



# **Service Advisor Training Program**

## **Leader's Guide**



(248) 433-1900 • (800) 453-2787

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## **Service Advisor Training Program**

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# INSTRUCTIONS

The **Service Advisor Training Program** was designed as an in-house Advisor Training Aid. Benefits of owning and using the program include the following:

- When hiring a Service Advisor who is new in the business, this individual generally gets very little, if any formalized training during the first six weeks.
- Experienced Service Advisors rarely receive continuous motivation and training necessary to maintain peak performance.
- It becomes very difficult to pull a Service Advisor away from the service aisle for long periods to provide formalized training.
- Service Advisors are resistant to outside training because they lose money while away from the dealership.

This **Service Advisor Training Program** is divided into three sections:

## ■ LEADER'S GUIDE

The Leader's Guide is utilized by the trainer/manager to provide eleven effective modules of training that can be presented in 20 to 40 minutes. It serves also as an introductory course for new Service Advisors entering an Advisor career . The trainer can add or delete any information necessary. It is meant to be a guide, and not the only training needed to complete the orientation process.

## ■ WORKBOOK

This WorkBook is coordinated with the Leader's Guide modules. A WorkBook master copy is provided for in-house duplication. Advisors to be trained should receive their own copies.

## ■ LESSONS

Once the Service Advisor is in the lane, the Lessons are used to provide continuous training and motivation without the need to attend formal meetings or seminars. At the beginning of the day, hand out the Lesson(s) you want the Advisor to complete. Check the returned Lesson(s) and provide necessary one-on-one training. Suggested responses are provided in the back of this section. As in the WorkBook, these Lessons are your master copy and should be duplicated for Advisor usage.

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## SERVICE ADVISOR TRAINING PROGRAM

### MODULE 1 DEALERSHIP ORIENTATION

#### ■ INTRODUCTION

*(Have new employee fill in information on page 1 of workbook)*

- Introduce yourself, and have service advisor tell something of himself/herself.

#### ■ COMPANY ORGANIZATION

- Introduce and discuss all dealership departments and explain their relationship to the service department.

— New Car Department	— Business Office
— Used Car Department	— Parts Department
— Finance and Insurance	— Service Department
— Vehicle Preparation Department	— Body Shop

#### ■ MANAGEMENT STRUCTURE

- Introduce and explain dealership management structure.

*(each dealership is structured differently)*

— Dealer Principal/Owner	— Finance and Insurance Manager
— General Manager	— Service Director
— General Sales Manager	— Service Manager
— New Car Sales Manager	— Parts Manager
— Used Car Sales Manager	— Body Shop Manager
— Office Manager/Comptroller	— Customer Relations Manager

- **Tour dealership and introduce employee to everyone.**
- **Tell the history of the dealership.**
- **Talk about the success of the service department.**
- **Review what will take place of over the next several days.**

■ **EMPLOYEE PACKAGE**

*(Have new employee fill in information on page 3)*

- Job description
- Dress code
- Employee handbook
- Compensation and incentives
- Job performance and evaluations
- Vacation policy
- Employee benefits
- Health and insurance
- Termination policy

## **MODULE 2**

### **ROLE OF THE SERVICE ADVISOR**

**An article in the Power Report stated:**

*“In all probability, consumers’ first impression of a dealership comes when they are greeted by a salesperson. However, the initial meeting that more directly affects the entire ownership experience for new car buyers is when they are being introduced to a service advisor, hopefully before their first visit for service. That relationship can create enduring positive or negative perceptions of the service department, the dealership, the factory and the car.”*

■ **ROLE OF THE SERVICE ADVISOR**

*(Have new service advisor fill out worksheet on page 4, and then debrief. Have advisor supplement worksheet with the following:)*

● **To act as the initial contact between the customer and the service department**

A customer’s impression of the service experience begins the moment he/she calls the dealership or drives the vehicle into the service aisle. The dealership’s reputation is “on-line” with every customer contact. The job of the service advisor is to:

- gather information.
- provide excellent customer service.
- ensure proper treatment.

● **To manage the customer service experience**

Whenever a customer comes in for service, make sure that the customer experience remains pleasant. Pleasant experiences generate loyal customers. Loyal customers return for service regularly and continue to purchase vehicles from your dealership.

- **To communicate between the customer and other departments**

The repair order is the communication link between service and all other dealership departments. The responsibility of the service advisor is to make sure:

- the service order is filled out completely and properly.
- the customer understands the work to be performed and authorizes the repair.
- the technician understands what needs to be done.
- the parts department supports the technician's request for parts.

- **To gain customer trust**

A customer's trust is based upon the rapport with the advisor. The greater the trust, the more tolerant a customer becomes should problems occur and additional repairs are required.

- **To provide information on products and services**

Service department products and services should be matched against customer needs. Often customers do not understand service vehicle needs and/or requirements. Therefore by keeping abreast of all products and services available, the advisor can make the necessary recommendations. Some effective ways are:

- service menus (handouts)
- service menu boards
- computerized service pricing guide
- basic factory recommended services (handouts)

- **To observe customer's vehicle for problems or repairs not mentioned by the customer.**

To minimize additional visits by the customer, the advisor must allow sufficient time to question customers about vehicle symptoms. This can be accomplished by:

- setting customer appointments in advance.
- doing complete vehicle walk-around for unmentioned vehicle repairs and body damage.
- reviewing vehicle repair history.

- **To suggest needed services rather than merely taking orders**

Customers are not experts on vehicle service needs! Advisors should not be order takers. Service department profitability depends on separate repair concentrations such as:

- mandated vehicle factory maintenance.
- customer retail repair/services.
- factory warranty repair per guidelines.
- quick service and oil changes to compete with independent shops.

- **To treat the customer the way you would want to be treated**

Put yourself in your customer's shoes and deliver what the customer demands.

Today's customer wants advisors to:

- provide a prompt and pleasant acknowledgment.
- be an active listener to his/her concerns.
- verify and clarify all information received.
- follow-up and provide vehicle status.
- ensure repairs are completed in a timely manner.
- return vehicle fixed right and on-time.

- **To keep all promises to the customer**

A Service Advisor needs to be detail-oriented so as not to forget anything that was discussed or mentioned by the customer. This way, it makes it easier to keep all promises made, and retain the trust that was formed by the Service Advisor and the dealership.

## **MODULE 3**

### **ROLE OF THE SERVICE DEPARTMENT**

#### **■ ROLE OF THE SERVICE DEPARTMENT**

*(Have new service advisor fill out worksheet on page 5, and then debrief. Have advisor supplement worksheet with the following:)*

#### **● To be responsible for maintaining and repairing the customer's vehicle. This is accomplished by having:**

- professional service advisors to counsel customers on their service needs.
- current computerized repair order systems.
- adequate numbers of well-trained, qualified and certified technicians.
- state-of-the-art diagnostic equipment and tools.
- adequate service stalls to accommodate customer traffic.
- up-to-date knowledge of factory repair techniques.
- comfortable waiting area.
- shuttle/loaner/rental car services.
- a system to meet scheduled promised times.
- a professional level of service.

#### **● To work well with other dealership departments**

The service department does not stand alone. Every other department within the dealership has a hand in the successful running of service.

- The Sales Department is responsible to introduce the customer to service and to provide instructions on warranties, service hours, shuttle/loaner/rental services, night drop procedures, and where to bring vehicle in for service.
- The Parts Department is responsible for stocking parts, for finding needed parts outside the dealership, and for ordering parts from the manufacturer.
- The Service Department provides additional support in the areas of warranty claims, preparation and submission, and cashiering for repair orders and over-the-counter parts purchases.

## TRAINER CHECK LIST

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**Service Advisor's Name**

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**Trainer's Name**

**Module 1**

*Dealership Orientation*

**Module 2**

*Role of the Service Advisor*

**Module 3**

*Role of the Service Department*

**Module 4**

*Customer Expectations*

**Module 5**

*Professionalism and Image*

**Module 6**

*How Service Department Gets Customers*

**Module 7**

*Service Department Conveniences*

**Module 8**

*Service Advisor Appt. Process*

**Module 9**

*Who Pays?*

**Module 10**

*Potential Areas of Liability*

**Module 11**

*Computer Procedures*



**Service  
Advisor  
Training  
Program**

**WorkBook**



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## SERVICE ADVISOR TRAINING PROGRAM

### MODULE 1 DEALERSHIP ORIENTATION

#### ■ INTRODUCTION

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#### ■ COMPANY ORGANIZATION

##### — Dealership departments

- New \_\_\_\_\_
- Used \_\_\_\_\_
- Finance and Insurance \_\_\_\_\_
- Vehicle and Preparation \_\_\_\_\_
- Business Office \_\_\_\_\_
- Parts \_\_\_\_\_
- Service \_\_\_\_\_
- Body Shop \_\_\_\_\_

## MODULE 1 (cont)

### — Management structure

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### — Tour of dealership: introduction of new employee to everyone in the dealership.

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## MODULE 1 (cont)

### ■ EMPLOYEE PACKAGE

- Job Description
  
- Dress Code
  
- Employee Handbook
  
- Compensation and Incentives
  
- Job Performance and Evaluations
  
- Vacation Policy
  
- Employee Benefits
  
- Health and Insurance
  
- Termination Policy

**MODULE 2**  
**ROLE OF THE SERVICE ADVISOR**

**An article in the Power Report stated:**

*“In all probability, consumers’ first impression of a dealership comes when they are greeted by a salesperson. However, the initial meeting that more directly affects the entire ownership experience for new car buyers is when they are being introduced to a service advisor, hopefully before their first visit for service. That relationship can create enduring positive or negative perceptions of the service department, the dealership, the factory and the car.”*

The Service Advisor is one of the most important persons of the dealership. On average, Service Advisors see 20 customers a day. Quality of treatment and service received are the major factors that determine if a customer returns for service and sales.

**What do you feel then is the role of the Service Advisor?**

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## **MODULE 3**

### **ROLE OF THE SERVICE DEPARTMENT**

Once a customer buys a vehicle, the relationship between the customer and the dealership is just beginning. It now becomes paramount to make sure that the customer's driving experience is as trouble-free as possible.

**What is the role of the Service Department?**

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## SERVICE ADVISOR CHECK LIST

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**Service Advisor's Name**

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**Trainer's Name**

**Module 1**

*Dealership Orientation*

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# **Service Advisor Training Program**

## **Lessons**



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# LESSONS

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**ROLE OF THE  
SERVICE ADVISOR**

As the initial contact between the customer and the service department, the Service Advisor becomes one of the most important people within the dealership. The customer's impression of the service experience begins with the Service Advisor.

**What do you feel then is the role of the Service Advisor?**

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- 2. \_\_\_\_\_  
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- 8. \_\_\_\_\_  
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# ROLE OF THE SERVICE DEPARTMENT

Whether a customer returns to your dealership for service and/or to purchase additional vehicles depends on the quality of service received. The role of the Service Department then is to support the Advisor's promises to the customer by making the customer's driving experience as trouble free as possible.

**What is the role of the Service Department?**

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8. \_\_\_\_\_  
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# CUSTOMER EXPECTATIONS

When customers come into the dealership for service, they have certain expectations of both the Service Advisor and the Service Department.

**List the customer's expectations of the Service Advisor.**

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2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_

**List the customer's expectations of the Service Department.**

1. \_\_\_\_\_
2. \_\_\_\_\_
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4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_

# TEAM CONTRIBUTIONS

Service team members should also support and contribute to the Advisor's servicing and selling efforts. Assess how you and each team member can maximize your efforts.

**Fill in the following worksheet:**

	What do I need from them?	What do they need from me?
• Other Service Advisors		
• Service Manager		
• Shop Foreman		
• Technician		
• Warranty Administrator		

## SUGGESTED RESPONSES

Following are some Suggested Responses to the lessons provided. They are merely guidelines to assist Advisors and are not meant to replace Service Advisor creativity and Service Management policy. Suggested Responses are itemized by both topic and page number.

Page 1

### **Role of the Service Advisor**

- To act as a representative of the customer.
- To manage the customer service experience.
- To communicate between the customer and other departments.
- To gain customer trust.
- To provide information on products and services.
- To observe customer's vehicle for problems or repairs not mentioned by the customer.
- To suggest needed services rather than merely taking orders.
- To treat the customer the way you want to be treated.
- To keep all promises to the customer.

Page 2

### **Role of the Service Department**

- To be responsible for maintaining and repairing customer's vehicle.
- To provide professional, timely, competent and friendly service.
- To work well with other dealership departments.

Page 3

### **Customer Expectations**

- They expect you to help them solve their problems in the best way.

- They expect you to explain things so even they can understand.
- They expect you to empathize with them.
- They expect you to be honest.
- They expect you to give them help in making the right decision.
- They expect you to be better than independent shops.

Page 5

### **Professionalism and Image**

- Smiling and being eager to assist customers.
- Appearing clean, neat and well-groomed.
- Speaking clearly, avoiding jargon and slang.
- Treating male and female customers with equal respect.
- Approaching your role in the dealership as truly an "advisor" and not merely an "order taker."

Page 6

### **Communication**

#### **Situations**

- Dealing with other dealership employees.
- Dealing with customers.
- Handling angry customers.
- Writing a repair order.
- Calling customers on the phone.
- Explaining repairs to the customer so they can understand clearly.
- Conversing with management.
- Explaining repair order to the technician.

Page 29

**Questioning**

1. Closed
2. Closed
3. Open
4. Open
5. Open
6. Open
7. Closed
8. Closed
9. Open
10. Closed

Page 30

**Customer Satisfaction**

- Handling irate customers with patience.
- Returning calls in a timely fashion.
- Maintaining a positive attitude.
- Keeping all promises to the customer.
- Smiling and being eager to please.
- Treating all customers with respect.
- Going the extra mile for customers.
- Helping other employees.
- Writing correct repair orders.
- Listening to the customer.

Page 31

**Active Listening**

**Annoying habits**

- Interrupting
- Lack of eye contact.
- Holding side conversations.
- No response/feedback.
- Asking questions that have been answered.
- Correcting grammar or word choice.
- Completing sentences of others.
- Showing complete lack of interest.
- Walking away, but claiming to be listening.
- Looking at your watch while customer talks.

- Answering before customer finishes.
- Appearing impatient.
- Conveying false understanding.
- Disagreeing with everything customer says.
- Having bad breath.
- Allowing distractions to interfere.
- Coughing and throat clearing.
- Ignoring customers to answer the phone.
- Grooming, combing hair, putting on make-up.
- Snacking in front of customer.
- Doodling.
- Finger tapping, twisting hair.
- Blank stares.
- Shuffling papers.
- Reading the mail, newspaper.
- Listening to others on the phone.
- Smoking.

Page 45

**Goals**

**Reasons why Advisors don't set goals:**

- Fear of attaining goals.
- Don't care.
- Complacent.
- Requires more work.
- Don't know how.
- Too busy.
- Not motivated.
- No rewards.
- No priorities.

**Benefits to set goals:**

- Build motivation.
- Improve focus.
- Generate confidence.
- Learn to prioritize.
- Increase profit and productivity.
- Establish good habits.
- Improve organization.
- Gain respect.
- Re-establish new goals.

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If you would like to begin receiving the benefits from the rest of this program, return to the web site to see how easy it is to purchase.