

Service Training



The Service 6-Pack

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SERVICE 6-PACK

The steps in the Service 6-Pack are:

-  Reservation, Pre-Work
-  Greeting
-  Walk-Around
-  Vehicle Inspection
-  Informed of Status
-  Active Service Delivery

These are the 6 most influential steps in the customer's service experience. They establish relationship, build trust and confidence, and value. They also allow you to maximize revenue from service visits – by fully serving each and every customer.

Reservation, Pre-Work



The objectives are to:

- 🔥 ***Be ready to fully serve your customers –***
don't make them waste time and money on repeat visits.
- 🔥 ***Maximize your revenue from each visit –***
by fully serving each customer on every visit

Fulfilling this objective starts with documenting your customer's primary concern. Write/type it exactly as explained in their initial contact and prepare your schedule for their arrival. Most times, your customer will call in to arrange for their vehicle repair. Sometimes you will be working from an email message or a lead from your website. In both cases, your customer states a primary concern for you to address.

Collect the primary concern from the customer with open questions like:

- 🔥 “Tell me how the vehicle is behaving.” or
- 🔥 “What can we do for your vehicle this time?”




Always capture the customer's verbatim comments in your description. Even though, it may be tempting to abbreviate or edit terminology, doing so is disrespectful to your customer. Use her terms and then, ask follow-up questions to confirm your understanding. When the customer checks in for her appointment, the fact that you use her terminology to describe her situation builds trust that you listened and intend to address her specific needs. It builds trust and confidence.





Imagine that your customer phones in for a service appointment. She says that the car is screeching.

What do you do next?

ANSWER:

1. Write down “screech”
2. Ask a follow-up question such as:
 “Tell me when this happens...”

After capturing the customer information and setting up the appointment, review the customer's service history including:

-  Service Record
-  Transaction History
-  Write-Up of the vehicle issue
-  Last multi-point inspection (MPVI)

Look over the Service Record and Transaction History for clues about upcoming maintenance needs or anything related to the new event. Jot some notes in your Write-Up so you can make reasonable offers for additional services when your customer arrives.

Have your pre-work easily accessible for your customer's arrival so you are ready to begin your efficient check-in!

If your first question on arrival is to ask what your customer is there for today – you have failed and your customer is now wondering why they bothered to set an appointment in the first place.

Greeting



Your objective now is to **Make Connection** and create a welcoming atmosphere for your customer.

Never, ever, sit and wait for your customer to approach you! Always meet the customer at their vehicle and hold the door open.

Start with a smile. Don't wait. Don't approach your customer without a smile! Lighten their load today by showing you are here to serve and automatically diminish any defensiveness.

Realize that your customer may not be happy about servicing a vehicle. There are many unknowns associated with a service visit. The customer doesn't know how long it will take or how much it will ultimately cost. Most customers do not have technical knowledge about their vehicle, so they feel intimidated. They may think you will take advantage of their ignorance, so they usually have their defenses up.



This isn't a personal judgment about you. This is about them; about previous unpleasant experiences they have had, or about things they have seen dramatized on television or movies. But that doesn't mean it doesn't exist. You cannot change the existence of customer's intimidation and defensiveness. Instead, to be successful, realize it is there. Then, work to diminish it by replacing what they expect, with what they **desire**. Be warm and professional and you will earn their trust and loyalty (repeat business.)

The beginning of the great greeting is making that great first impression. It consists of:

- 👁️ Smile
- 👁️ Demonstrating your willingness to serve
- 👁️ Making eye contact
- 👁️ Assist opening vehicle door
- 👁️ Friendly, enthusiastic, and ready
- 👁️ Professional attire and posture
- 👁️ Use customer's name *(only use a first name if you know them and/or they have asked you to use it)*



List things YOU can start doing today to create a welcoming atmosphere:

In terms of process, do the following:

- 🔥 Introduce yourself and provide your business card so they have your name and number
- 🔥 Confirm their appointment
- 🔥 Confirm/clarify needs
- 🔥 Offer additional services that make sense based on the primary reason for the appointment
- 🔥 Confirm correct address, email and contact information

Walk-Around



A quick comprehensive walk-around with your customer serves many purposes. You will **Make Connection** and **Exchange Information** regarding your customer's vehicle. Additionally, it sets the stage for value. It starts by showing how you respect your customer's property. It shows them how you will conduct comprehensive work and treat their vehicle in its whole. It begins a partnership between you and the customer in caring for their investment.

When you omit this step, you eliminate your customer's chance at assurance of your attitude and capabilities. You allow those old stereotypes and fears that we've talked about to take over.

As a professional, take some time to investigate YouTube for examples of a service walk-around. Of course, this is our favorite: <https://www.youtube.com/watch?v=Hb-igBZvLy0&list=UUBqcjpPdbKvhJe6Tjt9nOaA>

But don't stop there; hundreds more exist for your review. It's encouraging to think that the Walk-around is a how-to, that people are excelling in this process and they will post videos to show you how. It is a great way to up your own game by seeing particular techniques or word choices that create value for your customer.












List one thing YOU can do for your next customer that will improve your Walk-Around presentation:

Remember – virtually every service customer comes to you to have their vehicle serviced by a professional, someone that is competent and caring. Performing a comprehensive walk-around at the vehicle with the customer is the ideal place to demonstrate they have made a great choice bringing their vehicle to you. It is also the very best place to point out additional concerns and services relating to their vehicle and get approval to perform those services on the spot.

It is not just an opportunity to document damage on their vehicle.

In terms of process, do the following in your Walk-Around:

-  Take your tire depth gauge and flashlight with you
-  Invite your customer to look at their vehicle with you
-  Obtain accurate mileage
-  Release hood, turn front wheels to the left
-  Check for interior damage and personal items
-  Check oil change window sticker
-  Record VIN
-  Check driver side windshield wiper blade
-  Move around vehicle counter-clockwise
-  Check tires with gauge for wear and 4/32" tread depth and wear pattern
-  Check wheel wells with flashlight for suspension issues
-  Touch, verbally acknowledge and record any body damage
-  Check passenger side wiper blade
-  Open hood and check belts, hoses, leaks, and master fluid with flashlight

Vehicle Inspection Form

Once the vehicle is assigned to a technician, a multi-point inspection of the vehicle is part of a complete diagnosis for work to perform. Typically, the form is laid out in a checklist format with all the parts of the vehicle designated and a green/yellow/red color code.

The beauty of this form are the colors. It makes vehicle maintenance approachable and understandable to your customer. It's a perfect tool to **Exchange Information** and describe what you've done and/or what needs to be done on their vehicle. Your customer visibly knows what is alright, what may soon need attention, and what definitely needs attention today.

It is a visual that can help your customer see your thoroughness, how well all parts are working, and also prepare for future expenses.



Your job as a professional Service Advisor is to describe what must be done, what should be done, and provide reassurance of the safety and well-being of their vehicle. This is a wonderful tool to demonstrate how you are going to take care of them and their vehicle. Because of its simple format, you break down the walls of technical phobia they may have and make their vehicle an understandable object. Because you take the time to inspect it and instruct on it, you create credibility as skilled and as their partner. The outcome is they drive with confidence.

Don't overlook this opportunity to continue the comfort and welcoming atmosphere that you've worked so hard to create up to now.

If your customer is leaving your site, make sure they have a blank copy of the multi-point inspection form, so they can refer to it while you are advising them over the phone about the work to be done today.

When you describe the inspection to your customer, you can now ask for permission to conduct necessary work. This permission step is crucial in overcoming that fear of over-charging and over-servicing vehicles that every customer harbors.

A proven word track that instills confidence and trust with customers is to tell them you:

“Want them to be safe, comfortable, and to get the full value from their vehicle.”

The multi-point inspection is the foundation for bringing that statement to life.






Why would a customer appreciate being informed about a yellow item?

- a. Plan and budget for future repair
- b. Demonstrates transparency in vehicle inspection
- c. Shows the value of full inspection each time her vehicle is here
- d. All of the above

ANSWER:

- d. All of the above

In terms of process, do the following:

-  Present and build value
-  Show the Inspection Form
-  Provide brief review of major components to build the value
-  Present your findings:
 - Summarize all the POSITIVES
 - Share additional findings
 - Support findings with digital photos (email if customer is not on site)
 - Establish follow-up time for any needed work
-  Thank the customer for their business

Informed of Status



One of the worst things about bringing our vehicles in for service is waiting.

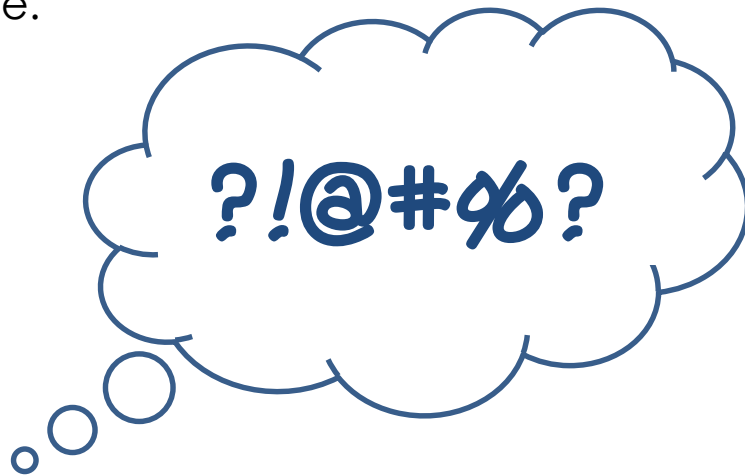
Try this:

- 🕒 Sit still and look at your watch or timer on your phone for 60 seconds. Don't look away or do anything at all for the full 60 seconds.

Just sitting quietly doing nothing at all makes time crawl, doesn't it?

Now imagine what a waiting customer's mind can invent that is happening to their vehicle. They have no choice but to create their worst-case scenario. They picture some major thingamajig is broken and has to be ordered and will cost \$9000 and the car will be in the shop for 2 weeks.

Even if something is covered by warranty or relatively affordable, being without your vehicle for any amount of time is very inconvenient. It upends all parts of your customer's life.



With this horror show in mind, **Take Action** and use **Empathy**. Think of ways that you can keep your customer posted about progress on their vehicle.

You can start with providing a realistic estimate on how long service will take if all things are typical. You know your technicians. You know your shop. You know what else is going on here today, so draw from that for a reasonable “ball-park” completion time.

Which phrase do you think is more helpful for a customer to hear:



“Your car should be ready by 3:00”



“We’ll call you as soon as it’s ready”

The first phrase is best because it states a time. The second is not as good because it sets no expectation and is completely open...the customer’s mind is already racing to “what ifs”.

Now that you’ve set the stage for the completion time, consider how you will let your customer know that progress is being made.

It is totally unacceptable not to make status updates.
Even if the customer is waiting in your lounge.

Choose the best phrasing for obtaining customer contact information:





- a. "Is this the correct phone number?"
- b. "What is the best number to reach you?"
- c. "What is the best way to reach you today...
phone, email, text?"

ANSWER:

- c. “What is the best way to reach you today...
phone, email, text?”

Many of our service customers today prefer to a text notification over a phone call or even email.

NEVER, EVER, EVER ask a customer to call you. This is a bad idea for so many reasons.

-  It puts responsibility on the customer: bad.
-  It ties up your phone line with unnecessary inbound calls: bad.
-  It does not demonstrate a willingness to serve: bad.
-  It illuminates your incompetency: bad.

Even if your customer is waiting at the dealership for the service to be performed, you need to check in with them to let them know what is happening.

A text message is optimal if the customer grants that permission. A face-to-face conversation is fine. A message on a light board in the lounge is fine as long as you have notified the customer to watch for it. The method is not as important as making a commitment and keeping your word.

So come to agreement with your customer as to how you will contact them and how frequently that will be.









It is to your benefit to make those contacts take as little time as possible. Obviously, a phone conversation takes longer than an email message or a text, so encourage your customer to provide you with one of these contact points.

Then set a timer or reminder so that you are in touch with your client at least once before the vehicle is delivered back to them. A good rule of thumb is to not let more 2-3 hours go by without an update.

(Obviously a multi-day repair does not fit into this guideline. You will contract with longer repair situations and special parts ordering by setting an end date versus end time. Likely you will make one contact a day for status. Tailor this to the customer and situation.)



In terms of process, do the following:

-  Ask your customer how they want to be updated
-  Capture accurate phone and email information
-  Tell them when you expect the job to be done **AND** when you will provide updates
-  Contact every customer at least once before work is complete
-  If you don't know anything, then THAT is the update
-  Commit to another update when you know more
-  If something occurs that requires more time – let the customer know immediately, including an estimate of additional time required
-  Contact your customer when their vehicle is ready for delivery

Active Service Delivery



You and your team have provided a highly technical service. Be proud of it. You are returning one of your customer's most important possessions back to them ready to perform safely and reliably. The active service delivery puts a bow on the entire service experience.

Let your pride and **Enthusiasm** show. Make it a pleasant interaction. This helps to create a customer for life. It is your chance to prevent buyers' remorse by reinforcing the great decision they made by entrusting their vehicle to you.

List one thing YOU can change to improve how you deliver a car today:

Here is your checklist for delivering a vehicle. Tailor your presentation to each customers' needs:

- 🔴 Provide a face-to-face invoice review
- 🔴 Use the customer's name
- 🔴 Confirm services provided today and concerns corrected
- 🔴 Resolve any confusion or unhappiness
- 🔴 Resell benefits of work done and benefits of additional work needed (schedule this work)
- 🔴 Offer to set next maintenance appointment
- 🔴 Confirm her Complete Satisfaction and promote survey return
- 🔴 Solicit friends/family/co-workers/employer vehicles
- 🔴 Thank the customer for her business
- 🔴 Ask them to come back



Personalized Quick Action Plan

Service 6-Pack

Select at least one priority from this summary of skills and activities of a Professional Service Advisor that you can start emphasizing today:

✓	Skill/Activity	Page #
	Reservation/Pre-Work	5
	Greeting	10
	Walk-Around	15
	Vehicle Inspection	19
	Informed of Status	24
	Active Service Delivery	31

Name

Date

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