



# Automotive Fixed Operations Performance Review Checklist

## Service Department Performance

Evaluates key metrics related to service revenue, customer satisfaction, and efficiency.

### Total Service Revenue

### Average Repair Order (ARO)

### Customer Satisfaction (CSAT) Score

### Overall Department Health

- ☐ Excellent
- ☐ Good
- ☐ Fair
- ☐ Needs Improvement

### Shop Labor Utilization %

Enter a number...

### Last Safety Inspection Date

Enter date...

### Key Performance Observations

Write something...

## Parts Department Performance

Assesses parts sales, inventory management, and supplier relationships.

### Total Parts Sales Revenue

Enter a number...

### Gross Profit Margin (%)

Enter a number...

### Inventory Turnover Rate

Enter a number...

Percentage of Parts Returned

Enter a number...

Vendor Performance (Overall Rating)

- ☐ Excellent
- ☐ Good
- ☐ Fair
- ☐ Poor

Key Parts Categories Performing Well

- ☐ Brake Parts
- ☐ Filters
- ☐ Engine Components
- ☐ Accessories
- ☐ Detailing Supplies

Last Inventory Audit Date

Enter date...

Notes on Inventory Challenges

Write something...

Collision Center Performance

Analyzes collision repair processes, customer satisfaction, and profitability.

### Number of Claims Processed

Enter a number...

### Average Repair Cycle Time (Days)

Enter a number...

### Customer Satisfaction Score (1-10)

Enter a number...

### Primary Insurance Carrier Used

- ☐ State Farm
- ☐ GEICO
- ☐ Progressive
- ☐ Allstate
- ☐ Other

### Repair Quality Issues Reported?

- ☐ Color Mismatch
- ☐ Panel Alignment
- ☐ Paint Defects
- ☐ Parts Quality
- ☐ None

### Date of Last Safety Audit

Enter date...

**Comments/Notes on Performance**

Write something...

**Labor Efficiency & Productivity**

Reviews technician productivity, repair times, and labor utilization.

**Average Labor Hours Per Repair Order**

Enter a number...

**Technician Labor Utilization (%)**

Enter a number...

**Average Repair Order Revenue**

Enter a number...

**Number of Repair Orders Completed Per Day (per technician)**

Enter a number...

### Primary Bottleneck in Repair Process

- ☐ Parts Availability
- ☐ Diagnostic Time
- ☐ Repair Time
- ☐ Customer Approval
- ☐ Other

### Detailed Explanation of Factors Affecting Productivity

Write something...

### Date of Last Productivity Training Session

Enter date...

## Customer Satisfaction & Retention

Measures customer feedback, online reviews, and repeat business rates.

### Overall Satisfaction Score (1-10)

Enter a number...

### Was the service advisor helpful?

- ☐ Yes
- ☐ No
- ☐ Not Applicable

**Was the waiting area clean and comfortable?**

- ☐ Yes
- ☐ No
- ☐ N/A

**What did we do well?**

Write something...

**How could we improve?**

Write something...

**Likelihood to Recommend (0-100)**

Enter a number...

**Were your questions answered thoroughly?**

- ☐ Yes
- ☐ No
- ☐ Partially

**Date of Service**

Enter date...

# Financial Performance & Profitability

Examines revenue, expenses, profit margins, and financial targets.

## Total Fixed Operations Revenue

## Cost of Goods Sold (COGS)

## Gross Profit

## Operating Expenses

## Net Profit Before Taxes

## Net Profit After Taxes

## Profit Margin (%)



### Reporting Period End Date

Enter date...

## Operational Efficiency & Process Improvement

Identifies areas for process optimization, waste reduction, and overall efficiency gains.

### Average Repair Order (ARO) Cycle Time (Days)

Enter a number...

### Parts Order Fill Rate (%)

Enter a number...

### Workflow Automation Software Utilized?

☐ Yes

☐ No

### Describe any recent process improvements implemented.

Write something...

### Which areas have seen the biggest bottlenecks?

- ☐ Appointment Scheduling
- ☐ Parts Ordering
- ☐ Diagnostic Procedures
- ☐ Vehicle Delivery
- ☐ Billing & Payment

### Date of last process mapping exercise

Enter date...

### Specific actions to be taken to improve identified bottlenecks.

Write something...

## Employee Performance & Training

Evaluates individual employee contributions, skill development, and training needs.

### Sales Quota Attainment (%)

Enter a number...

### Customer Satisfaction Score (CSAT)

Enter a number...

### Average Repair Order (ARO)

Enter a number...

### Performance Rating (Overall)

- ☐ Exceeds Expectations
- ☐ Meets Expectations
- ☐ Needs Improvement

### Strengths Observed

Write something...

### Areas for Development

Write something...

### Training Needs Identified

- ☐ Sales Techniques
- ☐ Product Knowledge
- ☐ Customer Service
- ☐ Technical Skills
- ☐ Compliance Training

### Last Training Completion Date

Enter date...

## Equipment Maintenance & Calibration

Ensures that all diagnostic and repair equipment is properly maintained and calibrated.

### Last Calibration Date

Enter date...

### Calibration Readings (e.g., pressure, temperature)

Enter a number...

### Calibration Procedure Followed

Write something...

### Calibration Certificate/Report

 Upload File

### Equipment Status

- ☐ Operational
- ☐ Needs Repair
- ☐ Out of Service

### Next Scheduled Calibration

Enter date...

## Compliance & Safety

Verifies adherence to all relevant safety regulations and compliance standards.

### Last Safety Audit Date

Enter date...

### Number of Safety Incidents (Last 12 Months)

Enter a number...

### SDS (Safety Data Sheet) Accessibility

- ☐ Readily Available
- ☐ Accessible with Delay
- ☐ Not Readily Accessible

### Required Safety Training Completed (Technicians)

- ☐ Hazard Communication
- ☐ Lockout/Tagout
- ☐ Personal Protective Equipment (PPE)
- ☐ Ergonomics
- ☐ Confined Space Entry

## Copy of Most Recent Safety Inspection Report

 Upload File

## Fire Extinguisher Inspection Status

- ☐ Up to Date
- ☐ Needs Inspection
- ☐ Out of Date