

Management Duties & Kpis 90 Days

Scheduling - all services

- ☐ Understand timelines for projects
- ☐ Understand how long it will take our team to complete projects
- ☐ Ensure materials are ready before the scheduled project arrives
- ☐ All appointments have formatted, clear notes and are color coded properly
- ☐ Enforce rescheduling procedures
- ☐ Know when to reschedule in advance if we are getting overbooked or extend timeline for the project
- ☐ Call and confirm appointments the day prior (especially on Saturdays and in the slow season)
- ☐ Fill the schedule and foresee when we do need to cut hours
- ☐ Schedule jobs for the same day if there are available spots.

Estimating/ Sales - Window tint, CC, PPF

- ☐ Complete verbal and written estimates for paint protection, or tint
- ☐ Collect and record 25% deposits on paint protection and cc.
- ☐ Immediate follow up on incoming inquiries
 - ☐ social media, phone, voicemail, email and walkin
 - ☐ Phone inquiries should be followed up with immediately, even if they do not leave a message
 - ☐ Emails/forms should be followed up within 24 business hours
- ☐ Follow-up on pending estimates until we get a "No" with a reason
- ☐ Offer clients upsells and cross-sells
 - ☐ Add ons for auto tinting
 - ☐ Ceramic coating, smoked reflectors, windshield or sunroof

Customer Service

- ☐ Check Clients In/Out
- ☐ Offer every customer (upsell options)
 - ☐ Same day roll down

- ☐ No fault
- ☐ windshield/sunroof
- ☐ Hand every customer water and popcorn (don't ask)
- ☐ Offer every customer
 - ☐ Uber
- ☐ Get at least 15 Google reviews per month or at least 20 when combined with reviews that the team got (this position is responsible for tracking results)
- ☐ Discounts- know what discounts can be given
 - ☐ Prefer to throw something in rather than discount
- ☐ How to handle upset customers
 - ☐ When to offer compensation
 - ☐ When to break up with customer
 - ☐ When to offer money back guarantee

Administrative

- ☐ Ensure all customers receive proper paperwork
 - ☐ No fault
 - ☐ Warranties
 - ☐ Door hangers
- ☐ Record all deposits and final payments in QB
- ☐ Keep and organize receipts
- ☐ Create invoices in QB for all projects including auto tinting/removal
- ☐ Adjust/record team hours that need adjustments
- ☐ Ordering - ordering materials and tools as needed.
 - ☐ Calculate our materials needed for job
 - ☐ Be able to track time sensitive materials and confirm they have arrived before job.
- ☐ Track all Fellers Orders

Shop/Project Management

- ☐ Know all team members priorities and goals are for the day
- ☐ Set final timeline for completion on longer term projects and make sure daily goals are being hit to ensure project is finished in time

- ☐ Making sure our projects and our team are working efficiently
- ☐ Know how to adapt and change the schedule when needed (ex walkin, upsell, removal)
- ☐ Assign shop projects as needed (ie cleaning, errands, inventory)
- ☐ Follow up on project timelines
- ☐ Ensure we are getting to job sites on time, if we are running late call as soon as we know we are running late

Procedures - Perfect the Quality way of doing things and ensure our team is doing them

- ☐ Checking customers in and out
- ☐ Recording payments
- ☐ Handling comebacks
- ☐ Explaining common issues (contaminants, moisture)
- ☐ Taking care of an upset customer
- ☐ Answering the phones
- ☐ Breaking bad news
- ☐ Billing/estimating questions
- ☐ Sales cycle

Product Knowledge - understand the benefits, price points, and timelines for the following. Services with asterisk do not require as in depth knowledge of pricing

- ☐ Flat glass tinting
- ☐ Automotive tinting
- ☐ Polishing/Paint correction
- ☐ Ceramic coating
- ☐ Paint protection

Financial

- ☐ Hourly Projects
 - ☐ All final invoices with hourly components are carefully reviewed and then given to Vlad for final review
 - ☐ Administrative, consultative, and ordering time is accounted for with all hourly projects

- ☐ Ensure we do not over order on materials or reorder tools we already have
- ☐ Make sure all completed jobs are invoiced for

Team Management/Leadership

- ☐ Onboarding orientation
- ☐ Approve overtime, time off and adjust hours
- ☐ Understand individual team members strengths and weaknesses
- ☐ Complete routine 1-on-1 meetings and reviews
- ☐ Assist Vlad with milestones for raises
- ☐ Be a decision maker and administrator for hiring and firing
- ☐ Be an encourager and give recognition to the team
- ☐ Ask team members to stay late or come in early
- ☐ Maintain a professional relationship by not hanging out with team after work
- ☐ Do daily morning huddle
 - ☐ Hold team members accountable with pushups
 - ☐ Discuss potential for mistakes

Decision Making

- ☐ Make hard decisions when it comes to hiring, firing, and difficult customers or situations
- ☐ Make the final call on how projects will get done
- ☐ Come up with options for customers when something is broken or damaged

Company Improvement & Profitability

- ☐ Implement ways to create:
 - ☐ Efficiencies
 - ☐ Higher profits
 - ☐ More revenue
 - ☐ Improved morale