

Service Management

Workshop Preparation Kit

2007

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Congratulations! You are going to host an all-day workshop titled, “Service Management.”

To help you have a successful workshop, I have prepared this workshop pre-meeting kit to assist you in planning your event. As you work your way through the process, you may want to check off the boxes.

12 Weeks or More Before Your Workshop

- Schedule and book the workshop with Lodestar.

8 Weeks Prior to the Workshop

- Decide what, if anything, you will charge. (See the Workshop Fee Worksheet included in this kit.)
- Decide who to invite.
- Mail out the invitation letter (a sample is attached to this kit).
- If you need to order audio-visual equipment, schedule it now. If you have it on hand, skip this step. Equipment needed: computer VGA, SVGA, or SVGA projector and screen; flip chart with 1 full pad of paper.
- If you decide to hold the workshop off-site, make arrangements for a meeting location. If you go off-site, remember to make arrangements for lunch or dinner (depending on when you decide to start your workshop) and early and late refreshment breaks.

2 Weeks Prior to the Workshop

- Call any dealers who have not responded to the invitation letter and confirm their attendance.
- (Optional: Send the confirmation notice to all who will be attending. See the attached sample in this kit.)
- Arrange for computers for all the attendees (either bring their own or rent them locally; computers should be equipped with Windows XP or Vista and have Excel 2003 or later, and Adobe Acrobat Reader; computers will need a CD-ROM (read) bay; also be sure to plan on plenty of power cords)

1 Week Prior to the Workshop

- Print the workbooks from the master material sent to you by Lodestar.

1 Day Before the Workshop

- Make sure the room is set up per the attached room set-up diagram.
- Make sure the audio-visual equipment and flip chart are set up and ready to go.
- Make sure the lunch is set.
- Make sure the breaks are set up. You should have coffee/tea on hand when your guests arrive; donuts and fruit are optional. Plan on a mid-morning break (around 10:00 am; refresh the coffee; add soft drinks) and an afternoon break (around 2:30 pm; soft drinks).
- Designate a representative from your distributorship to be present to start the meeting with welcoming comments, etc. (This person is not required to stay beyond the kick-off speech.)
- Make sure the computers (if rented) are scheduled for delivery and setup on time.

Day of the Workshop

- Make sure your welcomer will be present and has appropriate welcoming comments ready.
- One hour before the meeting starts, make sure the opening refreshments are out and ready and that the caterer is on schedule for the first and second breaks and meal.

1 Week After the Workshop

- You will be receiving the invoice from Lodestar for your workshop.

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Workshop Fee Worksheet

Item	Quantity	Cost Ea	Net Cost	
Facilitation Fee	1	\$3,500	\$3,500	
Travel expenses (estimated)	1	\$1,000	\$1,000	
Workbooks		\$	\$	
Arrival refreshments		\$	\$	
First break		\$	\$	
Meal		\$	\$	
Second break		\$	\$	
Audio-visual: projector/screen	1	\$	\$	
Audio-visual: flip chart/pad	1	\$	\$	
Room rental	1	\$	\$	
“Trinkets” you may wish to give away		\$	\$	
Other: (computer rental?)		\$	\$	
Total workshop costs			\$	
Co-op from Manufacturer			\$	
Net Cost to Distributor (Costs less co-op)			\$	
Markup to apply to costs				
Total workshop selling price (cost x markup)				\$
Total expected attendance				
Charge per attendee (sell / attendance)				\$

SPIN[®] Questions to Help You Sell The Workshop

Lodestar believes very strongly in using SPIN[®] questions to help sell a solution to a customer's problems. When the customer sees the linkage between his or her problem and your solution, the sale is much easier. The following SPIN[®] questions can be used by you and your sales team to generate interest in this workshop.

Situation

How is your service department doing?

Problem

Is it making you any money, or do you think it is costing you money?

Implication

If it is costing you money, how much longer do you think you should subsidize it?

Needs Pay-Off

If you could learn some simple but powerful service management tips and tools, what could that do for your business over, say, the next five years?

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Sample Invitation Letter

Dear [Contractor name]:

If you build a retirement program like a 401-K, you'll have to save your behind off in order to have enough to retire in comfort. Or, you can build a profitable business and sell *it* when the time comes and have a whole lot more money than any 401-K could amass. And, one of the best ways to build a profitable business is to have a strong and profitable service department.

So how's your service department? Is it making you any money? How do you know? Would you like for it to make more?

We are going to give you a chance to learn how to run a better, more efficient, more profitable service department. We're going to do that with an all-day workshop titled (oddly enough), "Service Management." We are going to host this event on [date], at [location], starting at [start time] and ending at [end time]. We'll provide the meal plus refreshments. We'll also provide the instructor and workbooks.

What do you need to provide? *Whoever is responsible for the service operation at your firm.* That could be you, and/or others. It would certainly include your service manager. You will also need to bring your laptop computer with you. (It should run Windows XP or Vista, have Excel 2003 or later installed, and Adobe Acrobat Reader installed.)

You should also bring the following with you:

- your last fiscal-year's income statement (you won't be required to show it to anyone, including the instructor, unless you want to); some people also call this the "P and L"
- a calculator
- a pen or pencil
- some note paper

What will this workshop teach you? In a nutshell, how to get more work done with your current organization. In detail, you'll...

- Learn how to correctly departmentalize your P&L into installation and service
- Learn how to set a correct street rate to assure profitability
- Learn how to price parts for profit
- Learn how to price residential and commercial service agreements
- Have some fun
- Make tons of money because of all of this

We are asking you to make an investment of only [\$ fee] per person to reap these powerful benefits. You will be billed the tuition after the workshop. However, you will be billed for either the number of reservations you make or your actual attendance, whichever is greater.

So if you are already satisfied with your weak service operation and the stress of the daily struggle to survive, don't bother to call and enroll. This workshop won't do you any good.

But if we have aroused your curiosity (and we hope we have!), call [name] today at [number] and reserve your spot(s) now before this workshop sells out. Space is limited to [number] seats, and when they are sold, they are sold. So don't delay— call today!

[signature]
[name]

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Sample Confirmation Letter

Dear [Contractor]:

Congratulations! You are confirmed for the workshop, “Service Management”, to be held at [location] on [date]. We have you down for [number] slots. You will be invoiced [\$ fee] per person for the tuition after the workshop and you will be invoiced for either your reservation count or actual attendance, whichever is greater.

As a reminder, be sure to bring with you the following:

- your last fiscal-year’s income statement (you won’t be required to show it to anyone, including the instructor, unless you want to); some people also call this the “P and L”
- a calculator
- a pen or pencil
- some note paper
- a laptop computer with Windows XP or Vista, Excel 2003 or later, and Adobe Acrobat Reader

The workshop starts promptly at [start time] and ends at [end time]. Please make every effort to be there on time as this is a jam-packed day and there is much ground to cover.

We’ll see you there!

[signature]

[name]

Throughput Workshop Fee Calculator

Item	Quantity	Cost Ea	Net Cost	
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Service Management Room Layout Diagram

