

Rui Martins “Process For Success”



Get In The Green

A Comprehensive Series of Live Business Management Training Courses

THE CLIENT SERVICING PROCESS

DAY 1 Detailed Agenda

- Overview of the two Days
- Benchmark – Advisor Role Play Exercise
- Understanding the Current Service Center Performance
- How does the Customer Perceive Your Brand
- Self Assessment:
 - Understanding The Role Of the Service Advisor Today
 - Understanding People
 - Language – Are we using the Language of Today
 - Need For Change
- Preparing For the Day
- Understanding the Purpose of the Reservation (Appointment)
- The Pre-Work Order Package
 - What are the Tasks
 - Who Does Them
- Role Play – The Reservation
- How will the Service Manager “Manage” the Pre-Work Order Package

- Understanding the Consultative approach to the Write-Up
- Understanding the Professional Work Order
- Why Focus on Process
- The Cathcart Model – Moving a Customer to a Client
- The Importance of the Reception

- How to Approach the Maintenance Conversation
- Using a Services Menu for Discussion
- Use of the Advantage Form – Multi Point Inspection
- Introducing Safety and Reliability into the Write-Up
- Educating the Client
- Role Play – The Pre-Work Order Package

DAY 2
Detailed Agenda

- Benchmark – Shop Loading Techniques and Delivery
- Understanding Shop Loading and Who is responsible for it
- Techniques for Dispatching
 - Competence
 - Tier Labour rates
 - Diagnoses, Repair, and Maintenance
- Completing the Advantage Form
- Introducing the Advantage Form to the Client
- Use of Inspection Reports
- Introducing Be Car Care Aware
- Obtaining Parts
- Using a detailed Estimate – For Today, For Tomorrow
 - Mitchell, Identifix, Service Intelligence
- Role Play – The Estimate
- Mechanical Service – Re-Scheduling the approved work
- Quality Control
 - Who's responsible
 - What steps do we do
 - Use of Technicians Business Cards
- Final Inspection
- Scheduling an Active Delivery
- Techniques for the Active Delivery
 - Scheduling the next appointment
 - Warranties
 - Work not Completed
 - Education Material
- Role Play – Active Delivery
- Techniques for a proper Follow-Up Program
- Use of the telephone for Follow-Up – Asking Relevant Questions
- Use of email and newsletters for follow-up
- Monitoring and Scheduling for the next appointment
- Role Play – Follow-Up
- Summary
- Role Play – The Process
- Conclusion

Information and Material each student should bring to the course to maximize the benefit:

- 1) A Calculator
- 2) Records for 5 transactions - The final Invoice, the working copy of the day (RO), inspection sheets used, parts order slips used, etc. Any paperwork related to that transaction. Each Student should have Five Records
- 3) A copy of customer follow-up questions and a sampling of results - if a survey is used
- 4) A copy of the daily appointments page
- 5) Any forms or brochures used in the day to day operation -- such as Shop Scheduling, Inspections, Quality Control, Invoice Delivery, info Brochures
- 6) They should be aware of this info : How many appointments are booked per day on average? What percentage of the day does Appointments represent? Sales per Invoice - in dollars and hours sold? What the sales levels are per quarter - How does Jan, Feb, Mar compare to Oct, Nov, Dec