

Standard Operating Procedure

Remote Expert

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Version	1.2 — aligned to ReggieWatch (SERVER 124)
Effective Date	September 16, 2026
Department	Remote Expert
Owner	Gino Roy
Applies To	Technicians performing remote vehicle programming

1. Purpose

The purpose of this procedure is to make clear that we hold ourselves to a high standard on every piece of remote work we do. It sets the expectations each role is responsible for, so that no matter who handles a job, the quality stays consistent and dependable. This document explains how the team works together to deliver remote work to that standard, the steps to follow before, during, and after a session, the records to keep, and how customers are credited when a job cannot be completed as expected.

ReggieWatch is the single live source of truth for roles, pricing, flashing and vehicle guidelines, troubleshooting steps, and the Do-Not-Grab list. This SOP mirrors what is on ReggieWatch; where they ever differ, ReggieWatch takes precedence and this SOP is updated to match.

2. Roles & Responsibilities

Role	Responsibilities
Hunter	Intake new work orders as fast as possible — passcode jobs first, then non-passcode — then redirect to a Worker when available. Never grabs a make on the Do-Not-Grab list.
Coms	Communications and intaking orders, redirecting each to the correct technician. Manages designated and returning customers and handles customer communication and quotes in a timely manner.
Support	Troubleshoots software issues and anything new or unfamiliar, and provides information on things we have no database or prior knowledge of. Ensures all other roles maintain their objectives. Fills gaps, helps clear connection issues so Workers are not left waiting, and assists Coms and the other roles as needed.
Worker	Performs programmings and assists Hunters as needed — the grinders who handle the bulk of the work, completing the tickets handed to them by Hunters.

2.1 Detailed Role Expectations

Each role is expected to meet the standards below. Staying disciplined on these keeps the team tight and our quality of work high.

Hunter

- Grab new orders the moment they come in, with the fastest turnaround humanly possible — **passcode jobs first, then non-passcode.**
- Confirm the order details are complete and accurate before handing the ticket to a Worker.
- Keep an eye on incoming volume so no order sits unclaimed.
- **Never grab a make on the Do-Not-Grab list** (see §3.6): Lamborghini, Maserati, Ferrari, McLaren.

Order of Operation — Tickets with Passcodes

When a ticket requires a passcode, work it in this order. The goal is to secure the passcode quickly while never letting the ticket stall — intake and dispatch even if the passcode or payment hasn't landed yet.

1. Consistently keep the work phone on the Remote Expert screen so incoming contact is never missed.
2. Call the customer from the work phone to secure the passcode. If you reach a shop or dealer menu, get to the service department and ask for the technician with the programming tablet. No answer or voicemail → go to step 3. Answered → go to step 5.
3. Call the customer from Quo. No answer → go to step 4. Answered → go to step 5.
4. Message them on the Remote Expert platform.
5. Follow up on Quo via text to that number and/or the number supplied for the actual technician.
6. Intake the order and dispatch it to a Worker — **even if you still haven't gotten the passcode or payment.** The ticket keeps moving.
7. Keep an eye out for incoming messages from the client with passcodes or payment — they may send via Shark or text, or call us back.

Coms

- Intake orders and redirect each one to the correct technician.
- Manage designated and returning customers and own all customer communication and quotes.
- Respond to quotes and customer messages in a timely manner so nothing goes stale.

5-Minute Rule (Coms)

Coms operates on a 5-minute maximum response window. Within 5 minutes, Coms must either respond to the teammate or customer as needed, or follow up with the Worker on the car for a status update. This keeps the team tight and our quality of work high.

Support

- Fill in the gaps wherever the team needs coverage.
- Troubleshoot software issues and anything new or unfamiliar; provide information on things we have no database or prior knowledge of.
- **Ensure all other roles maintain their objectives.**
- Help clear connection issues quickly so Workers are not left waiting.
- Assist Coms and any other role as needed to keep work flowing.

Worker

- Handle the bulk of the tickets handed off by Hunters, working through them steadily.
- Keep Coms updated on the status of each car, especially when prompted within the 5-minute window.
- Flag connection or programming problems to Support early rather than getting stuck.

3. Programming, Diagnostic & ADAS Calibration Procedures

This section covers the three types of remote work we perform: programming, diagnostics, and ADAS calibration. The first step is the same for all three and is required every time before any work begins.

3.1 Customer Contact & Readiness Confirmation (Required for All Work)

Before starting programming, diagnostics, or ADAS calibration, you must make contact with the customer and confirm that the module, connections, and vehicle operating conditions are correct and ready. Do not begin any work until this confirmation is complete.

1. Make contact with the customer and confirm the work requested and the specific module(s) involved.
2. Confirm all connections are in place and stable: the interface device, the vehicle link, and the internet connection.
3. **Confirm latency is 0–90 ms and steady before any flash** — wired if possible; Wi-Fi is fine if it stays steady. Watch for spikes. If latency is above 95 ms, use a Windows laptop when possible (if J2534-compliant or the server has the specified VCI).
4. Confirm the vehicle operating conditions are met: stable battery/charger, correct ignition state, and a safe, suitable environment for the work.
5. Record the starting state (software/calibration versions, stored fault codes) before making any changes.
6. If the customer is having trouble following instructions, call them to confirm. For some clients it is easier to understand what they are doing over a phone call, and confirming directly avoids mistakes before any work begins.

3.2 Programming

1. Complete the 3.1 customer contact and readiness confirmation first.
2. Ask the customer whether the module is new or used. This is required for all programming and can determine whether the job can be done at all, so confirm it before going any further.
3. Ask the customer whether they have a TSB (Technical Service Bulletin). Some vehicles require a TSB to update, so confirm this before proceeding — if one is needed and not available, the update may not be possible.
4. Select the correct procedure and file for the confirmed vehicle. Never program a file intended for a different vehicle.
5. Begin programming and monitor progress and battery voltage continuously. Do not interrupt an active write/flash.
6. Confirm the new software/calibration installed correctly, clear and re-scan codes, and verify the vehicle operates normally before closing out.
7. Aftercare (learns & calibrations): we only perform static learns ourselves when the calibrations and learns will take less than 5 minutes. Anything dynamic or time-consuming is handed off to the customer to perform — but always tell them clearly what they need to run.

Flashing Rules (from ReggieWatch — always apply)

- Latency must be **0–90 ms and steady**; if it is above **95 ms**, use a Windows laptop when possible (if J2534-compliant or the server has the specified VCI).
- **Do NOT flash Toyota/Lexus ECU over Remote Expert** — install software only on Windows laptops.
- **Do NOT flash Nissan modules with Vi3** — use Vi2 instead, unless it requires Consult 4 software. NEW ADAS module configuration **is** allowed with Vi3 (it is not a flash).
- **ECU Key Write is a Configuration Write, not a Flash.**

5-Minute Learn Rule

Under 5 minutes (static): we perform the static learn/calibration ourselves.

Dynamic or time-consuming: the customer performs the learn. Tell them exactly what needs to be run so they can complete it correctly.

3.3 Diagnostics

1. Complete the 3.1 customer contact and readiness confirmation first.
2. Perform a full scan and record all stored and pending fault codes, along with relevant live data.
3. Interpret the results and identify the affected systems or modules.
4. Document findings and recommended next steps, and communicate them to the customer through Coms.

3.4 ADAS Calibration

1. Complete the 3.1 customer contact and readiness confirmation first, including confirming any physical setup the on-site contact must have in place (targets, ride height, clear space, etc.).
2. Confirm pre-calibration requirements are met (alignment, fuel/load, tire pressure, and other manufacturer conditions as applicable).
3. Run the calibration procedure for the confirmed system, guiding the on-site contact through any physical steps.
4. Verify the calibration completed successfully, clear and re-scan codes, and confirm the system reports ready before closing out.

3.5 Vehicle-Specific Notes

ReggieWatch carries the live, authoritative Vehicle-Specific Notes and they take precedence.

Always check the Flashing & Vehicle Guidelines on ReggieWatch before starting a job — they change over time. Current highlights include:

- **Ford (all Ford vehicles in Canada):** USB-share (Flexi-hub) to one of our Ford computers. Do not put Ford on the client's computer — it will ban the account.
- **Genesis, Hyundai, Kia tablets:** must be in High Latency Mode when connecting. These vehicles get Autel pre/working/post scans — the tablets are not scan-friendly over RE.
- **JLR (Jaguar, Land Rover, Range Rover) 2017+:** need a Windows laptop and one of these VCIs — JLR VNCI, DA-Dongle, Cardaq3, or Cardaq4 (we can loan equipment if needed). KVM/RFA/BCM/CJB/GWM may require **2 keys minimum — inform the client.**
- **Mitsubishi MUT 3 SE:** sometimes requires a Windows laptop if it fails over RE.
- **Nissan:** Kicks that require Consult 4 can't do BSM and AVM; C4 programming gateway must be in Open Mode (will not program in Test Mode).
- **Subaru 2014- ABS programming:** may need a Windows laptop with a Cardaq 3, Subaru Mongoose, or Subaru VCI — try over Remote Expert first.
- **General Motors:** 2020- prefers MDI 1; 2021+ prefers MDI2 (Secure Gateway); Chevrolet Express, Trax, and Malibu have no Serial Data Authentication and do NOT require an MDI2.

3.6 Do Not Grab

Hunters must not grab these makes: **Lamborghini, Maserati, Ferrari, McLaren.**

4. Troubleshooting & Escalation

Before asking for help, complete troubleshooting — you may be asked **"TSD?" (Trouble Shooting Done?)**. Make sure you have gone through the resources below and have screenshots ready (Service Information, Alldata, software error, etc.).

Use all resources in the following order:

1. KATABASE
2. Alldata
3. Service Information
4. Diag.net
5. Google
6. ChatGPT
7. Ask in chat
8. @ Admins — send screenshots of what you need help with after going through the TS resources.

No communication with the vehicle and/or module?

Use the client's Autel tablet and start a scan there. If their Autel won't even scan it, check for Ethernet plugged into the VCI.

Failing programming / coding / configuration / calibration over RE, and no data on KATABASE?

- Use ALL available options — ask and @ all admins working RE that day.
- Try J-Mode (if J2534 compliant).
- USB SHARE (Flexihub) it to the client's laptop.
- Localize it on the client's laptop (ask what VCIs they have available).
- If needed, @ ALL ADMINS and **ADMIN BOMB as a last resort if no response / no progress within 30 minutes.**

If a session fails or is interrupted:

- Keep the interface connected and the ignition on. Do not disconnect a module mid-flash.
- Re-establish the connection and attempt to resume or restart the programming procedure.
- If the module is unresponsive or in a failed state, stop and escalate to the Admins immediately.
- Record exactly what happened, including any error messages, the time, and the last successful step.

4.1 Logging Failures & Errors for Review

Every Failure and Error Must Be Logged

Any failure or error encountered during a job must be documented and submitted to an admin or another experienced expert for review. This is required even if the job is ultimately completed, so problems can be tracked, learned from, and prevented going forward.

- Record what failed or errored, the exact error message(s), the module and vehicle involved, and the last successful step.
- Note the date, time, and the role/name of the person who encountered the issue.
- Submit the log to an admin or an experienced expert for review before the job is closed out.
- The reviewer confirms the cause and the resolution (or next steps) so the same failure can be avoided in the future.

5. Customer Credit Policy

Admin Approval Required

Going forward, all customer credits must be approved by an admin before they are issued. No credit may be applied without admin approval, regardless of the amount or reason. This keeps credits consistent and accountable across the team.

This section explains when and how a customer is credited. Every credit, no matter the situation, requires admin approval before it is issued.

5.1 When a Credit Applies

- All available options to resolve the problem have been explored and the job still could not be completed.
- A second opinion has been obtained on the job to confirm nothing further can be done.
- Only after the above, an admin has been reached out to and has approved the credit.

5.2 When a Credit Does Not Apply

- Before all resolution options have been explored and a second opinion obtained.
- For any amount greater than the original ticket. A credit can never exceed the original ticket amount.

5.3 Credit Amounts & Approval

Situation	Credit Amount	Who Approves
Job could not be completed after all options explored + second opinion	Up to the original ticket amount	Admin

5.4 How to Process a Credit

- Document the resolution options that were explored and the second opinion obtained, with supporting notes in the work order.
- Obtain admin approval. No credit may be issued until an admin has signed off.
- Once approved, apply the credit in the billing system (never more than the original ticket amount) and notify the customer.

5.5 Credit Format & Notes Requirement

Every credit must be worded exactly as shown below and recorded in the notes section of Quo under the customer who requested the ticket. Fill in the reference order number and the cost of the ticket.

Required credit wording

We can offer you a free credit. Just contact us here or email us at info@kaizen-automotive.com
Reference order number: XXXXXXXXX and (cost of ticket here)

Recording the credit in Quo:

1. Enter the credit wording above in the notes section of Quo, under the customer who requested the ticket.
2. Once the credit has been used, add a follow-up comment in Quo with the order number and the word "complete."

6. Documentation & Recordkeeping

Every session must be documented, whether it succeeds or not. Records protect the customer, the technician, and the company.

- Customer and vehicle details (name, VIN, year/make/model).
- Work requested and work actually performed.
- Before and after software/calibration versions and fault codes.
- Start and end times, and the technician's name.
- Any issues, escalations, and the outcome.
- Any credit issued, the reason, and who approved it.

7. Maintaining Standards

To keep service quality consistent across the team:

- Follow this SOP on every job — no skipped steps, even for routine work.
- **Follow the live guidelines, pricing, and vehicle-specific notes on ReggieWatch — it is the source of truth, and this SOP mirrors it.**
- Keep tools, software, and firmware current at all times.
- Complete documentation fully and promptly while details are fresh.
- Report recurring problems so procedures can be improved.
- Treat customers professionally and communicate clearly about delays, issues, and credits.
- Always thank the customer after a service we have provided. A simple thank-you maintains good etiquette and leaves a positive, professional impression.

This SOP is reviewed at least once a year, or sooner if tools, vehicles, or policies change — and whenever ReggieWatch's guidelines change, since this SOP mirrors them. Suggested changes go to the document owner listed on page 1.

8. Approval & Revision History

Version	Summary of Changes	Date	Approved By
1.0	Initial draft	June 16, 2026	Ian Murphy
1.1	Aligned to ReggieWatch (SERVER 113): Hunter grabs passcode jobs first and honors the Do-Not-Grab list; Coms intake/redirect duty added; Support scoped to software/unfamiliar work and now ensures all other roles maintain their objectives; escalation changed from "Shift Lead" to Admins with the 30-minute ADMIN BOMB; added flashing rules (latency, Toyota/Lexus, Nissan Vi3/Vi2, ECU Key Write), the TSD troubleshooting ladder, the Vehicle-Specific Notes reference, and the Do-Not-Grab list.	September 10, 2026	
1.2	Aligned to ReggieWatch (SERVER 124): added the Hunter "Order of Operation — Tickets with Passcodes" (7-step sequence: work phone on the RE screen, call from the work phone, call from Quo, message on the RE platform, follow up on Quo, intake and dispatch even without passcode/payment, and watch for the client sending passcodes/payment). Daily Roles tab on ReggieWatch expanded to mirror these detailed role expectations.	September 16, 2026	