



# Training with a purpose

*Your new service advisor will be a critical part of your business if they know what you want and are trained to accomplish it.*

By Alan Beech

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Dear Alan,  
I've recently hired a new service advisor and the transition is much more difficult than I ever imagined!

During the interview, he seemed like the perfect fit. He had a good background in automotive and we seemed to really hit it off. However now in the weeks since hiring him, it has not been an easy road.

My gut still tells me he's the right guy, but I can't handle how long it's taking for him to be a productive part of the team. Is this normal, or should I start looking for someone else?

—Craig

Dear Craig,

Taking on a new service advisor is rarely an easy transition for any shop. Whether your business is growing and you need to add a new face at the counter, or you're experiencing a staff changeover and filling a pre-existing position, finding the perfect service advisor for your shop is difficult.

I've found that there are two factors that make the integration process far from pain free.

First, many shop owners lack a clear understanding of the role they need filled. What I mean is that they haven't properly defined the service advisor's roles and responsibilities. How is your new hire supposed to exceed all of your expectations when they have no idea what your expectations are?

Second, I find that many shops lack a formal training process. The

## COLLECTIVE WISDOM

assumption seems to be that they'll figure it out over time. What training they offer usually involves job shadowing and 'learning by doing.' Don't get me wrong; these are legitimate ways to train, but they're not very efficient and they often cause frustration for both parties along the way.

If this sounds familiar to you, you may have a bigger hole in your business. It's the lack of clear processes that dictate every aspect of how your shop operates. This could be why your new service advisor is struggling.

I would encourage you to start taking control of this situation by writing out the complete service process for your business. This may seem daunting but it's an essential step, not only for your employees but also to ensure you provide a consistent level of customer service.

Start at the initial contact with the customer. Outline exactly how you want them to be greeted and the scope of the information you want your service advisor to collect.

Next, consider the first appointment. How prepared do you want your service advisor to be for each guest? For example, do you want him to review past work orders before the customer arrives? Do you want him to print a list of maintenance items and past declined work? Perhaps begin working on the new work order? Do you want a consistent process for getting work approval, timelines, and client contact information?

And what about the estimate? Do you know how you want it laid out and what it needs to cover? For example, how do you order the jobs, and how do you break out the pricing? To make sure this part of the process is smooth and easy, enter preset price matrixes and job codes into your computer program. This will improve price consistency and estimating efficiency.

While you're outlining the sales process, it's also important to include the techniques that you find to be most effective in a sales presentation.

Finally, conclude the service process with a description of how you'd like to handle the return of the vehicle. It's important that this is not left to chance. It will form your customer's final impression of your shop. All efforts should be taken to ensure they leave on a high note.

### A good service advisor who can effectively quote and sell services is an invaluable asset to your team.

Once your service process has been developed and written out, I'd encourage you to take some time and thoroughly review it with your new service advisor. Provide him with a copy so he can have it as a reference whenever he needs it.

While discussing the service process, it's essential that you get his full buy-in. He needs to understand its objectives and agree on the value of a consistent service process. Once the process has been taught he will then be accountable for the entire process.

Having a service process already prewritten before hiring will give the training some focus and direction. However, don't be surprised if there are still some learning curves after the initial training. There's no question that training is a continual and ongoing process. It's your responsibility to ensure that all areas of a new hire's training are covered.

Take the time to thoroughly review all the computer software and programs.

Also ensure that he has a sufficient knowledge of automobiles. There's no need for him to have an advanced

technician-level understanding of engine management. But he must be familiar enough to explain to the customer what the techs will be doing.

Make sure your he's well versed on how to properly sell the value of maintenance services, as well as the intricacies of selling different types of tires. These, along with many other topics, are commonly left for the service advisor to learn along the way.

Purposely set some time aside to explain and discuss them.

Finally, I'd recommend spending some time on sales training. Whether you outsource your service advisor's training or do it yourself, it's a fundamental component of the job.

Once the service process has been taught, basic sales training has been completed, and related topics have been covered, it's your job to audit their process. You have provided your new hire with everything he'll need to be effective in the job. If at this point he's still underperforming, you'll either need to figure out if you missed any training steps or if he's simply not the right fit for your shop.

A good service advisor who can effectively quote and sell services is an invaluable asset to your team. They're an investment in your business, and it's essential that you be willing to invest time into giving them proper training.

I guarantee that by following a more disciplined process-driven training protocol, you'll have a more effective and competent service advisor, who will also feel more confident in his abilities. ■



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