SERVICE ADVISOR

Service Processes

Module Two

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INDUCTION
In Module One, we reviewed the following processes:
- Service reminder process.
- Appointment process.
- Preparation and greeting process.
- Reception process.
In Module Two, we will discuss the next six processes.

Continuation of the Service Advisor Processes
Objectives of Module Two

In this module, you will learn:

The role of the Service Advisor in understanding and performing standard processes of diagnosis, resource availability, estimation quote and approval, issuing of order sheets and controlling the process.
Review the activities when you see the activity symbol.

Time for the "what to do" Activity.
The process of diagnosing the work to be done, must identify for maintenance and repair, all the work that the customer wants carried out. The process will also identify other work and maintenance that needs to be done in the interests of the customer and it will alert the customer to these existing or potential needs and problem areas.

Service Advisors, if this is seen as their role or the technicians, must have strong technical and diagnostic skills to interpret the information given to them by the customer and their own analysis of the conditions that apply on the vehicle. They must be well versed in the use of diagnostic equipment and aids.
Diagnosis

**Customer Expectations**

Customers expect, because they are dealing with professionals in the field, to have their descriptions of any problems they may be experiencing, translated into effective remedies. They expect that Service Advisors will readily test-drive the vehicle to ensure that they understand fully, what is wrong with the vehicle. They feel that this accurate diagnosis can often be critical to the efficient operation and durability of their vehicle if not to its safety critical operation.

The Service Advisor needs to establish if the vehicle is going to have a routine maintenance or he should diagnose a repair symptom. The Service Advisor also needs to establish if the repair is due to a recall or service campaign.
## Diagnosis Activities

### Diagnosis
Diagnose the vehicle and determine the necessary work to present to the customer as follows:

#### Routine Maintenance
- Check the condition of the maintenance items, and determine the necessary work for the vehicle.

#### Body and paint repair
- Identify the areas and the extent of the damage, as well as necessary parts for the repair.

### Repair
- Diagnose the symptom according to the interview and identify the root cause. With the diagnosis, determine the work necessary for the vehicle.
- In case of Rework, find out what was done in the previous repair and diagnose it carefully.

Check the VIN if the requested vehicle is under outstanding recalls or service campaign. If so, record it so that the remedy work will be offered to the customer.
Availability of Resources

The Service Advisor needs to check that parts were picked and all parts are available to perform the task at hand. He is also responsible to check availability of workshop staff and bay and sublet availability before allocating jobs.

The job allocation process is designed to get the right job to the right technician with the right level of skill at the right cost of labour at the right time in order to have the vehicle ready on time, clean and fixed right first time. The process must also control and expedite work sent out for sublet. It must also allow constant and ongoing monitoring and recording of progress of work.
Availability of Resources

The Service Advisors, Team Leaders or Service Centre Controllers need to know the skill levels, strengths and weaknesses of the various technicians in the service centre. They should know if a customer has a particular preference as to which technician should work on their vehicle. They must be good at organising workflow and expediting work from technicians and sublet contractors. They must know at all times the progress on a vehicle in relation to the promised time. They must be able to contact the customer when the vehicle is ready for collection. They should be able to tell the customer what the price will be and to confirm the customer’s method of payment.
Checking Availability (Parts, staff, facilities) Activities

**Parts availabilities**
- Check availability of the parts required for the required work.

**Checking staff availability**
- Check availability of service staff to complete the service work by the promised timeline

**Checking facility availability**
- Check availability of required lifts and other facilities in the workshop for the service work.
Customer Expectations

Customers very often bring their vehicle to the service centre because of the highly trained people that they have as technicians. They want, above all else, to have the vehicle maintained and repaired right first time and on time. Many customers also like to think that a specific technician who “knows their car” works on it.
Once you have questioned the customer to establish all of his/her needs and concerns, the question of time and money will be raised. The customer might ask for an estimate of the likely cost of the service, and when they will be able to collect the vehicle.

Estimate the charges as accurately as possible, and break down the costs.
It is possible to estimate the service costs relating to a straight service, but not possible to do so for repair work that can only be established once the vehicle is on the lift. Here, you will need to ask the customer when it will be convenient to contact them, to discuss further work considered necessary for their vehicle.
Estimate Quote and Approval Activities

Writing up estimate sheet
• Complete the following in the estimate sheet:
  • All-inclusive works.
  • Necessary parts.
  • Price.
  • Estimated completion time.

Explanation
• Explain the following to the customer:
  • The work to be done.
  • Necessary parts.
  • Reason of each work and parts required.
  • Price.
  • Estimated completion time.

Offer remedy work for recall / service campaign
• If the vehicle is under an outstanding recall / service campaign, explain it to the customer and offer remedy work for it.
Estimate Quote and Approval Activities continue...

Obtain approval
• Obtain signed approval from the customer on the estimate sheet, if the customer is still in the workshop.

Guiding the customer
• Check if customer would like to wait or leave.

If customer waits -
• Guide the customer to the customer lounge.

If customer leaves -
• Confirm the phone number and convenient time to contact with the customer. Guide the customer to alternative transportation, if that has been pre-arranged according to the customer's request.
**Customer Expectations**

In this time of squeezed affordability on the part of the customers, they do not want a so called “five o’clock surprise” where the cost of the service may be a lot higher than expected. Customers also like to feel that they have a choice. They want to feel they are in control of what they have to spend. They want to have a say in work that needs to be done. They certainly want the right of refusal.

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*Exceeding Customer Expectations*

Achieving true loyalty by raising the satisfaction bar.
Issue a Service Order Sheet

Once you have accurately gathered all information from the customer, you need to document it according to company procedures, usually on your pre-printed Job Card or Service Order Sheet. You also need to ensure that the customer confirms what you have written, for example by signing the Job Card/Repair Order.

The information on the job card is a very important step in the service process, as this is the document that shows the workshop staff what work needs to be done and by when.
Issue a Service Order Sheet

This very important process ensures that there is no misunderstanding, on the part of the workshop, on the task to be performed. The Service Advisor needs to be accurate and document all requests and requirements on an issue order sheet. Most important note is the expected time of completion as this is a promise you made to the customer.

Under promise and over deliver!
Issuing a service order sheet

• Issue a service order sheet based on the estimate including:
  • Items to be worked on.
  • Comments which should be conveyed to the technician, if any.
  • Estimate time of work completion.
  • Contents of recall or service campaign if the customer has accepted to do the remedy work.

Repair Authorisation Activities
Prepare Parts

The stocking of the right part to be available at the right time is critical to the efficient and profitable operation of the service centre. The process aims to provide the highest level of “fill rate” to the service centre. The “fill rate” is the ratio as a percentage, of the number of repair orders where the service department could supply all the service needed, to complete the work required, *off the shelf on a first time pick basis*. The targeted achievement should be 100% for service parts and 95% on repair service.
Perform Service Work

Ensure that the technician collecting the prepared vehicle receives the vehicle with the requirements and that he or she can start working on the vehicle without any delays. The time started and completed must be recorded as this is crucial in establishing the technician’s productivity.

Quality control is a vital part of the dealership processes and checks to establish that all customer issues are dealt with must be done with precision.
Customer Expectations

Customers expect, because they are dealing with professionals in the field, to have their descriptions of any problems they may be experiencing, translated into effective remedies.

They expect that Service Advisors or workshop foremen will test-drive the vehicle to ensure that they understand fully what is wrong with the vehicle.

They feel that this accurate diagnosis can often be critical to the efficient operation and durability of their vehicle, as well as to their safety when driving the vehicle.
Performing Service Work Activities

Prepare the parts
• Order the parts required for the jobs and retrieve them from the Parts Department.

Before service work
• Comprehend the contents of each work item, including:
  • Items to be worked.
  • Necessary parts to replace.
  • Start & completion time.
  • Applicability of any outstanding recall or service campaign.

• Place protective covers such as fender covers, a grill cover, etc, on the vehicle.
• Prepare all the tools and the parts necessary for the work.
• If the serviced vehicle is very dirty, pre-wash the vehicle.

*Utmost care should be taken to prevent any damage or stains during work.
*This is important for efficient work; starting the work with poor preparation will result in time wasted on looking for the tool/part when it is required.

• Take care not to adjust the original settings of the vehicle. If anything is likely to be changed during the work, such as seat/mirror position, audio memory, etc, record the settings on the service order sheet so that it can be restored after the work.
Performing Service Work Activities continue...

Service work
• Process the work safely within the designated time as instructed.
• Record the start time of the work.
• If any technical problem that is worthy to report to the manufacturer is found, report it without delay to the distributor, according to the procedure specified by the distributor.
• Do not touch any of the customer's belongings left in the vehicle.
• Drive customer's vehicle with care at all times.
• Lock the vehicle if left unattended.
• Place the replaced parts in a sealed clean bag so that they can be returned to the customer or distributor, if requested.
• Tag all warranty parts, including those from sublet repairers and keep them in good order.

Additional work
• If the technician finds additional work that needs to be done which is not on the service order sheet, report it to the staff in charge of contacting to the customer.
Performing Service Work Activities continue...

Checking before work completion

• Check if all of the requested works were completed right and if all the customer's concerns have been resolved satisfactorily.

*Test drive the vehicle if necessary.

• Return all settings and adjustments to their original positions, if changed during the work.
• Check to ensure no tool, waste cloth or parts is left in the vehicle.
• Record the completion time, staff name, etc. in the service order sheet.
Controlling the Process

Vehicle Service and Quality Control

The vehicle servicing and quality control process must ensure that all the work required and authorised by the customer, is carried out to the highest possible level.

The process must ensure that this work is carried out in a profitable manner and that all recurring quality problems are eradicated from the system.

The process must also allow for prompt and special attention to be given to “come-backs”. These “come-backs” must be properly recorded and monitored for systemic improvements.
Controlling the Process

Vehicle Service and Quality Control

The technicians must be fully trained in all aspects of vehicle maintenance and repair. The Service Advisors or Team Leaders and the Service Manager, must have a quality orientation and the technicians must have a pride in their workmanship for the service centre to produce excellent quality. Service Advisors or team leaders must be able to identify sub-standard quality. Everyone in the dealership, as well as customers, must know what the quality policy of the service is. The technicians should be encouraged to measure their own quality and they certainly must be informed of the work they have done that doesn’t measure up to the dealership’s policy.

Controlling the process ensures that vehicles are completed on schedule. The Service Advisor needs to check for any assistance necessary from the manufacturer, warranty claims and needs to ensure the vehicle is spotless before delivery to the customer.
Controlling the Process

Inspecting the Vehicle

You have, as the Service Advisor, communicated with the customer, made promises on repairs and delivery times. Adhering to these promises will ensure the dealership and Brand reputation, lives up the promises made.

This implies that you would ensure all work is performed on time, performed satisfactorily and that the vehicle is in a condition to be delivered to your customer.
Customer Expectations

Customer Expectations

The “bottom line” of the customers’ expectations is that all the work required to be done, is completed to the highest standard. They expect the work to have been completed by highly trained technicians. This is why they are prepared to pay a premium price for value for money. They can’t afford the time in their pressured lives to bring their vehicle back for the re-working of items that were not completed on their first visit.
Controlling the Job Process Activities

Meeting
- Hold regular meetings at selected intervals a day to check that work is progressing on schedule and to determine if additional work that is not included in the service order is necessary. (e.g.; morning, noon and afternoon) with technicians.

Re-arrangement
- If the work is likely to be behind schedule or an additional work is found inform the staff who received the customer's order.
- Arrange the schedule to recover the delay including check on availability of parts, staff and facility.

*Arrange other technicians to help with the work, if necessary.*
- Update the estimate sheet and other related information according to the re-arrangement.

Obtaining Customer’s approval
- Inform the customer of any change to the promised service work, charge, delivery time or any other matter, and obtain the customer's approval for it.

Assistance
- Contact the distributor/manufacturer for technical assistance as necessary
Controlling the Job Process Activities continue...

Final inspection
- When the work is completed, the staff in charge of final inspection should check that all of the requested works were completed right and that all the customer's concerns have been resolved satisfactorily.
- Conduct a test drive as necessary.

Inspection failure
- If the vehicle fails to pass the inspection, return the vehicle to the responsible technician.

Completing the inspection
- When all of the inspection has passed, record the result.
You have reviewed the first eight items on the Service Core Processes illustration in module two. Module three will continue outlining the next four processes.
End

This concludes the e-learning Service Process Introduction Module Two for Service Advisors.

Thank you for your participation!