



James Anderson

“Smooth and efficient business is my pursuit.”

job title **Shop Manager**

motivation **Business Administration and Labor Estimation**

Goals

- Track vehicle and customer history
- Create work orders that can be used to track a job throughout the shop
- Estimate time and cost for repairs
- Print out an invoice for the customer
- General customer management

Traits

- Cares about maintaining CRM
- Cares about efficiency – saving time is saving money
- Uses smart phone every day while conducting business

Features Used

- Estimating
- Repair forms (customer management section)

Representative Scenario

1. When a customer comes in, James takes down his information (name, car type, issue they're having). He begins a new estimation and enter this information in.
2. The technician checks the car to see what is wrong.
3. After talking to the technician, he enter in the operation that will need to be done, the parts that will need to be used and their cost.
4. He then talks to the customer to share what they technician thinks needs to be done, and the cost and labor time as estimated by CP.
5. He okays the procedures, and the technician gets to work.
6. When the technician is finished with the customer's car, he move the estimate from a Work Order to an Invoice, and print out a copy for the customer to keep as a receipt.



Thomas Morton

“I need to have all the specific knowledge to do my job well. Knowledge is power!”

job title **Technician**
motivation **Knowledge Base**

Goals

- Look up recommended maintenance schedules
- Find helpful diagrams I need for job
- Get supplemental materials to bolster previous knowledge
- Check Technical Service Bulletins

Traits

- Needs to concentrate on his work.
- Hates going back to office for information
- Too busy to search through all the titles
- Expert in several models, but not all
- Doesn't use his smart phone at work

Features Used

- Search
- Diagrams and images
- Removal and installation information
- Technical Service Bulletins
- Videos and animations
- Estimating and repair forms

Representative Scenario

1. Thomas technician reads the repair form for the vehicle he is going to start work on, and then checks the car to see what is wrong.
2. He estimates where the problem is and what needs to be done.
3. He speaks to the manager about what he has found, and the manager enters this information into the repair form.
4. His work has been okayed by the customer, and he gets started.
5. He needs to remove a part, but is not sure if he needs to remove another part to get to that part.
6. He checks ChiltonPRO and sees that he does not need to remove the other part, but can work around it..



Carolyn Adler

“Customer satisfaction is my No.1 goal.”

job title **Customer Service Agent**
motivation **Customer Consulting**

Goals

- Show costs of repair equipment
- Confirm customer repair schedule
- Explain repair process to customers
- Address customer following inquiry
- Update repair forms
- Do follow-up contact with customers

Traits

- Efficiency in communication with customers
- Quality in addressing customer inquiries
- Detailed explanation on cost and schedule
- Care about customer feedback on services
- Uses her personal smartphone every day

Features Used

- Repair forms
- Search
- Videos and animations

Representative Scenario

1. A customer arrives at Carolyn's office to make inquiries about repair information of his car (previous repaired by this shop).
2. After acquiring detailed information about the customer's car, she searches for it in ChiltonPRO. Then she gets the repair forms with changed equipment and cost.
3. She communicates with the customer and explains details of repair history and processes, with reference to the video and animation in ChiltonPRO.
4. Based on her experience, she also offers some recommendation to the customers about car repair.
5. Following finished repair, she updates the repair form and addresses any further inquiry from the customer.
6. She sends email to the customer to collect feedback.