Shop buyer’s first 90 days plan

Protect cash, technician capacity and customer trust while you learn which shop routines deserve to change.

Shop / location

Review date

Prepared by

Day one through the first month

☐ Verify cash custody

Test your merchant settlement, bank permissions, cash drawer and daily close. Match the first deposit to the batch total.

Evidence / next action

☐ Review every open order

Assign a service writer to contact waiting customers. Reconcile deposits, backordered parts, promised dates and warranty work with the closing schedule.

Evidence / next action

☐ Meet each technician privately

Confirm schedule, pay basis, toolbox ownership, specialties and current bottlenecks. Record commitments and follow up after the first payroll.

Evidence / next action

☐ Set a baseline

Save closed tickets, ARO, billed hours, comeback hours and cash balance each week. Document filters so the next month remains comparable.

Evidence / next action

Open item, responsible person and due date

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Days 31 through 90

☐ Watch working capital

Build a weekly cash forecast from fleet receipts, payroll, vendor terms, sales tax and debt service. Update it when a large fleet account pays late.

Evidence / next action

☐ Test one operating change

Choose one constraint such as parts waiting time. Name a lead, set a test period and compare results with the baseline.

Evidence / next action

☐ Review retention signals

Check repeat appointments, lost fleet work and technician overtime. Ask the service desk what customers notice before changing pricing.

Evidence / next action

☐ Set the next quarter’s priorities

List the three cash or capacity constraints with the largest verified impact. Assign an owner, due date and evidence for each.

Evidence / next action

Open item, responsible person and due date