

CHECKLIST

The Customer Communication Checklist

Make sure every customer gets the right information at the right time, from drop-off to follow-up.

Most complaints in a collision shop aren't about the repair. They're about not knowing what's happening. This checklist keeps every customer informed on a set rhythm, so the quiet ones and the loud ones get the same care. Built from 25+ years on the shop floor, and meant to run alongside CCC ONE and your DMS.

At drop-off / check-in

Set the expectations now and you'll spend the rest of the repair meeting them instead of apologizing.

- ☐ Tell them exactly how they'll hear from you and how often, so silence never feels like bad news.
- ☐ Set the promise date honestly. A real date you can hit beats an optimistic one you'll miss.
- ☐ Name the three things that can move that date: **insurance approvals, parts, and supplements.**
- ☐ Give them a point of contact by name so they know who owns their car.
- ☐ Confirm their preferred contact method — text, call, or email — and use it.

During the repair

Updates on a set cadence are the whole job here. Don't wait for progress to have a reason to reach out.

- ☐ Send proactive updates on a set schedule, not just when the customer calls.
- ☐ Update even during quiet stretches. "Still waiting on the insurer's approval, nothing you need to do" beats saying nothing.
- ☐ Send a photo at teardown and again mid-repair. People trust what they can see.
- ☐ Use plain language, not shop jargon. If a term needs explaining, explain it.
- ☐ Log every touch on the repair file so anyone can pick it up and know exactly what the customer's been told.

WHERE OPVANTIS FITS

Two-way text, email, and portal messages stay on the repair file, so the next person who opens it sees the whole conversation.

When something changes — a delay or a supplement

Bad news travels fine when it comes from you first. The goal is to reach the customer before they reach for the phone.

- ☐ Reach out before the customer calls you. Beating the call is the difference between a heads-up and a complaint.
- ☐ Explain the why in plain terms. A found supplement or a back-ordered part is normal; say so.
- ☐ Give a new, realistic date, not a hopeful one.
- ☐ Tell them what they need to do, if anything, or make it clear there's nothing on their end.

At delivery / pickup

The last impression sticks. Make pickup smooth and warm, with no surprises at the counter.

- ☐ Send the ready notification with your pickup hours and the final out-of-pocket amount.
- ☐ Include a photo of the finished car. It's the moment they've been waiting for.
- ☐ Thank them for trusting you with the repair.
- ☐ Invite a reply with any questions once they've had the car a day or two.

After delivery

The repair's done, but the relationship isn't. Follow up while the experience is still fresh.

- ☐ Send a post-repair follow-up or CSI survey within a few days, while it's top of mind.
- ☐ Act on any unfavorable result quickly. A fast, honest response can turn an unhappy customer around.
- ☐ Invite a review from the customers who tell you they're happy.

WHERE OPVANTIS FITS

Post-Repair Surveys measure CSI and flag unfavorable results so nothing slips through, and the **Customer Portal** gives every customer 24/7 access to status, photos, and their promise date.

Translate the jargon

The customer didn't go to trade school. Swap the shop terms for words that land.

- ☐ **R&I** — remove and reinstall; we take a part off to do the repair, then put the same part back on.
- ☐ **Blend** — we feather new paint into the neighboring panel so the color matches and there's no visible line.
- ☐ **Sublet** — a piece of the work we send to a trusted outside specialist, like glass or alignment.
- ☐ **Supplement** — extra damage we found once we got in deeper, added to the estimate with the insurer's approval.
- ☐ **Betterment** — when a worn part gets replaced with new, the insurer may ask you to cover part of the upgrade.

CONSISTENCY IS THE WHOLE GAME

Set the cadence once and run it the same on every file, so every customer gets the same care — not just the ones who call twice a day.