



January 2008

ROAMS

MASTER CERTIFICATION

KTA

(Knowledge Transfer Assessment)

(Please Print)
Name

Date

Score

Comments



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1. ROAMS is an acronym – what do the letters stand for?

KPI Report #4 is used for MOST Questions!

2. What Report Viewer is used by ROAMS in order to display reports?

3. List the 7 Top Priority Reports used by all new startup clients. (List by Report #)

4. What is the primary focus of each report?



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5. What is the primary reason for the “Resolving ROs” function?

6. How long does ROAMS store RO Data?

7. What are the 6 labor categories that are analyzed by ROAMS?

8. How often does ROAMS update (download) data for the reports?

9. What is a good goal for client Repair Order Resolution %?



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10. Give a brief description of how to resolve a Repair Order:

11. What does ROAMS (to DMS) "Reconciliation" mean?

12. Outline the steps for reconciling the ROAMS database to the DMS database (SA Performance Report):



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13. What Report is used to reconcile ROAMS Database to the DMS and WHY?

14. What does several days in a row of 100% RO Resolution indicate?

15. What is meant by “cleaning up” Tech and Service Consultant names?

16. Outline the steps for “cleaning up” Tech and Service Consultant names:



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17. Where is the ROAMS Custom Setup Screen located?

18. Explain **HOW** ROAMS counts Repair Orders:

19. What is the primary focus for Line 2 "Avg. Days RO Open"?

20. What is a good standard for Line 2?

21. What is the definition of "Share Value"?



22. What would be the share value standard for:

- 2 Service Consultants _____
- 3 Service Consultants _____
- 4 Service Consultants _____

23. What Two Key Performance Areas decrease when SC Share Value is too **HIGH**?

24. How is Line 4 activated in order to start tracking comebacks, and what is your specific LON for comebacks?

25. What screen and data field is used to enter activation data for Line 4?



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26. What is an “ELR Opps”?

27. Explain in detail how ROAMS identifies an “ELR Opps”:

28. Define “Grid Pricing”:

29. Explain in detail how ROAMS identifies a “DONE” (when grid is used correctly):

30. What is the number ONE reason for using grid pricing?



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31. What is number TWO and THREE?

32. What position does ROAMS take (regarding "Dones") when the labor dollar amount is OVER the grid cell amount?

33. WHY? (for question 30)

34. Why is this so important for the client?

35. Explain the \$.88/.99 technique:



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36. What screen in your DMS is used to setup your grid?

37. Why do you have to enter your Grid manually rather than let your DMS build a grid for you?

38. Explain the \$5/8/9 technique:

39. Explain how Grid Back Testing works:

(use back of page if needed)



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40. How is Report #17 (FRH Frequency) used to improve clients Repair Effective Labor Rate?

41. When is the BEST time to activate a new Grid Formula?

42. Explain in detail the steps to building a new Grid Formula:

43. What are the basic rules you must follow in order to build a new Grid Formula?



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44. How many different Grid Formulas can ROAMS build and track in a single Service Department?

45. Explain the “Red Box Outlines” after you have implemented the Flat Rate Frequency Technique:

46. What are “# NA-Ds” on line 5?

47. Where are “OGs” setup in the system?



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48. What are "OGs" used for?

49. What is "D%" and how is the "D%" calculated?

50. What is a good standard for Line 5?

51. What is ONE "Sure Fire" way to help each SC reach the standard for Line 5?

52. What is a good goal for Repair ELR on Line 9?



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53. How is the "100% GU" Effective Labor Rate calculated on Line 9?

54. What is used to calculate the Maintenance/Repair mix on Line 11? Labor Dollars or FRHs?

55. Why? (for question 54)

56. What does a line item have to have in order to be counted as a line item on Line 12?



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57. How is a 30-K Service treated for the 1 Item Analysis Process on Line 12?

58. Explain how ROAMS qualifies a car for being a "Menu Up"?

59. What is the Second Level of Qualification and exactly how does it work?

60. Explain how ROAMS knows when a menu has been sold:



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61. How does ROAMS calculate "Menu Potential"?

62. What does LOTT stand for (Lines 15 & 19)?

63. Explain the "RF Factor %" (Lines 14 & 18):

64. How are Menu "#NA-Ds" tracked?

65. How are menu "D%" Calculated?



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66. Why is the "D%" so important?

67. What is a good standard for Line 17?

68. What is Line 17 telling you when it is at .3 or .4?

69. What are the 3 Levels of Menu Mileage Intervals tracked on line 14?



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70. What qualifies a car for a Multipoint Inspection on Line 18? (What are the FDCI rules?)

71. How is "FDCI Potential Dollars" calculated?

72. Explain exactly how ROAMS tracks and gives credit for all upsells associated with FDCIs:



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73. What is a good standard for Line 21?

74. When the FDCI % on Line 18 is at 90% and "FRHs Per FDCI Done" is at .2, what is ROAMS **screaming** at you?

75. Explain what Line 28 is all about:

76. Explain (step by step) how to get to the data entry screen for Line 28:



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77. List several uses for info on Lines 30 and 31 when meeting with Techs and Service Consultants:

Techs: _____

Service Consultants: _____

78. Write the step-by-step process for setting up Report 31 for maximum impact on Line 8:

79. How does Report 31 impact Line 8?

80. Give a detailed overview of Report Number 31:



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81. What does “CRG” stand for?

82. Give a brief overview of what “CRGs” are used for:

83. What is the primary focus for SPECIAL TOOL #33?

84. What is “Artificial Intelligence” regarding Labor Category Assignment?



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85. Give a brief overview of how it works.

86. What is meant by “Rerunning the Rules”?

87. When is it necessary to Re-Run the Rules?

88. Can ROAMS track “Declined” service work by the customer?

89. Give brief overview of how ROAMS does this:
