ISI SOFTWARE

# Making The Switch: A Guide To Switching Quick Lube Software

Does your shop's software tend to cause more issues than it solves? Maybe it slows down operations, or there are several features that don't make sense for your business. You're constantly wishing it would "just work" or saying, "I'm sorry, don't know why it does this."

A lot of shop owners feel stuck with a system that can't keep up, but they aren't sure what to do about it. If that sounds like you, this guide is here to help.

We'll walk you through how to recognize when your current software is holding you back, what to look for in a better solution, and how to switch systems without disrupting your business. With decades of experience supporting quick lube shops, ISI Software knows what it takes to simplify operations and deliver outstanding service at the counter and behind the scenes.

**Let's get started.**

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# Chapter 1: Identifying the Need for Change

Before you can improve your software, you've got to know when it's time for a change. This chapter helps you assess whether it's time to make a change based on real, day-to-day frustrations.

### You'll learn how to:

- Spot common issues like manual processes, poor integration, and staff workarounds
- Understand the risks of sticking with outdated software
- Recognize the business benefits of upgrading to a more modern, efficient system

If any of the pain points in this chapter feel familiar, it may be time to take the next step toward a better solution.

## Signs It's Time to Move On

- **Too much manual work** – You're still handwriting tickets, entering the same info in multiple places, or relying on sticky notes to track jobs.
- **Poor (or no) integration** – If your software doesn't connect with your POS, vehicle history tracking, or loyalty tools, you're wasting time and missing out on valuable insights.
- **Staff frustration or workarounds** – When your team finds ways to "get around" the issue just to get work done, the system's broken. Not only does this slow things down, but it also opens the door to mistakes.
- **Inconsistent customer experiences** – Disorganized check-ins, missing service history, or long wait times at the counter leave customers frustrated and less likely to return.

## Risks of Keeping Outdated Software

Holding on to outdated software might seem easier in the short term. But long-term, it can cost you in ways that your business can't afford:

- **Slower service times** – If your system isn't keeping up, neither is your shop. That means longer lines, frustrated customers, and fewer cars through the bay.
- **Inaccurate or missed service recommendations** – Outdated tools can lead to missed maintenance items or incorrect upsells. You risk losing revenue and customer trust.
- **Lost repeat business** – Without proper tracking and engagement tools, it's harder to bring customers back and even harder to earn their long-term loyalty.

## Benefits of Upgrading

By switching to a modern system, you can unlock new potential in your shop:

- **Simpler processes** – The right software streamlines everything. That means less training for new staff and fewer steps for everyone else.
- **Smarter decisions** – Better reporting gives you clear insight into what's working and what's not, so that you can run a more efficient, profitable shop.
- **More time for what matters** – When your software works the way it should, you get to focus on service, customers, and growth instead of problem-solving and configuration.

# Chapter 2: Evaluating Software Features and Capabilities

Once you've decided it's time for a new system, the next step is knowing what to look for.

To do that, you need to understand exactly how your shop operates day to day. This chapter will help you identify what features truly matter for your workflow, your team, and your customers.

### You'll learn how to:

- Map out your current service flow to guide your software needs.
- Identify must-have features that support your team and impress your customers.
- Evaluate software options based on usability, integration, support, and long-term fit.

By the end, you'll have a clear checklist to compare providers and pick the best fit for your business.

## Step 1: Map Your Workflow

Take a step back and look at the big picture of how your shop operates today. Map out everything from check-ins to inspections, service tracking, technician handoffs, and checkout.

### Here are a few questions to guide this process:

- What happens when a customer pulls in?
- How is information passed from the front desk to the technician?
- Where do delays or miscommunications happen?
- Are there any steps that frequently frustrate customers or staff?

## Step 2: Choose Your Must-Have Features

Every shop is different, but some tools are essential across the board.

### Here are a few things that should be standard for every quick lube shop:

- **Service history tracking** – So you can pull up any past work in seconds.
- **Service recommendations** – Automatically suggest services based on mileage, history, or manufacturer guidelines.
- **Ticket and bay management** – Have complete visibility of jobs moving and bays full without confusion.
- **Loyalty program and CRM tools** – Offer perks and personalized service to turn first-time customers into regulars.
- **Integrated marketing and reminders** – Send oil change reminders, promotions, and follow-ups without adding another task to your to-do list.
- **Mobile/tablet access for techs** – Let your team check off services or notes from the bay.
- **Real-time performance dashboards** – See what's happening in your shop at a glance and react immediately when necessary.
- **User roles and permissions** – Protect sensitive information and control who sees what.
- **Simple interface** – If a new employee can't learn the system in one day, it's probably too complicated.

## Step 3: Look for Integrations and Compatibility

Any successful business runs like a vehicle: there are several systems that need to work together. Your new software should connect to all other platforms you rely on daily.

### Here's what solid integration looks like:

- **POS systems:** Your shop management software should sync with your point-of-sale system so tickets, payments, and inventory updates happen automatically. It should all be in one place, ready when you need it.
- **Credit card processors:** With integrated payment processing, you'll speed up checkout, reduce errors, and give customers a seamless experience. Look for software that works with trusted processors. Decide whether you want to offer contactless or mobile payment options.
- **Car data providers:** Tools like CARFAX, OEM databases, or vehicle service history reports should tie directly into the system so your techs can get accurate service recommendations instantly.

## Step 4: Assess Support & Training Options

No matter how intuitive the system is, there will be a learning curve and times when you need a fast answer. Solid training and constant support are non-negotiables.

### Here's what to look for:

- **Onboarding help.** Clear setup guidance, data migration help, and dedicated support during the transition.
- **Live support.** Chat or phone support during your business hours from people who understand your business. You shouldn't have to explain how a quick lube shop works just to get help.
- **Knowledge base.** A searchable online help center that quickly explains how to solve simple problems, like resetting a password or printing a specific report.

## Step 5: Prioritize Software That Will Grow with You

Even if you're not expanding yet, the right software should be ready when you are.

### Ask possible providers these questions:

- **Can the software handle multiple locations?** Whether you're opening a second shop or managing a small network, your software should give you visibility across all locations. You should be able to track performance, employees, and customer data from one central place.
- **Does it centralize management?** Managing pricing, promotions, and services should be simple across all shops. Look for tools that let you apply changes once and push them out everywhere.
- **Is the support team ready to grow with you?** A provider that understands the quick lube business should offer proactive guidance. As your business evolves, your software partner should help you evolve your systems with it.
- **Does it offer user management flexibility?** You'll need to define clear roles and permissions as you bring on more employees. Make sure the software allows you to give the right access to the right people without compromising sensitive business data.

# Chapter 3: From Evaluation to Decision: Preparing for the Switch

Once you've evaluated your software options, the next step is preparing your team and your business for the transition. This chapter helps you turn your software research into a confident, well-planned decision.

### You'll learn how to:

- Narrow down your top choices and request demos.
- Involve your frontline staff in the decision.
- Understand what to expect from a vendor's transition plan.
- Align your team internally before any data moves.

Get ready to move forward with clarity, confidence, and buy-in from your entire shop.

## Step 1: Narrow Down Your Top Choices

Once you've identified a few solid options, it's time to take a closer look. Don't rely on website information alone. You need to see how it works in action.

- **Shortlist 1–2 providers.** More than that, and you'll lose focus. Less than that, and you won't have a comparison point.
- **Request demos or sandbox environments.** You and your team should be able to click around, ask questions, and see how things work with your actual workflows.
- **Involve your frontline staff.** These are the people who'll use the system daily. Let them get their hands on the software so you can take their feedback into consideration.

## Step 2: Request a Transition Plan

Any experienced vendor should have a plan. If they've worked with quick lube shops before, they should know how to keep things running during the change.

- Ask how they'll help with data migration, training, and launch.
- See what timelines and resources they provide.
- Ensure they've worked with quick lube shops like yours before.

## Step 3: Align Your Team

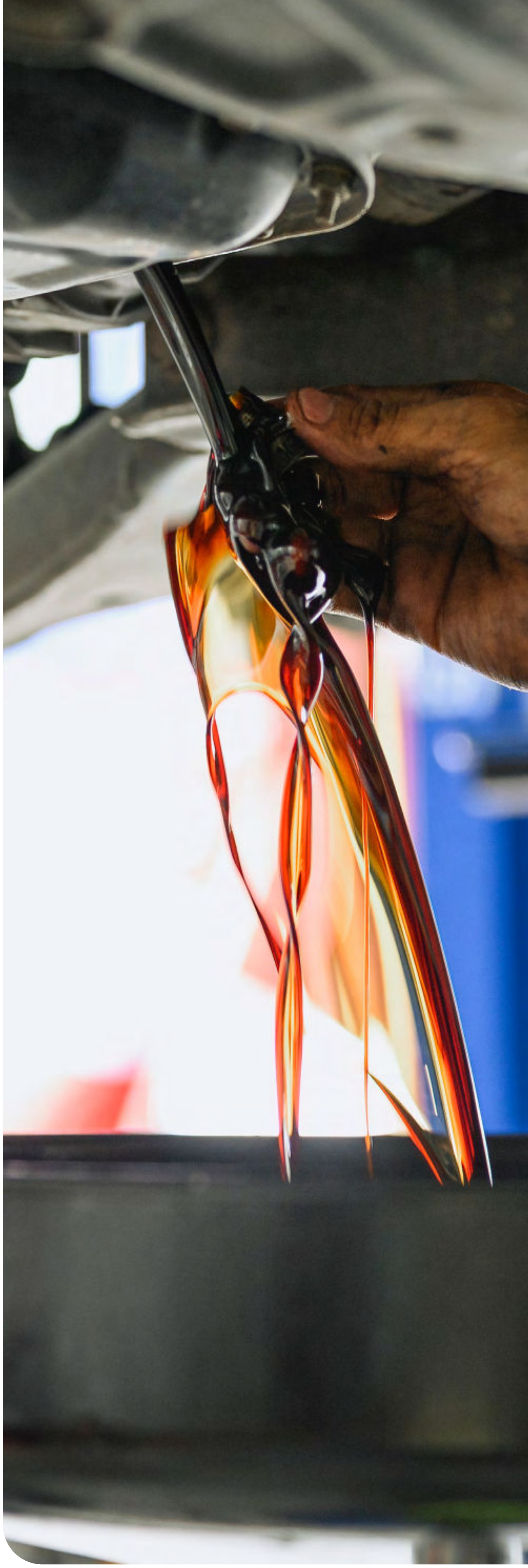
Take a minute to bring your crew into the loop before making any changes. When your team feels like part of the process, they're more likely to embrace the switch and help it succeed.

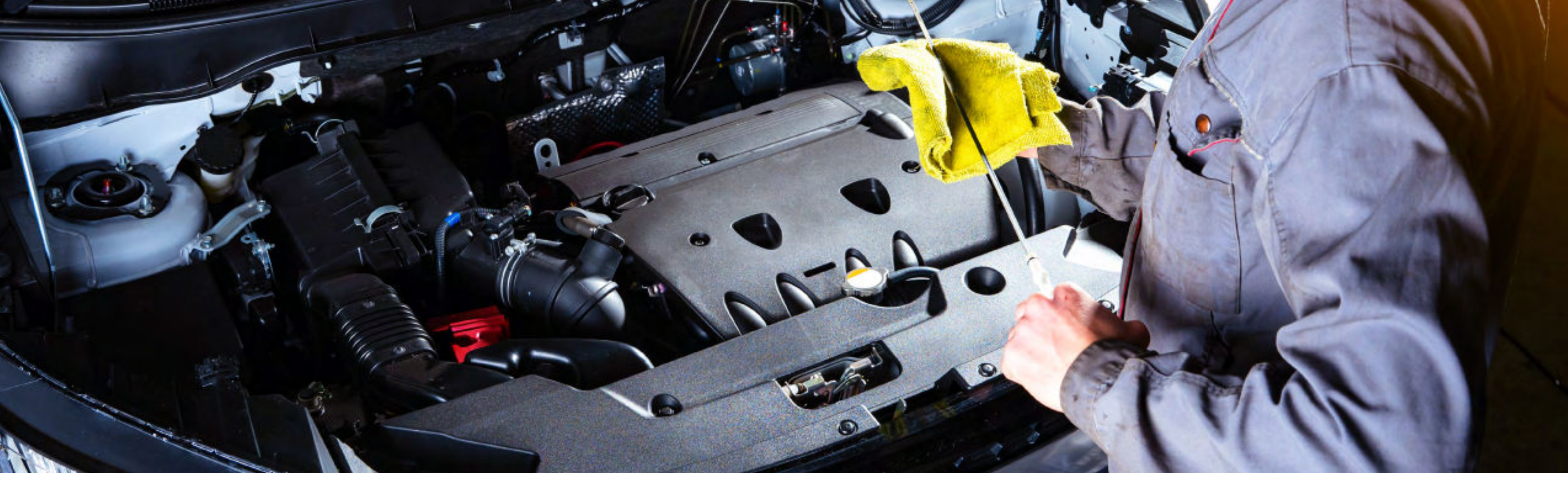
- **Hold a team meeting.** Keep it short and clear. Share why you're making the change and how it'll help improve operations.
- **Focus on the benefits.** Less time on tickets. Easier upsells. Fewer mistakes. Faster customer checkouts.
- **Address concerns early**. Some people don't love change. That's normal. Listen to their concerns, set expectations, and reassure them that support is available.

## Step 4: Clean Up Your Data

Before you move to a new system, take the time to clean up your existing data. Don't just assume your software vendor will do it all for you.

- **Review customer records.** Remove duplicates or inactive profiles.
- **Clean up vehicle history notes.** Make sure everything is accurate and worth transferring.
- **List out what you want to keep.** Service records, loyalty points, coupons, open tickets—be clear about what should move and what can stay behind.





# Chapter 4: Getting Ready and Switching Over

Switching your data is one of the most critical parts of adopting new software. You're moving your entire business history from your old system to your new one. A smooth transition will protect your customer relationships, service records, and operational continuity.

This step takes some planning, trial-and-error, double-checking, and support over a few weeks. It is a bit of work, but it will make the transition much easier.

### In this section, you'll learn:

- What a successful migration looks like
- How to assign roles during the process
- How to organize your current data
- What to expect during practice runs
- What to expect when you make the full switch

## What a Successful Migration Looks Like

- **Clean data transfer.** Customer names, vehicle history, loyalty points, and notes migrate without errors or duplicates.
- **Staff can hit the ground running.** They should be able to pull up records, log services, and check out customers without hunting for information.
- **Your shop doesn't slow down.** There might be a short adjustment period, but no major service disruptions.
- **Customers don't notice the change.** They should have a smooth experience without any interruptions.

## Assigning Roles Throughout The Process

**Project Lead** – Someone to oversee the whole process and work directly with the software company.

**Data Lead** – Someone to handle the exports from your current system and review the accuracy of what's imported.

**Team Trainer** – A trusted team member to test the new system first and support other staff in training.

In addition to these internal roles, make sure you have a dedicated point of contact from the software provider who guides you through the migration.

## Work with Your Vendor to Organize Your Data

Your vendor will help move your data from the old system to the new one. This includes customer information, vehicle histories, loyalty points, and open tickets.

- Ask your vendor to walk you through how your data will map into the new system.
- Request a preview of how the records will appear so you can double-check everything is there.
- Clarify whether any custom fields or notes will be carried over, or if they'll need to be added manually.

## Clean Up Your Data Before Migration

- Remove old or inactive customer files. Merge duplicates. Fix typos and outdated contact info.
- Double-check loyalty balances and service histories. Make sure they're accurate before transfer.
- List what needs to be transferred. Prioritize customer information and vehicle history, open tickets, and loyalty data.

## Keep Your Information Safe

- Make sure your vendor encrypts your data during the transfer to keep it secure.
- Limit access so that only approved staff or vendor team members can handle the migration files.
- Store a backup copy of your current data, just in case anything needs to be restored later. Your vendor should help with this step.

## Test Before Going Live

Pick 50–100 real customer records and have your vendor import them into a test version of your new system. Use this sandbox environment to simulate everyday tasks like:

- Check in a returning customer.
- Look up vehicle history.
- Apply loyalty rewards or coupons.
- Complete a ticket and close out payment.

## Get Feedback From Your Team

Your staff knows how things should work. Ask them:

- Was anything missing?
- Did the information look wrong?
- Was anything harder to do than before?

## Prepare for Go-Live

You're almost there! This final stage is about making sure everything's in place so you can start using your new system smoothly and with confidence.

- Clean up your data one last time, checking for errors, duplicates, or missing info.
- Confirm everything is correct and complete.
- Check it's backed up in a secure file.
- Let your team know when the switch will happen and what they should expect.
- Make sure all staff members have their logins and correct roles, and that permissions are working as expected.
- Check that services, prices, and reports are set up properly.

## Import All Data and Go Live

During the full data migration, your vendor will load all of your cleaned-up data into the new system.  After that, you or your data lead should double-check key info, like:

- Total number of customers
- Number of open and closed service tickets
- Loyalty point balances
- VINs and vehicle records

## Test the System After Migration

Make sure everything works by running a few real-life tasks:

- Open a new service ticket
- Look up a past job or vehicle
- Finish a job and complete a payment

If something's off, get help from your vendor right away to fix it.

# Chapter 5: Rolling Out the New Software

Now, it's time to bring your new quick lube software to life in your shop. This phase is all about putting the system into action: training your team, testing how it works day to day, and making sure everything runs smoothly for your customers.

A successful launch keeps your shop running without disruptions.

To get there, you'll need to:

- Provide clear training based on each job role.
- Test daily tasks (workflows).
- Launch during a slower time of the week.
- Monitor how things are going and adjust as needed.

## Role-Based Training

Training should reflect how each person uses the system day to day. Keep it short, focused, and hands-on.

Here's what to focus on for each role:

### Front Desk Staff (Service Writers, Customer Greeters)

Checking in customers and finding them in the system
Starting and updating service tickets
Viewing service history and recommending services
Taking payments and applying discounts or rewards

### Technicians

Finding and updating service tickets

Looking up vehicle info using the VIN

Adding service details and technician notes

Marking jobs complete and flagging upsells

### Managers

Setting up dashboards and reviewing reports

Assigning user roles and setting permissions

Editing services, pricing, and ticket settings

Understanding key metrics and shop performance

## Choose a Smart Time to Launch

Go live with your new software on a day and time that's typically slower for your business. This will give your team time to adjust without feeling overwhelmed.

### Use this pre-launch checklist to guide preparations before you unlock the doors:

- [ ] Everyone can log in
- [ ] You have paper backup forms ready, just in case
- [ ] Vendor support is on call

## Monitor Performance and Improve as You Go

Even the smoothest launch will come with questions and small fixes. The key is to stay proactive.

### First Week: Daily Huddles

Start each day with a quick 10-minute team check-in. When you're finished, report back to your vendor so they can fix anything that's off.

- What's working well
- Any issues you ran into
- Adjustments you're making
- Average ticket time
- Upsell rates
- System errors or lags

### 30, 60, and 90 Days After Launch

- **30-Day Check-In:** Review team feedback and adjust training as needed
- **60-Day Check-In:** See which features are being used and how your numbers look
- **90-Day Check-In:** Lock in best practices, support your most skilled users, and gather customer feedback


## Run Your Shop the Smarter Way with ISI

You've now seen what it takes to make a successful switch: recognizing when your current system is holding you back, evaluating the right features for your shop, prepping your team, migrating your data, and rolling out the new system with confidence.

If you follow the steps laid out here, your team will be more confident, your systems will be smoother, and your customers will notice the difference from day one.

ISI has helped hundreds of quick lube shops just like yours make the switch. We know the industry, and we're here to help with modern digital tools and hands-on support.

**Book a Demo**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