

FIXED OPS

Service Advisor Training – Upselling Customer Pay Revenue

2-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

- 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