

## **FIXED OPS**

### **Service Advisor Training** **4-Month Program Outline** **2 Days per Visit**

- **MEET & GREET**
  - Do's and don'ts
  - Process Steps
  - Guiding the customer
  - Understand the impacts
  - Generating additional revenue
  
- **WALKAROUNDS**
  - Understand the purpose
  - How to engage customers
  - Master specific steps
  - How to gather information
  - Navigate with the customer
  - Identifying needs/opportunities
  
- **PREPARE FOR THE SALE**
  - Utilization of pre-workorders
  - Proper review of service history
    - Trend identification
    - Maintenance history
    - Repair history
  - How to properly structure findings and communicate to customers
  
- **MENU PRESENTATION**
  - Services due by time/mileage
  - Value added services
  - Maintenance packages
  - Preventative maintenance
    - Fluid services
  - How to present services to customer
    - Knowing how to define by priority

- TIME MANAGEMENT
  - How much time is too much with a customer
    - Knowing how to determine
    - When less is more
  - How to properly structure your day
  - Utilization of your most valuable resource
  - Time waste
    - Defined processes that minimize
    - Identify the biggest daily sources
  
- MANAGE CUSTOMER EXPECTATIONS
  - The rules of communication
    - Understanding the next steps
    - Transparency in charges
    - Setting realistic expectations
    - Best contact methods
  
- STATUS UPDATES
  - Defining the different types of Statuses
  - When to deliver a status update
  - How to deliver the update
    - Electronic vs. phone
    - What information to include or exclude
    - Building value
  
- ESTIMATE PREPARATION & PRESENTATION
  - Estimate construction
    - Proper way to prepare an estimate
      - Transparency is key
    - What to include or exclude
    - How an estimate can damage your approval chances
  - Engage through the presentation
    - The steps to a successful presentation
      - How to start
      - Visuals
      - Ease of understanding

- MPI PRESENTATION
  - Guiding the customer
    - Understanding the report
    - What the colors/results mean
  - Adding value
    - Investment vs. Cost
    - Immediate vs. future
  - How the MPI can hurt
  
- ACTIVE DELIVERY
  - Defined
    - True vs. Partial
    - Benefits
    - The ultimate differentiator
  - Generate an ROI
    - Value to the dealership
    - Value to the advisor
    - Value to the Customer
  
- CSI PERFORMANCE
  - Top box CSI
  - Processes defined
  - Create additional revenue
  - Increasing Retention
  - Sales impacts