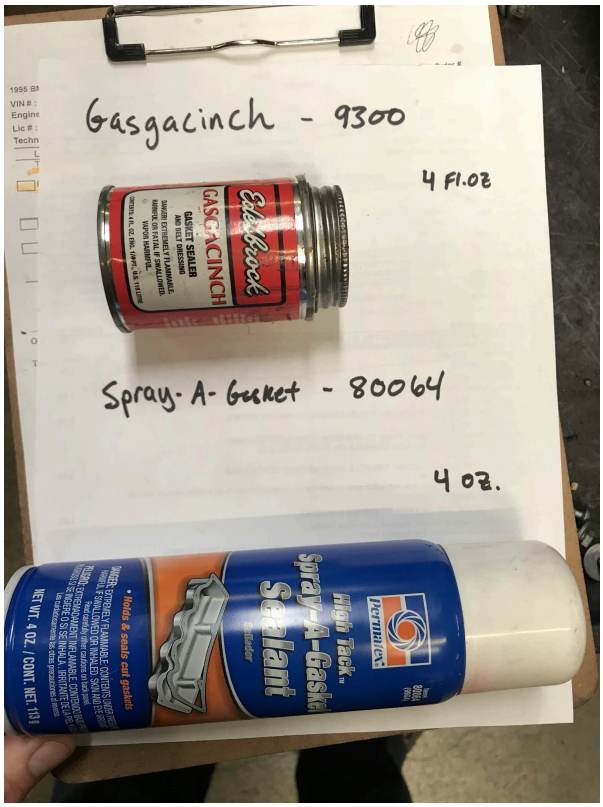
After any work is complete or any car is leaving, we must make sure the job is done. You must step back from the vehicle, close your eyes, and visualize the entire repair or service from beginning to end. Think of every nut, bolt, or component touched and make sure you put

everything back where it was supposed to be and everything is tight. If there was more than one technician working on the vehicle or if another technician performed the original inspection or diag - you must do this together.
Think of the work we've done from the customers perspective. If their concern was a vibration - Does the car still vibrate?

The 2 minutes it takes to do this makes the difference from a repair done well to a repair not done well.

7.9. Sealants to use





Use Hylomar for most valve cover gaskets. Do not coat the entire gasket but use the hylomar at the jointing surfaces where the timing cover bolts to block or at cam seal locations. Do not use hylomar to coat gaskets - Let the gasket do its job.

Most oil pan sealants need at least a 12 hour cure time, don't fill or ship the car immediately after sealing

Used Spray tack on n52 - no leaks after 4 oil services

Loctite sealer for oil pans - We prefer using Toyota Black as we've had better luck sealing them with that. The loctite sealer does work sometimes but we've also had it fail. We think the failures we've seen are due to old tubes of sealant that didn't dry. They stayed tacky for over 12 hours.

Comebacks caused by incorrect sealers -
M20 with windage tray used bond and seal - leaked. Next time use toyota black

We stopped using Loctite sealer (listed under OE part number in SSF and sold from dealers) as we've had to warranty a few jobs using this. Use Toyota Black instead.

7.10. Rod Bearings

Rod bearings are typically charged at .5/unit per cylinder in addition to an oil pan gasket. Book times usually quote for removing engine but this is not typically required on the cars we work on. **YOU MUST ALWAYS REPLACE ROD BEARING BOLTS -** A common upgrade is to replace with ARP bolts, this is an excellent upgrade for track cars

Installing Turbos

We ALWAYS either clean or replace the feed lines to ensure the new turbo lasts as long as possible.
We ALWAYS perform an oil service along with a turbo replacement

7.11. Installing front lips and other stick on body pieces

We prefer not to use the tape or any other product the customer may bring with the lip. We charge this sealant on top of labor used. Typical labor for installing a front lip is 1 unit. We always have to educate the customer about figment issues and we will try our best to install it with no issues but figment issues and gaps are most likely due to a manufacturing issue. We will have to charge additional labor if it's a part fitment issue.

7.12. Fluids going in cars -

It's the techs responsibility to make sure the correct fluids go in the car

7.13. DPF DEF fluid process diesel oil change

- We top off DPF fluid on all Diesel vehicles as part of their 15k mile oil service.

- We notify the customer upon drop off that we will be doing this and charge only the amount used in their vehicle. Typical cost of this is $80-$120
- We just top off the passive tank off if applicable

This is listed as a CAN job under BMWDIESELOILCHANGE - .2 labor and .5L DEF
DPF

7.14. Recycling oil filters

There are two bins labeled for the filters

7.15. Puncturing oil filters

Oil filters are required to be punctured if metal and disposed of. It’s important to organize these into two different bins. It is the technician's responsibility to puncture and dispose of filters immediately after the oil service so the oil drain is empty for the next user.

Lube techs will clean and empty the oil drains as part of the opening procedure.

7.16. Intake boots with trans removal or other moving of the engine

On multiple occasions we’ve torn intake boots when removing the trans. We recommend disconnecting the intake boot when any engine/transmission movement is expected. Set a reminder for yourself to tighten this back up after repair.

7.17. Using the Welder

The welder should be stored neatly and ready to use for next time. Remember the time when you need to use the welder is more valuable that the time when you’re putting it away - It's all about preparation and taking care of your future guy.
Anytime we weld using 220v we have to make sure the drier is not in use. Our building is limited to power and we had to add the drier onto the same circuit.
1.Make sure there’s enough wire and gas for next time
2.When swapping from 110v-220v please return the adapter to where it belongs inside the welder
Edited 10/31/17

7.18. Torque sticks are required anytime installing wheels

Wheel lug bolts and nuts must be tightened down to factory spec USING A TORQUE WRENCH. Don't over torque or trust an impact to install lug nuts. You must use a light duty screw gun, impact, or torque stick so the torque wrench will still apply the final torque. Still use torque wrench, use 1/4in or 3/8in drive impact that is under 80ftLbs or torque stick. Amatures over torque lug bolts, you are not an amateur.

7.19. Convertible tops and interior work - The white glove service

During the inspection or any other work we do not touch convertible tops or sunroofs unless part of a diagnosis.
While working on these items its VERY important to keep them clean. Its required to use white gloves so you can tell when they're dirty and its not allowed to add any prints or smudges.
Most headliners have a foam underlay that when touched will leave the inprint of your hand - don't mess these up!
Some cars may require us touching this headliner - its very important to notify the customer PRIOR to the service that this headliner will be messed up (offer to replace as part of the repair)

Convertible Tops, Mechanical Failures. Not Fabric Repairs

- When estimating any convertible top repair technician must sign off on labor and parts.
- Labor for estimating time will be added to estimate
- Parts will be sourced from the dealer or Top Hydraulics.
- All convertible top repairs will be at a standard warranty.

7.20. Comebacks after a service/ Lessons Learned -

Always thoroughly check the previous service first. Example - We did an oil service on Jansen B.'s Mini. Shortly after the oil pressure light came on. We diagnosed and replaced the oil pump thinking our BG service caused it to fail. Turns out the oil filter was installed crooked causing the oil pressure relief valve to stick open when engine was hot. We should have reinstalled the oil filter "just because" before spending all the time and money on the oil pump that the car didn't need.

Mini cooper N14 engine - ANY turbo Mini's - twice we've had comebacks because the oil filter was not seated correctly. The oil filters on these engines are very hard to get to and in most cases the coolant reservoir must be removed to change the oil filter. There is a valve at the bottom of the oil filter housing that the oil filter contacts when improperly installed.

It can be tough to know for sure if you've seated the oil filter correctly. If there is ANY doubt you must drive the car for 20 minutes or until engine temp is up and make sure the oil pressure light does not come on. In both cases the engine oil pressure light has come on at idle when warm.

Suspension components from aftermarket (aka ground control)

We've received complete suspension kits

0.4. Clutch Fork Pivot Pins

-OMS does not install AGA brass clutch fork pivot pins
-this is the OEM part number for the steel pins 21511223281

0.6. Audi’s and their plastic stuff

Over 100k warn customer?

3.10. Double wrapping is not typically effective

- don’t let the oring from a canister oil filter stick to the housing

Torque Converter Installation - 550 and 750i

on the 8hp if you were to pull the torque converter away from the trans for any reason it has to be loaded back in with the transmission standing…or tail shaft down. Loading it in the horizontal position will damage internal seals in the tc and you will have a failure in the very near.

Crankcase vent hoses and valves

When working in an area near or on the crankcase hoses we always quote replacing the hoses ahead of time. These hoses can be very brittle especially on an inverted turbo engine. When quoting on M54 style systems we always quote to replace the 4 hoses and valve assembly

N63 in particular it shouldn’t be an option to only do one hose. There is an updated hose.

13.14. Engine Priming

After a car has been sitting for a few days or the oil pan has been off we always “prime” the engine by cranking it without fuel input. This avoids engine damage from starting the car without oil pressure. Ask us about the F10 engines!

This is also super important after replacing an oil filter housing on an N55.

It is best practice to prime this shit out of an engine after any occurrence of extended not having oil.

This procedure is used when the high pressure fuel system pressure is not depleted after minor engine repairs and the fuel injection system needs to be disabled by removing the fuel injector electrical connectors.

1. If the engine has been drained prior to the repair remove the engine oil drain plug again to remove any residual oil that may have settled in the engine oil pan during the repair if the engine oil pan was not removed entirely.
2. Reinstall and torque the engine oil drain plug (with a new seal ring) per the applicable repair instruction.
3. Remove the oil filter housing cover and verify the oil filter is present. Reinstall the oil filter housing cover and torque it to the proper specification noted in the applicable repair instruction.
4. Fill the engine with the proper type and amount of engine oil, as specified in the applicable repair instruction.
5. Connect a battery charger to the vehicle.
6. Remove all fuel injector electrical connectors to disable fuel injection.
7. Crank the engine for 10 seconds.
8. After 10 seconds have elapsed, stop the starter, and allow the starter to cool for 20 seconds.
9. Repeat steps 7 and 8 two additional times.
10. Reinstall the fuel injector electrical connectors, reassemble the vehicle and verify proper engine operation.
11. After the engine has reached operating temperature, check the engine oil electronically or with the dipstick, and top up the engine oil as needed.

7.21. Underpanels / engine covers

If left off a car - where do they go?

Back on the car! This is the only safe way to do it

If they are removed and there is oil or fluids on it, be sure to clean it before installing again.

First - add a do not ship card with a note on it saying underpanels off.
If they fit in the trunk, they may he placed in the trunk but they can not touch the interior of the car at all. Use plastic or other material to keep clean. Do not touch the customers stuff in the trunk. We prefer not to use the customers trunk unless absolutely necessary.
If the car is moved out of the bay and the panels are left in the shop they must be labeled with the RO number or customer name. Remember the “do not ship” card is the most important part of this.

Note panel location on the do not ship card. Panels may only be stored in your assigned bay. Shared bays are always left empty once car is moved.

Any part left around the shop - the team must be notified to identify where the part or cover goes. Don’t get used to walking past stuff that belongs on a car!

Warning Cards

These are necessary for quality control and protecting us when we are not at our 100% and can be crucial to providing the highest quality service. For best practices:

- Initials of person applying tag
- Put in place where it ***can not*** be missed
- Secured so it can not fall or be misplaced
- Make it intentionally annoying to work around to avoid any negligence

Do Not Ship

Put in a car when it shouldn't leave a bay or if out of the bay ***can not*** go to the customer.
Examples include but not limited to:

- Not QC’d by the technician
- Not QC’d by the advisor
- Missing body/under panels
- Not detailed or scheduled for a detail
- Needs ***any*** further attention to give the OMS experience

If this tag is in a car the tech/advisor associated ***needs*** to be consulted before any next steps

Do Not Start

Mandatory when a car is in a non running condition and should not be started under any circumstance.
<u>Do Not Ship</u> card rules apply to this tag as well
Examples include but not limited to:

- Tow in with unknown concern
- Engine empty of critical fluids
- Critical belts off vehicle

- Open fill/empty ports
- Hooked up to diagnostic devices/machines

If this tag is in a car the tech/advisor associated ***needs*** to be consulted before any next steps

Do Not Drive On Street

Used when car can be started and carefully moved around our lot but ***can not*** be driven at speed ***or*** on roads around the shop
Do Not Ship cards rules apply to this tag as well
Examples Include but not limited to:

- Tires worn beyond drivable state
- Concerns of overheating
- Suspension loose/broken
- Driveability safety concerns
- Any brake concerns
- Car not street legal

If this tag is in a car the tech/advisor associated ***needs*** to be consulted before any next steps

-

7.22. Valve Jobs

We always need to order valve stem seals for the machine shop when we have valve jobs performed.
They will not replace valve stem seals without performing a valve job.
Remember when taking any component to another shop you must remove all hardware or additional pieces. The machine shop will not take responsibility for hardware or anything else lost during their process.
Any time we take a cylinder head to the machine shop the camshafts must be removed. Most machine shops don't accept heads with cams still installed or they will charge extra to remove them. The cams must be out for them to perform a pressure test and resurface as all of the valves must be closed.

Taking parts to other shops & rebuilders

Remember when taking any component to another shop you must remove all hardware or additional pieces. The machine shop will not take responsibility for hardware or anything else lost during their process.

Take before pictures before the part leaves the shop
Take pictures immediately when we get it back

Best to call ahead to see what the shop needs and ONLY send the minimal components

Components that are related to this -

- Turbos -
- Engines
- Cylinder Heads
- Cars to body shops
- Interior component
- Hydraulic hoses for rebuild

Anything that is submitted -

- Cars to muffler shop
- Smog
-

7.23. Setting Smog monitors for customers

We prefer to stay away from this process but sometimes it is necessary to finish a job. Our smog monitor run is to Los Pulgas and back. The smog monitors require driving at 55mph for an extended period of time so sitting in the slow lane behind a truck is usually the best option. Be sure to drive safe. We charge .5 units to set smog monitors for customers

Its best to look up the specific drive cycle for the car you're working on. This will prevent wasted time. Ex Mercedes is a totally different drive cycle than Ford/BMW

General points for smog monitors -
Secondary air sets after the car see's the secondary air pump run its cycle from a cold start
Evap sets overnight after the car sits for 8 hours with ¾ of a tank of fuel (more than a half, less than full)
Oxygen sensor and Cat monitors set after a long drive at 55mph with no acceleration or deceleration. This is best done in the slow lane going to los posas and back

Special Tools

Purchasing

We have to have the proper tools to provide the quality of repair that we do BUT we don't have to own every single one. There are many alternatives for special tools listed in instructions and we've found that many times we have something that will work or can get an alternative vs. the OEM tool. The GM will make the final call for special tool purchasing. If a job requires ordering a

special tool we must consider how often we will use that tool in the future and if its worth doing that job.

You may purchase a special tool under $200 without authorization from GM.

Sources for special tools are -

- Snap on
- Rob Gleason
- Dealer
- Amazon
- Google search
- Ebay

7.24. Special tools Etiquette

- Right Cabinet– Specific VW, BMW, etc. tools
- Left Cabinet– Generic kits
- Middle – Housekeeping
- When to take it/when to put back
- Special tools – half day time limit
- On the bench when idle
- End of day – put it away no matter what
- Whiteboard – check out/broken/future needs
- Sample Check Out:
    - Auto light cable – carefully wrap up every time face down
    - Blue cable only for programming
    - Don’t put pressure on the cable while using
- Computers – Turn off & plug in
- Jack stands – Stand up 1 per station
- When using the transmission fluid flush machine fill it up again for the next use and wipe it down
- Cleaning tools/stands – When done using
- Sell brake bleeder
- Battery charger – 2 white boards
- Engine stands
- Welder

- When returning any press kits it is mandatory to clean threads so they are able to be used for the next service. If any tools or threaded rods are damaged you must immediately notify shop foreman and must be fixed or re-ordered immediately

7.25. Oil Pump Nuts and Baffles

BMW's have issues with oil pump nuts coming loose and most of them have the option to upgrade the oil pan baffle. If an oil pump nut comes loose, the engine blows up. ANY time we have an oil pan removed we are to inspect and secure the oil pump nut. Acceptable securing methods are - Welding, Wire Nut (in stock), or replacing the oil pump shaft. Even with replacement of the oil pump shaft the new bolt must be secured by welding or wire nut, we've had the VAC upgrade shafts fail in the past. Our preferred method is to wire nut the OEM nut.

Actual failure reasons - the oil pump nuts fall off, or the splines strip/shear in the shaft
https://www.achillesmotorsports.com/Achilles-Motorsports-Upgraded-Oil-Pump-Shaft-Kit-p/11-am-uopsk.htm

The baffle is available for our "performance drivers" that may be experiencing hard cornering. It is our job to recommend this whenever an oil pan is being removed because if the customer wants to upgrade later they will need to remove the oil pan again.

We charge .5 for installing wire nut and 1 for welding existing nut to pump. 2 units for installing shaft

You MUST check the oil pump nut on EVERY car that has its oil pan removed

AC Services

Servicing R12 - We cant
Servicing R12 converted systems - When converted to R134 You must calculate to fill to .9 of the recommended R12 capacity

All AC services require before and after vent temp readings as well as operating pressures

7.26. Welding

When doing ANY welding on a car you must ALWAYS disconnect the battery. Disconnect ANY aftermarket stereo equipment - be weary of aftermarket Capacitors

7.27. How to flag tech pay units according to mitchell

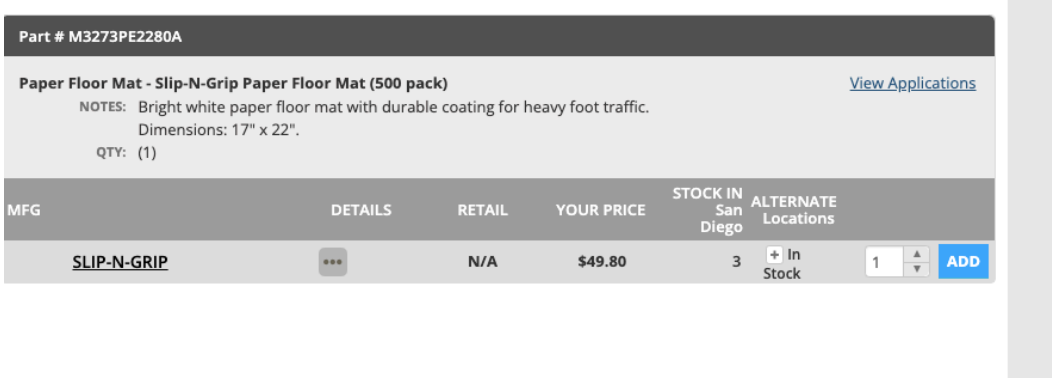
7.28. Required technician production

Each technician who works a full 40 hour week is required to produce 40 units of work per week on average.
We understand you'll have some weeks with much higher production and some with lower. A low week once in a while isn't a big deal as long as the average stays above 40 units.
In the event there is a low week we will start with a verbal conversation about that week being below the quota.
Next week a written course redirect form with an action plan to get production above 40
If production is still not above the required 40 units we issue a first write up - We will create an action plan with the technician as to how we will get production up.
If production is still not in compliance we will issue a second write up and determine an action plan as to how we will succeed the following week. Employee is at risk for termination at this point.
By the 3rd week if production is not above the 40 required employee will most likely be terminated at the discretion of management.

7.29. Floor Mats

We use paper floor mats in every car to protect the customer's carpet - no exceptions
The floor mat should be installed by the service advisor upon vehicle check in but in the case it is not, it is YOUR responsibility to install the floor mat
Floor mats are available near each large door of the shop.
North east - on counter under key box (one additional full box of mats stocked here)
North west - In detail cabinet
South East - On alignment cart
South West - On Arturos shelf

There is a box available at each door of the shop. We purchase these from SSF -



Part # M3273PE2280A

Paper Floor Mat - Slip-N-Grip Paper Floor Mat (500 pack) View Applications

NOTES: Bright white paper floor mat with durable coating for heavy foot traffic.
Dimensions: 17" x 22".

QTY: (1)

MFG	DETAILS	RETAIL	YOUR PRICE	STOCK IN San Diego	ALTERNATE Locations		
SLIP-N-GRIP	•••	N/A	$49.80	3	+ In Stock	1	ADD

7.30. Seat Covers

At this time we do not require seat mats in every car. It is our responsibility to ensure every customer's car is returned in better condition than when it arrives so using a seat cover is recommended in most cases
Plastic seat covers are stored next to the floor mats at the front of the shop
Seat covers must be used on all white/tan & cloth interiors as well as all special needs customers
Service advisors and all employees are encouraged to recommend using a seat cover whenever necessary
When I worked at the dealer a technician sat in a seat with a pocket screw driver in his pocket. The screwdriver made a hole in the seat and the dealer had to pay to replace it - please don't let this happen at OMS. No pens, knives, or screwdrivers in your pockets please

How to use and tighten zip ties

https://youtu.be/3Z-kEBFYhDU

7.31. Tighten it down

Even if you're about to drive less than 10 feet to the alignment rack - tighten it down. Don't leave a suspension item loose thinking you'll tighten it later. Multiple times we've had items left loose because it was "assumed" that we would tighten it later

7.32. The alignment Rack

No other cars on the rack for service - We try to keep this rack available for alignments

7.33. We do things the right way.

When replacing steering rack boots we use the OEM clamps instead of zip ties like most mechanics
The only exception is race cars. Race cars are 90% assembled with zip ties.

7.34. Verifying the repair

In some cases its needed to set monitors to ensure the repair is complete. If you replace an Oxygen sensor, make sure you perform the O2 sensor monitor check.

Should complete an extended test drive for any major repair. To duplicate “normal” driving conditions as the customer would drive. This verify longer use, ensuring that the repair is ready to go.

7.35. Head Gasket Repair

Requires extended test drive to verify repair
Requires setting smog monitors after repair

Cam Sensors and Oxygen Sensors

Cam and 02 sensors are very sensitive. We recommend them based on mileage at 100k because even if they are not throwing a fault they can become laggy causing in reduced performance. This is most needed on S50,S52, S65 engines for cam sensors and on all makes and models for oxygen sensors.
Anytime a cam sensor or 02 sensor is removed (like during a head gasket repair) we will recommend replacing the sensor. We’ve done many head gasket repairs then immediately had cam sensor circuit codes after repair because of the sensor failing just from removing it. This is also the case with oxygen sensors if they are removed like during replacing the manifolds or installing headers

7.36. Oil Drain Vows

I Vow to respect the oil drains as if they were my own and I spent $600 on each of them
The oil drain will always be ready to use for the next person - clean and empty - If I fill it up I will make sure it is empty for the next user
I will always dispose of the oil filters and never leave them in the oil drain
I will never put any weight on top of the oil drain and understand it is a drain only, not a workbench
If there is a leak or issue with the drain I will make sure it gets fixed ASAP
Added 10/31/17 when we purchased new oil drains

7.37. Verify the repair

“Is the original concern fixed?” Asked after any and every diag + repair

When you change a fuel pump - verify fuel pressure

When you fix a vacuum leak - smoke test the system

The bluepoint tire fillers

These must be turned on prior to connecting the tool to the tire. If you turn it on while connected to a tire the tool will zero out at the current pressure. So a tire with 30psi will show zero on the tool and allow you to overfill the tire as well as any other tires after that.

7.38. Protecting radiators & other sensitive parts during disassembly & install - By Zach

Tape cardboard to radiator/condenser fins to keep from damage. Radiator fins should look brand new after install. This also applies to anytime we are working around the radiator or condenser

Tape off fenders when installing bumpers

7.39. Oil change

Also see - Waiter Oil Change

- Review work order, check services, and ask questions if needed
- Floor mat if doesn’t already have one
- Perform appropriate test drive on approved test drive route determined by work requested by customer
- Rack the car according to car racking procedure and lift safety guidelines
- Perform inspection according to “OMS courtesy inspection” process
- Check if blackstone analysis is needed. These are typically done on ALL ///M cars and race/performance cars. Take sample according to blackstone oil analysis process
- Perform oil system clean if necessary and called for by the work order according to the manufacturer's specifications
- Remove oil filter, vacuum out excess oil, replace oil filter housing o-rings. We prefer not to use the white o-rings
- Remove the oil cap, check for any oil mix or other concerns
- Lift car - be sure to look around and above - don’t lift the car into anything!

- Remove drain plug - advise if there are any issues with the threads or plug before removing or as soon as possible - replace drain plug if necessary
- Replace crush washer according to manufacturer's instructions. Torque to spec
- Clean up any oil spill residue
- Replace any panels that were removed during inspection/oil service - It's very important to note any clips, panels, or brackets that were broken or missing previously!
- Lower car - Look around and beneath the car! (Ask neil about his first day working as a mechanic)
- Check oil quantity and weight (check all data)
- Fill oil neatly to spec - Add additives if needed and requested
- Check oil level before starting
- Start engine and run for 30 seconds then turn off and check/ correct oil level - hold check button till clock comes up (**Must show full!**)
- Recheck filter and plug for any leaks
- Wiper down engine bay after completely done adding fluids
- Double check to make sure there are no tools/rags left behind
- Close hood - make sure it's latched!
- Install lube sticker with correct oil interval and date - This must be written NEATLY with a fine tip sharpie
- Note if there are any other service lights on and notify service advisor. We can clear “vehicle check” and “emissions inspection” lights while here since we’ve done an inspection and the emissions inspection warning light doesn’t apply here in California
- Unrack car
- Take a step back, close your eyes, retrace your steps, and make sure we didn’t miss anything - This is the most important step!
- Install an OMS thank you card on dash with a neat signature - This customer pays our paychecks , let's make sure we thank them for choosing us!
- Perform appropriate road test - pay attention for any new noises, smells, smoke, etc.
- Mark finished jobs complete on tablet and submit the RO
- Park the car and let detailers know when it is leaving - If car is leaving right away make sure there is no evidence of us working on it (except for being cleaner!) and park out front as per “how to park a car out front” procedure
- Give yourself a pat on the back for doing an awesome job!

5.19.1. Special Procedure for some oil changes -

- 2010+ mini cooper turbo add .25 to tech pay, and add .5 to customer wait time. To remove cooling system res, and to bleed the cooling system.
- 2006 + BMW’s with digital dash instead of dip stick - Make sure car is fully warmed up to check oil level - don’t ship it low!
- 2006 + BMW’s with oil coolers and digital dash. Ship the car with an oil level as full as possible (not overfull!). Its important to educate the customer that there could be a slight drop of oil level when oil gets to a high enough temp to open the oil cooler thermostat.

We've had some levels drop after a full day of driving and there doesn't seem to be a way for us to prevent this
- Charge more for sprinter oil service? - every service includes fuel filter
- F-350 inspection should be 1 hour
- V10 M's and V8 M3's - labor time is 1 hour - waiter oil service takes 3 hours

7.40. Oil Filters

Oil filters must be recycled properly and can not go in the trash. We have 2 buckets with drains in them for oil filters to finish draining the oil from them. Canister oil filters must be punctured before draining in the bucket. When the bucket is full it must be emptied . The metal filters must be separated from the paper.

Hood Latches

VIDEO - Hood Latches

7.41. Alignment

enter customer first and last name - don't skip this! Make sure the report shows the customers info and we can look it up later

7.42. Diagnostics

Diagnostic Check Sheets

Level 1 diag

Level 1 cooling system diag

Level One Diagnostic

A level one diagnostic covers the basics in diagnosing a customer's concern. It's important we get the basic details on an issue before moving forward with other diagnostic steps. We developed the diagnostic worksheets as a minimum expectation and guide - Looking at other relevant items towards the diagnostic is encouraged so we can find the actual concern.

Remember the inspection should be done before the diagnostic unless it's a no-start concern in which it must be done immediately after (and updated once the no-start is fixed with additional findings)
The level one diagnostic is the vitals check. When you go to the hospital they always start with the vitals. Without that information your diagnostic data could be incorrect. It's not uncommon to have to proceed with a level two diagnostic.
If we can't duplicate the concern we charge the diag and credit it again at the next service towards the next diagnostic of same concern

Added 10/31/17
When the diagnostic is done the technician should have -

- ❏ Inspection done
- ❏ Answers to diagnostic worksheet if applicable & Complete write up of diagnostic story (in Autovitals)
- ❏ Part numbers for every part needed to fix issue
- ❏ Labor time recommendation for next actions
- ❏ Any other items or mileage based recs related to repair?
- ❏ Additional recommendation for diagnostic if needed
- ❏ Next action items
- ❏ If no definitive answer - create LMV Post
- ❏ Tech must review final estimate before it is advised to the customer

Level One Cooling System Diagnostic

Includes Pressure test
ANY cooling system diagnostic includes reading stored data in DME

Flagging Diag

Only flag what we've used and is fair to charge the customer for

5.11. Diags with multiple codes

If we are diagnosing for a misfire and we find more codes that are unrelated we must document those codes along with the freeze frame data and advise that there may be further diagnostic needed for those issues. Its important we document how current and frequent all codes have happened

When clearing codes its best to just clear the one control unit you're working on. Its also best to perform a complete car code scan before diagnosing

We fix cars - Can we fix during the diag?

Sure! That’s what we’re here for!

7.43. Waiter Oil Change

As soon as check in and relationship building is complete - pull the car around back

1.9. Names of parts

When creating an estimate from an inspection, parts/jobs should reflect the name in the inspection that is used. This sometimes causes confusion when explaining to the customer what the difference is, or what part they are referring too when looking at quotes.

Cabin air filters during inspection - we always check if there are no tools required to inspect

Add engine vacuum line to inspection
Add brake booster hose to inspection

WHEN PERFORMING A SERVICE SAME DAY - OK TO MARK GREEN ON INSPECTION

Inspections before diags - always

- ❑

If CEL is on during an inspection we must scan and advise on codes stored

7.46. VW/Audi intake manifolds and other silly plastic things

Everything plastic breaks!! - Beware touching anything around an Audi/VW intake manifold. Customer should be aware that the entire system is very brittle and will most likely need to be replaced

Plastic radiator hose on OFHG jobs. When removing radiator hoses that clip on to the radiator be very careful not to break the radiator neck. In some cases just breaking this seal will cause it to leak after install. We recommend replacing ANY cooling hoses that have been removed to ensure no leaks after service. Our standard maintenance interval for radiators is 100k miles so if anywhere close to that recommend the radiator as well

7.47. Fuel Pump Replacement (7/21/22)

When quoting a fuel pump replacement we invest a bit extra effort to ensure there are no shenanigans after the customer receives the car.

1. *Estimator includes a $0 labor line that states "Technician, please fill the fuel tank after repairs to check for leaks, smells and fuel level sender function"*
2. *Estimator bills the guesstimated dollar amount of fuel to fill the fuel tank post repair*
3. *Estimator gives the option to have Frigi Fresh sprayed in the vent system.*
4. *Technician airs the vehicle out overnight (or all day) to ensure there is or is not any residual fuel smell.*

When repair is completed fill up the gas tank completely and check for leaks. Bring receipt for gas to estimator for billing purposes and then estimator takes the receipt to kevin (shop foreman <Zach> has the gas card dedicated to gas fill ups only). Add the gas cost to the ticket as a "fee" and round up to the nearest dollar.

We also always recommend replacement of the fuel filter along with a pump. When fuel pumps fail they can send debris into the fuel system.

7.48. Alignment related suspension bushings

When replacing any alignment related suspension bushings or parts it is very important to mark the alignment so that the wheel alignment is as close as possible when done - regardless if the

vehicle will be aligned on a machine next. By doing this we can avoid any potential issues between part replacement and a test drive etc.

7.49. Exhaust locking nuts and other locking hardware

This should and will be replaced every time. Exhaust lock nuts are typically in stock but must be ordered when starting the work needing to be done. Don't get left waiting for parts for something you could have ordered earlier! We have has exhausts fall off by not replacing the needed hardware

Hardware

Minimum 10.9 Hardware

On items like seats and safety related items we must always use 10.9 hardware

7.50. Loading bushings when installing

Any bushings like a thrust arm or control arm bushings must be loaded when final torque is applied. If tightened with suspension drooping premature wear can occur. MAKE SURE YOU TIGHTEN THESE! If you leave them loose and do no immediately put car on a drive up rack to tighten leave yourself a reminder to be sure they are torqued before leaving!

Cam and exhaust sensors - can malfunction when we touch them - recommend replacing them anytime. Vw coils have same issue

7.51. Belts

E36 belts - always check length
Gator back belts -
Typically eliminate belt squeal

7.52. Dead Batteries

Anytime there is a dead or weak battery in a car it must be charged and the entire team notified. Dead batteries in cars create inefficiencies and hassles for everyone.
We once let a battery die overnight by leaving the key on. The car was jump started to get it out of the shop but then forgotten. The car was then pulled around front for the customer. They then went to start the car and it didn't do anything. How awesome did we look?
We should have -

- Messaged the team - “Mr. Customer has a dead battery
- Immediately put a charger on it
- Customer should be notified so we can create plans to leave on charger or replace battery
- If by chance the car made it around front and had to be jumped at any point - you MUST TREAT THIS AS A RED FLAG

With any alternator quotes you must identify the current brand and the amps.

7.53. Intake boots with trans removal or other moving of the engine

On multiple occasions we’ve torn intake boots when removing the trans or moving engine up to perform a repair like an oil pan gasket or engine mounts. Don’t let this happen to you! Either quote a weak boot ahead of time, disconnect them to avoid tearing or pay for it out of your labor when you break it!

7.54. Spark plugs

Apply anti seize to threads
Check gap when applicable
Use appropriate tools to remove spark plug wires as jot to damage them
Some spark plugs require removing the connecting cap where it connects to the wire
Inspect spark plug tube seals for oil leaks or cracking
Pre 95 - we must gap spark plugs + M20 the plug must be modified

7.55. Fender Mats

We use fender mats on EVERY car.
If a computer or other scanner or anything is set on top of a car - there is to always be a mat under it
Nothing besides a fender mat should ever touch the paint of a customer's car.
When using an engine brace it must not touch the paint of the car!

Working on cars with faded paint - don’t muck it up - even fender mats can leave marks on cars with dry and faded paint

- Each car must have 2-3 clean protective OMS branded fender mats layed over the fender and any other work area. Nothing except a fender mat can touch the paint of the car.

- This protects the car aswell as fulfills our fundamental of “look really really really good”. A clean shop with fender mats on each car shows people we are the premium choice and we can be trusted with their car

7.56. Batteries

Battery Storage and labeling

- Battery storage is limited to the battery rack ONLY
- No batteries on the floor
- All CORE and WARRANTY Batteries must be labeled with the RO#
    - Labels are hanging above the rack
    - Parts manager must reprint these before they run out
    -

5.32.1. Dead Batteries

Anytime there is a dead or weak battery in a car it must be charged and the entire team notified. Dead batteries in cars create inefficiencies and hassles for everyone.
We once let a battery die overnight by leaving the key on. The car was jump started to get it out of the shop but then forgotten. The car was then pulled around front for the customer. They then went to start the car and it didn’t do anything. How awesome did we look?
We should have -

- Messaged the team - “Mr. Customer has a dead battery
- Immediately put a charger on it
- Customer should be notified so we can create plans to leave on charger or replace battery
- If by chance the car made it around front and had to be jumped at any point - you MUST TREAT THIS AS A RED FLAG

5.32.2. Battery Replacement

Battery instal procedure is used anytime a battery is disconnected

- Note preset radio stations
- Note if clock is set fast purposefully
- Do not use battery maintainer on BMW’s
- When replacing the battery observe cables for fraying, corrosion, or wicking and recommend needed service
- Be sure the month and year tabs are pulled out on the battery
- After cleaning if needed and replacing coat the terminals with corrosion inhibitor
- Reset clock and preset radio stations
- Perform battery, starting, and charging system test - take pic in inspection and advise
- Regarding radios that require codes - Most codes are noted in the owners manual. Its best if the advisor can ask the customer if they’re aware of a code needed for radio. Technician will try to code provided one time. You only get 3 times of a wrong code until the radio is locked. If locked you must leave the car on a battery charger and key in 2nd position for 90 minutes until entering another code. To find the correct code (on BMW’s) you must remove the radio and obtain the serial number and manufacturer of radio. The dealer can get the code based off of this or we can access via ISTA AIR. Other manufacturers may require dealer to reset but we can typically convince them to tell us.
- Most cars after 2006 require battery registering.
- Perform complete car code clear
- Give yourself a pat on the back for doing a great job!

5.32.3. Battery Charging

- When a battery is completely dead it can be hard to bring it back to life. Yes of course the best option is to replace the battery with a brand new one but in some cases this can cause a delay in a diagnostic or losing the job all together. For some reason our fancy expensive Snap-On battery chargers and jumpers are not ideal for totally dead batteries. Those chargers are great for programming or standard charging of batteries. In the case

that it makes sense to try reviving a battery before replacing it please take these steps to help out -
    - Use a trickle charger
    - Drop the battery on the ground - make sure not to damage a corner or anything
    - If the battery is super ultra dead you make have to hook up a battery pack to it to register the charger. Leave the battery pack on it for 2 mins then remove it "tricking" the charger into charging the battery
- When jump starting a super dead battery you may have to install a jumper pack (not a snap on one) to the battery then another one at the jump start point of the vehicle. Sometimes one jumper is not enough
- NEVER use the jump start option on a plug in charger
- Diag batteries - note on do not ship

Borrowing a battery for testing and diagnosis

In some cases we may need to borrow a new battery from the parts department to perform testing or diagnostics on a car. If a battery is EVER removed from the parts department it MUST be

- billed on the ticket
- Marked on a "do not ship" tag
- The customers original battery must be clearly labeled that it is not a core or warranty battery

5.32.4. Batteries (AGM, Gel)

All optima batteries are AGM. Do not treat AGM the same as Gel Cell for testing / charging purposes. This will provide inaccurate results.
Bonus: AGM batteries outsell their Gel Cell counterparts because AGM is better.

5.32.5. The battery tester -

Must be plugged in after each use. Do not let it sit overnight without being plugged in! If its beeping the plug may have failed and Interstate will need to fix it. That's not an excuse to leave it unplugged

7.57. Racking a car

No part of the car's body shall be touching a lift arm or pad. The area where the lift pad touches the car should not be affected in any way by the lift arm or pad.

7.58. How to replace a cabin air filter

A cabin air filter change is not just slapping a new cabin air filter in. We always clean and vacuum the air box of any and all debris which justifies what we charge for this service
We also perform a vent system cleaning service. This it to clean any mold etc from the vents but to also add a fresh clean smell when the customer gets their car back.

How to replace a cabin air filter

Look up procedure
Identify filter location
Check your parts - open the boxes (carefully) Are they correct? Do you have the quantity needed?
Remove cabin air filter cover as instructed (be sure to note any damaged clips or threads upon removal, don't wait until install)
If not already performed take a picture of the old filter within the inspection noting that it is being replaced today.
Vacuum out cabin air filter housing and all intake ducts
Perform vent system cleaning per procedure (Make sure there are no special notes denying this) - This is done on EVERY car unless specifically requested not to by the customer
Install new filter
Install filter cover (do not damage clips and threads!)
Wipe off cover so it looks clean
Test ac operation
Reset service indicator
High five yourself for doing a great job!

7.59. Old Parts

We save all the old parts for 7 days. We label the trash can with the date to dispose and save everything in case it's needed. We use a grey trash can for old parts to save and Black trash can for actual trash

7.60. Engine air filter

An air filter change is not just slapping a new air filter in. We always clean and vacuum the air box of any and all debris which justifies what we charge for this service

7.61. Cooling system exchange

Perform cooling system pressure test before repair

We prefer to perform the mileage based cooling system exchange by draining the radiator and the engine block. We then refill the cooling system with the OEM coolant (most require 50/50 concentrate and distilled water) so that it may continue to protect the internal engine components. If during the service there is any signs of contaminated coolant, stop leak, debris, etc. STOP, RED FLAG we recommend performing a complete cooling system “flush” which is a much more in depth procedure.

If there is any coolant spilled on a component of the car it must be cleaned before leaving (including underpanels). A drop is still a leak. Remember the car should leave cleaner and in better condition than arriving.

Replace all applicable bleeder screws per bleeder screw process

Drain plugs are ok to be reused as long as they are not one-time use and their condition is perfect

Any seals (like crush washers) must be replaced when removed

Follow factory cooling system bleed procedure and turn the heat on when bleeding.

Test the heater and all other cooling system components post repair (cooling fans) Be sure to keep an eye on the temperature gauge at all times when a car is running. Don’t let a car overheat in our shop!

Perform cooling system pressure test post repair

Make sure we do the initial heat up. MAKE SURE this car doesn’t smell like coolant when the customer gets it back.

Make sure the drain is clear from any parts and debris and at least 30% empty for the next user. Give it a quick wipe down and make sure you return it in better condition than when you got it

In most cases it is best to have the car stay overnight so we can check the cooling system level when its cold. If you cap the cooling system when it's hot the hoses will collapse in the morning when the car is cold. Its best to re-bleed the system when its cold to prevent this.

7.62. Injector retaining clips

These are super dooper important. Without these clips the injector can come loose causing a major fuel leak and possibly a fire.

*Anytime injectors are removed during a repair, we need to sell injector reseal kits. Especially on vehicle with high pressure fuel systems.

Differential Speed Sensors

We’ve had many failures due to differential speed sensors breaking internally on race cars. We recommend replacing them with new on all race and track cars or whenever they are removed for service.

7.63. Clutch master and slave cylinders

https://youtu.be/wdf--suwqw0

7.64. Filling a manual transmission

Follow factory guidelines.

Verify correct fluid is being used and matches what came out

When filling from side port - fill until it overflows then let it finish draining to be at the appropriate level. IT MUST STOP DRIPPING COMPLETELY. If this is not done the transmission can overflow if the car is driven aggressively or raced.

This is the same procedure for filling Differentials

7.65. Smoke Machine

Maintenance Checklist

Smoke Machine

- ❏ Monthly Maintenance

        - ❏ All Adapters Present
        - ❏ Cones in good condition
        - ❏ Battery Charged
        - ❏ Gas tank adapter present
        - ❏ Extra smoke fluid
    - ❏ Each Use
        - ❏ Battery Disconnected
        - ❏ Advise of any maintenance needed

7.66. Aftermarket Components

> When recommending a repair related to an aftermarket component in an inspection or otherwise it is very important we have all of the info on the aftermarket item at the time of recommendation. Brand, size, color, any other relevant details to quote the repair correctly.
>
> Example - sway bar bushings worn - what size and color is the sway bar?

7.67. Performing a brake fluid exchange with light reset

Brake fluid exchanges ALWAYS include the clutch system if applicable

Cars with aftermarket brakes installed require a special labor time. Most aftermarket calipers have 4 bleeder ports on the caliper. Only the top two are needed for brake fluid exchange and there is a specific order based on the manufacturer's instructions - make sure you look it up!

Most Porsche or aftermarket brake calipers will require an additional .5 or 1 unit of labor.

Some UUC kits require removing the caliper to perform a perfect bleed - this is also additional labor but is not usually needed. Wilwood calipers are supposed to be bled in a vertical orientation

How to install axle bolts so they don’t fall off

Installing bolts through CV Joint axles that may get grease on the theads
[Installing Axle bolts video]

Do NOT hammer on axles to install them. Use the install puller tool.

7.68. Clutch, Flywheel, Rear Main Seal replacement

Anytime we replace or remove a clutch we will also remove the flywheel so it can be resurfaced and we can inspect the rear main seal - Order new bolts immediately

Removing Damaged Wheel Locks

Ideas -
AGA Tool

- Use a slightly undersized chrome (non impact) deep ½ in 12 point socket. Hammer it over the lock
- cobalt drill bits, ratchet strap so you can put pressure on the drill, and it comes out pretty quickly. I pilot drill a hole and then step it up to hit the bottom of the cone. leaves the threads in the hub and usually comes out by hand. If you have shit bits, it sucks.
- Take all the other lugs off pry between the brake anchor and the wheel with a long digging bar and stretch the lug bolt a hair to loosen the wheel. Then just spin it out with a screwdriver.
- Pull 4 lugs, get a 6' prybar between the wheel and the rotor, get 2 people to yank and stretch it. Takes like 2 minutes to spin it out.
- drive in circles in the parking lot with it loose. Just don't get too crazy. I've had to do that with dually trucks a couple of times
- Put 4 big blobs of weld around the edge and hammer on an extractor. Snap on makes a kit with a very thin extractor and a silicone funnel that protects the wheel from weld spatter. I've done this many times with the newer locks that have the rotating ring on them.
- Hammer 12 point over ring, spin with impact until ring pops off, usually whole lug will come out with it once it gets hot enough. 2-3 minutes, done. If hole is too skinny to fit socket in over it, Milwaukee hole saw it, still done in 3-5 mins.
- I'll usually drill down the middle til about the neck where the threads would start. This is the weakest part of the bolt then I take a pry bar and pry against the wheel and suspension and the head snaps off
- Not my monkey so rotor be damned. Shove a portapower spreader in there with the lugs out and one long bolt wrapped in painters tape to catch the wheel.

7.69. Performing a mileage based service when there is a repair needed.

5.40.1. If we find a stage 3 oil pan leak during the inspection and we are changing the oil - do we change it?

The technician is to notify the service advisor immediately. We need to contact the customer to notify them of the large oil leak and ask if it's possible to perform the repair at this visit. If they approve then we finish the inspection, quote the ticket, and move forward according to the workflow process but saving their original oil change to be combined with the oil pan repair. This saves the customer and the shop having to pay for the extra oil if we were to change the oil first. The workflow process is still followed in every detail except that there is an extra “early” phone call to the customer before the inspection is completed. This should not delay the technician as we always start with the inspection. This process also applies to any other component with a stage 3 oil leak

2.5. When we fix a leaking component or seal

Make sure the level is~ correct!!! This from a customer - “Hi Neil. Yeah, everything's awesome right now. No gas smell and it looks like all the leaks are gone as well. I have to admit that I was a little surprised that the tranny was so low on oil though. I would have thought you guys might have checked that given the shift shaft seal was failing (and for God knows how long) but when I drained it to put new fluid in, there was less than a quart in there. In fact, the thing was a little noisy in neutral while idling but I just thought it was the throw out bearing. After I filled it up with Red Line MTL, it's TOTALLY quiet now. Food for thought in the future 😉”
We should recommend a fluid exchange with ANY transmission or Differential Seal

5.40.2. Cooling service based on mileage

This ticket had a coolant exchange sold based on mileage. The technician performed the inspection first (good!) but within the inspection noticed the water pump was leaking. In this case you should immediately notify the SA as we will probably not perform the cooling system exchange. We shouldn’t waist the customers money by performing an exchange, then replacing the water pump with another exchange.

7.70. Cooling System Electrolysis

7.71. Cooling System Electrolysis

Is your coolant eating your engine alive? Did you know that improperly wired aftermarket electronics, or even a poor ground wire, can literally corrode your engine, from the inside out?

An electrical charge in your coolant as low as .15 volts destroys aluminum very quickly, and I've seen many cars with twice, even three times, that voltage in their cooling systems.

There are two ways this charge can occur: (1) a poor ground or improperly wired accessory can cause the coolant to become a ground path for battery voltage (or even static electricity), or (2) old coolant which has lost its protective elements can start to swap ions with the aluminum and other metal components, causing the coolant to become an electrolyte, much like a battery, producing its own electrical charge as it eats the aluminum.

For those of you with a multimeter, here's a quick test:

Set your multimeter to voltage, with a range of 0.000 volts.

Attach the negative probe to the best ground - ideally, the battery negative post, although the main ground post underhood will do, in a pinch. Ground the positive lead of the multimeter, momentarily, to zero the meter.

Then dip the positive probe of the multimeter into your coolant. If you see a voltage of 0.15 or above, it's time to change your coolant. To make sure the problem is old coolant, and not a bad ground or electrical issue, detach the negative cable from the battery, and use a ground point underhood. If the electrical charge is still present, your problem is in the coolant.

Coolant should be changed every two years, and you should use BMW blue coolant and distilled water.

7.72. Detent pins

Any time a ZF manual transmission is removed we recommend replacing the detent pins preventatively. The labor time is typically 3.5 hours for doing all 6 caps

7.73. Vacuum Pumps

Every time we've quoted replacing just the seal we almost always end up replacing the whole pump later on. We should always recommend replacing the whole vacuum pump from the

beginning if we find oil leaking from that area - It must be clear in the notes if its leaking from the pump or the seal

Vacuum pumps have such a high failure rate that we recommend replacing them anytime they are removed. If you're removing a vacuum pump for another repair - recommend it

7.74. Order of mechanical work

Inspection is always first
ANY diagnostics or customer concerns are always looked into before service work
Any jobs that are oddball, diagnostic fixes, or have a possibility for a snag will always be performed first. Don't do the easy stuff first. Start with what is probably a pain in the ass then move on the the routine work after. Don't risk a job hitting a massive snag towards the end. Hit the snags first.

7.75. Underpanels, Fan Shrouds, and other missing/broken items in inspections -

During a courtesy inspection we remove the center engine underpanel if needed to accurately inspect for suspension issues and leaks

If they're damaged during any work or inspection we recommend them to the customer. Make sure you note a picture of the underpanel on the RO or in the inspection.

If an underpanel is damaged prior to service it must be made known to customer that it will most likely get damaged further by removing and installing it.

This same rule applies to ANY plastic components noticed during a repair or inspection (like fan shrouds)

ANY missing brackets or hardware MUST be noted. If you don't note it, its on you. Many times after a repair a customer will notice a small cover or hardware missing (like a valve cover beauty cover nut). If you don't note that its missing while the part is within your view or in your hands then its your fault and we end up paying for it. Cover your ass please and note/take pics of any items that are less than awesome.

BG Induction services

To perform a BG induction service you must have completed and passed the BG training for this service. You must understand the risks and how to avoid them

Regular air induction service can be done on most cars with regular low pressure fuel injectors
GDI induction service needs to be used on cars with direct injection
We cannot perform induction services on any M cars with individual throttle bodies or an intake plenum
This service requires that vacuum be created to suck the chemical through the engine. This is done by revving the engine once every minute or so to make sure all atomized chemical and liquid chemical is burned through the engine. If too much liquid builds up you will hydrolock the engine and it may fail.
We cannot perform induction services on supercharged cars or Hybrid vehicles where service mode can not be enabled. Do not perform this service on cars with mechanical engine issues or modifications done to the engine.

You must point the sprayer at the throttle body. To do this you need to disconnect the air hose leading to the throttle body (bypassing the MAF) You must unplug the MAF for the car to idle and run. Leaving the MAF plugged in gives the engine computer wrong data and the computer tries to correct based on that data vs unplugging it

Using the induction tool
Always wear eye protection
Regulate the tool to 60psi?
Follow the BG instructions to rev the car every minute or two but not too much as to heat up

7.76. BG Kits - GDI vs. intake cleaner???

How do you tell which intake kit to use!? The GDI kit is for direct injection cars. If the engine has a high pressure fuel pump then its direct injected and requires the GDI kit.

7.77. Replacing Calipers -

Most reman calipers fit other vehicles and are not required to come with brackets. If the caliper comes with a bracket - it is possible it is incorrect and the original bracket from the car should be used. Most replacement slide pins use a SAE socket - we prefer the metric ones. Make sure the bleeder is on top and it's not the incorrect side caliper

7.78. Oil Leaks

Fill the oil pan with oil as you are putting back together. Also clean the floor under the car before leaving if there was a leak we would have seen it the following day prior to car leaving

Any metal valve covers and oil pans should be straight edged while removed

After/before replacing valve covers we will use a manometer to check for cracks

We created a drain plug with a vacuum fitting for smoke testing oil pans (its blue)

Oil Pan gaskets - usually require a 24 hour curing time - Also in some cases the car needs to sit with the pan off for a bit to allow all the oil to drain. Extra time quoted to the customer

We replace timing cover gaskets along with EVERY valve cover gasket replacement. The timing cover is typically only an extra hour to replace and can save the customer tons of money and hassle if done in conjunction with VC

We recommend to replace the valve cover with every valve cover gasket replacement, these covers can crack and warp. This ensures the seal will last forever and we put our lifetime warranty on it. If we are unable to replace the valve cover we put our standard 30k warranty on the seal.

When we have the valve cover removed from an S54 or n54 engine we MUST inspect the VANOS bolts to make sure they are tight. Both of these engines have issues with VANOS bolts coming loose. Its also required that we do a general inspection of anything visible with the valve cover off. How are the timing chain guides? General condition? Cam lobes? We are professional technicians that find faults when they are there, not parts slingers.

** When building quote, especially above items(oil pan gaskets with sealants, timing covers, etc. Put set time in the revision. Example 24hr set time for gasket. As some jobs may be only a couple hours to complete, but need 24hrs to seal correctly. That information is needed when selling a job, to ensure an accurate completion deadline set.

When performing oil leak diagnostic, cleaning, or after repair of a heavy oil leak. There is typically oil hidden in places like subframes, frame, and underpanels. Make sure ALL of this oil is off the car before giving it to the customer. If we need to drive a car on inclines to be sure - go drive it on inclines. Use air to blow out the areas. Same thing goes for smoke and smells - make sure everything is cleaned before giving it back to the customer.

Process for making sure that sealant gaskets are “cured” before returning to the customer.

1. Once a gasket leak is determined it is quoted by Parts Guy
2. When quoting a gasket, and the replacement is a liquid gasket the Parts guy will add a labor line stating “Vehicle must set 24hr” - This allows all persons to know that car cannot leave until the gasket is set.
3. This will prevent any premature leaking that could occur

7.79. Important Tech Resources

Also see the tech resources folder in the google drive
http://wedophones.com/Manuals/BMW/

www.smogtips.com
https://www.smogtips.com/OnlineForumQuestionDetails.cfm?Question_ID=2919&Question=BMW-S-Series-Drive-Cycle
https://www.instructables.com/How-to-Do-BMW-OBDII-Drive-Cycle-For-Smog-Check/

Excellent Brake Resource
https://www.mye28.com/viewtopic.php?f=3&t=143677&fbclid=IwAR1rGOnpSgL2xWx3eIiRa0VGqblv_xtZ9likFj-cwJAfHrcnp5mzRYCmazY

Ista D and P install video - https://youtu.be/LJUBfCOq6HQ

RC Imports (volvo parts confirmed)

Car-part.com (used parts system)

All BMW torque specs http://www.e38.org/bmw_torq.pdf

ETM BMW diagrams -
http://wedophones.com/Manuals/BMW/

Alignment Info -

Converting in to degrees - https://robrobinette.com/ConvertToeInchesToDegrees.htm

http://www.beisansystems.com/procedures/index.html

Cas module diag and programming -
http://support.rpmmotorsport.net/

Excellent VW Information -
http://karmakanix.com/knowledgebase/

Directory of manufacturer support sites for programming -
https://www.oem1stop.com/

Autel tech support - 800-928-1576

Steve Secor - Mobile Automotive computer flash programming 858-335-3182 - American & Asian

Kevin Nieto - 760-484-7910 (referred by Rob EGA)

High Tech Mobile (EGA) Rob - 442-777-3374

https://www.firstfives.org/faq.html info on e12

> Turbo play - No real way to measure it assembled. There is only around .015" gap between wheel and housing so as long as the wheel is not contacting he housing its normally good. Axial play is what you need to be worried about. Should be almost nothing that direction.

6.0 ARTICLE
file:///C:/Users/parts/Desktop/6.0%20article.pdf

https://www.electude.com

Scanner Danner in pensilvania - https://www.youtube.com/user/ScannerDanner

Aes wave

Diagnose dan - https://www.youtube.com/channel/UCR73yN7vT7-P541g2qlfRrg

Car quest online

Bosch online training

Ac Delco ac system

Garage gurus

Our virtual academy.com

Standard motor products

AVI

https://aviondemand.com/bosch-training/technical-training/

Great link for VW info - http://www.vaglinks.com/vaglinks_com/Docs/SSP/

M20 intermediate shaft bearings

While I did not write the following myself, it's a summary of what I've found across the message boards and from dealing with it personally.

"Hot tanking will ruin the intermediate shaft bearings. They can be replaced, but it isn't a trivial job. The block can be sufficiently cleaned w/out hot tanking and unless the bearings are already bad I would not want to have to replace them.

1. Contact Local BMW Dealership and request the two following parts:

BMW# 11-11-1-280-863
BMW# 11-11-1-264-196

2. Take the engine and new bearing to the machine shop of your choice and have them do the following:

--Measure the IM shaft diameter, chuck the bearings up in a lathe, slow speed, cut to initial size. Use a standard cam bearing installation tool and install them in the block, they will crush and become smaller then the diameter of the shaft. Hand finish with a brake cylinder hone, low speed and a little goes a long ways. Test fit, finish sizing with green scotch brite.

--make sure the front bearing lines up with the oil feed hole from the #1 main bearing
feed (The second bearing does not matter as it is fed through the shaft from the front journal)

--You want about .001-.0015" clearance,002" max. Anything more then that and you risk loosing too much oil pressure."

s85 Bearing Clearance Explanation

Added 8/29/2018

https://www.m5board.com/vbulletin/e60-m5-e61-m5-touring-discussion/565385-just-another-rod-bearing-thread-newer-025-std-set.html#/topics/565385

"Let me explain why the current sets of BE Bearings are mixed STD (lower) and +025 (upper) shells. It's all about quality control.

When we receive bearing shells from Clevite, we measure the thickness of every single shell. As with any manufacturing process, there is variance in thickness. The variance follows a near-perfect normal distribution curve. The thicknesses range between 0.XXX00 - 0.XXX50 inch thick. The midpoint is 0.XXX25 inch thick.

When mating two nominal, 0.XXX25 inch shells together, the clearance is typically above our nominal 0.0024 inch recommendation, usually about 0.0028 inch. Furthermore, when we ship all STD shells, somebody's going to get too much clearance, and somebody's going to get less than we recommend. Due to normal distribution of bearing thicknesses, there's really no way around it. That's where the +025 shells come in.

The +025 shells are exactly 0.00050 inch thicker than the STD shells. They also follow a normal distribution curve of manufacturing thickness tolerance. These shells run between 0.XXX50 - 0.XXX95 inch. By mixing the STD and +025 shells together, I can basically guarantee everybody receives the same spec clearance -- as measured on a nominal thickness rod journal and brand new connecting rods of nominal big-end bore size.

Here's how this works:
BOTTOM, TOP SHL, CLEARANCE
0.XX000, 0.XX095, 0.00235
0.XX005, 0.XX090, 0.00235
0.XX010, 0.XX085, 0.00235
...
0.XX045, 0.XX050, 0.00235
0.XX050, 0.XX050, 0.00230

See how taking advantage of normal distribution curves and mixing STD and +025 works to control quality?

Now here's a word about plastigage. It's not accurate. It's just a sanity check. All of the BE Bearing wiki specifications were developed using bore gauges and micrometers as a race engineshop would do to measure clearance. So you can't really directly compare plastigage to bore gauges and micrometers. Here's a real case where this came to light. We had a customer measure 0.0010 inch with plastigage. He did the right thing and immediately stopped the installation. I paid to have the bearings sent to me next-day air. I measured them with plastigagetoo, then I measured them with bore gauges and micrometers. I seem to recall when I used plastigage, I measured about 0.0015 inch (I don't remember the exact number any longer). However, when I measured with bore gauge and micrometer, it was 0.0026 inch clearance. I repeated those measurements twice, and got the same measurements each time.

I hope this answers some questions that people may be asking."

- Second Post Down in the Link

Floor Cleaner

Daily -
Plug in everytime its returned to its home

Weekly service

- ☐ Drain Dirty water into our water filter system outside
    - ☐ Remove any large debris from the ground
    - ☐ Vacuum out any sediment in the waste tank
- ☐ Refill the fresh with degreaser and water mix.
    - ☐ Ratio is
- ☐ Check Tires
- ☐ Advise of any work needed
- ☐ Sign off the check sheet with your name

Oil Spills

Oil Absorbent must be discarded in the "Oil Absorbent" bin so it can be recycled properly
Each technician area will have its own GREEN Bucket for clean oil spill material. This bucket must be kept full at all times. Parts dept reorders oil absorbent from Autozone or similar store

E36 (M / Non-M) ASC Delete (Track only, not a policy)

When removing the ASC+t on this specific range of cars, it is important to follow these steps to get an awesome outcome:

1. Remove the ASC actuator and throw in parts save bin
2. Install a 10ohm 1watt resistor to the chassis side of the two prong plug for the ASC actuator (Pant's guy purchased about 10 of these on 3/1/2020, good luck finding them)
3. Delete the bulb in the cluster if you'd like
4. Install the Z3 (M I think) intake boot that doesn't use the ASC system from the factory
5. Install the Z3 (M I think) IAC valve hose

7.80. Alignments

4/25/19 add - Whenever a subframe is dropped an alignment needs to be recommended

- Car should have a full tank of gas
- Take into consideration the driver weight and car use
- Perform preliminary test drive to verify concern
- Pulling is usually a caster concern
- Make sure all the turn plates are locked before driving on rack
- Honk horn and use a spotter to pull onto the rack, watch for lower cars - don't let them get caught on the rack
- Check and adjust tire pressures to manufacturer spec (info located on inside of driver door)
- Use wheel chocks to avoid car from rolling
- Install weights as needed per spec
    - Be sure to use padding, board, etc. to avoid damage or marks on seat
    - do not leave weights in overnight, they can mark the seat
- Lift must be on locks so it is level while aligning
- If there is an issue, special adjustments needed, or more complicated alignment needed the tech must immediately notify the SA
- If specs seem like customer prefered a custom alignment previously, notify SA to ask customer if we should align to factory spec
-

If during an alignment you can not adjust within specification - immediately notify the service advisor with what needs to be done to adjust within specification
Any time we take a cylinder head to the machine shop the camshafts must be removed. Most machine shops don't accept heads with cams still installed or they will charge extra to remove them. The cams must be out for them to perform a pressure test and resurface as all of the valves must be closed.

Ride height measurement is not required to be entered but you MUST enter the “ideal” ride height as presented by the machine

If you make major adjustments you have to do the roll back procedure again before performing final adjustments

7.81. OMS Ride Height Adjustment

10/29/2020

Performing a ride height adjustment for a customer's vehicle is a great opportunity for us as a shop to show them how we do. Providing the best possible service requires a few key points to be hit, these are outlined below.

The first step to customer satisfaction during a ride height adjustment is to inquire about their coilover spanner wrenches. We require a customer to come prepared with these spanners in order for us to adjust their coilovers efficiently and effectively. Please don’t miss this step. Also, Service Advisors should be asking the customer about their goals for the height adjustments (ie: measurements, mm’s up or down, etc).

Another important role we play when adjusting the height of our customer’s vehicle is properly setting the adjustments to fit the customers needs. We need to get their specs (ie: how much to raise or lower) prior to the tech receiving the car in their bay. Also, we need to get the adjustment finished and before aligning, send the customer a photo of the car so that they can give us the okay on the look of the vehicle.
ADD WEIGHT ACCORDING TO THE DRIVERS WEIGHT OR CAR USE

We don’t often see ride height adjustments in our shop, but we can all agree we are more than capable of setting the suspension to the customer’s wants and needs. Woohoo.

We typically quote 1 unit plus an alignment for this but every suspension is different and some require much more time. An example of this is an E36 with no weight jacks. The rear adjusters require the spring to be removed everytime its adjusted - This adjustment usually takes about 3 units

8. MARKETING

Customer Retention

My Shop Manager

Our Current tool for customer retention is My Shop Manager. We use it for follow up texts after service and reminder texts. My Shop manager is also great for campaigns directed to current customers.
Video - How to use My shop manager and communication with SA's and Marketing guy

10. Contacts and Referrals

We are not direct competition with Airport Automotive, T&T, JA Services, EGA, or Independant Motorcars - Do not play the price game against them. We are all in this together.

10.1. Machine Shops -

Any cylinder heads sent to machine shop must be BARE - No camshafts, no dowels, no hardware - you might not get it back!

4.1. Machine Tech

Excellent machine shop, no urgency but does set accurate ETA's as long as it's not "we'll get to it"

4.2. Car Quest Oceanside

Only machines rotors and flywheels - Be carefull with newer BMW flywheels as they are amature and can mess it up

4.3. HDS Car Quest Escondido -

Excellent machine shop for cylinder heads. Does not deliver

Richard Auto Electric

Rebuilds starters and alternators. Has electric diag data.

Valley Chain and Gear

Located in San Marcos - stocks every kind of bearing you can imagine - (760) 744-4200

Custom BMW programming and wiring harness pro - Kassel Performance

Escondido German Auto - Custom BMW programming and mobile Key programming

Talk to Kyle Markman at Pass and Go Smog

Fiat diagnostics- Dieter Porsche, BMW, Audi, Fiat- 619-330-8100

Audi/VW diagnostics- Derek from EGA

Muffler Man - custom exhaust work

CX Racing - Exhaust V band clamps, turbo piping - all very cheap quality stuff

Nology - Custom performance spark plug wires made in San Marcos

Siliconeintakes.com - silicone hose, fake cats, other fabrication stuff

Southland Clutch - rebuilding pressure plate, flywheel, new disk $360

California Automotive SOlutions - Brake and light certification for salvage cars
760-726-2247 Eddie knows Spencer

Highway Max
Discount code - **EFKB5YJ6RMXK**

Paradise Motorsports in San Marcos - They specialize in VW (old stuff) and stock a ton of AN fittings and lines

5523 Motorsports Nick and Jen 858-914-1175 - Nissan and Mazda engine building, resto, custom stuff

Jim Wolfe Technology - Excellent clutches for NIssan and Infinity - http://www.jimwolftechnology.com/contact.asp - **619 442-0680**

Frank Fahey Motorsports - 858-693-1872

Turn 14 in Nevada

~~Laramie would be my first choice~~ but he hasn't been good about keeping a schedule lately so be sure to get details of if he can do it and when - 619-977-3738. All Purpose Manufacturing would be my next - the owner is a customer whos name is Orlando and his cell number is 760-828-04780. if you choose them they will produce a high quality product in a timely fashion but you have to be super dooper exact with what you ask for because they're not pros at the car fab stuff. Next is Marks fab shop - don't know where he is located now but he's done a ton of fab for us that comes out real well - 619-952-9823

3. Parts

Inventory

Oil Inventory

Check oil inventory levels weekly
Re-order when at minimum - Fill only to max fill

National Petroleum - Give invoice to Neil. Verify correct product put in the right barrel and we are billed for the correct quantity

Parts Shelves

Parts receiving supplies cart

This cart to remain cleaned and stocked at all times.

- [ ] Box opener
- [ ] Scrap paper for labeling parts
- [ ] Tape Gun
- [ ] 2 extra tape gun refills

Parts Receiving Shelf

The purpose of this shelf is to have a clear area for all parts to be dropped off. Its imperative that it is kept clear and is not allowed to be cluttered.

Parts will go these directions after being dropped on this shelf, there is no reason a part should be left on this shelf for longer than 60 minutes

- Taken to the technician
- Put on the staging shelf for a car that is not here yet
- Returned per returns process

Parts staging shelf

The purpose of this shelf is to organize parts waiting to go on cars that are not in the shop.

Each part must have a clear label on it showing

- Customer Name
- Date
    - Estimated date for part use

ALL parts on this shelf will be either -

- Prepaid
- Installed within 7 days of part arriving
    - Before returning parts that are not installed, check with SA to determine if the customer rescheduled within a week of original appointment.

Once a week parts manager reviews the shelf and makes a record of any part with a date prior to today. The list of those parts goes to the service team to schedule the appointment to install those parts.

Filing of vendor invoices

An invoice only gets filed when every dollar from the invoice is charged to a customer OR a copy of the return part is input into the returns system.

Any invoice that is not charged to a customer goes to GM for review, then GM handles filing

You are the gatekeeper of letting parts and $$ slip through the cracks. This process is super important so please be detail oriented and protective when filing invoices.

3.1. SSF - Nick

Our main parts vendor. Excellent online system. You can call and they can manually adjust a price if needed. Returns are very difficult with SSF so if there's a high chance of a return needed choose another vendor if possible

Worldpac - Super fast deliveries, excellent processing for returns. If its a large order that doesn't need to be here right away choose the stock order option (DC Direct) and itll save a bunch of money

Northside - Kris

Eager for our business, no online cataloug. You have to call or email. Kris is responsive and can typically beat other vendors pricing. Be careful not to order cheap brands. Kris is also a huge resourse for hard to find parts

IMC

Oreilly's -

https://www.akgmotorsport.com/
AFTERMARKET BUSHINGS AND STUFF

Detail Department/QC Manager

Wash bay water filter system

We are required to harness the runoff water from our car washes. The city is cool with it as long as it doesn't leave our yard. We can even pool it and let it evaporate if needed.

We've set up a filter system that uses a DIY "pond filter" system. Some people use a similar set up to filter water to a point where you can drink it. Because of the asphalt and stuff we wash off cars its not drinkable but the goal is to get the water clear or light gray by the end of the cycle.

UNPLUG THE SYSTEM WHEN IT RAINS

3 filter system -

Filter 1 - Screen filter pre sump pump

This filter is a screen located above the sump pump in the drain ditch mounted on top of a bracket. This filter needs to be cleaned anytime there is any blockage in it. Its important to make sure the float doesn't get messed up when you're moving the sump pump. The sump pump should turn on and off automatically with the water level

Filter 2 - DIY Pond filter

Located in a blue barrel there are 3 layers of filter material - Course rocks, Course sand, fine sand, and Diatomaceous earth. The PCV pipe runs to the bottom of the barrel where it splits off into a 4 way. The water is pressurized from the sump pump and water is pushed from the bottom of the barrel towards the top. The water at the top should be clean-ish. There is a one way valve located in the PVC to avoid water going back into the sump pump/drain. The one way valve is removable for service if clogged. There is a tee fitting with a valve used to back feed the filter for routine cleaning

Filter 3 - Paper Pool filters

This blue tank DIY filter set up has pool filters used as a final filtering stage. Its best to use Hydrocarbon filters for this. In theory the water after this should be clean enough to water plants with.
Water is poured into this tank from the large pipe coming from the pond filter. The water filters from the outside of the filters to the inside where there are two pipes coming up through the middle of the filter from the bottom. These pipes can pop out and its important they're secured in place for proper filtering. The water level must never go above the filters height, If it does it will bypass the filter. The drain pump from this tank (located below/next to the barrel) automatically turns on when the water level is close to the top of the filters. This is controlled by a float switch screwed into the side of the barrel. Test this by lifting the unit up - the pump should turn on and when its left to dangle the pump should turn off

Maintenance

- Screen filter for sump pump cleaned weekly
- Pond filter - drain water, scoop debris from top then backfeed the filter every 90 days
- Paper pool filters - These should be removed and pressure washed every 30 days
- Final Storage tank should remain clean at all times

Car Wash

We wash every car that is serviced or inspected at OMS no matter what (except other shop cars like Cal Collision). If it is raining or weather does not allow we clean what we can (interior) and give a rain check card for a future wash.

The car wash is technically available for every customer with or without service however our schedule does get booked up with washing cars that are in the shop. We typically reserve the "car was without service" to our really good customers. We do not offer shuttles or other services like that for wash only services. Wash only service MUST be scheduled ahead of time.

The OMS "car wash" is hugely underpromised. To the customer we simply call it a wash but in reality its the best damn car wash they've ever seen. Here's a few specifics that we expect -

- Wheels super clean - all spokes (might need to roll car to get them all)
- INSIDE of windshield clean
    - This takes practice and finesse to get the windshield clean and streak free. This is one of the very unique things about our detail and its expected to be perfect on every car. Use "windows only" towels
- Door Jams
- Inside fuel door

Time budget - We budget 1 hour per car wash. With practice a single detailer should be able to get this down to 40 minutes but the 1 hour budget is used for setting the expectation for black cars, oversized, or super dirty cars. A single detailer is expected to perform 8 washes per day in addition to other duties.

Standard Car wash procedure

- ☐ Pull car into wash bay so doors can be opened all the way
- ☐ Interior
    - ☐ Remove floor mats and clean
    - ☐ Vacuum complete interior
        - ☐ Under floor mats
        - ☐ In between seats
        - ☐ Rear floors
        - ☐ Seat cracks
        - ☐ Cup holders
        - ☐ Center console
        - ☐ Door pockets and handles
        - ☐ It is OK to remove obvious trash to vacuum these areas
    - ☐ Clean inside of windshield with window cleaner and fresh inside only window towel

- ☐ Clean rear view mirror glass
- ☐ Clean dash with interior cleaner
- ☐ Clean center console
- ☐ Clean out cup holders
- ☐ Clean instrument cluster surround with interior cleaner
- ☐ Clean instrument cluster glass with glass cleaner
- ☐ Wipe steering wheel, gearshift, door handle, and control handles with interior cleaner (nothing that makes it slippery)
- ☐ Clean door panels - especially kick area
- ☐ Clean seats

☐ Exterior

- ☐ Clean wheels
  - ☐ Use “I can’t believe its not wheel acid” on all OEM wheels. polished wheels, polished lips, plastidip, almost all non-OEM finishes should only be touched with soap and water. Be sure to use the correct ratio and be careful not to mess up wheel finish with a chemical.
  - ☐ Use the wheel brush to clean in between the spokes and in every crack
- ☐ Rinse with high pressure water
  - ☐ Use orange tip for first rinse and wheels
  - ☐ White tip for soap rinse
  - ☐ Be careful not to get too close or blast seals on old cars, roundels, convertible tops, etc
- ☐ Use a clean soap brush to apply soap and scrub the complete exterior
  - ☐ Do not use on wheels
  - ☐ Do not place on ground or allow to get dirty
- ☐ Rinse all soap off
  - ☐ Its OK if there’s still small marks or bee poop etc - This comes off with the chamois
- ☐ Use air for initial dry and to dry out cracks and seams.
  - ☐ Be careful not to blast off roundels and pieces of the car
  - ☐ Always keep a soft tip on the air gun to avoid any scratches
- ☐ Clean door jams with the wheel drying towel after drying wheels
- ☐ Dry car completely with clean chamois
- ☐ Clean exterior windows with window cleaner and a windows only towel - use fresh towel for outside windows
- ☐ Wipe wheels with ceramic spray to remove extra dirt
- ☐ Clean outside of tailpipes
- ☐ Perform final touch up using quick detail if needed
- ☐ Bring a towel with you when you pull the car out of the detail bay to wipe any water drops off once the car is moved

No touch car wash procedure

Use for black cars, ceramic coated cars, etc.

Don’t use the soap brush. Use the foam soap cannon instead

CSR

Mail

Mail sorting -

Please only open mail that is addressed to Oceanside Motorsports or Neil Daly.
2023 - OK to open mail for Torie Tobey to be scanned

Checks - Give to depositor or bank signer to deposit immediately - As of 2023 this is the parts manager
Credit cards - Advise management
Obvious junk - trash
Tax Documents or forms that look like they need to be filled out and sent back- Scan and save aside
All others - Scan and file in bin with the quarterly label on it. Example - Q1 2023 Scanned Mail