SERVICE ADVISOR BEST PRACTISE WORKBOOK V6

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GTE TRAINING AND DEVELOPMENT

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MODULE INTRODUCTION

BEST PRACTICES AS AN AUTOMOTIVE 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!

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MODULE STRUCTURE

KEY CONCEPTS

This role is crucial in bridging the gap between customers and technicians, ensuring that everyone's needs are met effectively.

In this module you are tasked with comparing what you do now and the ideas in the module. It is not about right or wrong but an opportunity for you to integrate the best of both and create your top ten best practise Standard Operating Procedure. SOP.

EXPECTATIONS

During this module, you can expect to:

Customer Communication: we'll delve into techniques for enhancing communication with customers, from active listening to conveying technical information in an accessible way.

1. **Problem-solving skills:** you'll learn how to identify and address customer concerns proactively, turning potential conflicts into opportunities for exceptional service.
2. **Sales techniques:** we'll cover best practices for upselling services without being pushy, fostering trust and building long-term customer relationships.
3. **Time management:** strategies for managing your time effectively while juggling multiple tasks and ensuring that no customer feels overlooked.

WHAT YOU WILL ACHIEVE

By the end of this module, you will

- ✓ Improve your communication skills, making your interactions with customers more effective and satisfying.
- ✓ Employ proven strategies to enhance customer trust and loyalty.
- ✓ Increase your ability to manage workloads while maintaining high service standards.
- ✓ Leave with actionable tools and insights that you can implement right away.

TIME TO COMPLETE

This module should take you approximately:

Workbook, Video and complete the Quiz

30 minutes

We're excited to embark on this journey together. Let's explore how these practices can not only elevate your performance but also transform the overall customer experience. Thank you for joining, and I look forward to our engaging session!

Let's get started!

DID YOU KNOW THAT EFFECTIVE COMMUNICATION CAN IMPROVE CUSTOMER SATISFACTION RATINGS BY UP TO 30%?

GREET THE CUSTOMER WITH A SMILE

"Good morning/afternoon, Mr./Ms. JOHNSON I hope you're doing well today. Thank you for bringing your vehicle in for service with us. We appreciate your trust in us to take care of your vehicle." My name is … and I will be looking after your vehicle today"

ADVISOR CHECKLIST EXAMPLES

Let us take a look at some Advisor Checklists – these are examples only and we encourage you to create your own.

On the next few of pages you will see some examples and your challenge is to write next to each one your own SOP (Standard Operating Procedure).

CHECK IN EXAMPLE	YOUR STANDARD OPERATING PROCEDURE
☐ Option: Service lane supervisor to welcome the customers and introduce the advisors.	
☐ Organise coffee if a customer is waiting.	
☐ All the team wear name badges	
☐ Advisor’s names on the counter	
☐ Advisors introduce themselves by name and “I will be looking after your car today” and call the customer by name	
☐ Explain what will happen (Tech will check the vehicle and the advisor will contact the customer if there are any issues to discuss).	
☐ Explain how payment happens if they have an account, or they will be paying cash or card.	
☐ Show recommendations and offer to check if they can be done.	
☐ Advisors will give them a business card with the pickup time written on the back.	
☐ Vehicle to be dressed whilst customer is there.	
☐ 2 parking attendants.	
☐ Phone calls to be handled by someone other than the advisors during the busy time.	
☐ The advisor explains the loan car policy and walks them out to the vehicle.	
☐ ***If Advisors contact the customer with any additional recommendations, they should confirm the customer’s agreement.***	
☐ Introduce the survey.	

CHECK OUT EXAMPLE	YOUR STANDARD OPERATING PROCEDURE
☐ Option: Service lane supervisor to welcome the customers back and introduce the advisors.	
☐ Advisor to present the account. Circle what has been done to build value on the invoice.	
☐ Payment with card or cash if they do not have an account. If they want one, they will pay now, and we can set up one for next time.	
☐ Books to be completed and left of passenger seat, next service sticker, handbrake checked, and washers filled.	
☐ Walk out with the customers to their car, take out the seat covers and floor mats, recommend tyre pressures and explain the survey and ask if they can give you top marks and if not, what can we do. (“Did you enjoy the service experience today and if not, what would you like me to do?”)	

MUST DO CHECK POINTS	YOUR STANDARD OPERATING PROCEDURE
☐ Tyres	
☐ Wiper blades	
☐ Lights	
☐ Brakes	
☐ Wheel alignment and balance	

THE CIRCLE OF TRUST	YOUR CIRCLE OF TRUST
☐ Smile and show you are interested in them.	
☐ Welcome the customer and let them know you will be looking after their vehicle.	
☐ Explain how it works and what you will do.	
☐ Let them know you will follow up after the service check.	
☐ Pat the dog (Talk about the vehicle and engage).	
☐ Introduce recommendations.	
☐ Follow up within 2 hours.	
☐ Gain agreement for any additional recommendations.	
☐ Give business card with pick up time.	
☐ Introduce the survey.	

PARKING	YOUR PROCESS
☐ Finished vehicles are reversed in for easy exit.	
☐ Loan cars are together.	
☐ Customer parking and service parking clearly sign posted.	

DOUBLE CHECK BEST PRACTICE TOP 10

These elements are required to make a customer's experience as enjoyable as possible and be encouraged to come back and recommend family and friends. Build trust.

IDENTIFY YOUR TOP TEN NON-NEGOTIABLES

TOP TEN	YOUR TOP TEN
Welcome them to the dealership, explain your role and that you will be looking after them and their vehicle.	
Pat the dog: by complementing them on something, the day, how they look (glasses), kids and ask or make a non-threatening personal comment.	
Explain the vehicle check in process.	
Explain the survey after the service and commit to do what it takes.	
Tell the truth. Over deliver.	
Confirm your follow-up protocols: 2-hour call.	
Give them a business card with delivery time estimate.	
Call them with early with diagnosis.	
Quality control the car prior to hand over.	
Deliver the vehicle in person. Confirm washers, handbrake, service sticker and service log. Recommend ways to reduce wear on tires.	

INVOICE PROCEDURE

When handing over a vehicle after service, it's important to go over the service invoice in a professional and courteous manner.

CONFIRM THE WORK DONE

"I'd like to go over the service details with you so you're fully informed about the work we've completed on your vehicle."

WALK THROUGH THE SERVICE INVOICE

"Here's the invoice, which provides a breakdown of the work done today. Let's review each section together to make sure everything is clear."

- Labour charges: "You'll see the labour charges here for the time spent working on your vehicle. This includes any diagnostics and repairs performed."
- Parts & materials: "This section lists the parts that were replaced or serviced, as well as any fluids or materials that were necessary for the service. We only use high-quality, original parts unless otherwise specified."
- Additional services: "if any additional services were recommended during the inspection or performed beyond what was originally requested, you'll find those listed here as well."

ADDRESS ANY QUESTIONS OR CONCERNS

"Please feel free to ask any questions you may have regarding the services or charges. We want to ensure you're completely comfortable with the work that was done."

SUMMARISE THE PAYMENT PROCESS

"As for payment, the total amount due is listed at the bottom of the invoice. If you'd like to pay by card we will do that for you?"

MENTION ANY FUTURE RECOMMENDATIONS OR FOLLOW-UP

"Before we finish, I'd like to mention any future recommendations or services that may be needed based on our inspection, such as … I've noted these for your convenience, but we can discuss scheduling these services at a time that's most convenient for you."

THANK THE CUSTOMER AGAIN

"Thank you again for trusting us with your vehicle. If you have any further questions or need anything in the future, please don't hesitate to reach out. We look forward to seeing you again."

Walk out to their vehicle with them and mention the sticker, Service log, hand brake and tyre recommendations. Close with a warm farewell "Have a safe drive and take care!"

This approach ensures that the customer feels well-informed, respected, and confident in the service they've received, whilst maintaining a professional and courteous tone.

COMMON OBJECTIONS

IS THAT THE BEST YOU CAN DO?

"Because we have not seen your car, we have quoted you our set menu price allowing for a complete rectification of the problem, however, if on inspection we find we can reduce this we would be able to provide a better price for you.

So when could be a suitable time to come in for us to do that for you?"

YOU ARE TOO EXPENSIVE!

"We have completed a market research survey amongst our local Dealer network and our labour rates seem to be one of the best value for money.

But more importantly with our speed of completion and quality of work you will not be disappointed with our fully guaranteed right first-time work. So when would be a suitable time to pop in so we can get you mobile?"

I NEED TO THINK ABOUT IT! (REPAIR).

"Yes, of course – we will make a tentative booking to allocate you with the first day available to rectify your car and get it back on the road. So, let us say 8.30 Tuesday morning and if you can't make it that time then please give me a phone call and we can rearrange it for you.

Do you have a pen handy?

My name is ____________________ and our number is __________________.

Thank you for your call."

STATEMENT OF INTENT.

"We have factory trained technicians and state of the art equipment specifically designed for the technical requirements in today's modern vehicle maintenance which guarantees the work and service will the best available. Right first time will save you time and money so shall we book you in and take care of your vehicle today?"

1. UPSET CUSTOMERS (ON THE PHONE)

"Mr. Jones, I appreciate your call, unless we know there is a problem we cannot begin to solve it. Now from the notes I have taken I would like to go over with you step by step what has happened so I'm sure I understand fully, then we can begin to put together a solution."

2. LIFE STORY CUSTOMER

"Excuse me Mr. Philips, I need to interrupt you for a moment, if you can hold for a few seconds, I'll be able to clear my other calls and make sure I get the right person to manage your enquiry"

3. GIVING BAD NEWS

It may not qualify for warranty, but I can apply and see what we can do.

MEETINGS SUGGESTIONS ON YOUR RETURN FROM TRAINING

Toolbox meeting involvement.
Managers and advisors to schedule “Do you have a minute” time in the afternoon.

Take a few days and write down what you are doing and discuss the following:

QUESTION	ACTION TO TAKE
What is working?	
What causes it to work?	
What is our goal for this week/month/year?	
What is in it for everybody?	
What do we need to do differently, more of or better?	

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?

Identify one area you strongly agree with

What do I need to work on?

What actions can I take to improve the team morale and overall experience?

What actions can I take to improve the customer's overall experience?

THE QUIZ

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

Should the advisor greet the customer with a smile

☑ Tick your answer

- ☐ Yes
- ☐ No

An SOP is a Stand Operating ?

☑ Tick your answer

- ☐ Proposition
- ☐ Project
- ☐ Procedure
- ☐ Plan

If there are any additional costs to the invoice what action would the advisor take ?

☑ Tick your answer

- ☐ Confirm agreement from their customer
- ☐ Do it because it is needed
- ☐ Don't do the work

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

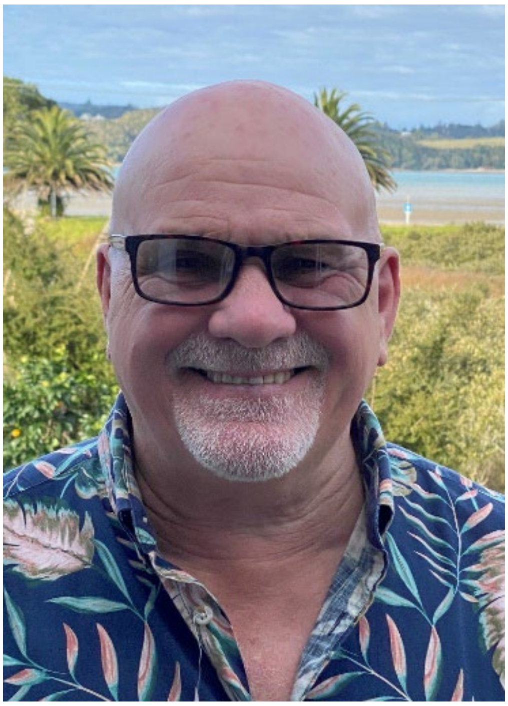
Graham (GTE) leads over 100 workshops annually, focusing on leadership, sales, fixed operations, and customer experience. He's the founder of Success Resources International, a Registered Training Organisation based in Brisbane, and the Managing Director of GTE Training and Development in New Zealand.

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.