

THE HISTORY OF THE SERVICE ADVISOR WORKBOOK V6



Graham Taylor Edwards

GTE TRAINING AND DEVELOPMENT

+64 21 246 8885 +61 404 190057

TABLE OF CONTENTS

MODULE INTRODUCTION:.....	3
MODULE STRUCTURE.....	4
HOW TO TURN LEARNING INTO PERFORMANCE.....	5
HISTORICAL CONTEXT.....	6
MAIN BENEFITS OF THE SERVICE ADVISOR ROLE	6
WHEN THE WARRANTY EXPIRES	7
THE MORNING RUSH.....	9
THE R.O MAINTENANCE MENU	10
UNSCHEDULED CUSTOMER.....	12
KEEPING TRACK OF THE REPAIR ORDER	14
THE COMEBACK	16
STRATEGIES TO PREVENT COMEBACKS	17
LOST OPPORTUNITY.....	18
SERVICE WALKROUND	19
WHAT CHANGES CAN YOU MAKE TO IMPROVE YOUR SERVICE EXPERIENCE AND MAKE SERVICE ADVISORS OF THE PAST PROUD?.....	20
PS.....	21
ACTION	21
IMPROVEMENT	21
REFLECTION.....	22
QUIZ.....	23
NOTES.....	24
ABOUT US.....	25

MODULE INTRODUCTION:

THE HISTORY OF THE SERVICE ADVISOR

Learn better faster

The concepts and ideas within each module are provided as suggestions and should be adapted to fit your unique environment, personality, and style, while still preserving the core value of the information presented.

Your workbook includes ample white space for you to jot down personal notes, thoughts, or ideas you may want to put into practice.

The workbook is designed to be completed in combination with the video.

Have fun and enjoy yourself.

To make sure you get the most out of this course, please ensure you're fully prepared to begin. Here's a quick checklist to help you get ready:

1. **Tools and Materials:** Have pens, and any required textbooks or resources organised and easily accessible.
2. **Time Management:** Schedule dedicated time for each module in advance. Block out these periods in your calendar to avoid interruptions.
3. **Distraction-Free Environment:** Choose a quiet space where you can focus solely on the course material, minimizing distractions from phone calls, emails, or other activities.
4. **Progress Tracking:** Consider keeping a checklist or journal to track your completion of each module or refer to your portal which will help keep you motivated and organised.
5. **Complete the quiz**

Remember, this learning platform offers resources that you can access anytime.

Don't hesitate to reach out to Graham anytime if you want to explore this topic further, clarify any questions, or share your thoughts. He's here to assist you!

graham@gtetraining.com +64 21 246 8885 +61 404 190 057

MODULE STRUCTURE

KEY CONCEPTS

Welcome to our workshop on the history of the service advisor! Today, we'll explore the evolution of the service advisor role, tracing its origins and examining its significance in the automotive industry.

EXPECTATIONS

Throughout this module, you can expect to:

1. **Gain historical insight:** Understand the development of the service advisor role from its inception to the present day.
2. **Identify key responsibilities:** Learn about the essential functions and skills that define successful service advisors.
3. **Recognise industry impact:** Discover how service advisors have influenced customer service, operational efficiency, and the overall customer experience in automotive businesses.
4. **Engage in discussion:** Participate in interactive discussions and share your experiences related to the role.

WHAT WILL YOU ACHIEVE?

- Have a comprehensive understanding of the historical context of the service advisor role.
- Be able to articulate the importance of service advisors in modern automotive operations.
- Develop insights into best practices that have evolved over time, which you can apply in your own work.
- Build connections with peers and share strategies for success in this vital role.

TIME TO COMPLETE

This module should take you approximately:

Workbook, Video and complete the Quiz

30 minutes approximately

We're excited to embark on this journey together and support each other in developing your service advisor understanding to make the experience more fulfilling and fun.

Let's get started!

HOW TO TURN LEARNING INTO PERFORMANCE



Robert Brinkerhoff (*Robert O. Brinkerhoff is Professor of Counselling Psychology at Western Michigan University. An internationally known speaker, he has written several books on organisational training and measurement*)

Trainers are sometimes accused of failing to deliver value on investments in training but, organisations need to start looking at the line manager's and the individual's responsibility for turning learning into performance.

What happens before training? *Training session* *What happens after training?*



The relative size of the sections represents the influence that they have over the ultimate result of improved performance or behaviour.

Perfect practice makes perfect: Role-plays and having fun will improve performance and results.

HISTORICAL CONTEXT



The role of the automotive service advisor has evolved significantly since the early days of the automotive industry. This position emerged as a response to the growing complexity of vehicles and the increasing need for effective communication between customers and service departments.

MAIN BENEFITS OF THE SERVICE ADVISOR ROLE

1. **Enhanced communication:** service advisors facilitate clear communication between customers and technicians, ensuring that vehicle issues are accurately diagnosed and addressed. This reduces misunderstandings and enhances customer satisfaction.
2. **Improved customer experience:** by serving as a friendly point of contact, service advisors create a welcoming atmosphere, making customers feel valued and understood. This personal touch fosters loyalty and encourages repeat business.
3. **Efficient operations:** service advisors streamline the workflow within service departments by managing appointments, coordinating with technicians, and overseeing service timelines. This efficiency helps reduce wait times and optimise productivity.
4. **Revenue growth:** effective service advisors can identify upsell opportunities, suggesting additional services that may benefit the customer and their vehicle. This can significantly increase revenue for the service department and the overall dealership.
5. **Customer education:** service advisors play a crucial role in educating customers about vehicle maintenance, safety, and best practices. By empowering customers with knowledge, they foster a sense of responsibility and connection to their vehicles.

In summary, the automotive service advisor role has become integral to the automotive service industry, shaped by technological advancements and changing consumer expectations.

This position not only enhances communication and customer experience but also drives operational efficiency and revenue growth, underscoring its importance in modern automotive service environments.

Let's look back at some of the skills required, identify what has changed and how do we rate today.

WHEN THE WARRANTY EXPIRES



Retaining customers after their service warranty expires is crucial for maintaining long-term relationships and encouraging repeat business. Here are five effective strategies to keep customers engaged:

1. Offer loyalty programs

Incentives for Repeat Business: Implement a loyalty program that rewards customers for returning for maintenance and repairs. Offer discounts, points for future services, or exclusive deals to encourage continued patronage.

2. Provide reminder services

Maintenance Reminders: Send timely reminders for upcoming maintenance services or inspections. Use email or SMS to inform customers of recommended services based on their vehicle's mileage and maintenance history.

3. Create value-added services

Special Promotions and Packages: Offer value-added services, such as discounted service packages, free vehicle health checks, or complimentary car washes with a service appointment. This can encourage customers to return even after their warranty expires.

4. Personalised communication

Tailored Offers and Updates: Maintain regular communication with personalised offers based on customers' service histories and vehicle needs. Personalised messages show customers they are valued and understood.

5. Solicit feedback and act on it

Engage Customers for Feedback: After service appointments, ask for feedback on their experience. Act on suggestions to improve service quality and address any concerns. Showing customers that their opinions matter can foster loyalty.

SUMMARY

1. Make sure they want to come back.
2. What is your customer retention after warranty period.
3. A good service advisor can generate more income than the salesperson.
4. Fix it first time.
5. The advisor understands the customer.
6. Follow up.
7. Appointments fast.
8. Build value in using the dealership service department.

By implementing these strategies, you can strengthen customer relationships and encourage continued business even after their service warranty has expired.

THE MORNING RUSH



Reducing customer rush during morning booking in at an automotive service department can improve the experience for both staff and customers.

Rate your current performance 1 poor/2 not bad/3/pretty good/4 excellent

ACTION AND SOP	RATING	IMPROVEMENT REQUIRED
Pre-Appointment Communication		
Online Booking System		
Staggered Appointment Times		
Dedicated Check-In Area		
Clear Signage		
Take care of the phones at busy times		
Sufficient staff at peak times		
Staff Training		
Customer Service Representatives		
Express Services		
Feedback Mechanism		
Waiting Area Comfort		

Implementing these strategies can help create a more organised and pleasant environment for both customers and staff during busy morning bookings.



Creating a repair order service recommendation and maintenance menu can help customers understand the benefits of various services and encourage them to keep their vehicles in top condition.

REPAIR ORDER SERVICE RECOMMENDATION AND MAINTENANCE MENU

1. Oil Change Services

- **Benefits:** Ensures engine longevity, improves fuel efficiency, and reduces emissions.
- **Frequency:** As recommended by the manufacturer.

2. Tyre Rotation and Alignment

- **Benefits:** Promotes even tire wear, extends tire life, and improves handling and safety.
- **Frequency:** Approximately every 1500 kilometres.

3. Brake Inspection and Service

- **Benefits:** Enhances safety, prevents costly repairs from worn components, and improves stopping power.
- **Frequency:** Inspect every service as needed.

4. Fluid Flushes (Coolant, Transmission, Brake, Power Steering)

- **Benefits:** Prevents overheating, ensures smooth shifting, and maintains braking efficiency.
- **Frequency:** As recommended by the manufacturer.

5. Battery Testing and Replacement

- **Benefits:** Prevents unexpected breakdowns, ensures reliable starts, and optimizes electrical system performance.
- **Frequency:** Test annually; replace every 3–5 years or as needed.

6. Filter Replacements (Air, Cabin, Fuel)

- **Benefits:** Improves engine performance, enhances air quality inside the vehicle, and maintains fuel efficiency.
- **Frequency:** As recommended by the manufacturer.

7. Belts and Hoses Inspection

- **Benefits:** Prevents breakdowns caused by worn or damaged components, ensuring smooth vehicle operation.
- **Frequency:** Inspect every 45,000 kilometres; replace as needed.

8. Headlight and Taillight Check

- **Benefits:** Enhances safety by improving visibility, reduces the risk of accidents.
- **Frequency:** Inspect regularly; replace burned-out bulbs immediately.

9. Wiper Blade Replacement

- **Benefits:** Improves visibility during adverse weather conditions, enhances safety.
- **Frequency:** Every 6-12 months or as needed.

10. Seasonal Maintenance Checks

- **Benefits:** Prepares the vehicle for changing weather conditions, ensuring safety and performance.
- **Frequency:** Winter and summer recommended.

Additional Recommendations:

- **Personalised Service Recommendations:** Tailor the maintenance menu based on the vehicle's make, model, age, and mileage.
- **Package Deals:** Offer bundled services at a discounted rate to encourage comprehensive maintenance.
- **Loyalty Programs:** Create programs that reward repeat customers with discounts on future services.

CONCLUSION

Clearly communicating the benefits and recommended maintenance schedule helps customers see the value in regular service. This not only boosts customer satisfaction but also encourages a proactive approach to vehicle care.

IN SUMMARY

1. The maintenance recommendations on the RO is important.
2. Check parts are available.
3. Make it convenient for the customer.
4. Can reduce costs for the customer.
5. It can give the customer something to think about when you call them back during the day.



Managing an unexpected customer in a fully booked automotive service department can be challenging, but with the right approach, you can handle the situation effectively. Here are some steps to consider:

1. Stay Calm and Courteous

Greet the customer warmly and listen to their concerns. A positive attitude can go a long way in easing tension.

2. Assess the Situation

Quickly determine the nature of the customer's issue. If it's urgent (e.g., a safety concern), prioritise it accordingly.

3. Communicate Clearly

Inform the customer about your current booking status. Be transparent about wait times and the reason for any delays.

4. Offer Alternatives with empathy

Acknowledge their inconvenience. Let them know you understand how frustrating it can be to have vehicle issues.

Suggest scheduling an appointment for a later time or date. If possible, offer to put them on a waiting list in case there are cancellations.

5. Provide Quick Solutions

If it's a minor issue that can be resolved quickly (like a tire pressure check or fluid top-up), see if you can accommodate them without disrupting your schedule.

6. Follow-Up Options

If they cannot be accommodated immediately, offer options such as a follow-up call when a slot opens or a reminder for their next scheduled maintenance.

7. Discuss Service Packages

If they're looking for routine maintenance, discuss service packages that can be scheduled for a later date.

8. Feedback Collection

After handling the situation, consider how to improve processes to minimise such occurrences in the future, such as better scheduling or communication.

By following these steps, you can manage unexpected customers effectively, ensuring they feel valued and heard, even when your schedule is tight.

SUMMARY

1. Relax and know how your appointment schedule works?
2. Tell the truth with empathy.
3. Build value for the customer even when delivering bad news.
4. Under promise and over deliver.

KEEPING TRACK OF THE REPAIR ORDER



Keeping track of repair orders effectively is crucial for ensuring timely completion of vehicle services and managing any additional work.

1. Establish Clear Communication Channels

Maintain open lines of communication among all team members involved in the service process. Regular check-ins can help identify any potential delays early on and keep everyone informed about the status of repairs and additional tasks.

2. Set Clear Time Estimates

When creating a repair order, provide realistic time estimates for each service. Break down tasks into smaller components and communicate these estimates to both the customer and the service team to set clear expectations.

3. Prioritize and Schedule Tasks

Use a priority system to manage repair orders. Identify which services are critical and need immediate attention versus those that can wait.

4. Document and Review Additional Work

If additional work is identified during the service, document it immediately and communicate it to the customer for approval.

Keep a log of additional tasks and their estimated completion times to help manage workflow and ensure nothing is overlooked.

By implementing these tips, you can enhance efficiency, maintain customer satisfaction, and ensure that vehicle services are completed on time.

SUMMARY

1. Pre-print the RO. for the confirmed appointment the night before.
2. Be aware of the service history.
3. Keep track of the job from start to finish. Everyone depends on you for that.
4. Know the customers' expectations.
5. The customer is the priority, not the car
6. Actively listen and ask questions.
7. Confirm with the customer any additional work or cost.



Comebacks, or repeat visits for the same issue after servicing a car, can be frustrating for both customers and service departments. Some of the reasons are:

Inadequate diagnostics

Failing to thoroughly diagnose the root cause of an issue can lead to incorrect repairs. If the initial problem isn't properly identified, symptoms may persist, resulting in the customer returning for the same concern. Watch for the uninformed person if they drop the vehicle off.

Poor quality of parts

Using subpar or incompatible replacement parts can lead to premature failures. If the parts installed don't meet quality standards, they may not function as intended, causing the issue to recur.

Rushed or incomplete work

When technicians are under time pressure, they might overlook steps in the repair process. This can include not tightening bolts properly, failing to reset warning lights, or missing critical checks. Have a robust quality check process.

Lack of communication

If customers aren't properly informed about the work performed, any residual issues or recommended follow-ups may go unnoticed. Clear communication is key to managing expectations and preventing misunderstandings.

By addressing these areas, automotive service departments can reduce the likelihood of comebacks and improve overall customer satisfaction.

STRATEGIES TO PREVENT COMEBACKS



Thorough diagnostic processes

Implement Comprehensive Checks: Ensure technicians perform detailed diagnostics to identify the root cause of issues before proceeding with repairs.

Quality parts and materials

Use original parts where possible: Establish strong relationships with trusted suppliers to ensure that parts meet industry standards and are compatible with the vehicles being serviced.

Enhanced training for technicians

Regular Training Programs: Invest in ongoing training for technicians to keep them updated on the latest technologies, repair techniques, and best practices.

SUMMARY

1. When booking in ask relevant questions.
2. Use the customers' words.
3. Know the service history.
4. Check who is bringing the car in.
5. Walk around the vehicle with the customer if possible.
6. Road test.



Introducing the service manager to customers after their car has been serviced can enhance the overall experience.

Personalised customer interaction

Builds trust and rapport: Meeting the service manager allows customers to connect with a key figure in the service department. This personal interaction fosters trust, making customers feel valued and more likely to return.

Addressing concerns and questions

Direct communication: The service manager can address any lingering questions or concerns about the service performed. This ensures that customers leave with a clear understanding of the work done and any recommended follow-up services.

Promoting future services

Encourages loyalty: The service manager can discuss future maintenance needs, upcoming promotions, or loyalty programs. This proactive approach can help retain customers and encourage them to schedule future services.

Overall, introducing the service manager enhances customer satisfaction and can lead to increased loyalty and repeat business.

SERVICE WALKROUND



Greet the customer by name.

Explain why and what you are doing

Dress the vehicle. Shows the customer you care

Connect in some way.

Show the customer you care.

Check for scratches.

Check tyres.

Make recommendations in a relaxed way.

Introduce the survey.

Business card and pick up time.

WHAT CHANGES CAN YOU MAKE TO IMPROVE YOUR SERVICE EXPERIENCE AND MAKE SERVICE ADVISORS OF THE PAST PROUD?



WHAT	WHY	HOW

PS TAKE A MOMENT AND TICK THE BOXES YOU BELIEVE YOU CAN DO, CIRCLE IF YOU CAN IMPROVE.



ACTION	IMPROVEMENT
Answer your phone promptly with a smile.	
Show empathy towards your co-workers.	
Emails are always positive.	
Keep promises. _____% of the time	
Actively listen to your customers.	
Actively listen to your co-workers.	
Deal with complaints promptly with enthusiasm.	
Be helpful - even if there is no immediate profit from it.	
Always be helpful, courteous, and knowledgeable.	
Give them something positive that they did not expect.	
Add value before asking for the business.	
Build value in the RO before presenting the invoice.	
Communicate in a positive and uplifting way.	
Follow up every time.	
Introduce the survey early.	



REFLECTION

Now that you've watched the video and completed the workbook, it's time to reflect on what you've learned from this module.

Reflecting on and reviewing information helps solidify what you've covered, supporting a deeper and more lasting understanding.

To get the most from your learning, take your time as you complete the review section.

Engage fully with each question—whether you're writing, discussing, or creating a visual summary. This process will reinforce your understanding and make it easier to apply these concepts in the future.

Please complete these questions.

What did you learn from this module?

What behaviour will you change based on learning?

How can you apply this knowledge in your role?

THE QUIZ

The quiz is available for you to review before completing your course online, or for you to complete if you're not taking the course online.

Tick the correct answer

Creating a repair order service recommendation and maintenance menu can help customers understand the benefits of various services and encourage them to keep their vehicles in top condition.

True ☐

False ☐

When an unexpected customer wants work done and you are fully booked what should you do?

Tell them you're too busy ☐

Stay calm and courteous ☐

Suggest another service department ☐

Tell them they should have called first ☐

What action can help identify any potential delays?

Expect there will be none ☐

Regular check-in ☐

Check if you have time ☐

Leave a message for the foreman to call you ☐

Should you walk around the customer's vehicle with the customer if possible?

Yes ☐

No ☐

Although not always possible what is a benefit for introducing the service manager to the customer on the first service

Builds trust and rapport ☐

No real advantage ☐

Something to do ☐

Encourages the customer to spend more money ☐

NOTES AND QUESTIONS

Use this section for any additional thoughts or information or if you have any questions that you would like to discuss.

ABOUT US

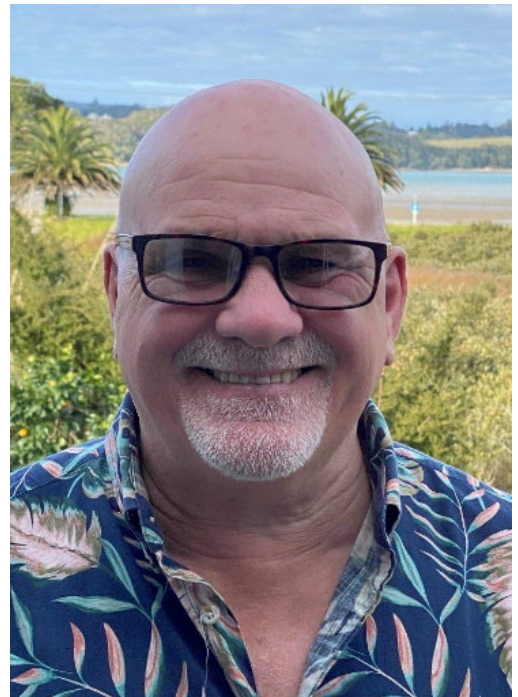
Graham (GTE) leads over 100 workshops annually, focusing on leadership, sales, fixed operations, and customer experience. He's the founder of Success Resources International, a Registered Training Organisation based in Brisbane, and the Managing Director of GTE Training and Development in New Zealand.

Originally from North Wales, Graham has spent 17 years in Australia (2001 – 2019) after more than two decades in New Zealand. His background includes service in both the Royal Navy and the Royal New Zealand Navy.

He's married to Shelley, a Kiwi from the Bay of Islands, and together they have two children Mackenzie and Gareth, along with four grandchildren: Hudson, Avyana, Reo and Vivienne.

Graham (GT) is a highly regarded coach and workshop facilitator specialising in leadership, sales, service and customer experience. He brings a wealth of expertise with the following qualifications:

- Advanced Diploma of Leadership and Management
- Diploma in Automotive Management
- Diploma of Training and Education and Design
- Certificate IV in Finance and Mortgage Broking
- Certificate IV in Business Sales
- New Zealand Certificate in Marketing
- NLP Practitioner



Graham's diverse skill set quips him to empower individuals and organisations to achieve their goals