

Core Processes

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HUMAN RESOURCES PROCESSES

The purpose of this process is to facilitate the protection of Grease Monkey assets and ensure compliance with generally accepted HR principles.

HIRING PROCESS

HR:

- Post job openings-using Indeed, Career plug, and other social media platforms to attract potential candidates.
- Go to events and meet potential candidates.

Manager:

- Review resumes and create a shortlist of the most qualified candidates.
- Schedule in-person interviews with the top candidates to further review their qualifications, follow our core values and confirm they are the right person for this seat. (RPRS)
- Contact references if provided by the top candidates to verify their employment history and qualifications.
- Go over salary, uniform, training, job description, and schedule.
- Once the Manager has decided to hire the candidate, email HR with the Onboarding information (see Onboarding Process)
- All paperwork will need to be completed before the candidate starts working. (I-9, W-4, direct deposit, acknowledge policies, emergency contact)
- This includes the handbook and Full Speed University.

ONBOARDING PROCESS

Onboarding (This needs to be the subject line of the email)

Managers will need to email hr@greasemonkey.shop:

- first & last name of the new hire
- hire date & what time to start
- mobile phone
- email address
- the \$ amount hourly or salary
- job position
- store number
- full or part time

HR will reply to the manager's email letting them know when HR has onboarded the new hire into the payroll software.

Onboarding must be complete **before** they start working. This includes:

- I-9 form completely and correctly filled out in payroll software
- Handbook needs to be acknowledged in payroll software
- FSU 100% complete
 - During this time the Manager enters employee into scheduling software
 - Manager also enters employee into the time tracking software
- Introduce new employee to the rest of the crew
- Show new employee around the shop

PAYROLL PROCESS

- Payroll is processed bi-weekly. (Every other week)
 - Every other Thursday employees should receive their money by 3:00 pm.
 - Paper checks should not be handed out until 3:00 pm.
 - IF an employee has not received their money by 3:05 pm on payday (Thursday) the Manager needs to contact Payroll.
- **ALL** updates, including changes in pay rates, terminations, time off requests, etc. should be submitted by 3:00 pm the Friday before payroll week. (Any questions please see the Employee Forms Process)
 - This includes Bonuses (This is done by the Area Managers)
- Timesheets **MUST** be approved daily.
 - Employee hours are tracked by using time-tracking software, with daily verification by the closing Manager as part of the nightly closing checklist.

BONUS PROCESS

- Area Manager enters totals (Month/Year column) in the bonus spreadsheet of all people in their division.
 - Enter the total previous monthly sales from the POS report.
 - The amount needs to be entered into the bonus spreadsheet by the end of day the Friday prior to the pay period ending and no later than the following Monday at 9:00am MST.

TIME OFF PROCESS

(All employees)

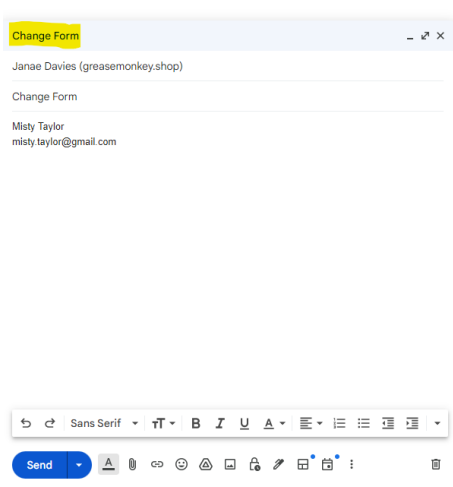
- Login to your payroll software
- Select the Time off button
- Enter the requested information
- Hit Review & Submit button
- Verify that your information is correct
- Hit Submit Request
 - You will see your pending request until approved or denied
- This will then go to your manager for approval or denial
- Once approved by the manager you will receive a notification in your app
- If request is not approved, you will be expected to show up for your scheduled shift

See Time-off and Leave Policies and Procedures in the Handbook for further information

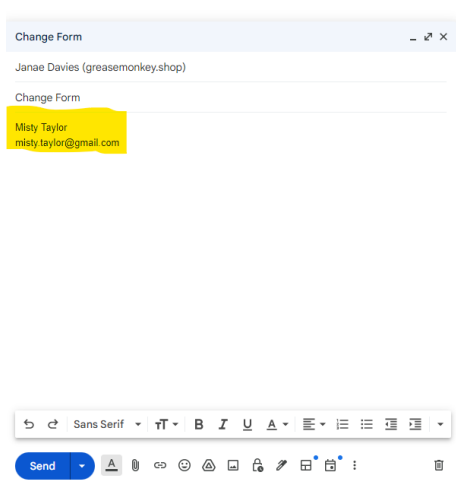
EMPLOYEE FORMS PROCESS

(Change form, Warning form, and Termination form)

1. Manager emails HR Manager what form is needed. (By putting form name in subject line)



2. In the body of email provide employee name and email address.



3. HR Manager will send form to manager and/or employee with required fields noted.
4. Manager and/or employee will fill out their preselected areas.
5. Changes in pay rates will go into effect the following pay period.
 - a. Mid-cycle pay changes are not allowed.
6. Termination form MUST be sent to HR Manager the day the employee is terminated.
7. Time off request should be processed through payroll software.
 - a. IF sick, the form must be completed the day the employee calls in sick.
8. Warning form must be submitted immediately at the time of the offense.
9. Once all areas have been filled out and signed, HR Manager receives back and will make the appropriate changes.

If the Manager and/or employee have not received the requested form within 2-3 hours, please reach out to the HR Manager to follow up.

WARNING FORM PROCESS

(Following 3 Strike Rules)

Effective January 1, 2025, this process for warning forms must be followed.

This process is being implemented to ensure that the information is documented and explained correctly to all parties involved. The key to following this process is to make sure there are clear, documented expectations and deadlines set. Be sure to give support to the employee and make sure they understand what is needed for them to be successful. Be definitive on what needs to happen so there is no room to interpret what a successful or unsuccessful outcome looks like.

When a Manager wants to make a verbal or written warning for an employee:

1. Email HR (hr@greasemonkey.shop) the first and last name of the employee AND their personal email address. Also, the first and last name of the witness that will be in the review meeting AND their personal email address.
2. Fill out the form with specific details. Before the form is signed a review meeting will need to take place where you will discuss the warning with the employee. A witness will need to be present during the meeting. (example HR Manager, Assistant Manager, Area Manager)
3. All signature or refusals need to be filled out. Once the form is signed by all, it will come back to HR to upload into the employee's documents or an investigation started.

3 Strike Rules

Strike 1 Verbal Warning:

- Document a verbal warning with HR.
- Identify what action needs to be corrected.
- Identify a date it should be corrected by.
- Be specific of what corrective action will take place if actions are not corrected.
- Set expectations of what complete looks like.

Strike 2 Documented Warning:

- If action is not resolved by the date specified, complete a warning form.
- Specify the details from the prior warning and explain that expectations were not met to resolve the issue.
- Set a new date for corrective action to be completed.
- Explain that if the employee does not correct the issue by the specified date and within the expectations set they will be terminated.

Strike 3:

- If an employee chooses not to complete the required correction by the set date then they have voluntarily exited the company.

QUARTERLY PERFORMANCE REVIEW PROCESS

Purpose: To provide regular feedback, set clear expectations, and recognize and reward employee performance. By following this process, you can ensure that performance reviews are meaningful, productive, and contribute to employee growth and development.

Process:

1. **Self-Assessment:**
 - Employees complete a self-assessment form, reflecting on their performance, achievements, challenges, and goals.
 - The self-assessment should cover key performance indicators (KPIs) and specific job responsibilities.
2. **Manager Assessment:**
 - Managers conduct a thorough assessment of the employee's performance, focusing on:
 - Job knowledge and skills
 - Work quality and efficiency
 - Problem-solving and decision-making abilities
 - Teamwork and collaboration
 - Customer service and communication skills
 - Achievement of goals and objectives
3. **One-on-One Meeting:**
 - Schedule a one-on-one meeting between the manager and the employee to discuss the self-assessment and manager's assessment.
 - The meeting should be a two-way conversation, with both parties sharing feedback and discussing areas for improvement.
4. **Goal Setting:**
 - Collaboratively set specific, measurable, achievable, relevant, and time-bound (SMART) goals for the next quarter.
 - Align these goals with the company's overall objectives.
5. **Performance Feedback:**
 - Provide specific, actionable feedback on the employee's strengths and weaknesses.
 - Offer constructive criticism and suggestions for improvement.
 - Recognize and reward outstanding performance.
6. **Documentation:**
 - Document the key points discussed during the meeting, including performance ratings, goals, and action plans.
 - Keep a record of the meeting and any relevant documents.

Tips for Effective Performance Reviews:

- **Be prepared:** Review the employee's performance data and goals prior to the meeting.
- **Create a positive environment:** Foster open communication and a non-judgmental atmosphere.
- **Focus on behavior, not personality:** Provide specific examples of the employee's behavior.
- **Listen actively:** Pay attention to the employee's perspective and concerns.
- **Be specific and actionable:** Provide clear and concise feedback.
- **End on a positive note:** Conclude the meeting with a positive outlook and a commitment to ongoing development.

TERMINATION PROCESS

Effective January 1, 2025, all involuntary terminations of employees must be approved by the Human Resources department prior to any action being taken.

This new procedure is being implemented to ensure consistency, fairness, and compliance with all relevant employment laws.

Termination Process for Employees Who Are Fired:

1. **Documentation:** Thoroughly document all performance issues, if a written warning (see Warning Form Process), disciplinary actions, and any other relevant information related to the employee's termination.
2. **HR Consultation:** Call to schedule a meeting with the HR department a Google invite will be sent to discuss the situation, present the documentation, and obtain approval for the termination. (See below for immediate zero tolerance examples)
3. **Termination Form:** The Manager should request this form by emailing the HR Manager (hr@greasemonkey.shop) HR will contact our partners with ADP to review and provide support.
4. **Termination Meeting:** Once HR approval is obtained, schedule a termination meeting with the employee and a witness (HR Manager, Area Manager, Assistant Manager, etc.)
5. **Exit Procedures:** Return of company property (credit card, vehicle and store keys, uniforms, remove access to company vendors, cell phones, laptops, etc.)
6. **Verify all their hours:** Make sure they are accurate in time tracking software immediately.
7. **PAYROLL DEPT:** issue final check and terminate benefits.

Termination Process for Employees Who Resign with a 2-Week Notice:

1. The Manager should email the HR Manager (hr@greasemonkey.shop) with the employee's name on the day notice was given. Provide the email or written resignation to HR Manager. **(No Witness needed)**
2. The HR Manager will email the termination form to the manager.
3. The Manager needs to fill out the termination form with the correct dates and a reason why the employee is resigning.
4. The Manager should collect all company property, including keys, credit cards, uniforms, cell phone, laptop, and any other items.
5. **PAYROLL DEPT:** issue final check and terminate benefits.

Termination Process for Employees Who Walk Off the Job:

1. They should be immediately suspended from all duties and access to company resources. **(No Witness Needed)**
2. The Manager should email the HR Manager (hr@greasemonkey.shop) with the employees' name the day they walk off the job.
3. The HR Manager will email the termination form to the manager.
4. The Manager needs to fill out the termination form with the correct dates and a reason why.
5. The Manager should collect all company property, including keys, credit cards, uniforms, and any other items.
6. **Verify all their hours:** Make sure they are accurate in time tracing software immediately.
7. **PAYROLL DEPT:** issue final check and terminate benefits.

Failure to comply with this new procedure may result in disciplinary action up to and including termination.

Please contact the HR department (hr@greasemonkey.shop) if you have any questions or require assistance with this new process.

ZERO TOLERANCE EXAMPLES

Use your best judgement, if you feel unsafe call the police.

If there is danger or harassment send the employee home on suspension for further investigation.

Terminate Immediately

- **Bringing weapons to work:** Possession of any firearm, weapon, or other dangerous object on company property without explicit authorization.
- **Witnessed physically violence:** Any act of physical violence or assault in the workplace, this includes any physical altercations, regardless of the severity.
- **Witnessed sexual harassment:** Any form of unwelcome sexual advances, physical conduct of a sexual nature.
- **Theft on video:** Any area under surveillance. Download footage immediately.
- **Safety accident due to recklessness:** Reckless driving company or customer vehicles. Accidents or driving behaviors demonstrate a significant disregard for safety.
- **Drug or Alcohol Use:** Possession, use, or being under the influence of illegal drugs or alcohol on company property. This may also include violations of company policies regarding drug testing.

INJURY PROCESS

Work-related incident:

- **Injury occurs:** When possible or if needed, transport the injured employee to a designated physician or urgent care center.
- **Fill out FROI form:** Email HR (hr@greasemonkey.shop) to request the FROI form.
 - Once information is completed email back to HR (hr@greasemonkey.shop)
- **Documentation:** Have the injured employee bring a work release from the physician prior to allowing employee to return to job duties. The original documentation needs to be submitted within 24hrs of their appointment to their immediate supervisor which in turn will immediately provide to HR (hr@greasemonkey.shop)
 - If restrictions are noted on work release accommodate accordingly. Provide light duty jobs.
 - Explain available modified duty/transitional work that may meet his/her physical limitations.
- **Continued Treatment:** If the injured employee is not released immediately to come back to work documentation needs to be provided after every doctor's visit. The original documentation needs to be submitted within 24hrs of their appointment to their immediate supervisor which in turn will immediately provide to HR (hr@greasemonkey.shop)
- **Communication:** Contact your employee following any injury and continue to do so on a regular basis. Explain to the employee that you value him/her, stressing your commitment to returning him/her to work as soon as possible.
- **Evaluation:** Regularly evaluate the employee's physical capabilities.

Employee misses work due to an injury: (non-work related)

- **Documentation:** Have the injured employee bring a work release from the physician prior to allowing employee to return to job duties. The original documentation needs to be submitted within 24hrs of their appointment to their immediate supervisor which in turn will immediately provide to HR (hr@greasemonkey.shop)
 - If restrictions are noted on work release accommodate accordingly. Provide light duty jobs.
 - Explain available modified duty/transitional work that may meet his/her physical limitations.
- **Continued Treatment:** If the injured employee is not released immediately to come back to work documentation needs to be provided after every doctor's visit. The original documentation needs to be submitted within 24hrs of their appointment to their immediate supervisor which in turn will immediately provide to HR (hr@greasemonkey.shop)
- **Communication:** Contact your employee following any injury and continue to do so on a regular basis. Explain to the employee that you value him/her, stressing your commitment to returning him/her to work as soon as possible.
- **Evaluation:** Regularly evaluate the employee's physical capabilities.

Training

Positions

Manager/Assistant Manager

Assigned a mentor from the Operations Team or Leadership Team.

Pit Crew Certified

Shadow Training

- Start with WHY
- Demonstrate and Explain
- Encourage Questions
- Be Trained by the Trainee
- Provide Feedback

Scheduling

Ordering

Running the Floor

Managing Shop Flow

Jolt

Paperwork Training w/ Misty

Abacus

Daily Paperwork

Fleet processing

HR Training w/ Janae

Processes & Best Practice

Customer Service Manager

Assigned a mentor from the Sales Team

Pit Crew Certified

Attend Advanced Manager Training - Denver

Shadow Training

- Start with WHY
- Demonstrate and Explain
- Encourage Questions
- Be Trained by the Trainee
- Provide Feedback
- Attend sales trainings

Courtesy, Hood, Lube Technician Positions

Pit Crew Certified

Shadow Training

- Start with WHY
- Demonstrate and Explain
- Encourage Questions
- Be Trained by the Trainee
- Provide Feedback

Technology

Ninety.io

- How to add users

- Add Licenses

- Who should have paid access

- How to put users in a team

Gmail

- Adding signature

- How to write a professional email.

- Adding email to phone

Sage

- Adding Users

ISI

- Auto Repair Manager (ARM)

- Abacus

- Allied

- Phones

- Voicemail

ACCOUNTING PROCESSES

The purpose of this process is to facilitate the protection of Grease Monkey assets and ensure compliance with generally accepted accounting principles.

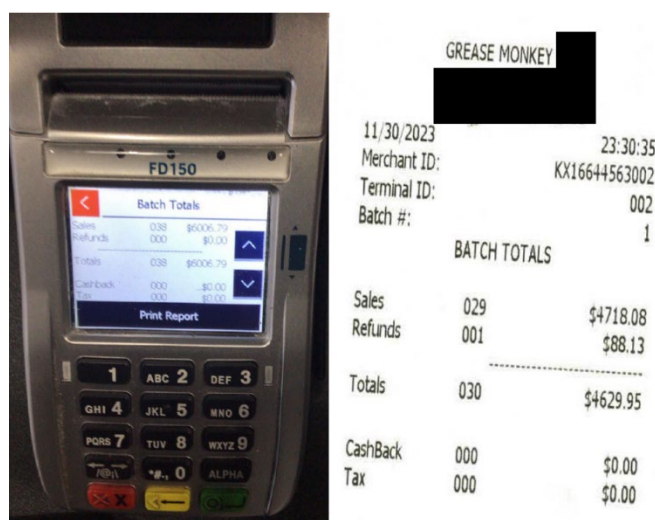
DAILY PAPERWORK PROCESS

All daily paperwork is to be uploaded to Google Drive > Shared Drives > Daily Paperwork > Select your store # > Select Month > Select day

- Bank Deposit
 - Take to the bank within 48 hours (**48 business hours: Monday due Wednesday, Tuesday due Thursday, Wednesday due Friday, Thursday, Friday & Saturday due Monday**)
 - Once completed, scan and upload to Google Drive (**rename file: Deposit**)
- CC Batch Total - see attachments for what I need exactly, either way works (**EOD**)
 - This is printed from merchant machine nightly (**rename file: CC batch**)
- Pay-ins (in one scan daily) (**EOD**) (**rename file: Pay-ins**)
 - Fleet payments (check stub, this should include the check #, invoice #'s paying)
 - Fleet payments (credit card receipt, attach copy of invoice(s))
 - Other payments (Receipt showing who, what, how received)
- Pay-outs (in one scan daily) (**EOD**) (**rename file: Pay-outs**)
 - Receipt (showing who, what, why)
- Month end Inventory (**Last day of month**)
 - This is printed from Sage (**rename file: Inventory**)
- Cruise America & Discount Tires invoices/backup (**EOD**)

GOOGLE DRIVE (scanned, **NO PHOTOS**) Should be uploaded to that day (e.g. Nov 6 **ALL** paperwork should be uploaded to Nov 6 folder (deposit slip included, even though you go the bank after the deposit was for Nov 6))

THIS IS ALL I NEED!



CC Batch Total Examples

FLEET SET-UP PROCESS

- Application & W9 filled out by new Fleet customer.
 - Make sure application is signed!
- Email application to: accounting@greasemonkey.shop from store email (save in daily folder, delete once sent)
- Subject Line: Fleet application
- Accounting Manager ONLY will set up the fleet in the appropriate store(s)

NATIONAL FLEET INVOICING PROCESS (Holman)

It is the responsibility of the Store Manager to ensure these invoices are entered. Failure to submit them may result in non-payment to the company, which will be deducted from the Store Manager's bonus.

- After entering the vehicle into POS
 - Don't forget to remove the fleet and re-add them to the vehicle (see updating fleet process)
- Go to the Holman website
- Start a new repair order
- Enter last (8) digits of the VIN
- Website will auto populate vehicle information
- Enter mileage of vehicle
- Enter your name
- Enter reference/PO #
- Enter complaint, cause, and corrections
- Select complaint type (only maintenance items)
- Click on Go to Next Step
- Add line items for maintenance (LOF)
- Select PM menu price items
- Quantity enter (1)
- Cost (oil change price before taxes)
- Click on Add Line Item to PO
 - Add all additional items with this step (examples: gear boxes, transmission, etc.)
- While adding items into Holman make sure you add them in POS system also
- Confirm subtotals match BEFORE you submit for approval
- Estimated time of repairs: enter today's date & AM or PM
- Click on Request Approval
- Once receive PO enter onto invoice in POS system
- Proceed to start work on vehicle
 - Oil changes, rotates, wiper blades can be done while awaiting approval
- Once all work is completed go back into website, locate PO and click on Close
- Enter tax amount
 - Verify amounts match on website and in POS system

NATIONAL FLEET INVOICING PROCESS (Auto Integrate)

It is the responsibility of the Store Manager to ensure these invoices are entered. Failure to submit them may result in non-payment to the company, which will be deducted from the Store Manager's bonus.

- After entering the vehicle into POS
 - Don't forget to remove the fleet and re-add them to the vehicle (see updating fleet process)
- Go to the Auto Integrate website
- Start a new repair order
- Select Fleet Management Company
- Enter last (8) digits of the VIN
- Enter Odometer reading
- Enter our POS invoice #
- Hit Next
- Select time vehicle arrived at shop
- Enter your contact information
- Select whether driver is waiting or not
- Create Repair Order
- Enter lines items from POS invoice into Auto Integrate
- Double check subtotals between POS and Auto Integrate to make sure they match
- Hit Submit
- Enter tax amount
- Enter completion time
- Verify that the amount matches between POS and Auto Integrate
- Hit Submit for Approval
- Remove items from Auto Integrate & POS that are not approved
- Verify that the amount matches between POS and Auto Integrate
- Re-submit for approval
- Once services are approved copy and paste Authorization # from Auto Integrate into POS system
- Verify all information matches between Auto Integrate and POS system

RECEIVED ON ACCOUNT PROCESS (ROA)

- Receive payment from fleet customer
 - Check in mail
 - Bringing check in to the store
 - Customer brings in credit card
- Post in Sage as a Pay-In
- Follow Daily Paperwork process for Pay-In

CREDIT CARD RECEIPT TRACKING PROCESS

- Upload receipt into credit card tracking software
- Code receipt
- Must be completed daily or a minimum once a week

REFUND PROCESS

- Refund on credit card
- Enter into Sage as a Pay-out
- Upload Pay-out information into Google Drive
 - (Pay-out sheet from Sage, Invoice (who, what, why))

RESEARCH PROCESS

- 1) Functions
 - a) Accounting
 - i) Account Inquiry
 - ii) Search for Fleet name
 - Enter Date of **OLDEST** invoice on "Start date"
 - ◆ Today's Date as the "End Date"
 - * Hit "View Report"
- 2) If payment has already been made, make a note and call Fleet AP to see how to proceed
 - a) If had to leave message put the check back in folder, wait for return call
- 3) Payment is over amount of invoice(s) or total owing on account, leave remainder as a CREDIT on account
 - a) If the invoice(s) listed are exceeded in check amount, DO APPLY PAYMENT TO OTHER INVOICES
- 4) If need phone number for Fleet
 - a) Functions
 - i) Accounting
 - Fleet maintenance
 - ◆ Search for Fleet name
 - ◆ OK

ROCK CHIP PROCESS (Store Side)

It is the responsibility of the Store Manager to ensure these invoices are entered correctly. Failure to accuracy may result in non-payment to the company, which will be deducted from the Store Manager's bonus.

AFTER calling the insurance company and getting the Authorization number or referral number open Omega, click on "New Job"

Sale Information

- Change CSR to Grease Monkey
- Change Dispatcher to Grease Monkey
- Change Biller to Grease Monkey
- Change Service location to **YOUR** Store number
- Select Campaign

Billing & Pricing

- Click on Account
- Enter the insurance company name
 - The Pricing Profile should prefill
- Leave "Agent/Referred By" blank

Customer (**MUST HAVE & BE CORRECT**)

- Enter in First name & Last name as it shows on insurance card
 - If person brining in is not person listed on insurance card, add their name to the notes section
- Hit tab and it should prefill the Policyholder
- Enter complete address as it shows on insurance card
- Enter Postal Code (zip code), Hit Tab
 - City and State should prefill
- Enter phone number
- Enter email address

PLEASE make sure everything is spelled/entered correctly!

Insurance Information (**MUST HAVE & BE CORRECT**)

- Authorization number must be 6-digits (SGC) or 9-digits (Lynx) long
- Enter in the Date of Loss (**CAN NOT** be the same day as the repair)
- Enter the Policy number as it shows on insurance card
- Enter Insurance Company phone number as it shows on insurance card in Notes section
- Deductibles for rock chips are usually \$0.00, BUT MAKE SURE TO VERIFY

PLEASE make sure everything is entered correctly!

Appointment Information

- leave blank

Vehicle

- Enter License Plate number
- Enter Full VIN, hit Tab
- Enter Year
- Enter Make
- Enter Model
- Enter Description

PLEASE make sure everything is spelled/entered correctly!

Invoice Items

- Click on Nags Part
- Scroll all the way down to the bottom of the list and click on WSREPAIR-WSREPAIR
- Then click on blue box ADD ITEM
- Customer **MUST** Sign in the blue Signature box

Tags

- Select WS Repair and any other tag that applies

Notes

- Enter your name

SAVE JOB

ROCK CHIP PROCESS (Accounting Side)

Check glass@greasemonkey.shop for any referrals that have come in from Safelite, LYNX, or any other private insurance company.

Login to Omega

Locate job from Safelite referral

- Click on Jobs
- Enter Customer name or referral # in search field
- Verify information from referral form matches information on job
 - If information does not match, update information in Omega to match referral form
- Once information matches
- Scroll to bottom and select "Save and Invoice"
- Open job again
- Scroll to note section and add note "submitted to insurance and date you invoiced as well as your name or initials"
- Click "Save Job"
- Enter job onto spreadsheet

Locate job from LYNX referral

- Click on Jobs
- Enter Customer name or dispatch # in search field
- Verify information from referral form matches information on job
 - If information does not match, update information in Omega to match referral form
- Once information matches
- Scroll to bottom and select "Save and Invoice"
- Save invoice to computer (file name cannot have spaces)
- Save referral to computer (file name cannot have spaces)
- Submit both to LYNX website

See Rock Chip Billing How To for more information and samples of referrals

Oil Change

The Greet/Welcome

Objective: Ensure a positive and informed first impression for every customer by implementing a standardized Welcome Procedure and utilizing the Top-Down Welcome process for effective sales.

Key Steps

Welcome Procedure

Greet every arriving customer promptly, demonstrating hustle and professionalism.
Identify if the customer is new or a repeat customer using available tools.
Record or verify customer name, vehicle information, and ask for their email address.
Utilize the Top-Down Welcome process to guide the customer through service options.

Top-Down Welcome Process

Present services starting with the superior Full-Service Oil Change and work down the list.
Highlight benefits of synthetic or semi-synthetic oils.
Provide options for tires, tire pressure, tire rotation, free brake inspection, wiper blade condition.
Mention payment options and explain pay later choices.

Customer Escort

Open the vehicle door, allowing the customer to exit with privacy.
Escort the customer to the lobby, building rapport by finding common ground and discussing non-oil change topics.
Open the lobby door and point out refreshments and seating.

Guiding Principles

Safety First: Emphasize the importance of safety, especially during adverse weather conditions.

Customer Education

Focus on educating the customer about service options, emphasizing benefits and choices without pressure.

Repeat Customers

For repeat customers, avoid assuming they want the same service as before. Instead, use the opportunity to inquire about mileage and recommend suitable options.

High-Mileage Opportunities

Recognize high-mileage vehicles as opportunities for recommending high-mileage oil with added benefits.

Adapt to Customer Interest

Tailor the presentation based on customer interest. Begin with full synthetics and adjust based on customer preferences and vehicle needs.

Value Building

Emphasize the value of each service and oil type during discussions, utilizing scripts and promoting additional programs like the Free Top Off.

Respect Customer Choices

If a customer shows disinterest, be gracious, and move on. Avoid pressuring customers into specific products.

Training and Resources

Encourage employees to undergo FullSpeed University training courses for a comprehensive understanding of the Top-Down Welcome process.

By consistently implementing this core process, Grease Monkey aims to enhance customer satisfaction, increase knowledge about available services, and promote informed purchasing decisions.

The Wait/Show

Objective: Ensure a seamless and educational customer experience during the Wait/Show phase, focusing on owner's manual recommendations and the Grease Monkey Service Review Process.

Key Steps

Preparation

Gather necessary tools from the POS system, including the customer's service history, owner's manual service recommendations printout, and any relevant notes.

Collect the vehicle's air filter and cabin air filter (if equipped) and new filters for comparison.

Customer Interaction

Provide the customer with their owner's manual printout.

Review notes from previous visits and services due today, prioritizing them.

Initiate the Service Review Process, starting with the visual comparison of old and new filters.

Service Review Process

Introduce specific vehicle parts using visual aids, such as diagrams or schematics.
Describe the role of each part with concise and easy-to-understand explanations.
Use professional terms to convey the condition of the parts.
Explain the recommended fix (repair, adjust, replace, clean) using professional terms.
Articulate the benefits of the recommended service in customer-centric terms.
Quote the price and provide the time frame for completing the service.
Ask for the customer's decision, allowing them to inquire or make an informed choice.

Customer Etiquette

Express gratitude to the customer regardless of their decision.
Inform the customer about "pay later" options, providing details and tools for application.

Guiding Principles

Educational Approach: Emphasize the importance of informing customers to facilitate good decision-making.

Customer-Centric Communication

Use language that informs and educates rather than "selling." Incorporate the customer's name, smile, and maintain eye contact.

Focus on Value

Emphasize the benefits customers will experience, such as peace of mind, a smoother ride, enhanced performance, and improved fuel economy.

Seed Planting

Even if the customer doesn't commit immediately, plant the seed for future services by educating them about their vehicle's needs.

Mindset and System Adherence

Encourage the right mindset among employees, highlighting the importance of customer education. Emphasize adherence to the established System of Operation for its proven effectiveness.

Training and Resources

Direct employees to relevant FullSpeed University courses for comprehensive training on the Service Review Process and tools.

By incorporating this core process, Grease Monkey aims to enhance the educational aspect of customer interactions, ensuring they are informed, engaged, and empowered to make informed decisions about their vehicle's maintenance.

Hood Tech

- Light check, Check transmission
- Check oil, Clear pit to drain
- Put vehicle in system, verify correct year, make and model and oil type

- Check fluid levels, serpentine belts, battery corrosion, wiper blades, headlight resto, rock chips
- Pull both air and cabin filters
- Test battery
- Fill out rock
- Hand off to CSA
- Fill out checklist
- Fill out notes
- Verify and sign oil filter (Sign whenever it comes up)
- Send oil
- Start vehicle
- Lower qualities
- Upper qualities
- Help with extra services/Courtesies
- Roll vehicle

Pit Tech

- Check Front Diff
- Pull Oil filter after cleared to drain
- Pull drain Plug
- Send up new filter
- Check T-Case
- Check Rear Diff
- Put Plug back in
- Clear Hood to Send
- Put Filter On
- Clear Hood To start
- Start Vehicle
- Check if sealed
- Start Lower Qualities
 - Rear Diff
 - T-case
 - Front Diff
 - Plug
 - Filter
 - Gasket on the Old
 - Wash off residual oil
 - Apply Tamper Seal
 - Clear Hood to Roll

Courtesy Tech

- Vacuum
- Windows
- Tires
- Communicate with Hood if you need to greet
- Time Limit- 8 min left on timer

Customer Service Advisor

Objective: Ensure exceptional customer service and maintain a clean and welcoming environment at the Grease Monkey center

Provide Exceptional Customer Service

Communicate wait times to customers and address their inquiries.
Educate customers on fluid and filter conditions, available services, promotions, and product guarantees.
Review Service Order Ticket with customers at check-out, explaining services and the purpose of static stickers and reminder cards.
Process payments using the computer system and credit card machine.
Encourage customer feedback and express gratitude to departing customers.

Telephone and Front Office Management

Answer phones, direct calls, and respond to customer inquiries.
Keep the front office area clean and organized.
Stock Service Order Tickets and input vendor shipments into the computer.
Perform basic computer cleaning and equipment maintenance.

Maintain Customer Waiting Area

Make and maintain fresh coffee.
Clean and organize the coffee service area.
Ensure reading materials are current and appropriate for all customers.
Clean waiting area restrooms, stock supplies, and tidy up chairs and tables.

General Center Maintenance

Perform courtesy work as needed.
Assist in resolving customer complaints.
File and organize paperwork as directed by the manager.
Conduct general center maintenance and cleaning duties.

Bill Out/Departure

Objective: Ensure a positive and informative departure for every customer, leaving a lasting impression about Grease Monkey's expertise, professionalism, and gratitude for their business.

Key Steps

Checkout Procedure

Call the customer to the checkout counter using their name.
Maintain a conversational tone, avoiding robotic or rushed communication.
Smile, make eye contact, and match the customer's pace.
Review services performed in detail, including fluid checks, top-offs, and courtesy services.
Review with the customer what preference they have for the static sticker interval.
Inform the customer of upcoming service needs and document them in the computer system.
Review any work order notes, emphasizing safety and quality double-checks.
Address customer questions or concerns.
Accept and process any coupons with a smile, ensuring accurate tracking of marketing efforts.
Provide the total price, collect payment, and remind the customer of payment options for future visits.

Print the Service Order Ticket (SOT) and refer to the warranty program, 100% customer satisfaction, and the free Top Off program. Have the customer sign the SOT to acknowledge warranty program details, work order notes, or declined services. Request the customer's email address if not already obtained. Check for customer satisfaction, encourage feedback, and address any remaining concerns. Escort the customer outside and present their fully serviced vehicle. Ask if they'd like to do the "vehicle Walk-Around."

Vehicle Walk-Around

Offer all customers the option to do a "vehicle Walk-Around" after the checkout inside the lobby. Highlight courtesy services and pop the hood to showcase fluid reservoirs, dipsticks, filters, serpentine belt, and a clean battery.

Positive Last Impression

Add finishing touches by placing a mint, flower, or small item as a thank-you gesture on the dashboard or in the passenger seat. Reinforce expertise, professionalism, and gratitude for their business. Emphasize the last opportunity to build value, stand apart from competitors, and impress. Aim to convert first-time customers into repeat customers and turn repeat customers into loyal clients.

Guiding Principles

Personalized Interaction:
Use the customer's name and maintain a friendly, conversational approach.

Thorough Review

Provide a detailed review of services, upcoming needs, and safety checks.

Customer-Centric Focus

Emphasize customer benefits, satisfaction, and feedback.

Special Touches

Implement small gestures like placing a mint or flower to enhance the customer's experience.

Training and Resources

Train employees to execute the Departure process effectively, emphasizing the importance of customer satisfaction and loyalty.

By consistently implementing this core process, Grease Monkey aims to leave a positive last impression on customers, reinforcing the brand's professionalism, expertise, and commitment to customer satisfaction.

Operations

Staffing

With a focus on keeping labor costs under 20% and man hours per car under 2, can be divided into several key phases based on the seasonal demand:

Phase 1: Mid-August to Mid-March (Slow Season)

Assessment and Planning.

Evaluate the current workforce and identify any gaps.

Maintain a lean staffing level to control labor costs during the slower season.

Continuous Recruitment

Keep the recruitment process open, even during the slow season.

Accept applications and conduct initial screenings to identify highly qualified candidates.

Phase 2: End of March to Mid-May (Preparation for Busy Season)

Heavy Hiring

Ramp up hiring efforts to prepare for the upcoming busy season.

Focus on hiring part-time candidates, especially students who can transition to full-time roles during the peak season.

Training and Onboarding

Begin training and onboarding processes immediately for new hires.

Ensure that employees are fully trained and ready to handle increased demand by the start of the busy season.

Phase 3: June and July (Peak Season Preparation and Ongoing Hiring)

Ongoing Recruitment

Continue accepting applications and conducting interviews to identify top talent.

Hire additional staff as needed to meet peak season demand.

Performance Monitoring

Implement performance monitoring and feedback systems to ensure efficiency and quality standards are met.

Identify opportunities for process improvements.

General Strategies and Considerations

By following this staffing strategy, Grease Monkey can effectively balance its workforce to meet seasonal demand while controlling labor costs and ensuring quality service delivery. Continuous improvement and adaptation will be essential to optimize the strategy over time.

Cost Control

Regularly monitor labor costs and adjust hiring as needed to stay within the 20% target.
Consider implementing efficiency measures to reduce man hours per car.

Employee Retention

Offer competitive compensation and benefits packages to retain employees during the off-season.
Recognize and reward high-performing staff to boost morale and reduce turnover.

Cross-Training

Cross-train employees to perform various tasks to maximize flexibility and efficiency during peak season.

Communication

Maintain clear and open communication channels with employees to keep them informed about seasonal changes in scheduling and expectations.
Compliance and Legal Considerations
Ensure that all hiring practices comply with labor laws, including those related to part-time employment and student workers.

Feedback and Continuous Improvement

Seek feedback from employees and customers to identify areas for improvement in service quality and efficiency.

Technology and Automation

Explore the use of technology and automation tools to streamline administrative tasks and improve scheduling.

Inventory Management

Effective inventory and cost-of-goods management is essential for the success of a Grease Monkey center. Below are key strategies and best practices to ensure efficiency: By implementing these practices consistently, a Grease Monkey center can optimize inventory and cost management. Regular evaluations and adjustments will help adapt to evolving business needs.

Cost of Goods Calculation

Use the following formula to calculate Cost of Goods (COG) percentage:

$$\text{COG \%} = (\text{Beginning Inventory} + \text{Purchases} - \text{Ending Inventory}) / \text{Total Net Sales} \times 100$$

Set a realistic goal for COG percentage each month (e.g., 24-28%) and aim for consistency.

Inventory Management Standards

Counting Inventory

Perform monthly inventory counts to stay aware of what's in your center, bays, and pits.
Schedule a distraction-free day for counting, ideally at the end of business to prevent issues with sales after counting starts.

Ordering Inventory

Place orders twice monthly on set dates, considering community events, seasons, and holidays.
Establish a cutoff date each month for inventory closure.
Twice-monthly ordering aids cash flow, simplifies counting, and avoids large month-end shipments.

Receiving Inventory

Verify shipments against packing slips upon arrival.
Check pricing and quantity before signing.
Develop a consistent method for handling paperwork and inputting data into the POS system.

Troubleshooting Inventory Issues

Print and Review Reports

Print inventory value reports and highlight items over a certain value.

Double-check counts and POS system inputs for accuracy.

Review Month-end Cutoff

Ensure late-month deliveries are correctly input into the system.

Check Pricing

Verify that pricing in the POS system is accurate.

Dealing with Obsolete Inventory

Regular Inventory Movement Reports

Run regular Inventory Movement Reports to identify slow-moving items.

Return obsolete items to vendors for credit or decide on retention.

Vendor Relationships

Maintain good relationships with vendors, increasing the likelihood of them taking back obsolete inventory.

Inventory Theft Monitoring

Identify High-Risk Items

Identify high-theft items such as Mobil 1, bottled goods, wiper blades, and air filters.

Conduct Spot Checks

Conduct spot checks and let employees know that theft is monitored.

Employee Awareness

Increase awareness among employees about the importance of preventing theft.

Marketing

New Customers

Direct Customer Marketing

- Advertisements
- Coupons
- Counter Cards
- Direct Mail Artwork
- Flyers
- Gift Certificates
- Social Media Ads

Visual content is more than 40 times more likely to be shared on social media than other types of content.

Positive Online Reviews

Online reputation can be your strongest asset or your biggest liability. 90% of consumers read online reviews before visiting a business. 84% of people trust online reviews as much as personal recommendation. 74% of consumers say that positive reviews make them trust local business more

Retaining Existing Customers

- Provide unmatched excellence in service
- Build relationships: 68% of customers leave due to indifference (No connection) with employees
- Respond to all customer feedback positive and negative
- 14% of customers leave due to poor handling of a complaint
- Contact customers with service issues
- Send scheduled reminders/coupons mailers 90/120/180 days.
- Capture customer data (email, phone number, address)
- Utilize Cinch, Throttle, and other CRM software to create customer journeys.
- Have exceptionally clean and maintained comfortable facilities.