



CAPRICORN

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Other resources in step 7f:

- **Up-selling and cross-selling checklists**
- **Sample service checklist**

Mindset of the modern technician

It is the nature of the automotive aftermarket repair business that it's very difficult to book in just the right amount of work that will fill every technician's day with income producing labour.

You can allocate a certain amount of work, but you might need to rely on technicians filling any time gaps by proactively looking for repair and maintenance opportunities with the vehicles they already have on the floor.

For this to work effectively, technicians can no longer see themselves just as people who fix the immediate problem, and nothing more.

Technicians need to understand their bigger responsibility when dealing with large, powerful and very lethal machines which depend so heavily on being perfect to keep their occupants and other drivers and pedestrians safe. In other words, today's technicians need to see themselves as car doctors, whose job – and responsibility – is to anticipate and prevent future problems.

When a car comes in for an oil change, a technician needs to look beyond that and into the future. They need to think, 'What do I need to do to ensure that this car doesn't break down and have problems in the future.' This is called preventative maintenance.

A preventative maintenance mindset should not be limited to a vehicle service. If a customer drops a vehicle off to have a set of brake pads fitted, it doesn't follow that the car is perfect in every other way.

What if the tyres were bald and this went unnoticed in the workshop.

And what if the customer was pulled up by the police next day, received a fine and put their car off the road until new tyres were fitted. The customer might be justified in laying some of the blame at your door because you failed to inform them, or at least to warn them that the tyres were illegal.

A technician's role, just like a doctor, is to inform the customer of the existence of any problems and present them with repair options. The buying decision is up to the customer.

It's time workshops and technicians stopped being judge and jury over a customer's ability to afford any repair. Those days are gone forever. Workshops should never fail to inform customers of preventative maintenance jobs that should be attended to, just because it was thought they couldn't afford it.

Whether any customer can afford it or not is not the workshop's business. So many workshops are still trying to put themselves and their own values into the customer's wallet. Everybody has a different perception of value and different size bank balances. The workshop will never know this. If a doctor decided not to inform a patient of a possible heart condition just because they thought the patient couldn't afford the specialist treatment, they would be sent to jail.

First check the essential due dates

Before starting any work on a vehicle, note the due dates for service and compulsory registration checks. This simple check needs to become a habit, combined with a procedure for collecting and recording the information.

If you notice that the car is due for service this is an obvious first upsell. So many technicians don't pick up on this, or if they do, the repair has already been carried out the car is off the hoist.

Look at it from the customer's point of view. Having to bring their car back for a routine service is a pain in the butt for most people. Most will prefer to get all the work done on the same day – the repair and the service.

Identifying extra opportunities on a vehicle service

Identifying extra opportunities should be easy on a routine service because most of a service is really a checklist of items. Service checklists are essential for consistency and ensures that technicians don't miss anything. Technicians are less inclined to brush past something if they have to tick or initial a checklist.

The modern technician mindset should be: What do I need to do to ensure that this car doesn't break down and have problems in the future?

Everything might be running fine on the day, but that doesn't always mean it's going to hold out until the next service or rego check. The customer must be told about every possible area of doubt, and they can then make an informed decision about what work they are prepared to get done immediately.

It is vital that technicians have access to the vehicle's history. This could be on screen, on earlier invoices or job cards. This allows them to very quickly check what was done last time. This is not designed to create extra paperwork but improve efficiency.

The example of a service checklist which can be downloaded from this website should be personalised to suit your workshop.

Identifying extra opportunities while specific repairs are being carried out

This can be a little difficult because the customer is paying to have a specific problem fixed and won't be expecting something else to be repaired.

But the same principles apply. Your responsibility of ensuring the car is safe and reliable overrides any concerns about how the customer will receive the news that something else really should be attended to during this current repair.

Here's the medical analogy again: if you were seeing your doctor about a chest infection and a suspicious looking mole is found on your chest, you would expect the doctor to alert you that it should be examined, perhaps by a specialist. If the doctor kept quiet about it, it would be a breach of their duty of care.

While there may be no checklist for this scenario, it's really about encouraging technicians and mechanics to take their blinkers off and use their knowledge to check for the obvious.

Advising a customer about something unexpected that should be attended to, might go something like this: *'We are just finishing up installing your stereo and one of our technicians noticed that your right reversing lights is not working because the wiring is damaged. Would you like us to fix it for you while we have the car today?'* The more things you check the more issues you will identify.

Measure your success through your average \$ sale

The best way to measure your success with these policies is to measure and monitor your average dollar sale. The technicians who take their blinkers off will generate a higher average dollar sale than those who don't.

For example, assume that one technician had three allocated services for a day. If they identified nothing extra on the back of those services and the average service price is \$240 they will generate sales for the day of \$720 and probably book out between three and four and a half hours of labour.

On the other hand, another technician might have only two services booked in but sells an extra \$450 worth of repairs on each \$240 service. That will generate sales for the day of \$1,380 and most probably book out between six and eight hours labour for the day.

Obviously the customers have to buy the recommendations but if they are never offered, they will never be bought.

There are significant efficiencies in having fewer cars booked in and achieving a higher average dollar sales than having many cars booked in and achieving a low average dollar sale.

Teaching your technician to take their blinkers off

This is a skill that doesn't appear overnight. It may take consistent reminders before it becomes a habit. When time permits, go through a job which has been completed, and see if you can identify missed opportunities.

The upselling checklist provided as a template with this *step* has been broken down into general service, electrical, air conditioning and EFI work. Common upsell opportunities are listed in each of these areas.

Have this laminated and attach it to each technician's tool box. There's nothing like a visible reference checklist to prompt and remind staff about extra opportunities.

Communicate opportunities early

There's little point having a list of upsell opportunities after a car has been serviced or repaired, and it's parked out in the street.

The list needs to be prepared before the car comes off the hoist. If the customer gives the go ahead on the recommended services or repairs, a lot of time will be saved if the car is already on the hoist or in a service bay.

We're too busy to do that?

Those who dismiss this upselling strategy as too time consuming or messy are just throwing opportunity and money away.

Believe it or not, it marks you as a real professional in the eyes of your customers if you are seen to be going out of your way to identify issues which might compromise the safety of the vehicle, or cause an unexpected breakdown.

Getting your customers to buy your extras

This is a skill in itself and will be examined in more detail in a future *step*.

So here's the challenge. Over the next month ensure that all technicians learn how to take their blinkers off and look for extra repair or service opportunities.

Your customer's safety and vehicle reliability depend on it and your bank balance will welcome it.

The place to start is www.tatbiz.net.au/capricorn

Just go for it!