



CAPRICORN
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Additional resources:

- Template of job description
- Template of responsibility schedule
- Template of interview questions
- Template of job advertisement
- Communication standards

Getting the most out of a service advisor

Many workshop owners will experiment with a service advisor, a person whose sole responsibility is to deal with the customers.

Among other things, a service advisor answers the phones, takes bookings, allocates jobs, orders stock, sells services to customers and prepares and presents invoices.

The recruiting of a service advisor is usually a major step in the growth cycle of a workshop.

Once recruited, there will always be uncertainty about the move, because the business owner has to let go, perhaps allowing time to get back on the tools or perhaps to move on to a more serious management role.

Things don't always go according to plan, and there are countless stories of new service advisors being quickly dispensed with because it just didn't work out.

Here are some guidelines for appointment of service advisors, or perhaps for getting better performance out of existing advisors.

Have clearly defined roles and responsibilities

The roles of the service advisor and the business owner must be clearly defined. Having grey areas of responsibilities will cause frustration and tension between both parties.

Each role must have a job description and a responsibility schedule. *(for samples of each, see www.tatbiz.net.au/resources July 2012 and July 2015)*

Recruit the right person with the right skill set

This sounds so obvious but workshops still can fail to find the person for the perfect job fit.

If your service advisor has to answer phones, deliver quotes, sell repairs and prepare invoices they will need to have some automotive experience.

They don't need to be qualified mechanics but they will need to have a basic understanding of the automotive world and be able to engage in a meaningful and authoritative conversation with customers. Trying to turn a bookkeeper or administration assistant into a service advisor will most likely not work. At worse, they will end up acting like a call centre, spending their day transferring calls to somebody else. The net result will be that the owner will still be stuck on the front counter, but the wages bill will have gone up.

So recruitment must match the roles. A service advisor has to be considered one of the most important people in the business, so they need to be paid accordingly. *(for recruitment tips, sample job advertisements and interview questions, see www.tatbiz.net.au/resources January 2013)*

Set daily goals

Service advisors need to set daily goals to cover sales, car count and average dollar sale. There may well be large daily fluctuations but daily targets will help reinforce the sales expectations from the service advisor. Goals will keep them focused.

Without goals, nobody will know how successful they have been from day to day. Being busy doesn't always mean being successful.

Daily goals can make employees feel great when they reached their goal and it also provides a good excuse for the business owner to pat them on the back and that's all good for employee morale.

Set customer service standard

It's critical that when a service advisor is appointed, there must be no discernable deterioration in customer service. Reduction in service levels could lead to disaster.

The basic customer service standard is:

- Greet every customer with a smile
- Have the job cards prepared
- Update customers on progress through the day
- Obtain authorisation for all repairs

- Present the invoices

This is basic stuff but it can so often get missed when the workshop gets busy. Let this happen often enough and customers will start to walk. *(for advice on good communication and service standards, see www.tatbiz.net.au/resources August 2012)*

Service advisors are decision makers

Service advisors actually manage the front office.

Get out of their way, show them trust and let them do it. Continually looking over their shoulder and correcting everything will rob them of their confidence and seriously affect their ability to make decisions.

Good service advisors should be empowered to make many decisions on behalf of the company. This not only stops the owner from being drawn needlessly into every customer issue, but it shows that management trusts their judgement.

Support the decisions the service advisor makes. If you disagree, pull them aside later in the day and explain why you would have made a different decision.

Clearly defined chains of command

Good service advisors are often the 2IC of the workshop, supporting decisions made by the owner and supervising staff. If this is the case in your workshop, make sure the rest of the staff understand this role or you might have mutiny on your hands. A service advisor who is also the company 2IC should not abuse this authority and staff should respect his authority to give instructions.

Clearly defined systems and procedures

Ensure that the workshop policies and procedures are in order before you install your first service advisor. Pay particular attention to key routine procedures like taking bookings, job allocation, service procedures and stock ordering. If these procedures are not consistent it will cause headaches for the service advisor and increase the likelihood of mistakes.

So if you are considering recruiting a service advisor or already have one in place take the above points on board, to ensure that there is no dilution of customer service or profitability.

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

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Just go for it!