

SavvyMx New Client Guide

Welcome to Savvy! We're delighted that you have hired us to manage the maintenance of your aircraft. The purpose of this Guide is to let you know what to expect from us, and how you can work with us to ensure that you get the greatest possible benefit from Savvy's professional maintenance management. Please review it carefully, and then let us know if you have any questions or concerns.

Your first day with Savvy

Here's what to expect on the first day after we receive your signed Savvy Service Agreement.

Savvy's client-only ticket system

You will be given access to Savvy client-only ticket system on the Savvy platform at <https://apps.savvyaviation.com>. This site is Savvy's "nerve center" and will be the focus of your aircraft maintenance activities going forward. This website may be accessed with all popular web browsers—Edge, Firefox, Safari, Chrome, Opera—and with mobile devices including iPhone, iPad and Android.

Your login credentials

You will have established your login credentials for the Savvy platform—an email address and password—at the time you enrolled in SavvyMx online. If you forget your password, you can reset it by clicking the "Forgot Password" link on the login screen. If you need assistance to login, contact Savvy operations department by email at support@savvyaviation.com or by phone at 888-465-8038 and we'll be happy to help.

Your new-client ticket

Shortly after you enroll online for SavvyMx—usually within an hour or two—our Operations staff will create a "new-client ticket" in the Savvy ticket system to introduce you to your Savvy account manager (and vice-versa), and to track the status of various milestones involved in getting your aircraft under Savvy management. (See "your first week with Savvy" below for details.) The ticket system will be the principal means of communications between you, your Savvy account manager, and the shops and mechanics doing work on your aircraft. Therefore, it's important for you to get familiar and comfortable using the ticket system.

Whenever there's activity on one of your tickets, you will receive an email notification. You can reply in one of two ways:

1. Clicking on the link at the top of the e-notification will take you directly to the job ticket where you can reply directly on the ticket. (You may be asked to log in with your email address and password if you haven't logged into the Savvy platform recently.) This is the preferred method.
2. Alternatively you can reply directly to the e-notification via email and your reply will automatically post to the ticket. Note the 'reply above this line' when doing so.

Using either of these two methods, please make a short post to the ticket so that we know you can communicate with us via the ticket system. If you're replying via the web interface, please don't forget to click on the "Update Ticket" button to post your reply.

Your Savvy account manager

When you first sign up for SavvyMx, you are assigned an "account manager" who is your primary point of contact with Savvy and has primary responsibility for managing the maintenance of your aircraft. Your account manager is a seasoned A&P/IA with extensive expertise in your aircraft make and model.

In addition, we assign you a backup account manager to support you should your primary account manager be unavailable for some reason. In the extraordinarily unlikely event that you are unable to reach your primary or backup account managers, please contact Savvy's operations department by phone at 888-465-8038.

From time to time, we may reassign you to a different account manager. We'll often do this if you have a maintenance issue that requires special expertise—for example, to our avionics guru if you have an avionics problem. We may also do this if your primary account manager becomes unavailable or is overloaded. If we change your account manager, we will notify you and introduce you to your new account manager by opening a ticket (and you'll receive notification by email as usual).

Multiple-owner aircraft

Some of the aircraft that Savvy manages have multiple owners. If your aircraft is owned by multiple partners (or by an LLC with multiple members or a corporation with multiple shareholders), we will ask that you pick one of the owners/members/shareholders to serve as the aircraft's "maintenance officer" and act as the sole point of contact with Savvy.

Only the maintenance officer will be issued login credentials to access Savvy's client-only ticket system. If you wish, we can set up the other partners to receive copies of all ticket posts via email to keep them informed. We will look to the maintenance officer to make any necessary maintenance-related decisions and approvals, and to make all posts to the ticket system.

The "I'm not happy" button

Your satisfaction as a customer is very important to us. If, at any time, you are unhappy with the SavvyMx service, we encourage you to open an existing or new ticket and hit the "I'm Not Happy" button. Fixing your problem will then become our top priority.

Your first week with Savvy

Add Savvy to your insurance

One of the very first things we need you to do (if you haven't done so already) is to contact your aircraft insurance agent or broker and have Savvy added to your aircraft insurance policy as an "additional insured." This is routine and normally takes only a day or two to accomplish. Detailed instructions can be found in the FAQ section of the SavvyMx Plan page on Savvy's public website at <https://www.savvyaviation.com/savvymx/>

We must receive a certificate of insurance from your insurance underwriter before we can manage the maintenance of your aircraft.

Scan your maintenance records

During your first week with Savvy, we ask that you have your aircraft maintenance records scanned into one or more PDF computer files that we can review and make available to the various service facilities and personnel who perform maintenance on your aircraft. One way to accomplish this is to take your records to your nearest Fedex Office or UPS Store or Office Depot, where you can have them scanned to a PDF file quite economically.

If you have an older aircraft with voluminous maintenance records, please scan the last five years' worth of records, but make absolutely sure to include all records of AD compliance (with IA signatures) and all records of major repairs and major alterations (FAA Form 337s, both sides).

We feel strongly that your original maintenance records should be kept continuously in your personal custody (preferably locked up in a fireproof safe). The originals should never be given to maintenance personnel, and should never be carried in the aircraft. We will direct maintenance personnel to make their maintenance record entries on self-adhesive stickers that can be scanned and then pasted into the original logbooks that you maintain in your custody.

Document any squawks

We also ask that you write up any outstanding aircraft squawks and other specific maintenance-oriented requests and questions and post them to your new-client ticket so that your Savvy account manager is aware of them. You can type this information directly into the ticket, or document them in the form of a Microsoft Word (.DOC or .DOCX) or Adobe Portable Document (.PDF) file and attach that file to the ticket. (If you're able to create PDF files, that is always our preferred format.) Another alternative is for you to create a Google Doc and post a link to it on the ticket.

Choose a service center

During your first week with Savvy, you and your account manager will need to come to a decision about which service center will be used to maintain your aircraft.

To begin with, we ask that you let your account manager know which shop(s) you've been using for maintenance in the past, and that you let us know your level of satisfaction or dissatisfaction with that shop or those shops. The more information you share with your account manager, the better.

If you've been generally satisfied with the shop you've been using, we'll most likely be inclined to keep using that shop—provided they are willing to work with Savvy and agree to follow our

protocols and policies (more about this below). Your Savvy account manager will contact the shop's director of maintenance (DOM) and explain how Savvy's program works, what the shop can expect from Savvy, and what we expect from the shop.

On the other hand, if you've been less than pleased with the shop you've been using, your account manager's first order of business will be to help you find a shop to use. Savvy is working with hundreds of service centers throughout the United States, so we're in a unique position to differentiate the good ones from the not-so-good ones.

Get the service center on the ticket system

If the selected service center is not one that Savvy is already working with, we'll need to obtain complete contact information for the shop and its DOM, create a contact record, issue the DOM a login credentials, and get the DOM up on the Savvy ticket system. If you provide your account manager with the necessary contact information, he can handle the rest.

Protocols and procedures

Once we get through these preliminaries, we can get down to business managing the maintenance of your aircraft. Savvy has established a series of protocols and procedures to make this process as effective and painless as possible. If we are to do the job you hired us to do, it's essential that you follow these procedures.

Contact Savvy first, early and often

Your Savvy account manager should be your very first point of contact whenever an aircraft maintenance issue arises—whether scheduled or unscheduled, at home or on-the-road, serious or minor. Regardless of what kind of problem or question you may have, please contact your Savvy account manager first. Don't contact a shop or mechanic directly—that's now your account manager's job.

Owners who are used to managing their own maintenance often have difficulty learning to do this. If you wind up putting your aircraft in the shop and then telling your account manager after the fact, don't be surprised if you receive a minor scolding. You've hired Savvy to manage your maintenance, and you really need to let us do that.

Use the Savvy ticket system whenever possible

The Savvy ticket system is the principal means of communications among clients like you, Savvy account managers, and service centers and their technicians. The ticket system offers huge advantages over traditional communications methods like telephone, email and fax.

The ticket system provides a contemporaneous written record of all communications, including squawks, decisions, instructions, status updates, discrepancy lists, cost estimates, invoices, maintenance records, and so forth. It puts all this information in one place, and ensures that everyone with a "need to know" can access it easily. By documenting everything in written form, it greatly reduces the likelihood of misunderstandings, surprises and disputes.

In addition, should your primary account manager be unavailable for any reason, another Savvy account manager can step in, review the ticket to get up to speed quickly, and pick up where your

primary account manager left off. Or if we need to call in another member of the Savvy team for special expertise (e.g., avionics, engines), our specialist can review the ticket and jump right in without having to “play 20 questions.”

IMPORTANT: When you post to a ticket, your post is always visible to your Savvy account manager and other members of the Savvy team. However, you have the option of making the post visible or invisible to the service center and mechanics working on your airplane. By default, your ticket posts are not visible to shops and mechanics; if you want the shop to see your post, make sure you mark it “visible to everybody” before submitting it.

From time to time, verbal communications (face-to-face or telephone) is unavoidable. If your account manager communicates with you or your service center by telephone, he is instructed to document the call on the ticket system as soon as possible thereafter. If you have a maintenance-related conversation with anyone, we ask that you do the same.

Similarly, if email communications takes place, we ask that the email be transferred to the ticket system via cut-and-paste so it becomes part of the record and available to anyone who needs to see it.

In most cases, it’s far better to communicate directly on the ticket system than to do it verbally or by email and then transcribe it to the ticket after the fact. The ticket system is quick, efficient, and easy to use—even from mobile devices like iPhone, iPad, or Android—so we ask that you use it whenever possible.

Don’t bypass your Savvy account manager

Your account manager should be the sole point of contact with all service centers and mechanics hired to perform maintenance work on your aircraft. You should always communicate your wishes, concerns, questions, decisions and directions to your account manager, and let your account manager communicate them to the shop or mechanic.

If you bypass your account manager and communicate directly with the shop or mechanic, it often injects ambiguity into the relationship. The shop can easily become confused about whose directions to follow. We know from experience that to prevent misunderstandings and surprises, it’s essential that shops and mechanics must “serve one master.”

We’ve found that things work much if the shop’s single point of contact is your Savvy account manager. This keeps the communications on a professional, IA-to-IA level, and is much more likely to achieve an optimal result for you.

Work with Savvy to troubleshoot problems

Any time you have a problem with your aircraft, the first order of business is to troubleshoot the problem. We need to come up with a precise diagnosis of exactly what’s wrong, and decide what work needs to be done and/or what parts need to be replaced to resolve the problem.

Usually, your Savvy account manager will walk you through the troubleshooting process before making a decision to put your aircraft in the shop. Frequently we can troubleshoot the problem completely; other times, we can arrive at a partial diagnosis that narrows down the possibilities to just a few.

We do this for several reasons. Wherever possible, we would like to resolve your problem without putting the airplane in the shop. If the problem occurs away from home, we want to be able to offer you thoughtful advice as to whether it's safe for you to fly home and deal with the problem at your regular shop, or whether the problem affects safety of flight and needs to be fixed locally.

The bottom line is that you should always contact your Savvy account manager first, and let him help you decide whether or not the airplane needs to go into the shop.

Never authorize work without a written estimate

When Savvy manages your aircraft maintenance, one of our most important objectives is to protect you from misunderstandings, surprises, disputes, and “sticker shock.” To that end, one of our inviolable rules is that we will strongly urge you never to authorize any shop or mechanic to perform work or order parts for your aircraft until the shop has provided you and us with a detailed written cost estimate. We will review the estimate, post it to your ticket so you can review it as well, and give you our recommendations and advice on how to proceed.

We will recommend that you approve work to be done in accordance with the shop's estimate only if we are convinced that it is both necessary and reasonably priced. We will recommend that you decline work and parts that we believe to be unnecessary, and we will question the shop about any items for which we feel the estimated cost is excessive.

We ask that you cooperate in this regard by never authorizing anyone to work on your aircraft—whether at home or on the road—without having a detailed written cost estimate in hand. It's almost always best to let your account manager handle this.

Never pay an invoice until Savvy approves it

Similarly, we ask that you never pay a maintenance invoice until your Savvy account manager has had the opportunity to review it. Your account manager will examine each invoice line item to make sure that it is correct, reasonable, and consistent with what we directed the shop to do and with the written estimates they provided.

If your account manager finds the invoice acceptable, he will recommend that you pay it (usually by posting to your ticket). If he has any problems with the invoice, he will work with the shop to get the problems corrected and ask the shop to submit a revised invoice.

If the shop presents you with an invoice directly, please submit it to your account manager (by posting it to your ticket) so he can review it and advise you whether or not to pay it.

Don't forget the punch line

When your aircraft comes out of the shop, please do not forget to let your account manager know that the aircraft is back in your possession and that everything is okay (or isn't). If all is well, your account manager will close out your ticket; if it isn't, he'll follow up to make sure that whatever's wrong is put right.

Your first Savvy-managed annual

Please start preparations for your first annual inspection under Savvy's management at least three months (preferably more) in advance of its due date. Please don't come to us at the last minute, because it's hard to do a proper job of managing an annual on short notice.

Choosing a service center

You'll want to work with your Savvy account manager to determine which service center will do the annual inspection. Sometimes it's best to use a different service center for the annual inspection than the one you use for routine maintenance. We want to ensure that the shop chosen for the annual has as much experience and expertise with your particular make and model as possible. The choice of shop may also be influenced by any specialized work that may need to be done (e.g., sheet metal or composite repairs, avionics repairs).

Scheduling the appointment

Once the service center has been chosen, a service appointment must be set up. It's generally best to give your account manager a range of dates during which the aircraft can be down, and let him contact the shop and set up the appointment.

If you elect to call the shop and schedule the service appointment yourself, please make sure they understand that Savvy will be managing the annual. Give them the name of your Savvy account manager and tell them to expect contact from him. Then immediately inform your account manager of your appointment dates by posting to the ticket system.

Regardless of who schedules the appointment, you'll want to consider whether you want to start your annual late in the calendar month that it comes due, and have the airplane returned to service early in the following calendar month. (E.g., if your annual is due in June, consider scheduling it the last week of June and having it signed off on July 1.) This will allow you to go 13 months between annuals instead of 12.

Completion deadline

When scheduling your annual inspection, please keep in mind that it may take longer than you expect. There's no way to predict what discrepancies may be uncovered during an annual inspection, so there's always the chance that some time-consuming work may be necessary or a long lead-time part may need to be ordered.

Just because your last several annuals took only a week or two is no guarantee that your next one might not take a good deal longer. Also, the first flight after the aircraft comes out of annual is the most like time to find that something that used to work fine isn't working anymore.

Don't paint yourself into a corner. If you have a trip scheduled right after the annual, make sure you have a Plan B just in case.

Savvy's three-phase protocol

To avoid surprises and sticker shock, Savvy uses a three-phase protocol on all annuals it manages.

Phase one is the “inspection part of the annual” during which the shop opens up the airplane, inspects the aircraft and its paperwork, and identifies any airworthiness problems and other discrepancies. We always require that the shop provides a flat-rate quote for this phase, and that it culminates with the shop submitting a detailed discrepancy list with recommended repairs and cost estimates for each discrepancy.

Phase two is the approval phase, during which your Savvy account manager scrutinizes the discrepancy list and estimate, annotates it with his recommendations of which quoted items should be approved or declined, and submits the annotated discrepancy list and estimate to you for review. In this phase, you and your account manager will discuss the discrepancies and arrive at specific decisions about what to repair and what to defer or decline. Your account manager will provide you guidance, but the ultimate decision is always yours.

Phase three is the repair phase, during which your account manager gives the service center detailed written instructions as to what work you want the shop to perform and what work you want to decline or defer. Your account manager will then monitor the shop’s progress to completion and approval for return to service, and will keep you informed of the status via the ticket system.

Required vs. recommended maintenance

Most service centers, if left to their own devices, will recommend that your aircraft be maintained in accordance with the manufacturer’s recommended schedule. Don’t be surprised if your Savvy account manager recommends that some of these manufacturer-recommended maintenance items be declined or deferred. In our experience, many of the manufacturer-recommended maintenance intervals are overkill, while other items are better performed “on-condition” (when demonstrably necessary) rather than on some predetermined timetable.

When it comes to manufacturer-recommended maintenance items that we believe, are unnecessary or excessive, we will usually recommend that such items be declined or deferred. (We’d rather see you spend the money on aviation fuel rather than maintenance.) But the ultimate decision is always yours.

Aircraft problems away from home

Mechanical problems away from home are always an aircraft owner’s worst nightmare. Sooner or later, you’ll find yourself in such a situation, and Savvy’s goal is to make it as painless for you as we can.

Contact Savvy first

Any time you have an airplane problem while you’re on a trip, contact Savvy first. The quickest way to get our attention 24/7 is to call Savvy’s breakdown assistance hotline at 888-588-6655 or—better yet—to log in to your Savvy dashboard and clicking on “Create a Breakdown Ticket.” If you phone the hotline, an operator will ask you for details of your breakdown situation, create a breakdown ticket for you. Either way, one of the on-call Savvy account managers will return your call, usually within 15 minutes.

Help us troubleshoot the problem

The first thing we'll do is ask you a lot of questions until we're sure that we know everything that you know about the problem and its symptoms. In some cases, we might ask you to perform some simple tests and report back with your findings. Our objective is to arrive at an accurate diagnosis, or at least the best partial diagnosis possible

Can it wait until you get home?

Our next step will be to help you decide whether the problem is one that you can live with until you get home, or whether it represents a safety-of-flight item that needs to be resolved before further flight. If the fix can wait until you get home, it's usually easier on both you and us—not to mention less expensive.

If it can't wait, relax and let us handle it

If the problem needs to be fixed sooner rather than later, let your Savvy account manager deal with it. Relax and enjoy yourself and we'll do the heavy lifting of finding a shop or mechanic and making sure that the problem gets resolved as efficiently and economically as possible. It's what we do.

Major upgrades, major repairs, pre-buys

Your annual flat-rate Savvy management fee covers professional management of your annual inspection plus all routine maintenance—scheduled and unscheduled, at home and on the road—for a full year. However, there are a few things that it doesn't cover.

Major upgrades

If you would like Savvy to manage a major upgrade to your airplane—avionics, paint, interior, engine replacement or major overhaul, turbnormalizer, tip tanks, STOL kit, etc.—we'll need to charge you a supplementary management fee. The fee to manage your upgrade will be a flat-rate fee, generally between 50% and 100% of your regular annual management fee, depending on the scope and detail of your upgrade. Most of the time, our management fee is less than the sales tax on the upgrade, so having Savvy manage it is usually a no-brainer.

Major repairs

If your aircraft suffers a prop strike, gear-up landing, hail damage, or some other calamity requiring a major repair that you'd like Savvy to manage for you, we'll need to charge you a supplementary management fee. Once again, the fee to manage your major repairs will be a flat-rate fee, generally between 50% and 100% of your regular annual management fee, depending on the scope and detail of the repairs.

Pre-buy examinations

If you decide to acquire a pre-owned aircraft and would like Savvy to manage the pre-buy examination for you and advise you on the purchase, we're happy to help. Please note that one Savvy-managed prebuy examination is included in your standard SavvyMx Plan fee. If you don't purchase the aircraft and need additional Savvy-managed prebuys during your subscription year,

we'll charge you an additional fee that is usually one-half the annual SavvyMx Plan annual fee for the make and model aircraft involved.