## Automated Service Inspection Program (ASIP)

### INSPECTION SALES PROCESS

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set-Up Inspection</td>
<td>Conduct Inspection</td>
<td>Submit Inspection</td>
<td>Assign Lead</td>
<td>Review Lead</td>
<td>Contact Customer</td>
<td>Develop Specific Quote</td>
<td>Close Lead / Communicate Results</td>
<td>Follow up on Outstanding Opportunities</td>
</tr>
</tbody>
</table>

### Service Manager
- Fill out the header information on the inspection form.
- If applicable, assign lead to PSSR (if it is not auto-assigned).
- If lead is assigned to Service Manager (i.e., no PSSR at branch). Then review opportunities on the lead.
- Contact customer to determine interest in addressing items for repair. May opt to send full inspection report.
- Develop detailed quotes for items that the customer expresses interest in addressing.
- Record the results of the conversation with customer. May opt to email the results to the service and/or customer.
- Follow up on opportunities that were given a follow-up date at the point of the inspection.

### PSSR
- Complete inspection.
- Submit inspection to Service Manager, which triggers a lead.
- If lead is assigned to PSSR, then review opportunities on the lead.
- Contact customer to determine interest in addressing items for repair. May opt to send full inspection report.
- Develop detailed quotes for items that the customer expresses interest in addressing.
- Record the results of the conversation with customer. May opt to email the results to the service and/or customer.
- Follow up on opportunities that were given a follow-up date at the point of the inspection.

### Technician
- Complete inspection.
- Submit inspection to Service Manager, which triggers a lead.

---

### INSPECTION TYPES

#### Walk-Around (Start / End of Shift)
- **Definition:** Inspection completed just before the operator begins to operate the equipment and/or after the operator concludes their shift.
- **Outcome:** Ensure equipment functions properly before it is operated and that it is in the same condition after it is operated.

#### Regular PM Interval
- **Definition:** Inspection completed during regular or scheduled maintenance on the equipment.
- **Outcome:** Identify issues that can be addressed during the preventive maintenance event and also identify potential bigger equipment issues that need to be addressed outside the scope of the PM event.

#### Warranty Expirations
- **Definition:** Inspection completed before equipment warranty expires.
- **Outcome:** Ensure items covered by warranty are identified and resolved within warranty coverage.

#### Unplanned Failure (Field, Shop)
- **Definition:** Inspection completed at the point-of-field or shop service for an unplanned failure.
- **Outcome:** Identify equipment issues beyond the scope of the repair.

#### Planned Repair (Field, Shop)
- **Definition:** Inspection completed at the point-of-field or shop service for a planned repair.
- **Outcome:** Identify equipment issues beyond the scope of the repair.

#### Job Preparation
- **Definition:** Inspection completed on equipment in order to ensure it functions properly before the start of an upcoming job.
- **Outcome:** Ensure proper function and configuration of equipment before the start of a job.

#### Recently Acquired Equipment (New / Used / Rental)
- **Definition:** Inspection completed on recently acquired new, used and rental equipment before it is operated by the customer.
- **Outcome:** Ensure equipment issues before they become larger problems.

#### Pre-Delivery
- **Definition:** Inspection completed on recently purchased new, used and rental equipment before it is delivered to the customer.
- **Outcome:** Ensure proper function and configuration of equipment before arrival to the customer site.

#### Pre-Divestiture
- **Definition:** Inspection completed before a unit is marketed for sale to identify potential issues and establish a value.
- **Outcome:** Determine an accurate value and potentially maximize value on used equipment.

#### Site Visit
- **Definition:** Inspections completed on a regular or ad-hoc basis during a visit to the customer job/work site.
- **Outcome:** Identify equipment issues before they become larger problems.
**INSPECTION SALES PROCESS**

<table>
<thead>
<tr>
<th>STEP</th>
<th>Process Description</th>
<th>How Activate Customers Supports the Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Set-Up Inspection</td>
<td>When a work order is opened, the Service Manager should start a new inspection by filling out the “header” information on the inspection. This will save time for the inspector (typically the technician) of the equipment.</td>
<td>Allows the user to begin an inspection and save it for another user to finish at a later point in time.</td>
</tr>
<tr>
<td>2 Conduct Inspection</td>
<td>The inspector of the equipment (typically the technician) completes the inspection. The amount of time that the inspector spends on doing the inspection will depend on the situation. For example, if it is a fast turnaround field job, then the inspector should do a shorter inspection. If the equipment is going to be in the shop for one or more days, it makes sense to do a more in-depth inspection.</td>
<td>Enables the user to finish an inspection that has been started and saved for them, or to begin a completely new inspection. Also, enables the user to develop a much richer inspection report as compared to paper-based forms through the ability to add photos, videos and voice-to-text notes.</td>
</tr>
<tr>
<td>3 Submit Inspection</td>
<td>The inspector of the equipment submits the inspection upon completion. The job of the inspector of the equipment is now finished and they can move on to other tasks.</td>
<td>Notifies the Service Manager via email that an inspection has been completed and that there are items that need to be addressed, and also that there is a lead to assign or follow up on.</td>
</tr>
<tr>
<td>4 Assign Lead</td>
<td>In dealerships or branch locations that have PSSRs, there may be a need to assign the lead. In this case, the Service Manager will assign the lead to the PSSR to follow up with the customer on the items that need to be addressed from the inspection. In cases where there is no PSSR, or where the Service Manager does not need to review the lead, leads can be auto-assigned to the Service Manager for follow up, or auto-assigned to PSSRs based on customer or territory assignments.</td>
<td>Gives the Service Manager the ability to assign leads or the Solution Supports the ability to route leads based on different business rules (e.g., assigned territories and/or customer accounts).</td>
</tr>
<tr>
<td>5 Review Lead</td>
<td>After the lead has been assigned, the person who has been assigned the lead should review the items that were noted as needing to be addressed and potentially the full inspection report. This gives them the ability to prepare for the call with the customer by establishing “ballpark” estimates on costs for repairs. If there are a number of items that need to be addressed, the person following up on the lead may not want to develop a detailed quote at this point until they have spoken with the customer to determine the level of interest in addressing the issue. This will save time in looking up specific parts pricing and other information.</td>
<td>Contained within the lead are the detailed photos, videos and notes from the inspector of the equipment, as well as the ability to view the full inspection report. Additionally, there may be an “hours estimate” on how long the repair will take to complete, and also a recommendation from the inspector about the urgency of addressing the issue (immediate, 30/60/90 days).</td>
</tr>
<tr>
<td>6 Contact Customer</td>
<td>Call the customer to propose and discuss the items that need to be addressed. Prior to calling the customer, the Service Manager will assign the lead to the PSSR that is following up on the lead. The user may want to email the customer the full inspection report. This will enrich the conversation and allow the customer to visibly see the issue as well as see the notes from the inspector (typically the technician, who is generally a trusted source of technical expertise by the customer). The objective of this step should be to get resolution – meaning a “yes,” “no” or “contact later” from the customer on each of the relevant items.</td>
<td>Allows the user to email the full inspection report to the customer and allows the customer to view full resolution photos, videos and notes from the inspector of the equipment. Also, gives the user the ability to set follow up dates on items that the customer does not wish to address at that point in time. The Service Manager or PSSR (whoever is assigned the lead), will get a follow-up email reminder on that follow-up date to call that specific customer.</td>
</tr>
<tr>
<td>7 Develop Specific Quote</td>
<td>For the items to which the customer says “yes” or “maybe,” it may make sense to develop a detailed quote. Most dealers have this capability in their dealer business system which contains parts pricing, labor rates, etc. If the dealer business system generates a quote in a Word, Excel or PDF format, then it should be attached to the lead.</td>
<td>Gives users the ability to attach files such as quotes, parts lists, technical diagrams, work orders and other documents to a lead. Also gives users the ability to enter into the lead by item, a parts estimate and a service estimate, or a total estimate.</td>
</tr>
<tr>
<td>8 Close Lead/ Communicate Results</td>
<td>After speaking with the customer and getting resolution on each item, the individual who is assigned the lead should close the lead out and communicate to others (if necessary) the outcome of that lead. For example, if the PSSR closes the lead out and needs to let the Service Manager know what the customer has agreed to do, then the PSSR can email a link to that lead to the Service Manager with the full results of the lead and any attached files (e.g., quotes, etc.).</td>
<td>Gives users the ability to email the lead to individuals internally to communicate the outcome of the conversation with the customer. Also, allows users to email that same information to the customer so that the customer has record of what they discussed/agreed to in the conversation.</td>
</tr>
<tr>
<td>9 Follow up on Outstanding Opportunities</td>
<td>Follow up with customers on the items that have been given future follow up dates. The individual that has been assigned the lead will get email reminders on those follow up dates.</td>
<td>Automatically reminds the individual assigned the lead to follow up with the customer, and gives them access to the full information about the lead, including the full inspection report, etc. so that they can have an informed conversation with the customer.</td>
</tr>
</tbody>
</table>