

Auto Repair Shop Customer Retention & Loyalty Program Checklist Template 2026

Loyalty Program Infrastructure & Setup

Ensuring the fundamental mechanics of the loyalty program are integrated into your shop's existing management software and physical workspace.

Loyalty Software Integration Status

- ☐ Not Started
- ☐ In Progress
- ☐ Fully Integrated

Required Hardware/Hardware Setup

- ☐ Tablet/POS Terminal
- ☐ Barcode/QR Scanner
- ☐ Customer Facing Display
- ☐ Receipt Printer

Software Version/Module Name

Infrastructure Completion Date

Enter date...

Software Configuration Documentation



Upload File

Manager Setup Verification

Customer Data Collection & Segmentation

Steps for capturing accurate customer contact information and categorizing clients by vehicle type, service history, and visit frequency.

Customer Full Name

Write something...

Primary Phone Number

Write something...

Last Service Date

Enter date...

Customer Tier

- ☐ New Customer
- ☐ Regular (3-5 visits/year)
- ☐ VIP (Loyalty Member)
- ☐ Inactive (6+ months)

Vehicle Type Segment

- ☐ Passenger Car
- ☐ SUV / Truck
- ☐ Luxury / Exotic
- ☐ Fleet / Commercial

Estimated Annual Spend

Enter a number...

Reward Structure & Incentive Design

Defining the value proposition, including point systems, discount tiers, and special offers for repeat business and referrals.

Loyalty Program Name

Write something...

Incentive Types Offered

- ☐ Percentage Discount on Labor
- ☐ Percentage Discount on Parts
- ☐ Flat Dollar Off Service
- ☐ Free Vehicle Wash/Detail
- ☐ Points-Based System
- ☐ Complimentary Seasonal Inspection

Minimum Spend Requirement

Enter a number...

Reward Redemption Terms & Conditions

Write something...

Point Accrual Rate

- ☐ \$1 = 1 Point
- ☐ \$1 = 5 Points
- ☐ \$1 = 10 Points

Program Marketing Assets

 Upload File

Staff Training & Communication Protocol

Standardized procedures for service advisors and front-desk staff to promote the program and explain benefits to customers during check-in/out.

Training Modules Completed

- ☐ Loyalty Program Value Proposition
- ☐ Software/POS Redemption Process
- ☐ Handling Loyalty-Related Complaints
- ☐ Upselling via Service Reminders

Staff Member Name

Write something...

Training Completion Date

Enter date...

Employee Role

- ☐ Service Advisor
- ☐ Front Desk/Receptionist
- ☐ Shop Manager
- ☐ Technician

Training Assessment Notes

Write something...

Trainer/Manager Acknowledgment

Automated Communication Workflows

Setting up automated SMS, email, and direct mail triggers for service reminders, birthday rewards, and 'we miss you' campaigns.

Active Automated Channels

- ☐ SMS/Text Messaging
- ☐ Email Marketing
- ☐ Direct Mail
- ☐ In-App Notifications

Service Reminder Frequency

- ☐ Every 3 Months
- ☐ Every 6 Months
- ☐ Annually
- ☐ Custom Interval

Last Workflow Audit Date

Standardized Message Templates

Write something...

Target Monthly Automation Open Rate (%)

Enter a number...

Manager Approval for New Campaign

Post-Service Engagement & Feedback Loop

Processes for soliciting reviews, conducting satisfaction surveys, and resolving negative feedback to prevent customer churn.

Customer Satisfaction Score (CSAT)

- ☐ Very Satisfied
- ☐ Satisfied
- ☐ Neutral
- ☐ Dissatisfied
- ☐ Very Dissatisfied

Customer Feedback/Comments

Write something...

Areas for Improvement

- ☐ Repair Quality
- ☐ Communication
- ☐ Pricing/Transparency
- ☐ Wait Time
- ☐ Vehicle Cleanliness

Follow-up Call/Email Date

Enter date...

Service Advisor Verification

Program Performance Tracking & KPIs

Monitoring key metrics such as repeat repair rate, customer lifetime value (CLV), and redemption rates of loyalty rewards.

Repeat Customer Rate (%)

Enter a number...

Customer Lifetime Value (CLV)

Enter a number...

Loyalty Reward Redemption Rate

Enter a number...

Reporting Period

- ☐ Weekly
- ☐ Monthly
- ☐ Quarterly
- ☐ Annually

Performance Analysis & Trends

Write something...

Monthly Performance Report Attachment

 Upload File

Manager Verification

Annual Program Review & Optimization

Periodic auditing of the program's profitability, cost-per-acquisition, and updating incentives to stay competitive in the 2026 market.

Review Completion Date

Enter date...

Loyalty Program ROI Percentage

Enter a number...

Successful Loyalty Drivers This Year

- ☐ Email Campaigns
- ☐ SMS Reminders
- ☐ Referral Incentives
- ☐ Seasonal Promotions
- ☐ Direct Mailers

Program Performance Status

- ☐ Exceeding Targets
- ☐ Meeting Targets
- ☐ Below Targets
- ☐ Requires Immediate Overhaul

Key Improvements for Next Year's Strategy

Write something...

Manager Approval Signature

< Previous

> Next

✔ Finish

✎ Generate Sample Report