



**Alderson**

*Service* • CONSULTANTS • *Guild*

**Module 1:  
Communications Skills**

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# **Part 1:**

## **Introduction**

## Part 1: Introduction

### 1. Alderson Service Consultants Guild Mission

*To provide a service experience that will consistently surpass customer expectations through a team of highly qualified, competent, and certified dealership service professionals.*

This fundamental philosophy will be applied throughout the training process.

### 2. Introduction of the Training Module

Because of the impact of competition on variable operations, fixed operations have become the focal point for dealerships. A dealership's ability to generate business will determine whether it stays a winner or becomes a loser in the automotive industry. The only way a dealership can survive in this context is to change its **WORK METHODS**, its **APPROACH** to customers and especially its **PERCEPTION** of service. Success also depends on the dealership's ability to provide customers with a product or service that meets their needs perfectly.

Throughout the Alderson Service Consultants Guild training, data and statistics will be provided to help you appreciate the urgent need for the automotive industry, to change their work methods. Understanding the need for change and how to effect change is a challenge for everyone.

In the years ahead, the successful service departments will be those that strive to go beyond meeting customers' needs by surpassing their expectations.

#### 2.1. General Learning Objective

The Service Consultant will **understand** the importance of effective communication within the Customer Servicing Process.

#### 2.2. Specific Learning Objective

The Service Consultant will become **familiar** with communication skills and learn how to **apply** them throughout the Customer Servicing Process.

### 3. Overview of the Current Situation in the Automotive Industry

Competitors are working hard to convince customers to entrust them with their maintenance and repair needs. Today's customers are more demanding, and new car owners have far more choices when it comes to maintenance: customers have the final say.

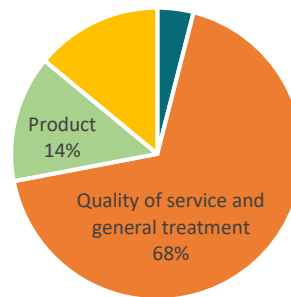
In light of this reality, dealers have decided to invest in the Alderson Service Consulting Guild. Service Consultants must take on the challenge of providing unique, outstanding service. The key to success lies in providing better service than the competition.

#### 3.1. Impact on Customer Satisfaction

*Why do retailers lose customers?*

The top 2 reasons:

- Overall treatment and quality of service
- Products



Source: *Boardroom Reports*

#### 3.2. Changes in After-Sales Service

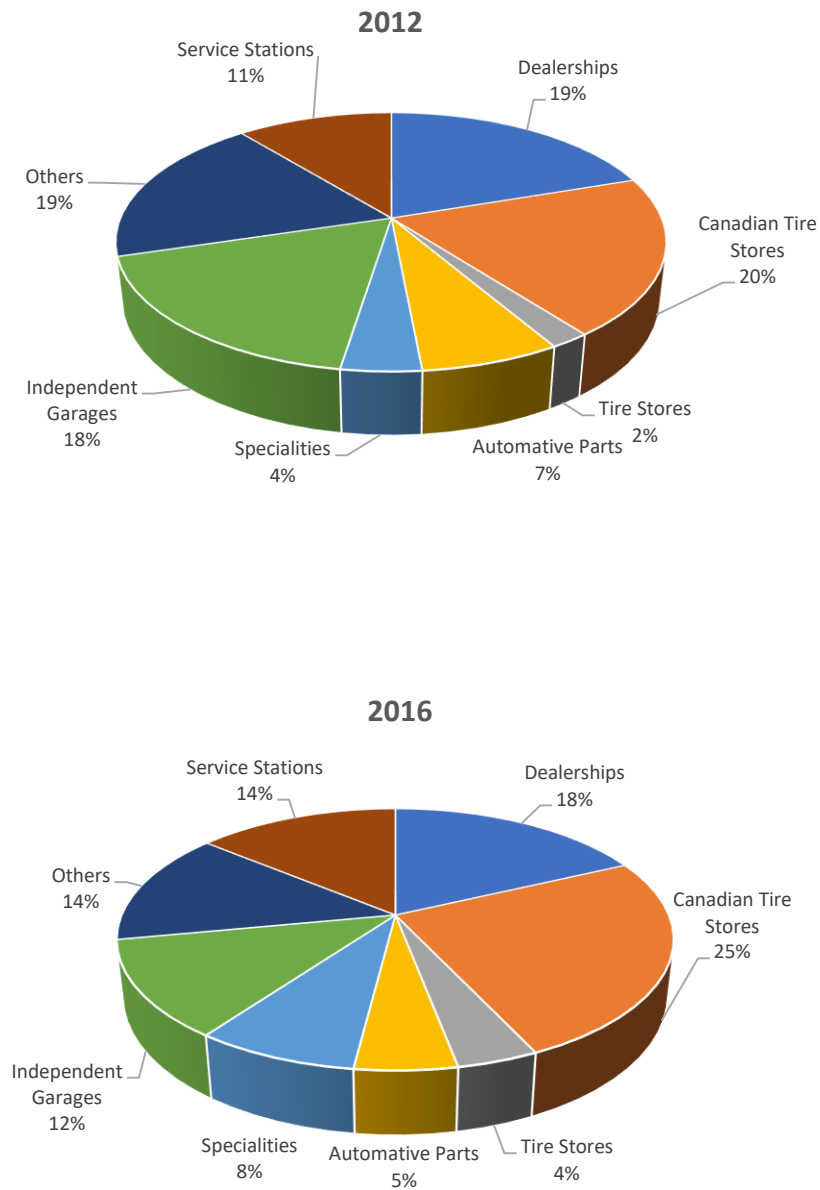
- Increase in quantity and variety of competition for dealerships.
- Customers are more demanding when it comes to service.
- Vehicles require less and less maintenance.

All this is happening in a context where new car sales have decreased in recent years.



### 3.3. After-Sales Service Market in Canada

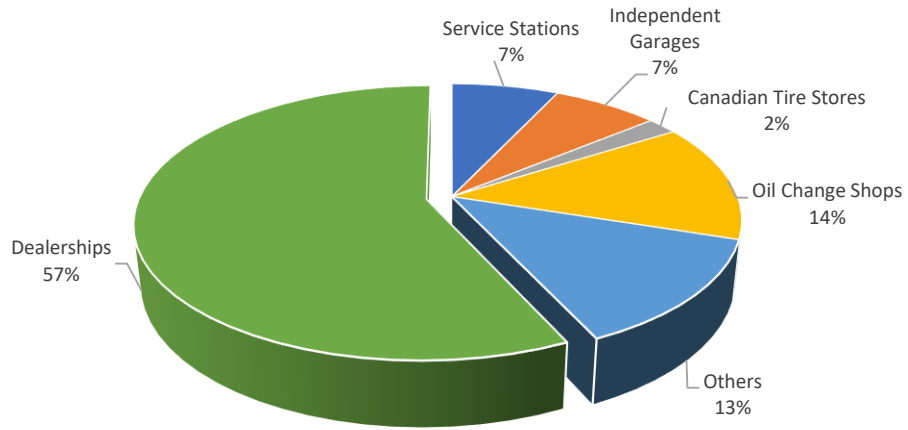
#### 3.3.1. Comparison between the 2012 and 2016 After-Sales Service Markets



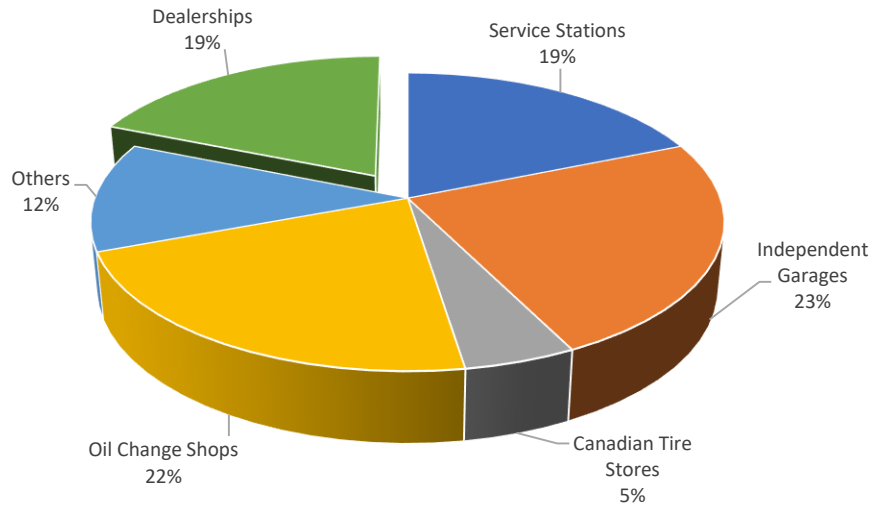
Source: Statistics Canada, 2016

### 3.3.2. After-Sales Oil Change Market in Canada versus Percentage Market Share

Vehicles 1 to 3 Years Old

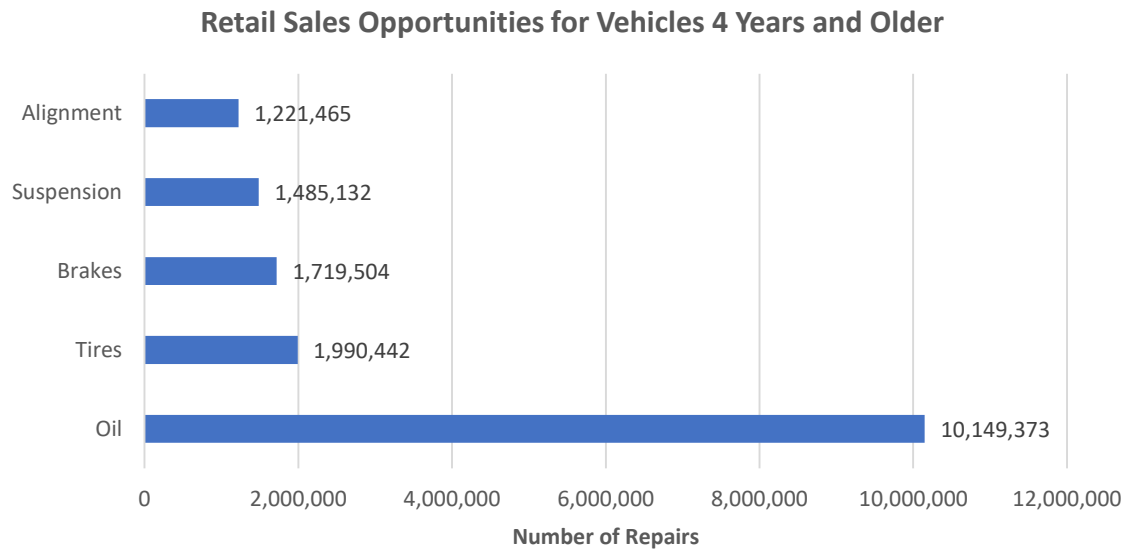


Vehicles 4 Years and Older



Source: Statistics Canada, 2016

### 3.3.3. Retail Sales Opportunities for Vehicles 4 Years and Older



*Why is it that some dealers hold only a 9% share of the oil change market in Canada for vehicles 4 years and older compared with a total share of 19% for all dealerships?*

**Lost sales opportunities for these five repairs alone are in the order of  
\$1,000,000,000 a year!**

### 3.4. Customer Satisfaction with Manufacturers in Canada in Terms of Service

A customer satisfaction survey carried out in 2015 by *J.D. Power & Associates* produced the following results.

**Rating scale: 1 to 7, with 1 representing the best. The numbers thus indicate rank.**

Criteria	Manufacturer
Courtesy/ Service Consultant	5
Helpfulness/ Service Consultant	5
Promptness/ Service Consultant	4
Understanding/ Service Consultant	3
Overall Performance/ Service Consultant	4
Knowledge/ Expertise/ Service Department Staff	5
Quality of Work	6
Ability to Fix the Problem on First Visit	6
Ease of Obtaining an Appointment	5
Ability to Return Vehicle When Promised	6
Prompt Service	5
Courtesy Extended by Staff	5
Helpfulness of Staff	4
Explanation of Charges	5
Fairness of Fees for Service Work	3
<b>SERVICE SATISFACTION</b>	<b>5</b>

**Manufacturers that were considered in this survey include:**

- Nissan
- Toyota
- Ford
- Honda
- Chrysler
- Mazda
- GM

## 4. Results of Recent Customer Satisfaction Surveys

### 4.1. The Customer Voices His Opinion

Research conducted to determine how the manufacturer's customers felt about the service and the way they were treated provided the following highlights:

#### Service Department:

- **Arrogant attitude!**
- **They act like *they* are doing *you* a favour!**
- **They don't give you the impression they want to keep your business once the warranty is up!**

Today's competition means we must learn to treat customers better. Appropriate practices must be put in place to bring customers into sales outlets and win their loyalty from the moment contact is first made!

### 4.2. Customer Retention

Research gathered on customer retention at the dealership shows:

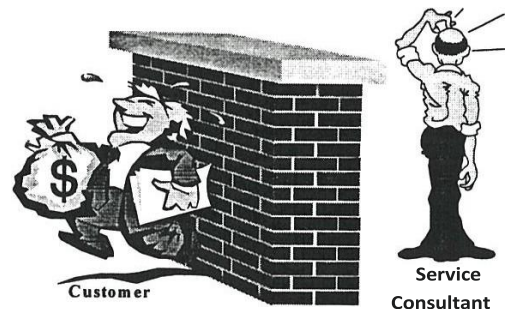
- The warranty forces the customer to come back to the dealership.
- Once customers have been exposed to the Service Department, their level of satisfaction declines and they decide that they want out of the dealership once the warranty is up.

#### **Why the lack of Opportunity?**

- Because customers are unhappy with the service and prefer to go to a competitor.

#### As a result:

- The customer's satisfaction decreases.
- The trust between the customer and the dealership is lost.
- A wall is built between the customer and the Service Consultant.
- The customer is then tempted to take their business elsewhere!



**The aim of the Alderson Service Consulting Guild is to provide the Service Consultant with the tools to rebuild customers' trust!**

## 5. Customer Service Standards

Customer Service Standards have been established to enable dealership staff to not only meet the needs of customers, but also surpass their expectations during each **moment of truth**.

Definition of "Moment of truth":

*Every time a customer comes in contact with any aspect of the service organisation and forms a perception of the quality of service.*

The following 26 service standards have been established in order to meet customers' expectations:

Examples:

- Does the Service Consultant answer the telephone by the third ring or within 10 seconds?
- Does the Service Consultant spend sufficient time with each customer during the consultation?
- Does the Service Consultant advise the customer when there are additional charges and delays?

### **26 Dealer Standards for Service:**

1. Convenient and competitive service hours are maintained.
2. Service is made available on both an appointment and non-appointment basis.
3. Service appointments are timely and convenient.
4. Service Consultants are knowledgeable and take the time necessary to listen to the customer and ask pertinent questions to assure clear communication.
5. Service Consultants discuss with each customer vehicle needs, including any open product recall campaigns based on the vehicle's history.
6. The repair order clearly describes the customer's concerns, the services to be performed. The customer's approval to proceed is always obtained.
7. Service Consultants offer customers alternate transportation options.
8. Service Consultants quote reasonable time promises with reasonable and competitive cost quotes.
9. A copy of the completed repair order/invoice is given to the customer.
10. Service Consultants actively check progress and immediately inform customers of any changes in vehicle repair status or completion.
11. If a time commitment is not upheld, it is remedied without inconvenience or additional cost to the customer.

12. During the service transaction, all customers' vehicles are treated with care and the following courtesies are provided:
  - Vehicles are returned clean and sanitized.
  - Servicing materials placed on/in vehicles are removed.
  - Radio has not been tampered with and is turned off.
  - Electronic settings are restored as practical.
  - Smoking is not permitted in customer's vehicle.
13. When a vehicle is brought in for repairs, all repairs listed on the repair order are completed in one visit.
14. Every attempt is made to fix it right the first time.
15. Authorized services are performed according to approved shop manual procedures and specifications.
16. Dealer provides the sole interface between the customers and offsite, sublet services.
17. Vehicles are quality checked before delivery to the customer.
18. A qualified person explains all services performed and related charges to the customer, and calls will be made ahead of time to those customers picking up vehicles after hours.
19. Installation of any parts that are not both:
  - New and unused, and
  - O.E.M. or manufacturer approved, is disclosed to the customer.
20. There is a procedure for parking repaired vehicles in an area of the dealer facility that is convenient for customer pick-up, for taking the customer to the vehicle, or bringing the vehicle to the customer -Vehicles may be brought to customers through a new contactless procedure.
21. There is a procedure to assure that customers can drop off and pick up vehicles at their convenience. This service will be contactless.
22. There is minimal waiting to pick up a vehicle. JD Power study shows that pickup needs to be 8 minutes or less.
23. The dealer's credit and payment policy is displayed in a positive manner in the service area where the customer can read it

NOT ALL OF THESE STANDARDS APPLY TO THE PROCEDURES THAT SERVICE CONSULTANTS ARE  
REQUIRED TO USE IN THIS TRAINING MODULE.





**6. Course Outline**

**6.1. Communications Skills Theory**

Today we will examine communication through the various steps in the Customer Servicing Process.

**6.2. Customer Servicing Process**

Each procedure in the process specifically related to the Service Consultant’s duties, as well as the accompanying Customer Service Standards, will be covered in this section.

**6.3. Exercises**

Practical exercises, role playing and other exercises dealing with communication will be introduced within the Customer Servicing Process to facilitate learning.

**Notes**

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## **Part 2:**

# **Communications**

## Part 2: Communications

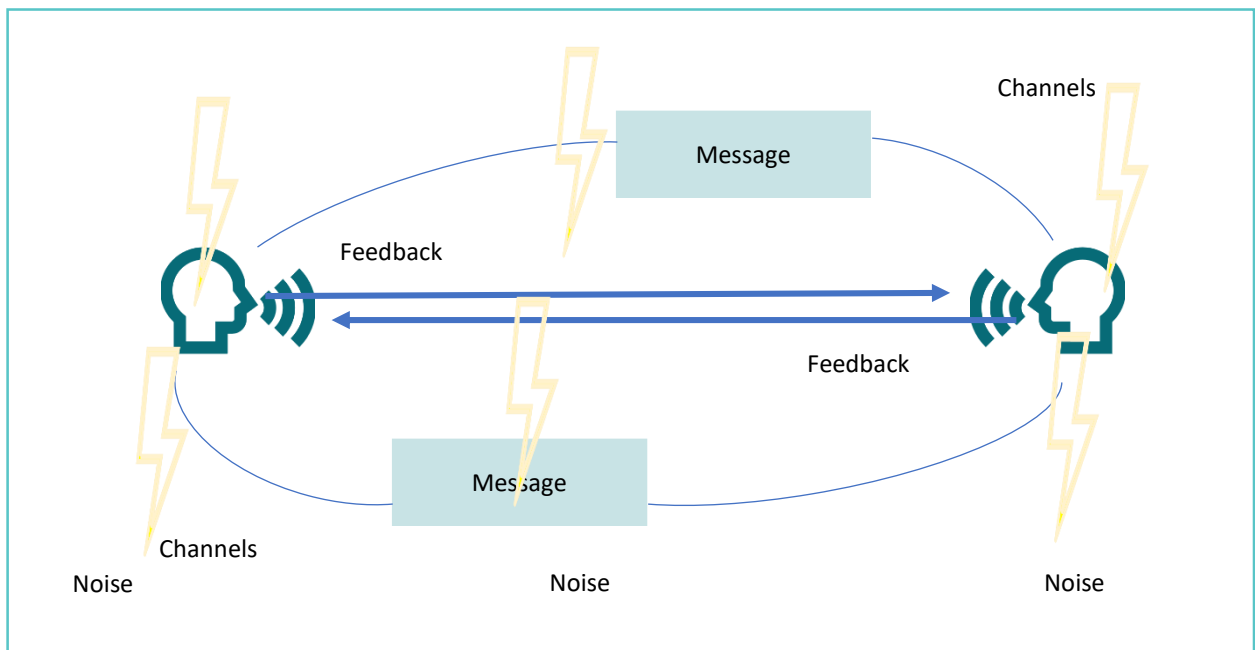
### 7. Principles of Communication

Communication is a process whereby two or more people exchange information. The process comprises six interrelated elements all of which play an important role in communication.

#### 7.1. Universal Model of Communication

This model will provide the support Service Consultants need to be able to determine which steps in the Customer Servicing Process require communication.

##### Context



Source: T.K. Gamble and Gamble, *Communication Works*, McGraw-Hill, 1993

##### People

Communication between human beings obviously involves two people. The people act alternately as **transmitter** and **receiver**. The transmitter sends a message, and the receiver receives it. The receiver can then switch roles and become the transmitter and *vice versa*. **The customer and the Service Consultant can thus be both transmitters and receivers.**

## ***Messages***

All of us transmit and receive both **verbal** and **non-verbal** messages. The words we use to convey our ideas, the sounds we produce, the way we sit, the gestures we make, our facial expressions and even touching communicate information. Everything a transmitter or a receiver does or says sends a message that the other person must decode.

## ***Channels***

Messages can be **sent and/or received by any of our senses**. We receive messages through sight, hearing, smell, touch, etc. Which of these channels represents the best form of communication for you? Is it the same for everyone? Using the wrong channel can make it just as hard for the other person to receive the message as if you were speaking a foreign language. If communication is to be effective, many different channels must be used.

## ***Noise***

Another word for noise is **interference**. Noise is defined as anything that impairs or distorts our ability to transmit or receive a message. Noise can therefore be physical discomfort, a psychological state, or the environment. Noise includes such things as sirens, unpleasant smells, a room that is too hot and personal factors like bias and a lack of attention or feelings of incompetence.

## ***Context***

Context refers to **physical location** and **time**. It has considerable impact on the entire communication process and can affect dress, behaviour, posture and vocabulary. One context can put people at ease, while another can make them uncomfortable.

## ***Feedback***

Feedback refers to the **verbal** and **non-verbal indicators** we receive after we have transmitted a message. Feedback tells us whether or not the message is getting through. A smile, a furrowed brow, an unpleasant remark or silence can lead us to change, continue or simply end the message.

## ***Impact of Communication***

Finally, a change occurs as people communicate with one another because communication has an **impact on the people involved**. The impact can be emotional, physical, cognitive (intellectual) or all three. It is important to remember also that the impact is not necessarily perceptible right away.

Being aware of these elements will help you establish a better relationship with co-workers and customers. By understanding the elements that can improve or undermine communication with others, you will increase your chances of becoming a better communicator and, by extension, a better receiver.

The way a person communicates usually gives a good indication of their personality. People form opinions based on:

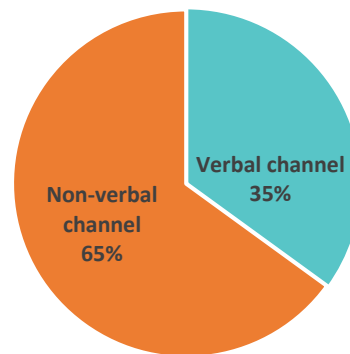
Communication Channel	In Person	On the Phone
Tone of voice	38%	87%
Words	7%	13%
Non-verbal communication	55%	

## 7.2. Non-Verbal Communication

*“What you are speaks so loudly I can't understand what you're saying”.*

Ralph Waldo Emerson

### 7.2.1. The Two Channels of Communication



Non-verbal language simply means any form of communication that does not use words. In normal communication between a customer and a Service Consultant, the verbal channel conveys only **35%** of the message; the remaining **65%** is conveyed by the non-verbal channel. This is why it is important to properly interpret and use non-verbal language.

Examples of non-verbal communication include:

- handshake
- posture
- facial expressions
- appearance
- tone of voice
- hairstyle
- eye contact
- smile
- proximity to others
- listening style
- breathing
- gestures and movements
- dress
- way of touching others



**Always remember that your body says a lot. It conveys what you really are, not what you think you are. Your physical environment also says a lot. The combination of these elements provides a number of indicators about your role, your objectives, etc. as a Service Consultant.**

Verbal and non-verbal messages can be contradictory. It is important to recognise these contradictions and pay more attention to them because non-verbal messages are hard to misinterpret!

### 7.3. Body Language

Body language comprises several elements. We will look at those that are most important for Service Consultants, that is, facial expressions, posture, gestures, dress, and voice.

Body language involves several parts of the body. The information (images) you convey to the other person when you use certain types of body language is described below.

#### Facial expressions

The face conveys a wealth of information in terms of non-verbal language and is unable to hide anything.

##### Forehead and eyebrows

- Furrowed brow (tension, concern, deep thought, or surprise).
- Raised eyebrows (surprise or fear).
- Sweating forehead (tension, nervousness, or hard effort).

##### Eyes

*“A man's eyes say as much as his tongue”.*

Ralph Waldo Emerson

- Eyes cast downward (modesty or embarrassment).
- Stare (coldness or lack of concern).
- Frequent blinking (nervousness or insecurity).

##### Smile

The smile is an important facial expression in non-verbal communication. Some people have a subtle smile, others an expressive one. It is important for Service Consultants to have a smile that is both subtle and expressive and conveys honest emotions.

## Posture

The way we hold ourselves, whether sitting or standing, says a great deal about what we are thinking and feeling. Examples:

- Shoulders hunched (submission, timidity, or discouragement).
- Shoulders straight (stress or anger).
- Head lowered (embarrassment, inferiority, or lack of interest).
- Head held high (confidence, superiority, or interest).
- Leaning forward during a conversation (interest).
- Leaning back during a conversation (complete lack of interest).



**Remember that the way you hold yourself sends messages to the other person. These messages can communicate confidence, anger, concern, or discouragement. Your posture shows whether you are prepared to deal with the people around you or whether you would rather avoid them. It also shows how you feel about the person with whom you are speaking.**

## Gestures

The way you move your arms, feet and hands also conveys information about what you are thinking and how you feel about the person with whom you are speaking.

- Arms crossed (closed mind).
- Hands on hips (confrontation).
- Weight shifted onto the heels or balls of the feet (readiness for action).

Some of these gestures can convey confidence while others can indicate feelings of rejection or hostility. When you are engaged in dialogue with a customer, it is important that your gestures show that you are enthusiastic, open-minded, and attentive to the person's needs.

## Dress

*"There is no way to wear clothing without sending out a social signal".*

Desmond Morris, anthropologist

The way you dress definitely has an impact on how the person you are speaking with sees you. The other person bases his first impression on what you are wearing before you even begin to say anything.

### What would you think of the following people?

- A technician wearing a business suit?
- A sales representative wearing jeans?
- A doctor wearing shorts and a cut-off shirt?
- A dentist wearing a black smock?



**As a Service Consultant, you have to think about the type of image you wish to project to your customers. Ask yourself what type of clothes will help you create that image!**

## Voice

To this point, we have discussed non-verbal communication in terms of body language alone. Another factor that comes into play in non-verbal communication is the voice. This section looks at four aspects of the voice: **tone of voice, volume, rate of speech and pauses.**

### Tone of voice

A person's voice can be high or low (deep). We usually associate a deep voice with men and a high-pitched voice with women. We also have stereotypes about voice: a deep voice is often associated with energy, strength or maturity, while a high-pitched voice is associated with weakness, tension or nervousness.

It is therefore important to know how to use different tones of voice to effectively communicate what you are feeling and thus spark interest in the person with whom you are speaking.

### **In your opinion:**

- What effect might a monotone voice have on a Service Department customer?
- What does a customer think when he senses nervousness in your voice?



**You must think about the tone of voice you should use to improve your professional image in the eyes of customers.**

### Volume

Speaking too loudly can be as bad as speaking too softly. Changes in volume are needed to emphasise certain words or phrases that you want to stand out from the rest of the message. Volume reflects the intensity of the emotions at play in a given situation. Increasing the volume at the right moments in a conversation makes you more effective in getting your message across.



### Exercise 1

**Instructions:**

To illustrate the above statements, read the following sentence aloud with emphasis on the **words in bold**.

⇒ How many animals of **each species** were there on Moses' **ark**?

**Length:** 5 minutes for exercises no. 1 and 2.

⇒ *By increasing the volume on certain words, you focus the other person's attention in a very specific direction*

### Exercise 2

**Instructions:**

Repeat the sentence with emphasis on the word "**Moses**".

⇒ How many animals of **each species** were there on **Moses**' ark?

**Length:** 5 minutes for exercises no. 1 and 2.

You have no doubt realised that it was **NOAH'S** ark, not **MOSES'**!

⇒ *Accenting specific words can highlight rather than distort the meaning of the message you are conveying.*

#### Rate of Speech

People expect a high-pressure salesperson to talk very quickly with very few pauses. By the same token, people will expect an official speaking at a formal ceremony to talk more slowly. The speaker will plan every pause to give people time to applaud.



#### **What happens in the Service Department?**

#### **How quickly should a Service Consultant talk when suggesting maintenance?**

There are no hard and fast rules when it comes to after-sales service. It all depends on the customer's mood and personality. A customer who is very energised and seems pressed for time will expect you to talk faster. However, if the customer is cautious or sceptical, it is better if you slow down; otherwise, the customer may be scared.

## Pauses

Pauses are very important. They allow you to emphasise a particular statement or the importance of the answer to a particular question.

### **7.4. Importance of Effective Communication**

Without effective communication, Service Consultants cannot:

- Work as part of a team.
- Write up a proper repair order.
- Suggest or sell the required maintenance or repairs.
- Solve the customer's problem(s)
- Satisfy the customer.

### **7.5. Behaviour Conducive to Effective Communication**

- Listening carefully.
- Clarifying specific points; checking to make sure the parties understand each other.
- Answering objectively and not making judgements.
- Displaying confidence in the ability of others to solve their own problems.
- Showing respect for the other person's opinion, even if it is different.
- Demonstrating identification with and understanding of the other person's feelings.

### **7.6. Obstacles to Communication**

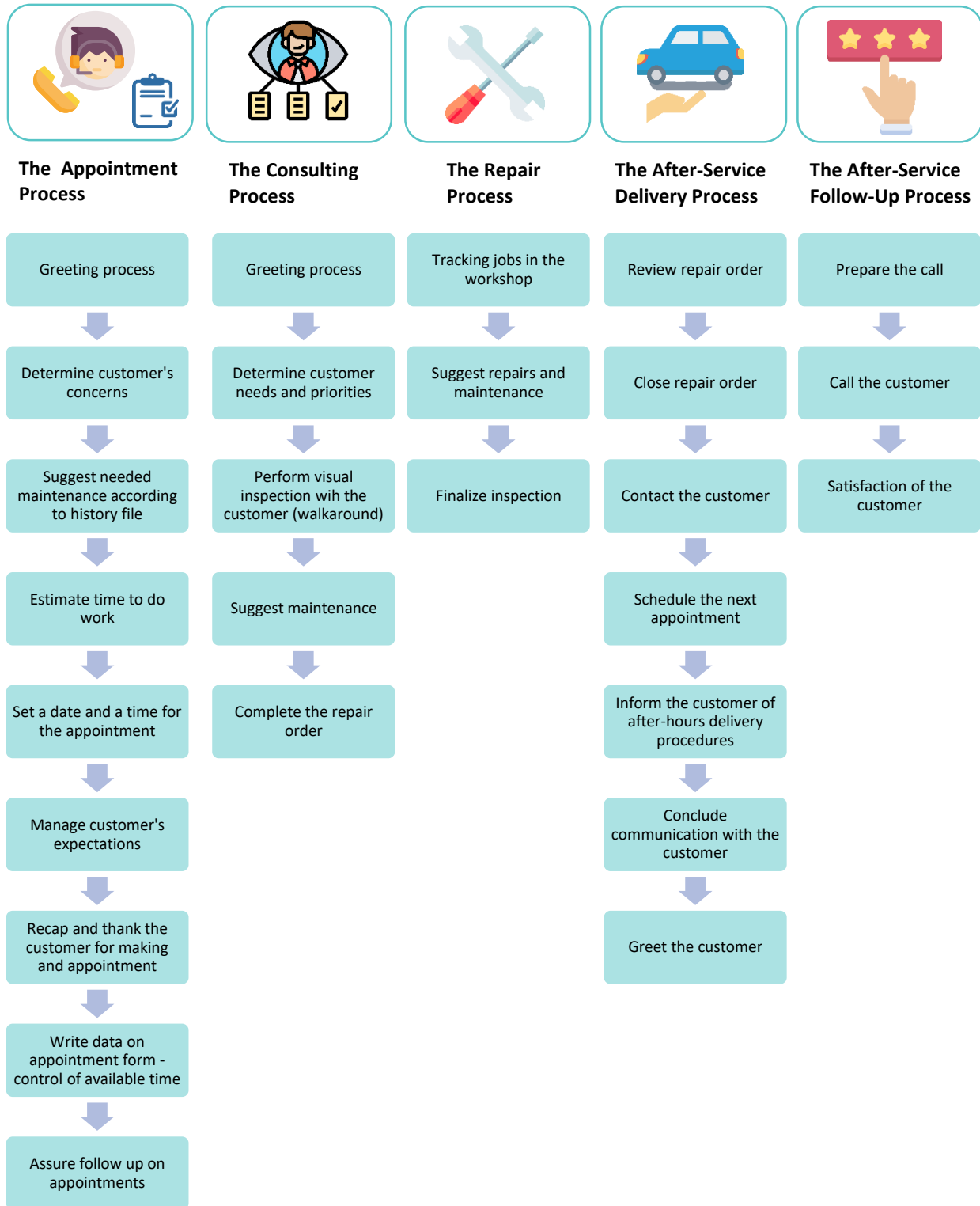
- Self-centredness.
- Narrow-mindedness.
- Inadequate listening.
- Insufficient dialogue.
- Lack of consideration.

### **7.7. Behaviour Not Conducive to Effective Communication**

- Displaying a lack of awareness of what is being said.
- Not reacting to what is being said.
- Avoiding the question.
- Talking down to the other person, lecturing.
- Acting distant or aloof, as if you were not really interested.
- Acting without conviction, as if you were incompetent.
- Coming across as inflexible toward the other person's needs.



## 8. Overall Concept of Customer Service





## 9. Communication Skills

### 9.1. Theory of Adaptation Based on the Customer's Personality Type

To help you adapt more easily or determine your customer's personality type, **which in turn will increase the quality of the communication process**, you should first learn more about your own -personality type.

#### Exercise 3

##### Instructions:

- Determine your own personality type.
- Read the instructions below and individually complete the following exercise.

**Length:** 10 minutes.

Read the following instructions:

1. Check in each of the four columns the features that describe your personality (see the following page).
2. Count the number of check marks in each column and enter the total at the bottom.
3. Subtract the total for column 3 from the total for column 1. This determines your position on the vertical axis.
4. Subtract the total for column 4 from the total for column 2. This determines your position on the horizontal axis.
5. Draw a horizontal line from your position on the vertical axis and a vertical line from your position on the horizontal axis.
6. The point where the two lines intersect (see the following page) represents the position of your personality on the graph on section 9.2.

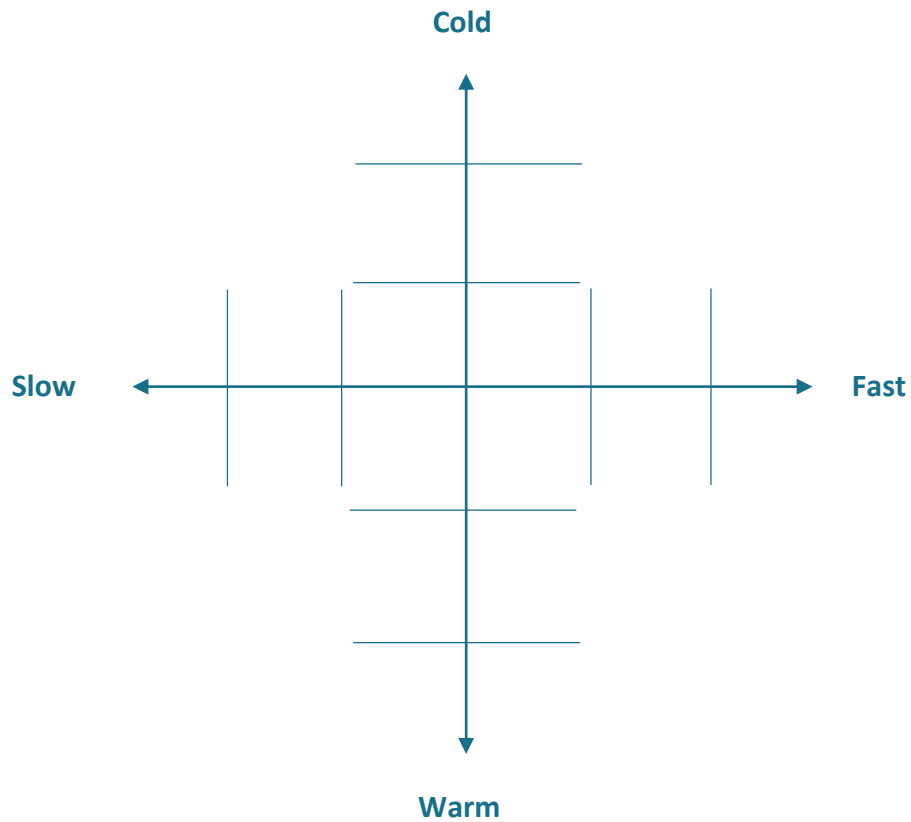
## Questionnaire

### Adapting to the Customer's Personality

Column 1	Column 2	Column 3	Column 4
<input type="checkbox"/> Composed	<input type="checkbox"/> Competitive	<input type="checkbox"/> Late	<input type="checkbox"/> Soft voice
<input type="checkbox"/> Reserved	<input type="checkbox"/> Prompt	<input type="checkbox"/> Impulsive	<input type="checkbox"/> Speaks slowly
<input type="checkbox"/> Quiet	<input type="checkbox"/> Takes risks	<input type="checkbox"/> Direct	<input type="checkbox"/> Monotonous voice
<input type="checkbox"/> Alert	<input type="checkbox"/> Dynamic	<input type="checkbox"/> Communicative	<input type="checkbox"/> Weak handshake
<input type="checkbox"/> Cautious	<input type="checkbox"/> Stubborn	<input type="checkbox"/> Accepts other people's opinions	<input type="checkbox"/> Indecisive
<input type="checkbox"/> Punctual	<input type="checkbox"/> Takes charge	<input type="checkbox"/> Casual attire and language	<input type="checkbox"/> Inquisitive
<input type="checkbox"/> Uses facts	<input type="checkbox"/> Leader	<input type="checkbox"/> Dramatic opinions and measures	<input type="checkbox"/> Lets others organise social activities
<input type="checkbox"/> Professional attire and language	<input type="checkbox"/> Tends to use power	<input type="checkbox"/> Permissive	<input type="checkbox"/> Avoids using power
<input type="checkbox"/> Measured opinions and actions	<input type="checkbox"/> Organises social activities	<input type="checkbox"/> Indecisive attitudes	<input type="checkbox"/> Positive
<input type="checkbox"/> Strict	<input type="checkbox"/> Makes statements	<input type="checkbox"/> Emotional decision making	<input type="checkbox"/> Accommodating
<input type="checkbox"/> Disciplined in seminars	<input type="checkbox"/> Loud voice	<input type="checkbox"/> Seems easy to get to know	<input type="checkbox"/> Co-operative
<input type="checkbox"/> Rational decision making	<input type="checkbox"/> Talks fast	<input type="checkbox"/> Easy to get along with	<input type="checkbox"/> Deliberate actions
<input type="checkbox"/> Seems hard to get to know	<input type="checkbox"/> Expressive voice	<input type="checkbox"/> Friendly and amiable	<input type="checkbox"/> Calm
<input type="checkbox"/> Demanding of self and others	<input type="checkbox"/> Firm handshake	<input type="checkbox"/> Sympathetic	<input type="checkbox"/> Moderate opinions
<input type="checkbox"/> Impersonal and professional	<input type="checkbox"/> Has a clear idea of needs		
<b>Total 1:</b>	<b>Total 2:</b>	<b>Total 3:</b>	<b>Total 4:</b>

## 9.2. The Four Personality Types

Following the instructions on the previous page, plot your results on the graph below:

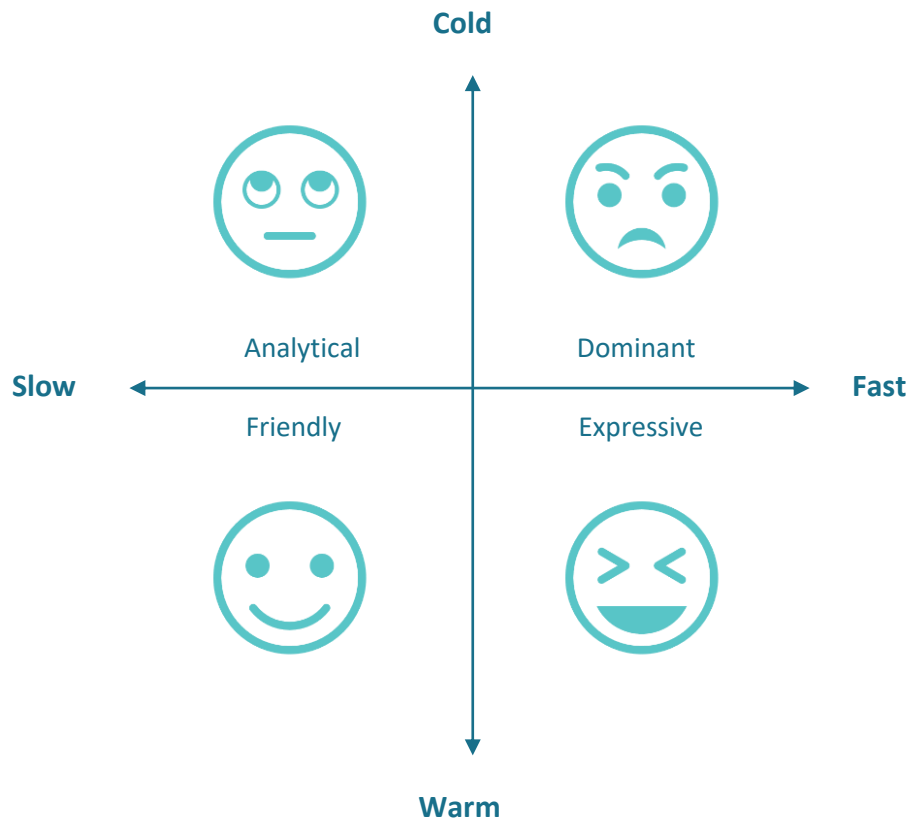


**Note:**

You have probably noticed that the horizontal axis corresponds to the speed at which people think and express themselves (fast or slow). The vertical axis indicates whether the person is warm or cold. The four quadrants formed by the two axes therefore represent four different personality types; these are described on the next page.



The main features that distinguish each of these personality types are:



### Analytical

- Takes a somewhat slow approach.
- Tends not to look people in the eye.
- Does not talk a lot, chooses their words carefully and thinks before answering questions.
- Lets the Service Consultant initiate the conversation but asks a lot of questions; wants to know why.
- Organised, very coherent, well informed.
- Is very familiar with the information in the owner's manual and has all the necessary documents with them.
- Needs more information.

### How do you handle this type of person?

⇒ Provide lots of information.

### Dominant

- Talks in a loud, often harsh voice and is impulsive.
- Wants immediate action, expects to be served right away.
- Wants to control or appear to be in control of the situation.
- Gets straight to the point, is quick.
- States their needs and expectations without being asked.

How do you handle this type of person?

⇒ Let them take control.

**Friendly**

- Moves at a slower pace and tends to be warm and calm.
- Looks the other person in the eye.
- Is very co-operative.
- Lacks self-confidence.
- Likes to be surrounded by and has faith in competent people.
- Needs reassurance.

How do you handle this type of person?

⇒ Be nice.

**Expressive**

- Moves quickly.
- Speaks in a warm, pleasant manner, talks about different things, readily shares ideas during a discussion.
- Is concerned about their appearance.
- Gestures a lot when talking.
- Is enthusiastic when he is happy.
- Loudly states how he feels when he is annoyed.
- Is not interested in details or paperwork because he trusts the Service Consultant.

How do you handle this type of person?

⇒ Be enthusiastic.

**Exercise 4**

**Instructions:**

Determine the personality type of one of your classmates.

Now that you know your own personality type, try to identify the personality of the classmate sitting beside you and have them determine yours.

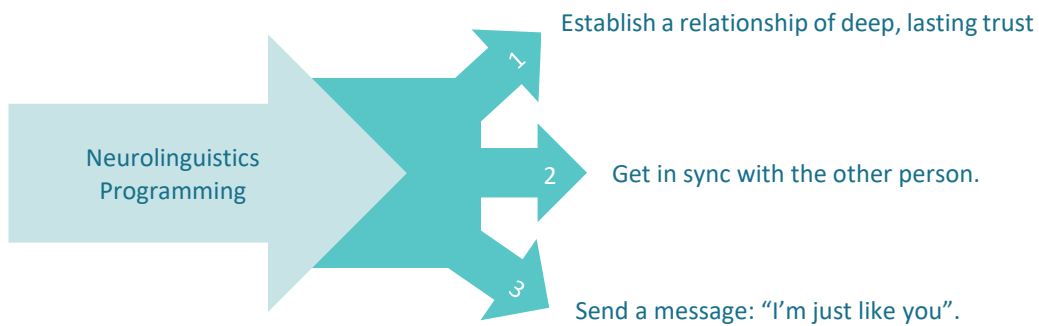
**Length:** 10 minutes.

## 9.3. Theory of Neurolinguistics Programming (NLP)

### 9.3.1. Definition of Neurolinguistics Programming

Neurolinguistics programming is a relatively new science that deals primarily with the study of people's personalities. It enables people to adapt their behaviour to the personalities of others so that they are compatible. In other words, neurolinguistics programming consists in identifying physiological states (respiration, visualisation, etc.) and an attitude which, once adopted, allows people to obtain results similar to those of the people with whom they interact.

### 9.3.2. The Three Principles of NLP



*What can Neurolinguistics Programming do for a Service Consultant?*

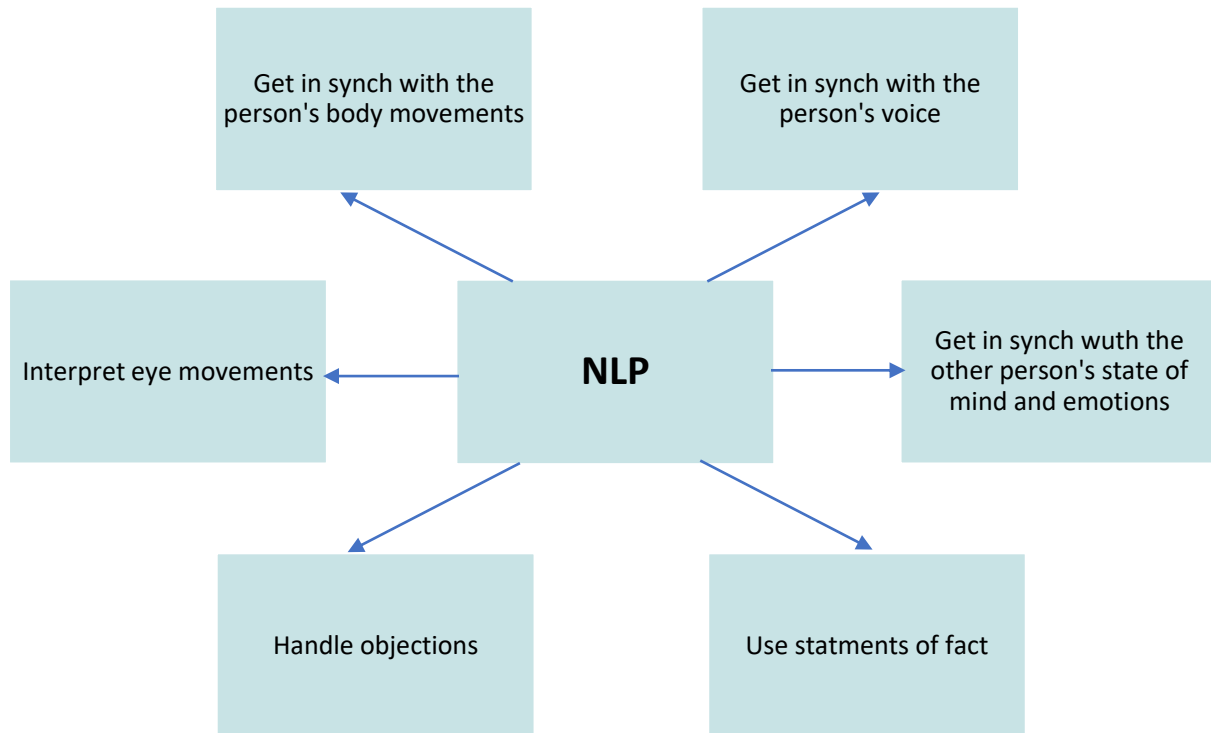
Service Consultants who understand that certain types of physical behaviour affect their feelings and emotions will see that the same holds true for customers. **Customers are looking for someone with a similar personality whom they can trust.**



**NLP is the science of establishing a relationship of trust.**

Service Consultants can create a relaxed atmosphere with customers by getting in synch with them and adapting to their body language, voice, state of mind, etc.

### 9.3.3. The Six Techniques of NLP



#### ***Technique 1: Get in Synch with the Person's Body Movements***

The Service Consultant should copy the customer's body language (mirror technique):

- Be subtle.
- Imitate the customer's posture and gestures.
- Do not make fun of the customer.

#### ***Technique 2: Get in Synch with the Person's Voice***

- Rate of speech.
- Volume.
- Speaking style.
- Length of sentences.

#### ***Technique 3: Get in Synch with the Person's State of Mind and Emotions***

Service Consultants who get in synch with the customer's state of mind will overcome resistance:

- Analyse the customer's state of mind.
- Respect the customer and adapt to their mood (professional and personal life).
- Lead the customer toward a solution.
- Help the customer develop a positive outlook.

#### **Technique 4: Use Statements of Fact**

The Service Consultant must use statements of fact to encourage the customer to develop a positive outlook:

- Repeat statements of fact.
- Repeat statements that are definitely true.
- Begin or end statements with phrases that call for agreement:
  - ⇒ "Right?"
  - ⇒ "OK?"
  - ⇒ "Do you agree?"
  - ⇒ "Correct?"
  - ⇒ "Experience shows that ..."
  - ⇒ "Don't you think that ...?"

#### **Technique 5: Handle Objections**

*(This technique will be discussed in greater detail in the "Overcoming Objections" module.)*

- Begin the conversation with the customer using statements of facts.
- Eliminate opposing positions.
- Refocus on the customer.
- Never get into a confrontation with the customer by disagreeing with any of their objections.

#### **Technique 6: Interpret Eye Movements**

- Watch the customer's eye movements and respond using appropriate communication.
  - ⇒ *Visual language (images):* when the customer looks up to the ceiling or sky.
  - ⇒ *Auditory language:* when the customer moves their eyes constantly or looks to the left and right (shifty).

*Sensory language:* when the customer looks at their feet and to the right, he is conveying an emotional reaction.

- Once you have identified the type of communication the customer is using, use appropriate words and phrases.



**With a very small number of people, these movements are reversed. If you think the customer you are trying to identify is one of those people, try this simple test. At an appropriate moment, ask the person to describe a past visual experience. If the person looks up and to your right, they are not one of the exceptions and you can apply the techniques as written. If the person looks up and to your left, they are one of the exceptions and you will have to reverse the techniques to get the same results.**

### 9.3.4. Dealing with Visual Customers

*How to identify a visual customer?*

- Tendency to look up to the ceiling or sky.
- Wants the Service Consultant to come to the vehicle with them.
- Notices signs and advertisements.

*How to deal with a visual customer?*

**Remember:**  
**"A picture is worth a thousand words. "**

- Use visual aids: charts, photographs, or parts.
- Use visual words: "Does that seem clear?" or "Let me show you."
- If you want the customer to visualise or imagine something, glance up at the ceiling as you talk. This will encourage the customer to do likewise and will enable them to form a lasting mental picture.

Conclude in a visual manner. It is not enough to simply restate the advantages. You should write the advantages down on a piece of paper or a chart so that the customer can see them. Remind the customer of the images when the repair order is being signed and finalised

Visual customers are likely to use words like:

<b>Analyse</b> It seems that... Obscure	<b>Opinion</b> Identify Perspective	<b>Upcoming</b> Unclear See	<b>Observe Realise</b> Read	<b>Clear</b> Angle Image
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### 9.3.5. Dealing with Auditory Customers

*How to identify an auditory customer?*

- Eyes move constantly and look towards their left.
- Hears noises.
- Consults or uses manuals.

*How to deal with an auditory customer?*

- Use testimonials and opinions.
- Think using words rather than images.

- Read things to the customer verbatim.
- Emphasise the most important points by changing the tone, volume and rhythm of your voice, because auditory customers pay as much attention to the way you say things as what you say.
- Use auditory words and phrases like "Do you understand what I'm saying?" and "Are we in agreement on this?"
- Use more than just visual material with auditory customers. Take advantage of their auditory nature and go to the vehicle so you can hear the engine noise, for example.
- Make frequent telephone calls to auditory customers; even a short conversation can be helpful.

Auditory customers are likely to use words like:

<b>Hear</b> <b>Misunderstood</b> <b>Speak</b>	<b>Express</b> <b>Rumour</b> <b>Listen</b>	<b>Discuss</b> <b>Silence</b> <b>Tell</b>	<b>Talk</b> <b>Question</b> <b>State</b>	<b>Report</b> <b>Tone</b> <b>Understood</b>
---	--	---	--	---

### 9.3.6. Dealing with Sensory Customers

*How to identify a sensory customer?*

- Tendency to look at their feet and to their right.
- expresses feelings/fears concerning the security of their vehicle.
- sensitive to odour.

*How to deal with a sensory customer?*

- Use physical, active and emotional words and phrases, such as:
  - ⇒ "What do you think?"
  - ⇒ "I want to understand what it is you need."
- Touch sensory customers because they are used to touching. They will think of you as sympathetic, caring, genuine and sincere.
- Glance to the right from time to time. Sensory customers will know intuitively that you really believe what you are saying.
- Get the customer involved. If possible, let the customer touch the part or have the customer do the walk around with you.
- Make sure the customer is physically comfortable during the meeting; otherwise he will fail to grasp the essence of the message you are trying to convey.

- At the end of the meeting, shake the customer's hand and say, "So, we're in agreement?" Sensory customers are likely to use words like:

<b>Abrupt Touch Move</b>	<b>Float Feeling Grasp</b>	<b>Affected Support Warm</b>	<b>Crush Heavy Complicated</b>	<b>Gentle Encourage Active</b>
----------------------------------	------------------------------------	--------------------------------------	--	--

### Summary

Proper use of the concept of neurolinguistics programming requires not only good powers of observation, but also a great deal of practice. It is especially important to be as natural as possible so that you can be as subtle as possible. The person with whom you are speaking must never feel he is being imitated. Remember: NLP happens in the subconscious, and because of that, discretion is essential.

## 9.4. Theory of Active Listening

**Definition: A series of actions intended to optimise the quality of listening.**

Active listening is characterised in part by behaviour that shows the listener is really paying attention and trying to understand what is being said.

*"It takes at least two years to learn how to listen."*

**Source:** T.K. Gamble and M. Gamble, *Communication Works*, McGraw-Hill. 1993.



**If you improve your active listening by just 10%, you will be more effective in your job as a Service Consultant; you will be more skilled and life will be better for you as well as for your customers!**

### ***Advantages of using active listening***

- ⇒ Increase in the number of satisfied customers (customer retention) most likely to come back to your dealership to have their vehicles serviced and who are potential buyers of new vehicles.
- ⇒ Improvement in the quality of your communication with Technicians, fewer interruptions and less wasted time.
- ⇒ Increase in your job satisfaction.
- ⇒ Decrease in comebacks and customer complaints.

The way a Service Consultant greets, understands, interprets and communicates with customers is essential if the job is to be done right the first time. Studies show that as active listening skills are developed, **the probability of customers returning to the dealership increases steadily.**

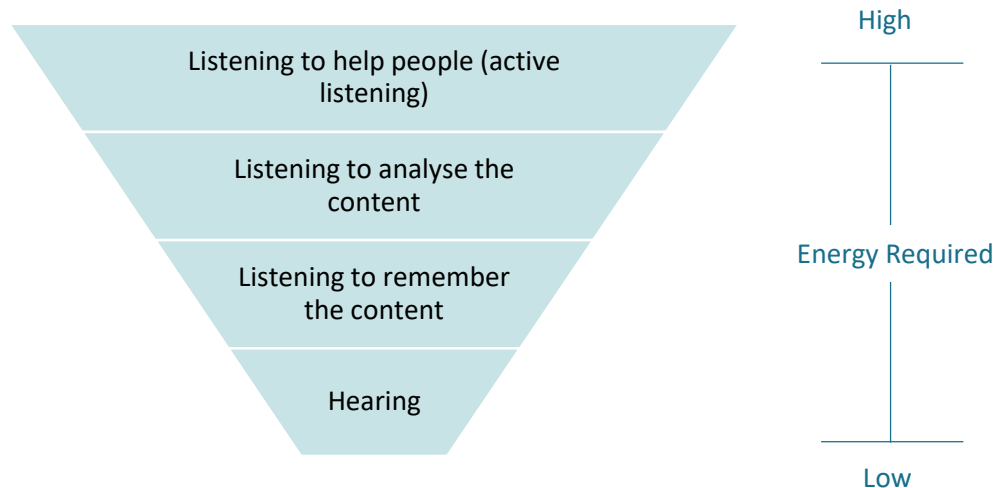


### ***A few figures***

*A number of years back, a study of comebacks showed that:*

⇒ 50 - 60% of comebacks are caused by a lack of communication.

### **Energy Required for Various Levels of Listening**



**Source:** T.K. Gamble and M. Gamble, *Communication Works*, McGraw-Hill. 1993

### **9.4.1. The Three Main Active Listening Techniques**

#### ***Technique 1: Focus Your Attention***

The first active listening technique is the ability to concentrate when you listen. If you are to apply active listening effectively, you have to pay full attention to the messages being conveyed by the other person.

#### ***A. Greet the customer***

The greeting is, without question, the step that sets the tone for the conversation between the customer and the Service Consultant. To illustrate this point, ask yourself what it is that sets a fine restaurant apart from other establishments in the food service industry:

- The way the staff is dressed.
- The language they use.
- Body language.
- Attention to customers.

In the After-sales Service industry, you are "fine dining".



**Rate yourself in terms of the factors identified above.**

### *B. Introduce yourself*

Introducing ourselves is a courtesy we use when we meet customers for the first time. It is strongly recommended that you introduce yourself instead of relying on the nameplate on your desk to do the job for you!

### *C. Use the customer's name often*

First, because people like to be called by name, this is a way of showing respect and appreciation. However, it is important not to become familiar too quickly.

It is strongly recommended that you address the customer using Mr. until he tells you differently. Always address customers the way they want to be addressed.



**The following tips will help you focus more effectively and therefore pay more attention to the person with whom you are speaking.**

## **Tips for Staying Focused**

### *A. Concentrate on non-verbal language*

- Look at the other person all the time.
- Focus on the person's face.
- Lean back.
- Lean towards the person.
- Keep your hands moving.
- Sit up or stand straight.
- Cross your arms and legs.
- Nod.
- Move your chair back.
- Stand or sit higher than the other person.

### *B. Maintain eye contact*

When talking with a customer, try not to let your eyes wander. Concentrate and look at the customer when one of you is talking. Looking directly at the other person indicates that the message being conveyed is sincere. A blank look often indicates a lack of interest and, more importantly, shows that you are not paying attention.

### *C. Ignore distractions and minimise interruptions*

When talking with a customer, try to ignore distractions around you. One of the best ways to do this is to work in a quiet area.

### *D. Repeat the last statement following an interruption*

If you absolutely must interrupt your conversation with a customer for a good reason, pick up where you left off. This will save you precious time and will have a positive effect on the customer. You are making it very clear that you are actively listening.

### *E. Recognise the customer's mood*

You have to adapt to the customer's mood. This will please the customer, who will probably feel more at ease with you because he sees that the two of you are alike.

## ***Technique 2: Ask Questions to Clarify the Customer's Statements***

The second active listening technique is asking appropriate questions. Properly used, this technique can be very effective. Appropriate questions allow the customer to give a clear, precise description of the problem with the vehicle, make comments or add pertinent information. There are two types of questions: open-ended and close-ended.

### *A. Open-ended questions*

Open-ended questions encourage the customer to answer freely. This means that they open the door for discussion and make it possible to gather subjective information and determine what the customer really wants.

Examples:     Why do you want your brakes checked?  
                  Under what condition does your vehicle's problem occur?

### *B. Close-ended questions*

Close-ended or directed questions limit the customer's answer to yes or **no** or one of several answers provided by you.

Examples:     When was the last time you had your brakes checked?  
                  Do you need an oil change?

## ***Technique 3: Reformulate the Customer's Statements***

The third active listening skill is reformulating the other person's statements. The idea is to repeat in your own words the content and underlying messages conveyed by what the other person is saying.

Reformulating:

- Allows you to reiterate a message, strengthening the trust and personal connection you have established with the customer.

- Lets the customer know that you are a good listener and makes the customer feel reassured and interesting.

When you are reformulating, you are asking the customer to continue the conversation; this, in turn, gives you a better understanding of what it is the customer wants you to know.

When you reformulate, avoid:

- Asking direct questions.
- Arguing or expressing your opinion.



**Through active listening, you must try to understand what the customer is saying and to convey to the customer what it is you understand.**

### Exercise 5:

#### Mirror Game

##### Instructions:

- Working in pairs, use your chairs and sit back to back. One participant acts as the transmitter, the other as the receiver. The transmitter gives the receiver specific oral instructions to write on a piece of paper (**see the overheads**). The instructions are on a slide and only the transmitter will be able to look at them. **Each participant will act as a transmitter.**

**Length:** 15 minutes for both participants.



# **Part 3:**

## **The Appointment Process**

## Part 3: The Appointment Process

### 10. Introduction

An appointment system is an essential Service Department function, for dealerships concerned about customer convenience and operational efficiency. A well managed appointment system is extremely important because it affects all other procedures in the Service Department. Booking appointments is the active way to manage fluctuations in daily business volume and make the most of available service resources. The Alderson Service Consultants Guild approach to the Customer Servicing Process will start with the initial contact: **a customer's telephone call.**

#### 10.1. Taking Appointments

As soon as the customer phones the dealership and asks for service, the Appointment Process begins. The Service Consultant will now have to schedule an appointment following these procedures:

- Greet the customer.
- Identify the customer's needs.
- Suggest needed maintenance according to history file.
- Determine the date and time of the appointment.
- Manage the customer's expectations and thank them for their business.

##### 10.1.1. Goals

Before we look at how individuals in the Service Department actually handle the booking of appointments, we should make sure that the Service Consultant knows the four main goals of the Appointment Process.

###### ***Improve customer satisfaction***

Spend more time to:

- Understand customer's needs and priorities.
- Provide better service.
- Give customer special attention.

###### ***Reduce the volume of comebacks***

Spend more time to:

- Provide more details on the repair order.
- Make the right diagnosis.

### ***Increase the volume of sales per customer***

Take time to:

- Suggest needed maintenance.
- Explain advantages to customer.

### ***Maximise shop productivity and utilisation***

Provide more details to:

- Give the right diagnosis.
- Reduce time to find cause of problem.
- Schedule appointments according to availability and shop load (reduces low periods).

## **10.1.2. Customer Expectations**

The appointment system has to meet customers' expectations if it is to be efficient.

- Dealer welcomes my business.
- Service appointments are easy to make.
- Check-in is easy and convenient.
- Service Consultant is friendly and competent.
- Alternate transportation is available.



### **ALWAYS REMEMBER WHO THE BOSS IS**

- Service Consultants work for the people who buy the products and services. If customers don't like the products or services, they simply won't buy.
- If this situation continues, customers will eventually fire everyone in the company, including the dealer, by spending their money elsewhere.

This is one good reason for taking pride in our work and striving for continuous improvement. Many companies that were thriving a year ago are no longer in business.

**WHY? THEY FORGOT THAT THE REAL BOSS IS...  
THE CUSTOMER.**

## **10.1.3. Dealer Standards for the Appointment Process**

- No 1.** Convenient and competitive service hours are maintained.
- No 2.** Service appointments are timely and convenient.



- No 3. The Service Consultant is knowledgeable and takes the time to listen to the customer and ask pertinent questions in order to assure clear communication.

**Remember...**

**The appointment is one element in the Service Department that is:**

- **The most important.**
- **The most neglected.**
- **The least understood function of the servicing process.**



## 11. Purpose of the Appointment Process

### 11.1 Objectives of the Appointment Process

An appointment system is not a customer list. It should include:

- Name and telephone numbers.
- Labour description.
- Estimate of work duration.
- Number of hours for sale.
- Number of hours sold.

Whether your appointment system is manual or on a complex computer system, the objective is the same: Systematic utilisation and promotion of the appointment system to have more customers with appointments.

***Booking appointments provides an excellent opportunity to develop a competitive advantage, as you will see throughout this training module!***

### 11.2. Characteristics of the Appointment Process

Whether the Service Consultant uses a computerised appointment system or a manual system, the system must be able to track essential vehicle and customer data.

Moreover, an appointment system must:

- Be convenient for customers.
- Allow shop time open for drop-ins, comebacks and fluctuations in workload.

- Reserve shop capacity for customers with appointments.
- Allow proper scheduling to avoid under booking or overbooking of the shop.
- Ensure that the dealership has the capacity to satisfy the demand.
- Set aside a specific time, allowing the Service Consultant to talk to the customer about their vehicle's needs.

**Exercise 6:**

**List the Features, Advantages and Benefits of Some Maintenance Packages (Cont'd)**

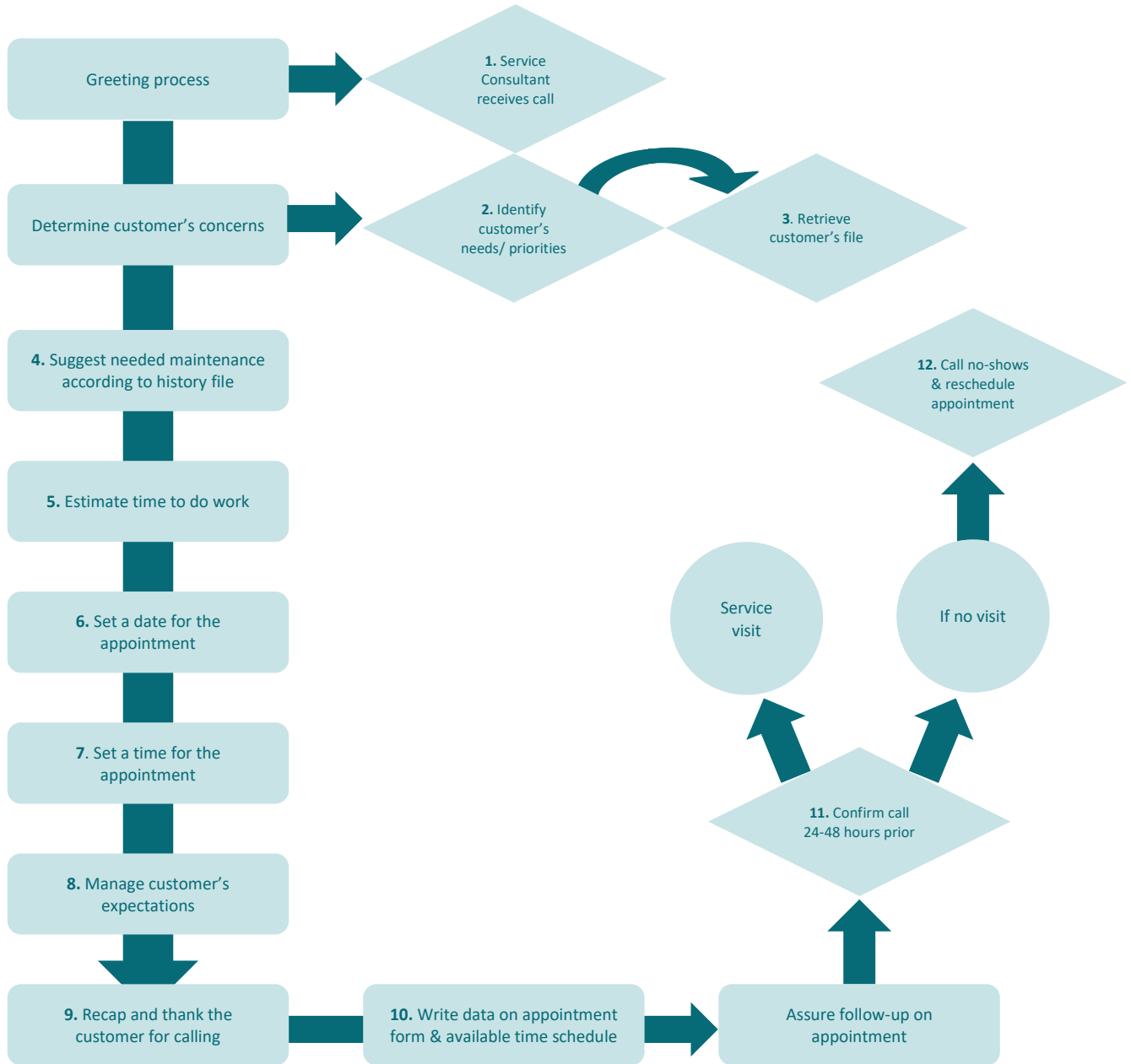
**Instructions:**

- Get together in groups of 3 or 4. Using annex no. 1, list in order the 12 procedures of the Appointment Process.

**Length:** 10 minutes.

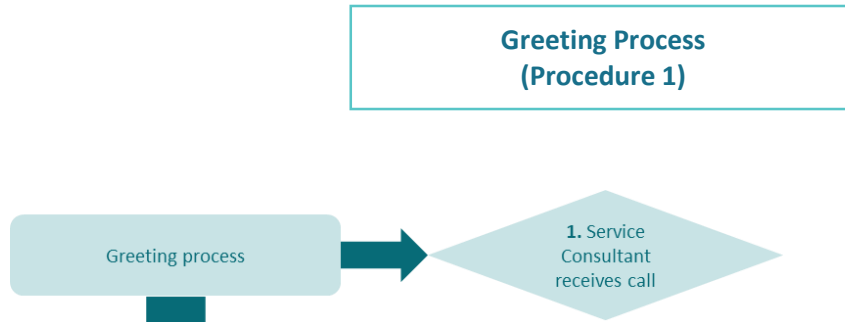
## 12. The Appointment Process

### 12.1. Overall Procedures



## 12.2. Detailed Procedures

It is the objective of the Service Consulting College that Service Department employees be able to complete all service procedures in the specified order for each service transaction.

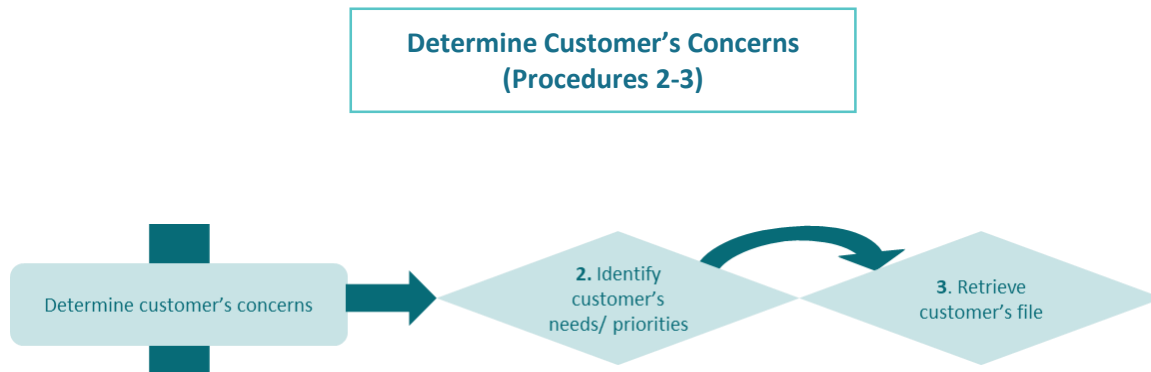


### 1. Service Consultant Receives Calls

Service Consultant must check his pre-assigned available hours for sale on the shop load schedule drawn up by the Service Manager to be better prepared to start taking telephone calls from customers.

The Service Consultant must:

- Answer the telephone by the third ring or within 10 seconds.
- Never leave a customer on hold for more than 30 seconds.
- Greet the customer in a courteous and professional manner:
  - ⇒ Indicate the department.
  - ⇒ Identify themselves.
  - ⇒ Offer to help the customer.
- Obtain the customer's name.
- Ask for customer's home and business telephone numbers.
- Note pertinent information in the system.
- Appropriate response time to text and email requests.



## 2. Identify the Customer's Needs

It is of utmost importance that the Service Consultant spend sufficient time with the customer to ask relevant questions concerning the vehicle's condition and to obtain a precise description.

### Dealer Standard

No.4. The Service Consultant is knowledgeable and takes the time to listen to the customer and ask pertinent questions in order to assure clear communication.

In order to identify the customer's needs and priorities, the Service Consultant must ask pertinent questions to identify the vehicle's problem. Thus, the Service Consultant will be able to determine what type of work is needed and which skilled group/Technician should be assigned to the repair or maintenance work. Later on, in the module "Product and Technical Diagnosis Knowledge", the types of questions the Service Consultant should ask, depending on the condition of the vehicle, will be examined in greater detail. The following factors must be considered when identifying customers' needs and priorities.

- Apply active listening, verbal and non-verbal, in order to clearly identify the customer's needs and priorities.
- Ask questions based on the customer's explanations of the condition of the vehicle in order to determine what type of work has to be done and which Technician should be assigned to the job.
- At this stage take notes on a separate sheet only (do not use the repair order or appointment form yet).
- Politely ask the customer if any other work needs to be done on their vehicle.

If he is to be knowledgeable and efficient, it is recommended that the Service Consultant view the manufacturer's guidelines on new vehicle models. Furthermore, the Service Consultant should remain up-to-date on recent information by reading the Service Bulletins regularly. He should be able to use the Techline equipment which contains all Service Bulletins.



By being well informed, attentive to the customer and asking questions, the Service Consultant establishes credibility. A relationship based on trust is bound to encourage customer loyalty and increase the sales of service and parts. Communication is the key element that enables Technicians to receive repair orders that are well documented and precise.

### 3. Retrieve the Customer's File

When the Service Consultant retrieves the customer's service file, he must never leave the customer on hold for more than 30 seconds.

Retrieving the customer's service file from the computer system when he calls for an appointment:

- Accelerates the Consulting Process.
- Allows the Service Consultant to be better prepared to suggest maintenance.
- Enables the Service Consultant to verify date warranty expires thus avoiding unpleasant surprises for the customer.

**Suggest Needed Maintenance  
(Procedure 4)**

4. Suggest needed maintenance  
according to history file

### 4. Suggest Needed Maintenance According to History File

Once the file has been retrieved from the computer system, it is crucial that the Service Consultant suggest a vehicle maintenance schedule according to the customer's vehicle service history file. If there is no computer system, the Service Consultant must discuss maintenance based on the vehicle's odometer reading or age.

Reference tools:

- Recommended maintenance calendar.
- Maintenance list.
- Price list.
- Ask the customer if any other work needs to be done.
- Be familiar with the week's or the month's advertised specials.

- Ask the customer if a maintenance program and warranty information were presented to them during the information session: e.g. "Smart Care Clinic".

### Estimate Time to do Work (Procedure 5)

#### 5. Estimate time to do work

### 5. Estimate Time to do Work

It is important that the Service Consultant be able to estimate the amount of time needed to fix the customer's vehicle according to labour time guide.

After having suggested the maintenance or repairs to be performed on the customer's vehicle, the Service Consultant should estimate the actual repair or maintenance time for the work.

Question: How much time should a Service Consultant allow or set aside when a customer calls in the afternoon to complain that the transmission is slipping?

Answer: 1 hour.

### Set a Date for the Appointment (Procedure 6)

#### 6. Set a date for the appointment

### 6. Set a Date for the Appointment

Service Consultant has to set a date with the customer according to the shop load schedule and the customer's availability.

- Politely ask the customer to hold.

- Check the shop load for availability.
- Take into account the vehicle's problem (e.g. an emergency).
- Offer the customer two different dates. Appointment should be booked within 3 days.

Be flexible. Keep in mind that the customer is the only boss when it concerns a conflict of schedule.

When setting the appointment, the Service Consultant must consider the following factors:



Setting a date for an appointment is based on customer convenience and shop availability.

Taking into account customer convenience, shop capacity and estimated repair time, the Service Consultant should always schedule customers on days that are not usually busy days if their schedule permits.

### Set a Time for the Appointment (Procedure 7)

#### 7. Set a time for the appointment

## 7. Set a Time for the Appointment

The Service Consultant should set a time for the appointment based on the customer's availability, shop availability and customer convenience.

### Dealer Standards

- No.1. Convenient and competitive service hours are maintained.
- No.3. Service appointments are timely and convenient.

If the customer agrees to one of the two days suggested:

- The Service Consultant can suggest two times at which he is available and ask the customer to pick one of those times by putting emphasis on hours that are less busy.

If neither of the times suggested are convenient for the customer:

- The Service Consultant should try to determine what time would be best.



Then, based on their own availability:

- The Service Consultant should continue to give the customer options until a mutually suitable time is found.

**The Service Consultant must consider the following factors:**

Setting a time for an appointment is based on customer convenience and the Service Consultant's availability

The basic idea is to schedule peak times for people who are not available at any other time. Often, people who are free to come in at any time do not say so and will accept whatever time is suggested.

For example: A doctor, a housewife or a shift worker would be able to take and might actually prefer an appointment outside peak hours.

**The Service Consultant should always begin by offering an appointment between 9:00am and 11:00am.**

(Unless he needs work to get the shop started).

Taking into account **customer convenience and Service Consultant availability**, the Service Consultant should always check whether there are any openings on their appointment form between 9:00 am and 11:00 am. If there are openings, the Service Consultant should offer appointments to customers who are able to come between those times (give two options, e.g., 9:30 am or 10:00 am). **This allows the Service Consultant to keep peak times for customers who do not have a choice.**

The Service Consultant should always allow 10-15 minutes per customer.

It is essential for the Service Consultant to have enough time to serve customers appropriately to clearly identify their needs

### Alderson Service Consultants Guild's strategy is to...

- Schedule appointments outside the morning and late afternoon rush periods if it is convenient for the customer.
- One customer every 10 minutes per Service Consultant (between 7:30 am - 8:30 am).
- One customer every 15 minutes per Service Consultant (after 8:30 am).

#### Build in Buffers:

The Service Consultant should limit the number of appointment times in each Technician's area of expertise. This will leave openings that the Service Consultant can use to sell additional servicing or accommodate comebacks, customers without an appointment, emergencies, etc.

A survey of 1,400 customers yielded the following results:

Q: What days do you prefer to have your vehicle serviced at a dealership?

A: Monday to Friday.

Q: What time do you prefer to have your vehicle serviced at a dealership?

A: *These results indicate the percentage of customers who would like to have their vehicle fixed at the following times:*

6:00 a.m. to 9:00 a.m.	48.9%	Yes
9:00 a.m. to 12:00 p.m.	46.6%	Yes
12:00 p.m. to 3:00 p.m.	24.3%	Yes
3:00 p.m. to 6:00 p.m.	16.9%	Yes
6:00 p.m. to 9:00 p.m.	4.9%	Yes

### Manage Customer's Expectations (Procedure 8)

#### 8. Manage customer's expectations

### 8. Manage Customer's Expectations

The Service Consultant must:

- Find out what the customer expects from the Service Department.
- Adjust their attitude to meet those expectations.

Doing this will improve productivity and time management of the workshop and the Service Consultant's as well.

To manage customers' expectations of the dealership's Service Department, the Service Consultant must consider the following factors:

- Tell the customer that the time set for the appointment is the time he will see the Service Consultant to complete the repair order, not the time the repair or maintenance work will start.
- Convince the customer of the benefits of leaving their car for the entire day.
  - Less waiting time in the reception area.
  - The dealership will offer alternate transportation options.
- Ask the customer if he knows how to get to the dealership and if he needs alternate transportation.

It is important to understand that the concept of "time" in the Service Department varies widely. There are normally four types of time:

1. The time of the **appointment** - important to the customer.
2. The time the **work begins** - important to the Service Department.
3. The time the **work is completed** - important to the Service Department.
4. The time the **vehicle is returned to the customer** - important to the customer.

### Recap and Thank the Customer for Calling (Procedure 9)

#### 9. Recap and thank the customer for calling

## 9. Recap and Thank the Customer for Calling

It is mandatory that the Service Consultant recap all the information discussed with the customer concerning the work to be done on their vehicle and thank them in a courteous manner for doing business with the dealership

- Recap the work to be done.
- Remind the customer of the date and time of the appointment.
- Ask the customer to notify you should he not be able to keep the appointment.

- Tell the customer that if he is late, there may not be enough time for the work to be done as planned. (Do not sound inflexible.)
- Thank the customer for calling and doing business with you.

Finally, if the repairs include unusual work or there is some question as to the availability of parts, the Service Consultant should check with the Parts Department to ensure that the parts will be available when the customer arrives. When the customer arrives for the appointment, the Service Consultant should circle their name or place a check mark in the "Arrived" column on the appointment form.



**For repairs of more than 20 minutes, it is recommended that the vehicle be kept for the day.**

**Write Data on Appointment Form and the Available Time Schedule  
(Procedure 10)**

**10. Write data on appointment form and the available time schedule**

**10. Write Data on the Appointment Form and on the Control of Available Time Schedule**

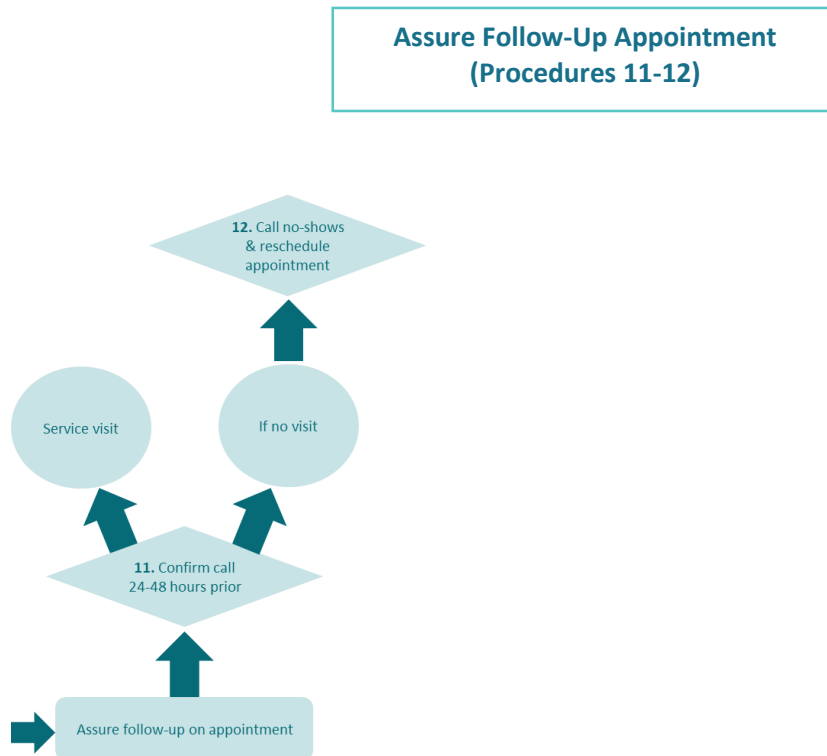
The Service Consultant must write down all required information on the Appointment Control Form and on the Control of Available Time Schedule immediately after he finishes talking to the customer. This is important since it ensures that the work is done according to the customer's needs and priorities.

The Service Consultant must write the following information on the **Appointment Form**:

- Customer's full name.
- Date and time of appointment.
- Customer's home and work telephone numbers.
- Vehicle model and year.
- Other work to be done.
- If customer will need alternate transportation;
- If the parts required are not available in the Parts Department, indicate when they will be available.
- Estimated time to complete work.
- Promised time to pick up vehicle.
- Type of work to be done.

The Service Consultant must write the following information on the **Control of Available Time Schedule**:

Record the estimated time to do the work on the corresponding line associated with each Technician assigned to do the work. This line also represents the estimated length of time promised to do the work.



### 11. Confirm Call 24-48 Hours Prior to the Appointment

This procedure will help the dealership eliminate "no-shows". It could be assigned to the Service Consultant or a qualified administrative employee in the Service Department. Since some customers may forget the date of their appointment, the best way to ensure that they show up is to make a follow-up call a day or two prior to the appointment.

The Service Consultant or another Service Department employee assigned to this job must follow these procedures:

- Get a copy of the next day's Appointment Form and call the customers to remind them of their appointment.
- Cross out the name of customers who are unable to keep their appointment.
- Reschedule another appointment for customers who will not be able to show up.
- Use a script.

## 12. Call No-Shows and Reschedule Appointment

Finally, the Service Consultant or another Service Department employee should be assigned to call the no-shows who are more than an hour late.

The Service Consultant or another Service Department employee should call the no-shows and reschedule their appointment if possible. If the customer cannot be reached and does not show up, the Service Consultant should call them later in the day.

- For current-day appointments, **use a script** to call customers who are more than an hour late and tactfully ask if they are still planning to come in and try to reschedule the appointment.

Follow-up is the last opportunity to let customers who made an appointment know that the Service Consultant cares and that your dealership welcomes their business. It also shows your professionalism and that you would like to keep them as customers.

## 13. Setting Up an Appointment System

Setting up an appointment system is an essential process in order to maximise your shop efficiency. In order to properly load your shop for maximum utilisation, your appointment system must be able to track reserved/sold and available hours for sale. This will let the Service Consultant know at a glance how many available hours have been sold and how many hours are left to sell.



**The recommended percentage of time available for sale through appointments is between 70% and 80%. This means that 20% to 30% can be left for customers without appointments, emergencies, comebacks, etc.**





## ROLE-PLAYING



## Role-Playing

Role playing exercises were developed so that you could apply the concepts and techniques that you were exposed to in this training module.

### What is role-playing?

An exercise that allows one person to **act** the part of another person.

### How can role-playing help you?

Role playing provides you with special learning opportunities, such as:

1. Actively participating in a **debate**, the outcome of which is based on different points of view.
2. Learning in close co-operation with others.
3. Making quick decisions in a context of urgency.
4. Dealing with problems that could be encountered in a work situation.
5. Talking to the other participants about their reactions to the role playing and coming to a group conclusion at the end of the exercise.
  - In taking on different roles, you will have to consider opinions that are different from yours.
  - Each role-playing exercise requires teams of three players who will alternately act the part of a Service Consultant, a customer and an observer. Players will have to simulate each of these roles in every one of the 5 role playing situations (15 minutes allotted for each role, for a total of 45 minutes per situation/process).
  - You must **read** the specific instructions for each player in every situation.

## Specific instructions for Each Role

### Instructions for the Customer

Your goal in this role-playing exercise is to enable the Service Consultant to practice the various customer service techniques and communication skills covered in this course. To play the role of customer effectively, you have to let the Service Consultant ask you for information as needed. Do not tell the Service Consultant anything other than what he wants to know. **Remember that you are playing the customer, not the Service Consultant!**

### Instructions for the Service Consultant

Your objective in this role-playing exercise is to apply as best you can the customer service techniques and communication skills covered in this course. Take a few minutes to collect your thoughts so that you can reap maximum benefit.

### Instructions for the Observer

Your purpose in this role-playing exercise is to evaluate your team's Service Consultant as he applies the customer service techniques and communication skills covered in this course. Record your reactions on the Observation Form provided using check marks in the appropriate boxes, so that you can objectively evaluate the Service Consultant's performance. Please follow each step/procedure on the Observation Form while giving feedback to your team's Service Consultant at the end of each role-playing situation.

### Instructions for the three players

Before starting each role-playing situation, each **participant must read their own instructions individually depending on which role he is assigned to (Customer, Service Consultant or Observer)**. At the end of each role-playing exercise, the participant on your team who played the role of the observer will give their comments and suggestions to the team's Service Consultant.

Finally, at the end each team's role playing, one team will role play in front of the group for each role-playing situation. **The trainer and the other participants will then act as observers and use their evaluation form to provide feed-back to the Service Consultant who was in the "spotlight"!**

**Each of the participants will alternately act the part of a Service Consultant throughout each role-playing situation.**

## Exercise 7:

### Role-Playing Situation 1: Customer

**Player:** Customer  
**Process:** Appointment  
**Length:** 45 minutes (15 minutes for each role)

#### **General Information:**

Customer's name: **Paul Andrews**  
Telephone numbers: **(807) 698-0210 (home) - (807) 974358 (cellular)**  
Type of vehicle: **2012 Edge**  
Odometer reading: **70,343 km**  
Address: **Thunder Bay, ON P7B 6C2**  
License number: **XGX493**  
In-service due: **September 13, 2011**

#### **Instructions:**

1. You call the Service Consultant on **January 25** to make an appointment to have a problem fixed. **You are not at all happy** about the problem with your vehicle and insist on getting an appointment the same day.
2. You last had your oil change done **at 65,156 km by a competitor.**
3. All the maintenance suggested by the Manufacturer has been done.

#### **Current Conditions**

1. Your vehicle seems sluggish when the engine is cold.
2. The engine is leaking oil (this is the second time this has happened).

#### **Previous Repairs (2 repair orders)**

- |                                      |   |
|--------------------------------------|---|
| <b>1. Repair order number:</b> 52702 | <b>2. Repair order number:</b> 48690      |
| <b>Date:</b> July 25, 2018           | <b>Date:</b> February 23, 2018            |
| <b>Odometer reading:</b> 59,900 km   | <b>Odometer reading:</b> 49,690 km        |
| <b>Work:</b> Oil change              | <b>Condition:</b> Engine oil leak         |
|                                      | <b>Cause:</b> Rocker cover gasket leaking |
|                                      | <b>Correction:</b> Replace gasket         |



## Exercise 7:

### Role-Playing Situation1: Service Consultant

**Player:** Service Consultant  
**Process:** Appointment  
**Length:** 45 minutes (15 minutes for each role)

#### Instructions:

1. Apply the same procedures used in the Appointment Process **except for the one listed below** (because it does not apply to this situation).

*Procedure 3: Retrieve the customer's file from a computer system.*

2. Consult your client's history file using the 2 Repair Order Forms.
3. Complete the Appointment Control Form.
4. Apply communication skills.

#### Principles of Active Listening to be Applied:

1. Focus your attention.
2. Ask questions to clarify the customer's statements.
3. Reformulate the customer's statements.

#### Principle of Neurolinguistic Programming to be Applied:

4. Get in synch with the customer's voice.

#### Principle of Adjustment to the Customer's Personality to be Applied:

5. Determine and adjust to your customer's personality type.



APPOINTMENT CONTROL FORM CHECK (V)

HRS	NAME	#	TEL NO.	WORK NO.	MODEL & YEAR	KM	R.O. #	OTHER WORK	MAINTENANCE & WARRANTY BOOKLET	EXTENDED WARRANTY COVERAGE	COURTESY TRANSPORTATION REQUIREMENTS	PARTS IN	ESTIMATED TIME	PROMISE TIME	REMARKS
7:30		1													
7:45		2													
8:00		3													
8:15		4													
8:30		5													
8:45		6													
9:00		7													
9:15		8													
9:30		9													
9:45		10													
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14:45		26													
15:00		27													
15:15		28													
15:30		29													
15:45		30													
16:00		31													

- 1. L.O.F.
- 2. MEC. INSPECTION
- 3. TUNE UP
- 4. ALIGNMENT & SUSPENSION
- 5. COOLING SYSTEM
- 6. BRAKES
- 7. ELEC. & INJECTION
- 8. ENGINE
- 9. TRANS. & DIFF.
- 10. A/C
- 11. EXHAUST
- 12. TRIM
- 13. PDI
- 14. GENERAL
- 15. SUBLET

## Exercise 7:

### Role-Playing Situation 1: Observer

**Player:** Observer  
**Process:** Appointment  
**Length:** 45 minutes (15 minutes for each role)

**Instructions:**

1. The participants who play the role of observer record on the Observation Form below whether the Service Consultant did or did not carry out the required tasks/procedures or whether the tasks/procedures do not apply to the role-playing situation.
2. It is recommended to **follow each step of the Appointment Process Observation Form** while giving feedback to the members of your team.

#### Observation Form

Did the Service Consultant....

Yes      No      N/A

<b>Procedure 1: Receives Calls</b>			
1. Identify themselves clearly?			
2. Identify the department clearly?			
3. Greet the customer in a courteous manner?			
4. Ask the customer if he could be of service?			
5. Ask for the basic information about the vehicle?			
6. Ask for the basic information about the customer?			
<b>Procedure 2: Identify the Customer's Needs</b>			
7. Gathers information about the condition of the customer's vehicle?			
8. Ask pertinent questions to clarify the nature of the problem?			
9. Note the customer's concerns on a separate sheet?			
10. Use the customer's name frequently?			
<b>Procedure 3: Not applicable (Retrieve the Customer's File from a Computer System)</b>			
<b>Procedure 4: Suggest Needed Maintenance According to Vehicle's History File</b>			
11. Know the features, advantages and benefits of each service item?			
12. Recommend maintenance based on the vehicle's history file or the odometer reading?			
13. Ask the customer if the vehicle needed any other repairs?			
<b>Procedure 5: Estimate Time to do Work</b>			
14. Have the knowledge to accurately estimate how long it would take to complete the work?			



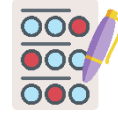
	Yes	No	N/A
<b>Procedure 6: Set a Date for the Appointment</b>			
15. Choose a date based on the customer's availability?			
16. Give the customer a choice of two dates?			
17. Give the customer an appointment within three days?			
<b>Procedure 7: Set a Time for the Appointment</b>			
18. Begin by offering an appointment between 9:00 am and 11:00am?			
19. Set a time based on the customer's availability?			
<b>Procedure 8: Manage Customer's Expectations</b>			
20. Tell the customer that the time of the appointment is not the time the vehicle goes into the shop?			
21. Suggest that the customer leave the vehicle for the day if the job was going to take more than 90 minutes?			
<b>Procedure 9: Recap and Thank Customer for Making an Appointment</b>			
22. Recap the work to be done and reconfirm the appointment?			
23. Thank the customer for calling?			
<b>Procedure 10: Write Data on the Appointment Form</b>			
24. Write data on the appointment form?			
<b>Active Listening</b>			
25. Focus his attention while listening to the customer?			
26. Use the customer's name frequently?			
27. Adjust to the customer's mood?			
28. Ask clarifying questions?			
29. Listen to the customer with a view to providing assistance?			
30. Reformulate the customer's statements as a way of encouraging the customer to continue the conversation?			
<b>Neurolinguistic Programming</b>			
31. Get in synch with the customer's voice?			
<b>Determine the Personality Type</b>			
32. Adjust to the customer's personality?			

**Instructions:**

- You can now share your observations with the other people on your team in order to initiate a discussion among the members of your team (conclusion).



## Exercise 8:



### Multiple Choice Questions on the Appointment Process

These questions are designed to evaluate your understanding of the Appointment Process and help you prepare for your post-module evaluation. It is strongly recommended that you not refer to your guide during the question period. If you like, you can record your answers as you go along or complete the questionnaire at home.

**NOTE:** These questions were developed to initiate discussion.

- 1. The following objectives all pertain to the entire Appointment Process, except one. Which one?**
  - a) Increase the volume of sales per customer
  - b) Maximise shop productivity and utilisation.
  - c) Make customers aware of the advantages of dealership servicing.
  
- 2. Indicate one customer expectation of the Appointment Process?**
  - a) The vehicle is fixed right the first time.
  - b) The customer is offered alternate means of transportation.
  - c) The dealership greets the customer courteously and promptly.
  
- 3. In November 2015, a mystery shopper survey was conducted to evaluate the performance of Service Consultants. Which procedure was rated lowest in terms of quality?**
  - a) Did the Service Consultant recommend the necessary maintenance?
  - b) Did Service Consultant recap the appointment?
  - c) Did the Service Consultant ask for the customer's work number?
  
- 4. Which of the following statements pertains specifically to the Appointment Process?**
  - a) Provides technical assistance.
  - b) Is convenient for customers.
  - c) Is the prime sales opportunity of the Customer Servicing Process.
  
- 5. What is a “moment of truth”?**

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**6. How much time should the Service Consultant allow or set aside when a customer calls late in the afternoon to complain that his transmission is slipping?**

- a) 30 minutes.
- b) 60 minutes.
- c) 90 minutes.

**7. The Service Consultant should first offer the customer an appointment...?**

- a) ...between 7:00 am and 8:00 am.
- b) ...between 8:00 am and 9:00 am.
- c) ...between 9:00 am and 11:00 am.

**8. The time the job begins is important to...?**

- a) ...the customer.
- b) ...the Technician.
- c) ...the Service Department.

**9. How much time should the Service Consultant allow for a consultation at 10:45 am?**

- a) 10 minutes.
- b) 15 minutes.
- c) 20 minutes.

**10. According to customer expectations, the Service Consultant should not let the telephone ring more than how many times?**

- a) 3.
- b) 4.
- c) 5.

**11. According to the theory of active listening, which type of listening requires the least energy?**

- a) Listening to remember the content.
- b) Listening to understand the content.
- c) Listening to analyse the content.

**12. The following procedures are all related to the "Focus your attention" technique of active listening, except one. Which one?**

- a) Ask open-ended questions.
- b) Using the customer's name frequently.
- c) Asking if the customer has an appointment.

**See key to exercises in annex no. 6.**



# **Part 4:**

## **The Consulting Process**

## Part 4: The Consulting Process

### 14. Introduction

In the service transaction, the Consulting Process constitutes one of the most important interactions with the customer. It includes the customer interview that allows the Service Consultant to determine their wants and needs, as well as other important consulting activities which are defined in this training module. Moreover, customer consulting is a dynamic way to start the customer service visit, and it lays the foundation for quality service work. The Alderson Service Consultants Guild has an active approach toward customer consulting ensuring the entire service transaction is more effective, accurate and efficient.

#### 14.1. The Consulting Process (5 Steps)

1. Greet Customer.
2. Identify their Concerns.
3. Inspect the Vehicle.
4. Suggest Needed Maintenance.
5. Commit to Survey
6. Complete the Repair Order.

##### 14.1.1. Goals

Before we examine how the Service Consultant handles the customer consultation, it is essential you know the four main goals of this process.

##### ***Improving Customer Satisfaction***

By demonstrating concern for the customer, the Service Consultant will:

- Establish a relationship of trust.
- Have a clear understanding of the customer's needs.
- Improve the quality of technical work performed on the vehicle.

##### ***Reducing the Number of Comebacks***

- Ask pertinent questions.
- Obtain more details.
- Give a precise diagnosis.

A national study conducted in 2008 demonstrated that the main reasons for comebacks were as follows:

Lack of communication	50-60%
Lack of parts	20-25%
Wrong diagnosis	10-15%
Poor quality of work performed-	5-10%

### ***Increasing the Volume of Sales Per Customer***

Spending more time with customers to suggest recommended maintenance according to:

- Odometer reading.
- The customer's file.
- Manufacturer's recommendations.

### ***Maximising Shop Productivity and Utilisation***

- Increase in hours sold.
- Better utilisation of shop and work force.



**In conclusion, we are off by nearly 1% in the processing of repair orders.**

## **14.1.2. Customer Expectations**

It is imperative that the Consulting Process meets customers' expectations if it is to be efficient. Their expectations are the following:

- Dealer welcomes my business.
- Dealer welcomes me courteously and promptly.
- Check-in is easy and convenient (a hassle-free experience).
- Service Consultant is friendly and competent.
- Transportation is available.

## **14.1.3. Dealer Standards for the Consulting Process**

- No. 2. Service is made available on both an appointment and non-appointment basis.
- No. 5. Service Consultants discuss with each customer their vehicle needs, including any open product recall campaign, based on vehicle history.
- No. 6. The repair order clearly describes the customer's concerns, and the services to be performed. The customer's approval to proceed is always obtained.
- No. 7. Service Consultants offer customers alternate transportation options.
- No. 8. Service Consultants quote reasonable time promises with reasonable and competitive cost quotes.
- No. 9. A copy of the completed repair order/invoice is given to the customer.



## 15. Purpose of the Consulting Process

### 15.1. Objective of the Consulting Process

The aim of the Consulting Process is that customers be **greeted in a systematic and professional manner** so that they will gain confidence in the dealership's ability to meet their expectations. Furthermore, by taking sufficient time with each customer it is possible to achieve an effective and clear communication process throughout the entire transaction which allows the Service Consultant to better determine the customer's concerns and requirements.

Moreover, applying this process sets the stage for a satisfying customer experience with your Service Department and ensures that each customer's service needs are met in fewer visits.

Question: Why should we apply each consulting procedure established by the Alderson Service Consultants Guild?

Answer: Because this program was designed and structured to allow continuity in the Consulting Process with the customer. By applying all the procedures in a logical sequence, no steps will be forgotten or be poorly executed, and customers' expectations will be met. Keep in mind that the Alderson Service Consultants Guild has thoroughly researched what customers expect from a dealership.



**The purpose of consulting is to improve the quality of service.**

### 15.2. Characteristics of the Consulting Process

- The consulting area is a key customer contact zone.
- Most customer consulting activities are best performed with customers at their vehicle.
- The Service Consultant can reduce customer anxiety by ensuring clearly written and oral communication.
- The Service Consultant is the communication link between the customer and the workshop.
- Exceptional people-handling skills and personal organisation are required
- The consulting process provides a prime selling opportunity.
- It is important to show that the Service Consultant cares.
- Customer line-ups must be avoided.

**Exercise 9:**

**List the Features, Advantages and Benefits of Some Maintenance Packages (Cont'd)**

**Instructions:**

- Get together in groups of 3 or 4. Using annex no. 2, list in order the 22 procedures of the Consulting Process.

**Length:** 10 minutes

**Notes**

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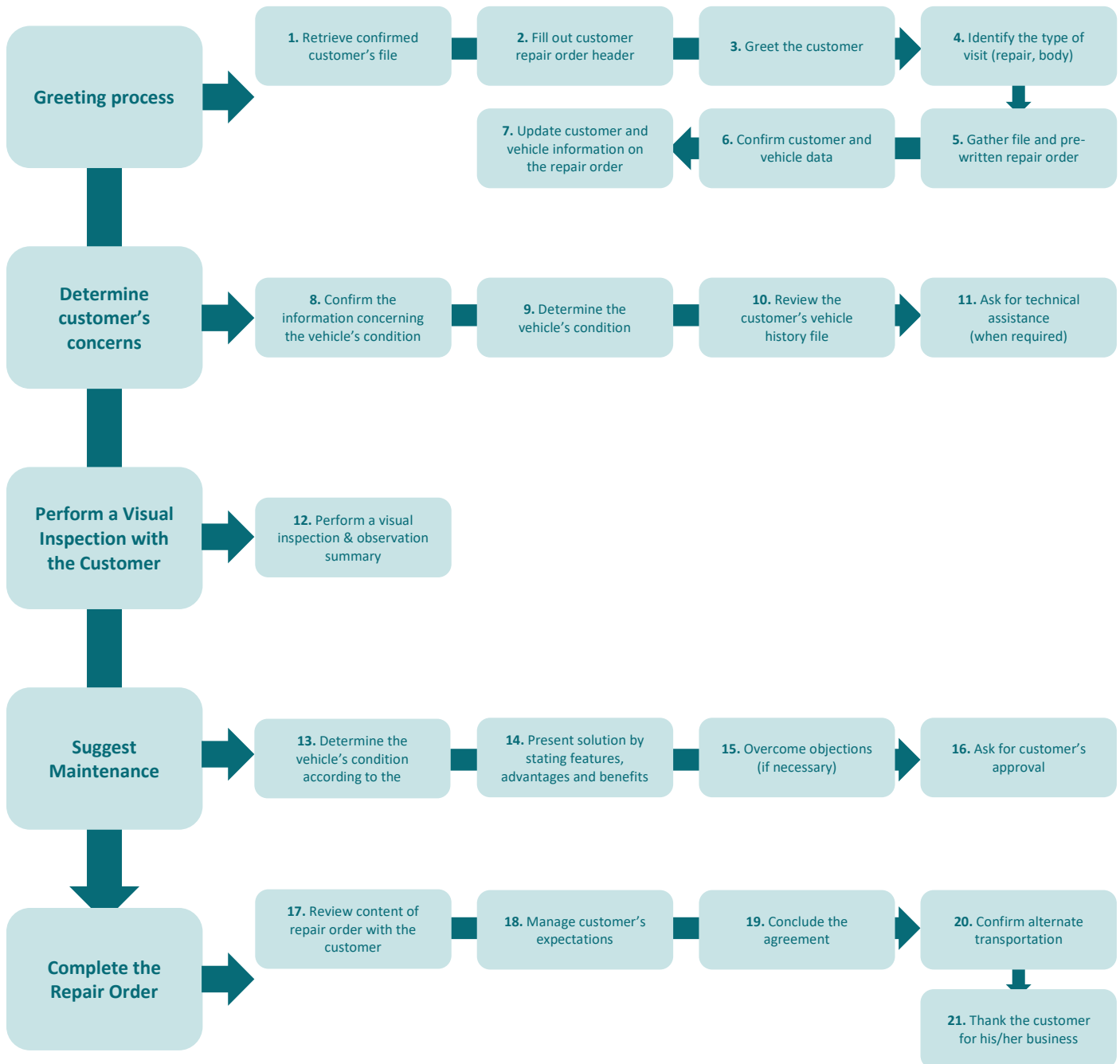
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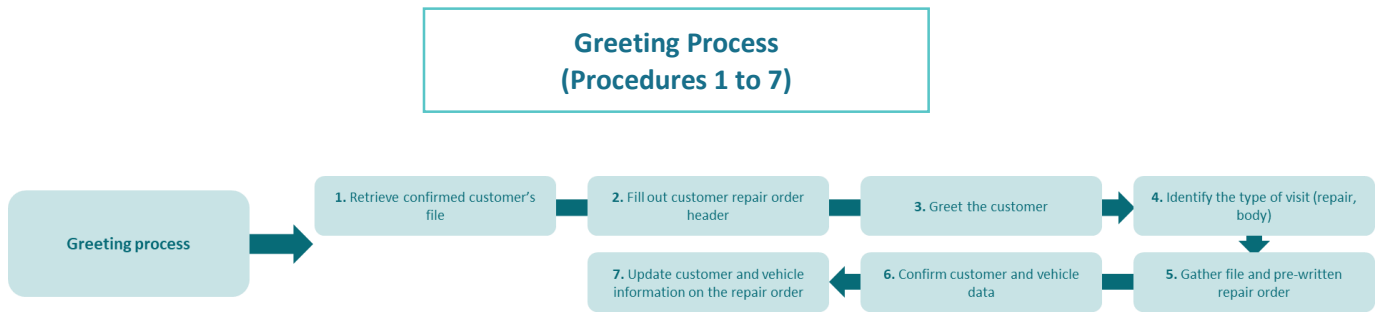
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## 16. The Consulting Process

### 16.1. Overall Procedures



## 16.2. Detailed Procedures



### Before the customer arrives:

1. Retrieve confirmed customer's appointment file.
2. Fill out customer repair order header.

### When the customer arrives:

3. Greet the customer.
4. Identify the type of visit (service, body).
5. Gather file and pre-written repair order.
6. Confirm customer and vehicle data.
7. Update customer and vehicle information on the repair order.

**THE KEY TO SUCCESS IS PREPARATION PRIOR TO CUSTOMER'S VISIT**

### Getting ready for the day:

#### **1. Retrieve Confirmed Customer's File**

At the beginning of the day, the Service Consultants will begin the first procedure by retrieving each confirmed customer's file and basic reference material before he/she arrives for their consultation.

#### **2. Fill Out Customer's Repair Order Header**

##### Procedures:

- Fill out the repair order headers according to customer appointments that were confirmed the previous day, or two days earlier, by the employee in charge of appointments follow-up.
- While transferring this information, review the status of each repair order and plan actions (verify if the parts required are available in the Parts Department, the workshop capacity, etc.). This will ensure promises made to customers when booking their appointment are kept.

- The pre-written repair orders should be placed alphabetically with vehicles' history files.

*Information to be completed on a repair order header:*

- Customer's full name.
- Complete address.
- Vehicle identification number (VIN).
- Vehicle model.
- License number.
- **Odometer reading** \*.
- Home and work phone numbers.
- In-service and repair order dates.

\*To be confirmed when the customer arrives (visual reading).

### **When the customer arrives....**

#### **3. Greet the Customer**

Greeting is by far the most important part in setting the tone for the service transaction between the customer and the Service Consultant. The Service Consultant or other service personnel should always take the initiative to approach arriving customers to make sure they don't have to come looking for them or ask for help. Moreover, providing arriving customers with special attention brings the Service Consultant a step ahead of the competition. It shows that your service operation is organised with customer convenience in mind.

Finally, the main objective of the greeting process is to establish a relationship of mutual trust with customers within the first few seconds of contact.



**The goal is to acknowledge every customer the minute he walks through the door.**

In order to meet customers' expectations when they arrive at the dealership, the Service Consultant, or any other qualified employee, can use specific techniques and tips.

#### *Visual Greeting*

- Reassure the customer and put them at ease with a smile.
- Always acknowledge customers as soon as possible and within a minute of their arrival, even though there may be another customer at the consulting desk.

#### *Physical Greeting*

- An excellent way to establish mutual trust is to shake hands with the customer.
- There are three types of greetings: a polite, somewhat formal greeting, a friendlier and more familiar greeting, a warm and enthusiastic greeting. Try to determine which of these three types of greeting is best suited to the customer.

## *Greeting Procedures*

1. Practice eye contact.
2. Let the customer know you will be with them shortly.
3. Smile.
4. Go toward the customer.
5. Greet the customer with a handshake (good morning or evening).
6. Introduce yourself (give your business card).
7. Ask the customer's name.



**Every single person who walks in your dealership is a potential customer.**

### **When the customer arrives...**

#### **4. Identify the Type of Visit. (Repairs or Body Shop)**

It is the responsibility of the Service Consultant, or any other support personnel, to promptly clarify with customers the purpose of their visit and which department is concerned.

This procedure will enhance efficiency by ensuring the customer is directed to the appropriate consultation area, will show to the customer that you appreciate their visit, and finally will establish whether the customer is waiting for a Service Consultant or someone from another department (e.g. body shop).

#### **5. Gather File and Pre-Written Repair Order**

Once the Service Consultant has the customer's information on-hand at their desk or is ready to print it out on their computer system, he is ready to meet the customer.

#### **6. Confirm Customer and Vehicle Data**

The Service Consultant must verify the accuracy of the customer information (name, phone numbers, etc.) and confirm the vehicle data (odometer reading, condition explained by the customer when booking their appointment, etc.).

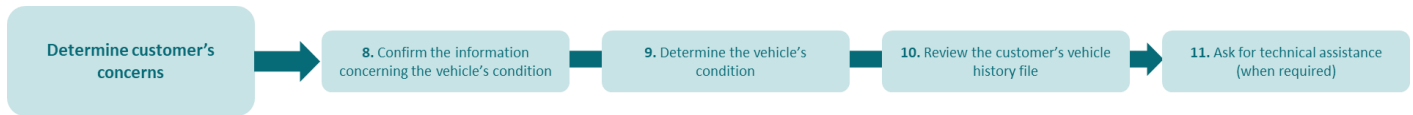
This procedure ensures that all customer and vehicle data is precise and prevents misunderstandings between customer, Service Consultant and Technician.

#### **7. Update Customer and Vehicle Information on the Repair Order**

It is very important to update the customer and vehicle information on the repair order because the Service Consultant can then work in a professional manner.

You may also have to update the information in the manufacturer's website depending on your DMS and your manufacturer.

## Determine the Customer's Needs and Priorities (Procedures 8 to 11)



### 8. Confirm Information Concerning the Vehicle's Condition

The realisation of effective customer consulting relies on the communication process between the customer and the Service Consultant. This element of the Consulting Process involves much more than listening and questioning; it is the process of gathering and interpreting information to assist the customer in making accurate decisions about his vehicle's maintenance and repair needs. It is the Service Consultant's duty to keep the customer well informed regarding these needs and requirements.

#### Recap Information Concerning the Vehicle's Condition

When the customer arrives for his appointment, the Service Consultant should confirm the accuracy of the work requested at the time the appointment call was made since the condition described earlier may no longer apply. For example, he could say, "When you made your appointment you mentioned that..., would you please give me more details." If changes are reported, the Service Consultant will have to determine the vehicle's condition with the customer (see procedure 9)

- Ensure the customer completes the explanation of what he needs or has observed.
- Listen to the customer carefully.

When the Service Consultant applies this procedure, the customer does not need to repeat themselves needlessly and consequently the Service Consultant projects an image of professionalism. Furthermore, a better description of the actual vehicle condition will be provided which will permit technicians to make a precise diagnosis and to correct the problem easily.

**Remember that 50% to 60% of comebacks are due to a lack of communication**

### 9. Determine the Vehicle's Condition

It is imperative that the Service Consultant determine the vehicle's condition accurately. To achieve this, he must apply excellent communication skills and act in a professional manner.



The days of "*passive*" service writers are over. Nowadays, Service Consultants must constantly apply their best communication skills and seek solutions to customers' concerns

### Confirm Information Concerning the Vehicle's Condition

The Service Consultant must:

- Summarise vehicle's condition with their customer.
- Paraphrase customer's comments to determine the actual condition before writing it on the repair order.

The following are diagnosis techniques that the Service Consultant should use.

*Probing with Diagnosis Sheet or Write Up Job Aid:*

The Service Consultant should use their Symptoms & Diagnosis Charts as a guide to the type of questions he should ask regarding the specific condition of the vehicle which is described by the customer. Thus, the Service Consultant will be able to learn what symptoms prompted the request, especially if there is a misunderstanding or if the customer has changed their mind as to the work to be performed on their vehicle. Never make assumptions as to the cause of any problem.

- The Service Consultant is entirely responsible for the effectiveness of the interview with their customer.
- Their job consists in learning what the customer thinks the condition of their vehicle is.
- One proven way to develop clearer communication is to apply **active listening** techniques.

⇒ See Symptoms and Diagnosis Charts annex no. 10.

### Important

It is imperative that customer's primary complaint be indicated clearly and precisely on the first line of the repair order so that Technicians are aware of the customer's main concern



**Improving your active listening by only 10% will make you more effective in your work and will make life better for you and your customer.**

## 10. Review the Customer's Vehicle History File

This procedure allows the Service Consultant to verify what work was performed on the customer's vehicle in the past. Consider the following positive factors associated with this procedure.

By reviewing the vehicle's history file in front of the customer, the Service Consultant:

- Enhances their credibility.



- Ensures that maintenance needs, which otherwise may have been overlooked, are immediately identified.
- Performs the vehicle's maintenance in fewer visits.
- Prevents errors in maintenance and repair recommendations.
- Allows to sell according to the suggested maintenance.

#### Dealer Standards

No.5. Service Consultants discuss with each customer vehicle needs, including any open product recall campaigns, based on the vehicle's history.

In many dealerships, the Service Consultant reviews the customer's history file only when a comeback occurs. However, it is strongly suggested that this procedure be done each time a customer comes for a maintenance or repair visit. By reviewing the vehicle's history file, the Service Consultant will determine what work was previously performed, detect important clues and provide consistency related to the vehicle's maintenance needs. Furthermore, credibility will be enhanced provided that the Service Consultant systematically determines maintenance needs.

*The following are steps to be applied by the Service Consultant:*

- Review the vehicle's history file for each customer and, if you have a computerised system, attach it to the repair order.
- Scan it quickly to get a sense of how long ago and how often the customer has been to your dealership.
- Look for notations on the customer's file recommending repairs or maintenance.
- Verify the vehicle's odometer reading and decide whether the vehicle is due for scheduled maintenance.

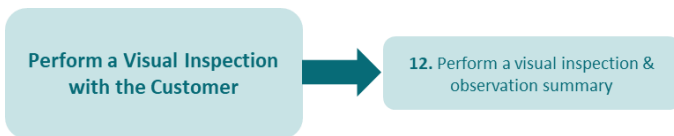
### **11. Ask for Technical Assistance (When Required)**

In circumstances where the Service Consultant does not have enough information about the vehicle's actual condition, he should ask the Shop Foreman or the Technician to perform a diagnosis. This procedure shows interest in the customer's concerns, enhances customer's trust in the service provided and demonstrates professionalism on the part of Service Department personnel.

*Technical assistance should be given to Service Consultants by:*

- Performing a visual inspection of the condition.
- Performing a road test.
- Asking the customer extra details about the vehicle's condition.
- Executing a quick function test (when problem is not identified through visual observation):
  - ⇒ Testing or minor disassembly of components; inspection on a hoist.
  - ⇒ Brief use of test equipment.
  - ⇒ Diagnosis labour operation (only when a complex malfunction requires extensive testing or disassembly).

## Perform a Visual Inspection with the Customer (Procedure 12)



Most dealerships regard the visual inspection as a complicated procedure for service personnel. However, the benefits by far exceed the cost of the extra effort provided. Moreover, the usual approach to the service experience has proven ineffective and results in inaccurate diagnoses by Technicians due to the lack of information. Consequently, work cannot be done according to customers' expectations and loyalty to the dealership is undermined.

### 12. Perform a Visual Inspection and Observation Summary

The Service Consultant must do a visual inspection of the customer's vehicle and summarise their observations to the customer.

- The main task of the Service Consultant is to verify that the vehicle's systems are operational through a simple visual observation.
- When complex vehicle subsystems need to be checked, the Service Consultant should ask for technical assistance (procedure no 11).
- To better determine the vehicle's condition, the Service Consultant or Shop Foreman in some cases, must perform a road test or inspect the underside of the vehicle on a lift.

The following procedure will help the Service Consultant to better determine the true condition of the vehicle.

*Visual Inspection (Walk Around):*

#### Definition of walk around

**A technique consisting in walking around and inspecting a customer's vehicle in their presence to confirm its condition, repair and maintenance needs.**

Explain to the customer why your dealership takes time to check the condition of the vehicle before performing maintenance and repair work.

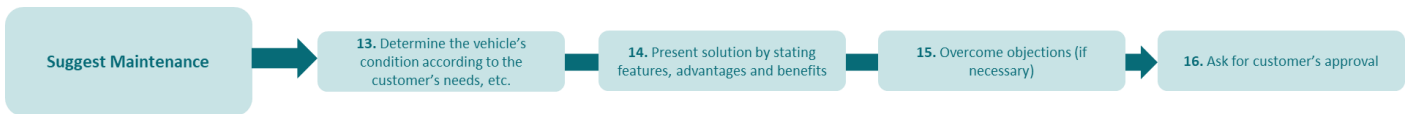
- Be sure to point out the benefits of this procedure to your customer.
- Inspect the customer's vehicle visually and/or by walking around it (inside, outside and under the engine).

- Inspect the following elements that are written on the **Vehicle Inspection Report**:
  - ⇒ Examine all safety and convenience systems.
  - ⇒ Verify lights, tires, wiper blades, body, etc.
  - ⇒ Check for signs of leakage or deterioration of hoses and loose or frayed belts.
  - ⇒ Ask routine maintenance questions when observing under the hood.
  - ⇒ Look for oil or coolant deterioration, or leakage.
  - ⇒ Inspect electrical connections that are obviously loose or misrouted wiring that could cause trouble.

Communicate and summarise your observations

- Communicate your visual observations to your customer.
- Sign the Vehicle Inspection Report and attach it to the repair order.
- Summarise your observations to the customer by explaining the characteristics and benefits of the repairs to be done.

**Suggest Maintenance  
(Procedures 13 to 16)**



The right approach is to assess what the actual vehicle needs are and to suggest a solution to the customer.

This approach modifies selling into consulting. Methods have now progressed from pressure selling to consultative selling.

**13. Determine Vehicle Condition According to Customer Needs, History File and the Maintenance Schedule**

It is a known fact that customers invest a lot for their vehicle's maintenance and repairs. Therefore, in determining their maintenance needs, make them feel comfortable with their decision and bring them to realise that the recommendations of a qualified Service Consultant can save them unnecessary visits to the dealership.

The following are steps that Service Consultants must apply in order to meet customers' expectations.

- Identify potential vehicle maintenance needs according to your previous walk around observations.
- Examine the vehicle's history and the maintenance schedule to confirm if the vehicle needs maintenance or not. Remind customers about any previously recommended repairs.
- When recommending maintenance, the Service Consultant should consider the maintenance recommended and the current needs of the vehicle.
- Verify labour time required by the Manufacturer as well as the parts pricing guide and give the customer a cost estimate for each labour operation requested.
- Check shop capacity before making any commitments to the customer.
- Quote time promises and costs.
- The Service Consultant has to take into consideration that depending on the customer, the vehicle, and the circumstances, it may be advantageous to mention all of dealer's current and special services and/or parts and accessory specials that could meet with the customer's actual needs and lifestyle.

Remember that the idea is to consult with customers to determine what their true needs are and not to up-sell.

#### 14. Present Solution by Stating Features, Advantages and Benefits

*(This procedure will be seen in greater details in module "Professional Selling Skills").*

It is the duty of the Service Consultant to present all the facts to the customer concerning their vehicle's needs. It will enable the customer to make the decision that better suits their particular requirements. Because of the respect shown towards their freedom of choice, and the guidance provided regarding their specific needs, the customer will undoubtedly feel appreciated and remain loyal to the dealership.

After having determined the vehicle's maintenance needs, it is now time for the Service Consultant to present to the customer the work that needs to be done.

To do so, the Service Consultant should:

- State the "**features, advantages, benefits**" of each maintenance need.

- Use visual aids (if necessary) to show the customer what will happen if the suggested maintenance is not done soon.
- Use the menu pricing so that the customer is aware of the cost of each maintenance need.

*Example of an offer encompassing features-advantages and benefits:*

**Why should the cooling system service be performed?**

- Highly recommended by the Manufacturer of Canada given our climatic conditions.
- Will help avoid engine overheating during the hot summers and coolant freezing during our sub-zero winters.
- Protection against expensive engine damage!

**What services are performed?**

- Pressure test the cooling system for internal and external leaks.
  - Drain out all of the old fluid.
  - Clean and flush the cooling system with heavy duty cleaners.
  - Refill the system with coolant and test to -40 F.
  - Inspect hoses for cracks and leaks.
  - Pressure clean radiator fins.
  - Check condition and tension of drive belts.
  - Test the radiator cap.

Only \$169.95 plus taxes.

*Why should the Service Consultant recommend maintenance to customers?*

- Decreases the incidence of mechanical failure.
- Reduces the probability of expensive repairs.
- Improves fuel economy.
- Extends vehicle's life and provides peace of mind.
- Increases resale value and enhances overall vehicle performance.

## 15. Overcome Objections

*(This procedure will be seen in greater detail in module "Overcoming Objections").*

The Service Consultant's duty is to convince the customer of the importance of having their vehicle's maintenance performed at the dealership.

Applying this procedure will:

- Reduce the risk of losing the customer to a competitor.
- Show that you know the features, advantages, benefits and quality of your products.
- Show that you take your customer's concerns seriously.
- Increase the volume of sales per customer.

Should the customer not be comfortable with the recommendations (e.g. price, competition, scepticism, misunderstanding and « not now ») once you have outlined the maintenance requirements, the Service Consultant will need to highlight once more 'the features, advantages, benefits' aspects of having their vehicle fixed at the dealership. The Consultant could use a comparative market study (competitive menu board) to attempt to convince one last time.

**The Service Consultant must have thorough knowledge of his products, services offered and the competition.**

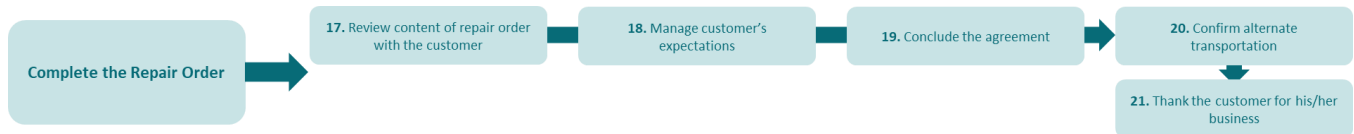
*Why Should Customers Have Their Vehicle Serviced at Your Dealership?*

- Qualified Technicians.
- Factory trained Technicians.
- High technology equipment.
- Technical support available (TAC and Techline).
- Quality original parts.
- Competitive prices.
- Warranty on repairs.
- Warranty knowledge.

## 16. Ask for Customer's Approval

Once the customer has agreed to have the work performed, the Service Consultant must accurately document the symptoms and/or required services.

## Complete the Repair Order (Procedures 17 to 21)



This procedure consists of converting the customer's wishes into concise repair instructions. It is by far the most important written communication to be performed by the Service Consultant because the customer's requests and the Service Consultant's repair instructions will inform Technicians on what precisely has to be done on the vehicle. Precision in this procedure will ensure that customer expectations are thoroughly met.

Moreover, by completing repair orders with accuracy, the basis for price estimates and time promises are in place and will result in smooth and timely processing. The main goal is to enhance customer satisfaction by providing the best possible information to all employees involved in the service transactions.

### 17. Review Content of Repair Order with the Customer

After having asked for the customer's approval regarding maintenance, the Service Consultant has to review all repair and maintenance items written on the repair order with the customer. **Keep in mind that lack of information on repair orders slows down Technicians in the shop.**

Customers do have a right to expect an itemised repair order with a breakdown of labour time and parts costs for each operation. Furthermore, the dealership should receive payment for all parts and services provided, thus an itemised repair order reduces the possibility that charges for parts, labour, sublet work, etc. be omitted.

### 18. Manager Customer Expectations

It is of prime importance that the Service Consultant understand and manage their customer's expectations before concluding the agreement (for example to surpass our promises). The primary concern of customers is the time promised for completion of the work on the vehicle and when he can pick up their vehicle at the Service Department.

#### Dealer Standard

No.8. Service Consultants quote reasonable time promises with reasonable and competitive cost quotes.

Customer perception of time promises at dealerships demonstrate that they think it takes too long to have their vehicle repaired. That's why the Service Consultant must provide a reasonable time

promise for completing the job. The purpose of this procedure is to encourage customer loyalty and discourage customers from going to independent shops.

#### *How to Make Accurate Time Promises?*

A written time estimate precludes misunderstandings and unpleasant surprises at the end of the consultation when the customer signs the repair order.

- Base time estimates on the labour time guide allowance and shop capacity.
- Check parts availability before making any commitment (if necessary).
- When agreeing on a time with the customer, record the date and time promised on the repair order so that all employees handling the repair order know what commitments were made.

#### *How to Make Accurate Cost Quotes According to Customers' Expectations?*

If customers' expectations are to be met, the Service Consultant must give them the choice of having vehicle parts installed that are either original equipment or after market parts. This will ensure customers are comfortable with their decision since they were consulted and given the range in price and quality of the parts being offered.

## **19. Conclude the Agreement**

The Service Consultant must apply this procedure because it is an excellent opportunity to clearly describe the customer's concerns and the service to be performed. Therefore, customer's expectations can be met.

### **Dealer Standards**

No.6. The repair order clearly describes the customer's concerns and the services to be performed. The customer's approval to proceed is always obtained.

No. 9: A copy of the completed repair order/invoice is given to the Customer.

Once signed, the repair order becomes a legal contract. Therefore, the Service Consultant must document key information on the repair order including:

- The reasons the customer brought in the vehicle.
- What services are to be performed on the vehicle and the cost.
- Method of payment.
- In the case where the customer has to pay, ask the customer if he/she wants the old parts.
- Other special arrangements and general conditions of the contract.



Moreover, the Service Consultant must follow these procedures to complete the administrative steps which ensure the contract is complete. Any other arrangements must be settled before giving the repair order to the Technician.

- Agree on special delivery arrangements with the customer, if necessary (after-hours pick-up, or physical delivery of the vehicle). Indicate these arrangements on the repair order form.
- Indicate the general legal conditions and terms of the agreement that are printed on the repair order (if necessary).
- Review the repair order one last time to make sure of its accuracy and ask the customer to read the content of the repair order.
- If they agree with the content, ask for their signature and give a copy of the repair order to the customer.

## 20. Confirm Alternate Transportation

### Dealer Standards

No.7. Service Consultants offer customers alternate transportation options.

Ask every customer whether they need alternate transportation. Customers remember and appreciate assistance. For customers who require transportation make arrangements according to their needs (taxi, bus, rental vehicle or shuttle service).

## 21. Thank the Customer for their Business

Be sure to thank every customer for visiting, and always offer a business card if you didn't already give one when he first arrived for their consultation. Tell the customer that you will call them if there are any changes. Mention that you will definitely call them to discuss the completed work.



## ROLE-PLAYING

## Role-Playing

### Exercise 10:

#### Role Playing Situation 2: Service Consultant

**Player:** Service Consultant  
**Process:** Consulting  
**Length:** 45 minutes (15 minutes for each role)

**Instructions:**

1. Using the general information for role playing situation 1, simulate a consultation with your Service Consultant. Let the Service Consultant control the situation and answer his questions to the best of your ability.
2. Leave the classroom and come in as if you were entering the Service Department to meet with your Service Consultant.
3. Remember that this is the second time you have come to the dealership with the same problem/condition: an engine oil leak.

**Notes**

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## Exercise 10:

### Role Playing Situation 2: Customer

**Player:** Customer  
**Process:** Consulting  
**Length:** 45 minutes (15 minutes for each role)

#### Instructions:

1. Apply the procedures in the Consulting Process except those listed below (because they do not apply to this situation).

Procedure 1: Retrieve confirmed customer's appointment file.

Procedure 4: Identify the type of visit (repair, body work).

Procedure 12: Ask for technical assistance

Procedure 13: Do a visual inspection and record your observations.

2. Consult the previous (2) Repair Order Forms and complete the blank Repair Order Form.
3. Your customer will come in by the door for his consultation as in a real-life situation.
4. Apply communication skills.

#### Principles of Active Listening to be Applied

1. Focus your attention.
2. Ask questions to clarify the customer's statements.
3. Reformulate the customer's statements.

#### Principles of Neurolinguistic Programming to be Applied

4. Get in synch with the customer's body movements.
5. Get in synch with the customer's voice.
6. Get in synch with the customer's state of mind and emotions.

#### Principles of Adjustment to the Customer's Personality Type to be Applied

7. Determine and adjust to your customer's personality type.



**Exercise 10:**

**Role Playing Situation 2: Observer**

**Player:** Observer  
**Process:** Consulting  
**Length:** 45 minutes (15 minutes for each role)

**Instructions:**

1. The participants who play the role of observer record on the Observation Form below whether the Service Consultant did or did not carry out the required tasks/procedures or whether the tasks/procedures do not apply to the role-playing situation.
2. It is recommended to follow each step of the Consulting Process Observation Form while giving feedback to the members of your team.

**Observation Form**

Did the Service Consultant...

	Yes	No	N/A
<b>Procedure 1: Not applicable (Retrieve Customer's Appointment File)</b>			
<b>Procedure 2: Fill Out Customer's Repair Order Header</b>			
1. Indicate the following on the repair order?			
Customer's full name			
Full address			
Vehicle Identification Number (VIN)			
Model			
License number			
Odometer reading			
Home, work and cellular telephone numbers			
In-service date			
<b>Procedure 3: Greet the Customer</b>			
2. Introduce themselves and shake the customer's hand?			
3. Ask the customer for his full name?			
<b>Procedure 4: Not applicable (Identify the Type of Visit: Repair, Body Work)</b>			
<b>Procedure 5: Gather File and Pre-Written Repair Order</b>			
4. Retrieve the pre-written order form (previous repair orders)?			
<b>Procedure 6: Confirm Customer and Vehicle Data</b>			
5. Confirm the customer and vehicle information?			

	Yes	No	N/A
<b>Procedure 7: Update Customer and Vehicle Information on the Repair Order</b>			
10. Update the customer or vehicle information on the repair order?			
<b>Procedure 8: Recap Information Received Concerning the Vehicle's Condition</b>			
11. Use the customer's complaint as a lead-in during the consulting?			
<b>Procedure 9: Determine Vehicle's Condition</b>			
12. Ask pertinent questions about the initial condition of the vehicle according to the list of symptoms?			
13. Take notes as he/she listened and ask the customer questions?			
14. Paraphrase the customer's concerns before recording the condition of the vehicle on the repair order?			
<b>Procedure 10: Review the Customer's Vehicle History File</b>			
15. Review the customer's file?			
16. Take into account the maintenance and repair recommendations supported by the vehicle's history file and the recommended maintenance schedule?			
<b>Procedure 11: Not applicable (Ask for Technical Assistance)</b>			
<b>Procedure 12: Not applicable (Apply a Visual Inspection and Observation Summary)</b>			
<b>Procedure 13: Determine Vehicle's Condition According to the Customer's Needs, History File and the Published Maintenance Schedule</b>			
17. Use the vehicle's history file and the maintenance schedule recommended to discuss what the vehicle needed and support any suggestions?			
18. Given an estimate of the cost of work?			
<b>Procedure 14: Present Solution by Stating Features, Advantages and Benefits</b>			
19. Know the features, advantages and benefits of the maintenance recommended to the customer, and were they appropriate in view of the condition of the vehicle?			
<b>Procedure 15: Overcome Objections</b>			
20. Know the strengths and weaknesses of the competition?			
21. Explain the advantages of having the vehicle serviced at his/her dealership?			
<b>Procedure 16: Ask for the Customer's Approval</b>			
22. Get the customer's approval when additional work has been recommended?			
<b>Procedure 17: Review Content of Repair Order with the Customer</b>			
23. Review each item on the repair order with the customer?			
<b>Procedure 18: Manage Customer's Expectations</b>			
24. Give accurate estimates during the consultation of how long the work would take and how much it would cost?			
25. Promise the customer the vehicle will be ready at a particular time?			



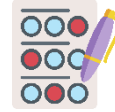
	Yes	No	N/A
<b>Procedure 19: Conclude the Agreement</b>			
10. Have the customer sign the repair order after reviewing and checking the accuracy of the information?			
11. Give the customer a copy?			
<b>Procedure 20: Confirm Alternate Transportation</b>			
12. Determine and confirm alternate transportation requirements?			
<b>Procedure 21: Thank the Customer for His/Her Business</b>			
13. Thank the customer in a professional manner?			
<b>Active Listening</b>			
14. Focus his attention while listening to the customer?			
15. Use the customer's name frequently?			
16. Pay special attention to body language (nod, sit or stand straight, etc.)			
17. Maintain eye contact with the customer?			
18. Ignore distractions and minimise interruptions?			
19. Repeat the last sentence following an interruption?			
20. Adjust to the customer's mood?			
21. Ask clarifying questions?			
22. Listen to the customer with a view to providing assistance?			
23. Reformulate the customer's statements as a way of encouraging the customer to continue the conversation?			
<b>Neurolinguistic Programming</b>			
24. Get in synch with the customer's body movements?			
25. Get in synch with the customer's voice			
26. Get in synch with the customer's state of mind and emotions (e.g. lead the customer toward a solution).			
<b>Determine the Personality Type</b>			
27. Adjust to the customer's personality?			

### Instructions

- You can now share your observations with the other people on your team in order to initiate a discussion among the members of your team (conclusion).



## Exercise 11:



### Multiple Choice Questions on the Consulting Process

These questions are designed to evaluate your understanding of the Consulting Process and help you prepare for your post-module evaluation. It is strongly recommended that you not refer to your guide during the question period. If you like, you can record your answers as you go along or complete the questionnaire at home.

**NOTE:** These questions were developed to initiate discussion.

**1. The following dealer standards are aimed specifically at the Consulting Process, which ones?**

1. Service Consultants offer customers alternate transportation options.
2. Service Consultants actively check progress and immediately inform customers of any changes in vehicle repair status or completion.
3. A copy of the completed repair order/invoice is given to the customer.
4. Service is made available on both an appointment and non-appointment basis.
5. Service appointments are timely and convenient.

- a) 1 and 5.
- b) 1 and 2.
- c) 3 and 4.

**2. Which if the following statements pertains specifically to the Consulting Process?**

- a) It is preferable to carry out most of the consultation with the customer present and near the customer's vehicle.
- b) Discussion of the next maintenance appointment with the customer.
- c) Both of the above.

**3. Which of the following factors plays the biggest role in the customer's opinions of the greeting?**

- a) Words.
- b) Tone of voice.
- c) Body language.

**4. The following actions are all carried out by the Service Consultant during the walk around with the customer, except one. Which one?**

- a) Point out to the customer the advantages of inspecting the vehicle.
- b) Suggest necessary maintenance based on the current condition of the vehicle.
- c) Record your observations on the Vehicle Inspection Report as you go along.

**5. Indicate one advantage of having a vehicle serviced at a dealership?**

- a) Higher resale value.
- b) Warranty on repairs.
- c) Expertise.

**6. Which if the following terms might be used by a sensory customer according to the principles of Neurolinguistic Programming (NLP)?**

- a) Express.
- b) Observe.
- c) Support.

**7. What type of sentence would you use in a meeting with an auditory customer?**

- a) "What's your impression?"
- b) "Let me show you."
- c) "Are we in agreement on this?"

**8. List in order the five steps in the Consultation Process?**

1. Do a walk around.
2. Complete the repair order.
3. Greet the customer.
4. Identify the customer's needs.
5. Suggest maintenance.

- a) 3, 1, 4, 5, 2.
- b) 3, 4, 1, 5, 2.
- c) Neither of the above.

**9. Suggested maintenance is based on...?**

- a) ...the customer's needs.
- b) ..the dealer's maintenance intervals.
- c) Both of the above.

**See key to exercises in annex no. 6.**



# **Part 5: The Repair Process**

## Part 5: The Repair Process

### 17. Introduction

The Repair Process is an extremely important function because it consists in carrying out the customer's request. The Alderson Service Consultants Guild's approach to the Repair Process entails controlling, organising and stabilising the workflow coming into the dealership based on the available resources. Since time can only be sold once, and can't be sold after it has expired, the Service Department must focus on productivity to ensure profitability for the department.

#### 17.1. The Repair Process

Once the Consulting Process is concluded, the Repair Process begins. The purpose of the following procedures, to be carried out by Service Department staff, is to promote better service and therefore increase customer satisfaction.

- Match each job to the Technician with the right skills.
- Keep tabs on the customer's vehicle while it is in the shop.
- Ensure that mechanical work is done efficiently and in accordance with the customer's concerns.
- Check the results of the entire mechanical servicing process.

##### 17.1.1. Goals

Before we look at how the Service Consultant and other Service Department employees actually handle a customer's repairs, we should identify the four main goals of the Repair Process.

##### ***Improving Customer Satisfaction***

- Keep customers informed on the progress of the work.
- Help maintain credibility and trust.
- Prevent unpleasant surprises at the end of the day.

##### ***Reducing the Number of Comebacks***

- Make sure that all work promised to customers is completed.
- Ensure that quality is maintained as the job is done.
- Ensure that mechanical work is done efficiently.
- Monitor the total quality assurance process.

##### ***Increasing the Volume of Sales Per Customer***

- Provide a timely means of selling additional work that may be needed during the service visit.
- Take the opportunity to make a complete vehicle inspection.

## ***Improving Service Department Management***

- Improve time management.
- Make the best use of Service Department resources.
- Assign jobs in a fair and efficient manner.
- Improve Technician productivity by matching jobs to skills.
- Track Technicians' assignments.
- Record carryovers and pertinent comments.
- Produce cost-effective and profitable work.
- Provide quality control

### **17.1.2. Customer Expectations**

To be efficient, the Repair Process must meet customers' expectations. Customers' expectations are:

- Reasonable time promises with reasonable and competitive price quotes.
- An option is given to customers for making alternate plans.
- A progress report on the vehicle is given to customers when additional work is needed.
- All repairs listed on the repair order are completed in one visit and by the promised time.
- Vehicles are handled with care.

### **17.1.3. Dealer Standards for the Repair Process**

No. 10. Service Consultants actively check progress and immediately inform customers of any changes in vehicle repair status or completion.

No. 11. If a time commitment is not upheld, it is remedied without inconvenience or additional cost to the customer.

No. 13. When a vehicle is brought in for repairs, all repairs on the repair order are completed in one visit.

No. 14. Every attempt is made to fix it right the first time.

No. 16. Dealer provides the sole interface between customers and offsite sublet services.

No. 17. Vehicles are quality checked before delivery to the customer.



## 18. Purpose of the Repair Process

### 18.1. Objective of the Repair Process

The purpose of this process is to ensure that customers' vehicles are fixed right the first time on a consistent basis. This is done by controlling the quality of Service Department operations. The aim is to ensure customer satisfaction while making efficient use of facilities, equipment and personnel. As shown previously in this module, part of the **quality** equation in the Service Pyramid is the **customer's experience**. Your dealership must therefore establish the reputation of being reliable and providing quality service. The only way this can be achieved is if all repaired vehicles are quality controlled before they are delivered to the customer.

### 18.2. Characteristics of the Repair Process

While high productivity is important in ensuring profitability, excessively high productivity can lead to poor-quality repairs, comebacks, and customer dissatisfaction. Furthermore, extremely high productivity may be a sign of excessive labour charges that in the long term may undermine customer retention and satisfaction. In conclusion, all Service Department employees should be aware of these dangers and should view the Repair Process as an extremely delicate operation that ultimately increases customer retention and, by extension, Service Department profitability.

By definition, a Repair Process is characterised by the following:

- Assign only one repair order at a time to each technician.
- Determine how long the technician should take to repair the vehicle.
- Track all pertinent information using the production schedule.
- Assign the job to the right technician.
- Track productivity of each individual technician and the entire shop.
- Ensure a qualified Service Department employee performs quality control.
- Make efficient use of facilities, equipment and personnel.
- Provide technical assistance and respect time commitments.
- Reduce waiting time for customers.
- Enhance dealership's image.

## Exercise 12:

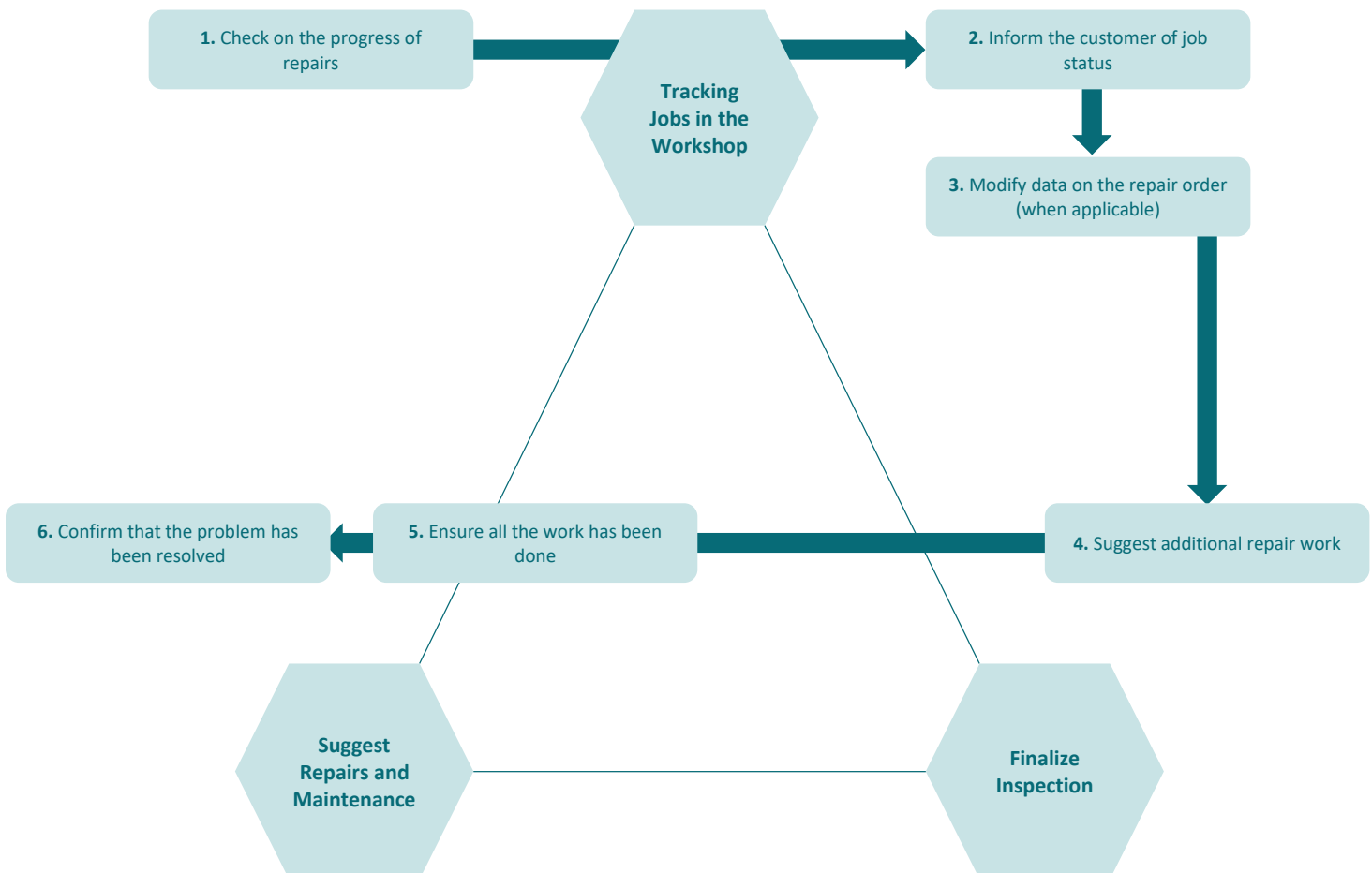
### Instructions:

- Get together in groups of 3 or 4. Using annex no. 3, list in order the 6 procedures of the Repair Process.

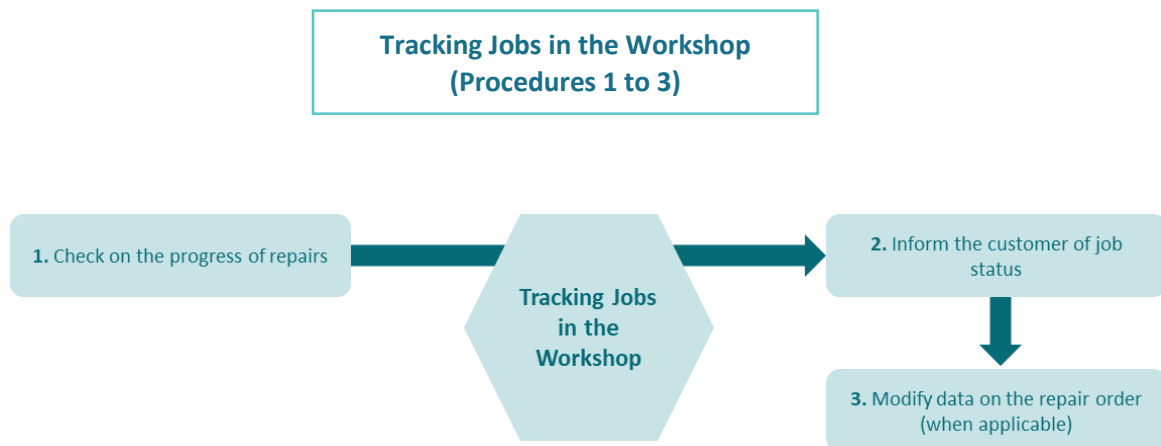
**Length:** 5 minutes.

## 19. The Repair Process

### 19.1. Overall Procedures



## 19.2. Detailed Procedures



By monitoring the progress of jobs in the workshop and honouring promises made to customers, the Service Consultant maintains the dealership's credibility and reliability. By practising their communication abilities as well as their customer relation skills, the Service Consultant can provide better information to their customers on the progress of work when they show up for their maintenance visit.

**Service Consultants are the most qualified Service Department employees to keep customers informed.**

### 1. Check on the Progress of Repairs

Progress checks are done by the Service Consultant and are designed to ensure that promises to customers are met and that each customer is told how the work is progressing or whether the work is finished. **Remember that customers are always interested in results.**

⇒ See Service Control Form annex no. 8.

#### Dealer Standard

No.10. Service Consultants actively check progress and immediately inform customers of any change in vehicle repair status or completion.

Because it is part of their job to check on how the repairs are progressing, the Service Consultant should make sure that all promises to customers are met by checking on each job periodically throughout the day. By following this procedure, the Service Consultant will be able to sell any additional work required and may avoid having to inform the customer of unpleasant surprises at the end of the day.

Procedures:

- Check what has been done.
- Check what remains to be done.
- Find out if there is any delay in work production.
- Find out if the job can be done within the cost estimate.
- Find out if any diagnosis work is needed.
- Ask if the Technician found any additional work that should be recommended to the customer.
- Find out if the required parts are available and if the price is within the original estimate.
- Ask if the invoice will be completed by the time the vehicle is ready for delivery.

## 2. Inform the Customer of Job Status

Procedures:

The Service Consultant must take the initiative to contact customers to keep them informed about the status of their vehicle, when necessary. The customer should never have to call the Service Department to find out if any problem arose while the work was being done or if the vehicle will be ready as promised. Customers are more likely to react positively, whether the news is good or bad, if the Service Consultant makes contact first because they will realise how much you appreciate their business.

### Dealer Standards

- No.11. If a time commitment is not upheld, it is immediately remedied without inconvenience or additional cost to the customer.
- No. 14. Every attempt is made to fix it right the first time.
- No.16. Dealer provides the sole interface between customers and offsite, sublet services.



**When necessary, Service Consultants must take the initiative to contact customers.**

Contacting customers when there are changes in the estimate or the promised time gives the Service Consultant time to gather the facts and to prepare in advance to give an accurate, professional status report.

- If a time or repair commitment cannot be met, the Service Consultant must establish and maintain a relationship of trust with the customer and do everything possible to live up to their commitments.

- If a time commitment cannot be met, the situation must be rectified without inconvenience or additional cost to the customer.
- The Service Consultant should contact the customer as soon as it becomes clear the promises will not be kept.

The following are situations in which the Service Consultant should contact the customer immediately:

- Additional work is required.
- Needed parts are not in stock.
- The work is taking longer than anticipated or is behind schedule.
- The services of a sublet operation are needed to perform additional work

**Note**

Service customers are referred to as external customers, whereas employees in the different departments of the dealership with whom you do business are referred to as internal customers.

**Procedures:**

- Inform the customer of any changes to the initial commitments.
- Contact the customer immediately if the work is behind schedule or if additional work is needed.
- Explain why the problem occurred.
- Report Technician's findings and repair recommendations.
- Try to sell necessary maintenance on the grounds that it will protect the customer's investment.

**3. Modify Data on the Repair Order (When Applicable)**

When changes to the original agreement occur, it is essential that the administrative procedures be managed in a professional manner. Recording those changes allows the Service Consultant to prevent the occurrence of serious and costly misunderstandings with customers.

This procedure is critical primarily because failing to handle it properly can give the dealership a bad reputation. Why? Because many customers have experienced being overcharged or have had unauthorised repairs done on their vehicle. They always keep those horror stories in the back of their minds.

**Procedures:**

- Make sure you speak to the person responsible for the vehicle when you call a customer to change the original agreement.
- Record all changes to the initial agreement on the repair order and:
  - Person's name
  - Date
  - Time

- Phone number
  - Initials
  - Email address
  - Cell phone.
- Be prepared to answer customers' queries by keeping up with the status of jobs on vehicles.

**Suggest Repairs and Maintenance  
(Procedure 4)**

**4. Suggest additional repair work**

Mechanical service is the heart of the service business. All other processes that come into play in Service Department transactions simply complement the mechanical process, the main goal of which is to perform high-quality maintenance and repair.



**The idea is for the Technicians to apply work practices that increase the quality of service.**

**4. Suggest Additional Repair Work (According to Technician's Report)**

When performing repairs and maintenance, it is not unusual for Technicians to uncover additional work that must be brought to the customer's immediate attention. In such situations, the Service Consultant must obtain internal approval and the customer's consent (or from Service Management if vehicle is covered by warranty) before performing any additional work.

**Dealer Standard**

No.13. When a vehicle is brought in for repairs, all repairs listed on the repair order are completed in one visit.

When additional work is required and has been approved by the Shop Foreman or any other person in charge of production, the Service Consultant must:

- Contact the customer.
- Obtain customer's approval.



**"Suggesting additional repair work" must be applied immediately following the Technician's report.**



## Finalize Inspection (Procedures 5 to 6)

6. Confirm that the problem has been resolved

5. Ensure all the work has been done

According to an automotive industry study, only one customer in five complains when something goes wrong with their vehicle after a service visit. This is not acceptable because four out of five customers never go back. In view of this finding, we must improve the quality of the final inspection carried out before the customer picks up the vehicle.



**Every vehicle must be inspected following maintenance or repair work.**

### 5. Ensure all the Work Has Been Done

The Service Consultant should always make sure that all the work listed on the repair order is done before the customer comes in to pick up the vehicle. In this section of the Repair Process module, we take a look at comebacks

#### Dealer Standard

No.17. Vehicles are quality checked before delivery to the customer.

Final inspection is the key factor that will ensure the Service Consultant delivers the type of service the client expects, and that proper preventive maintenance and quality repairs were carried out.

- Confirming that the work has been completed.
- Paying special attention to comebacks.

#### *Definition of a Comeback*

It is not only the re-occurrence of a problem, but any reason requiring the customer to return for a service visit with the same condition.

#### *Quality Control*

Applying quality control to every vehicle (whether the job was large or small, under warranty or paid for by the customer) may reduce the chances of comebacks. In most dealerships, the customer does their own quality control once the work on the vehicle has been done. What we want to prevent is that the vehicle ends back in our shop with the same problem!





**Quality control must be performed by the Service Consultant.**

**Comebacks are one of the most identifiable causes of customer dissatisfaction. Customers who have to come into the Service Department again and again with the same problem will most likely think that:**

- The dealership doesn't care about their business because the work was not done right, and quality checked
- The dealership is not competent to do the work.

#### *How Should Comebacks be Handled?*

The Service Consultant should pay special attention to comebacks right from the start of the Consulting Process.

The following procedures should be applied.

- Use a comeback form with a history of the problems the vehicle has had.
- Check the work that was done before.
- Inform the Service Manager or the Shop Supervisor.
- Check to see if a road test with the customer is needed.
- Use technical assistance (Technical Assistance Centre) when necessary.
- Give your Technician as detailed a repair order as possible.
- Give your Technician a copy of the previous repair order.

#### *How Can We Learn from Comebacks?*

Comebacks provide information on your weaknesses and allow you to correct them. All Service Department employees should know that comebacks are the "cardinal sin" of the servicing industry. They penalise every department in the dealership.

**Remember that the Service Department's policies and attitude toward comebacks often make the difference between keeping or losing customers.**

## 6. Confirm that the Problem has Been Solved

The last step in the Repair Process is to confirm that the problem has been solved. Although the work may have been done perfectly, the customer may find that the vehicle still has the same problem.

### Procedures:

- Check the customer's comments written on the repair order.
- Ensure that the problem reported on the repair order by the customer has been solved.
- Check to see if the vehicle is parked in the delivery area.

**Final inspection findings must be recorded. Ensure that the problem reported by the customer has been solved.**

In conclusion, we present the customer satisfaction formula:

**Customer Satisfaction = Your Performance – Customer Expectations**



## ROLE-PLAYING

## Role-Playing

### Exercise 13:

#### Role Playing Situation 3: Customer

**Player:** Customer  
**Process:** Repair  
**Length:** 45 minutes (15 minutes for each role)

#### Instructions:

1. Using the general information for **role playing situations 1 and 2**, simulate the Repair Process with your Service Consultant. Let the Service Consultant control the situation and answer his questions to the best of your ability.
2. In this situation, it is important for you to move away from the Service Consultant slightly to simulate a distance situation **(because you are currently at work)**.
3. You work **6 days a week from 8:30 am to 5:30 pm** and need a vehicle to get to work.
4. If the Service Consultant does not give you enough information about the delivery problem, you will have to ask questions, such as whether the delay will mean extra costs and when the vehicle will be ready for pick-up.
5. If the Service Consultant suggests that you install four new tires on your car, **say yes** and let them continue the conversation.

#### Notes

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### Exercise 13:

#### Role Playing Situation 3: Service Consultant

**Player:** Service Consultant  
**Process:** Repair  
**Length:** 45 minutes (15 minutes for each role)

#### Instructions:

1. Apply the procedures in the Repair Process except those listed below (because they do not apply to this situation).

Procedure 1: Check on the progress of repairs.

Procedure 5: Ensure all the work has been done.

Procedure 6: Confirm that the problem has been solved.

2. Your customer's vehicle is currently in the shop so that the Technician can fix the engine oil leak. Unfortunately, **you will not be able to deliver the vehicle at the time you promised because the cylinder head has to be machined by a subcontractor.** The vehicle will not be ready until **sometime tomorrow.**
3. The Technician tells you the customer's vehicle will need four new tires **within another 1,000 km.**
4. Use the Repair Order Forms, if needed.
5. In this situation, it is important for you to move away from the customer slightly in order to simulate a distance situation (because your customer is currently at work).
6. Apply communication skills.

#### Principles of Active Listening to be Applied

1. Focus your attention.
2. Ask questions to clarify the customer's statements.
3. Reformulate the customer's statements.



### Exercise 13:

#### Role Playing Situation 3: Observer

**Player:** Observer  
**Process:** Repair  
**Length:** 45 minutes (15 minutes for each role)

#### Instructions:

1. The participants who play the role of observer record on the Observation Form below whether the Service Consultant did or did not carry out the required tasks/procedures or whether the tasks/procedures do not apply to the role-playing situation.
2. It is recommended to follow each step of the Repair Process Observation Form while giving feedback to the members of your team.

#### Observation Form

Did the Service Consultant...

Yes No N/A

Did the Service Consultant...	Yes	No	N/A
<b>Procedure 1: Not Applicable (Retrieve Customer's Appointment File)</b>			
<b>Procedure 2: Inform Customer of Job Status</b>			
1. Immediately contact the customer when there was a problem?			
2. Make it clear to the customer that the situation would be rectified without any inconvenience or additional costs?			
3. Answer the customer's questions about the status of the vehicle?			
4. Discuss alternate transportation with the customer?			
<b>Procedure 3: Modify Data on the Repair Order (If Necessary)</b>			
5. Get authorisation from the customer for delay or additional work?			
6. Indicate the reason for the delay or additional work on the repair order once the customer agreed?			
<b>Procedure 4: Suggest Additional Repair Work (According to the Technician's Report).</b>			
7. Suggest that four tires be installed?			
<b>Procedure 5: Not Applicable (Ensure all the Work Has Been Done).</b>			
<b>Procedure 6: Not Applicable (Confirm That the Problem Has Been Solved.)</b>			



	Yes	No	N/A
<b>Active Listening</b>			
8. Focus his attention while listening to the customer?			
9. Use the customer's name frequently?			
10. Ignore distractions and minimise interruptions?			
11. Repeat the last sentence following an interruption?			
12. Adjust to the customer's mood?			
13. Ask clarifying questions?			
14. Listen to the customer with a view to providing assistance?			
15. Reformulate the customer's statements as a way of encouraging the customer to continue the conversation?			
<b>Neurolinguistic Programming</b>			
16. Get in synch with the customer's voice?			
17. Get in synch with the customer's state of mind and emotions (e.g. lead the customer toward a solution)?			
<b>Determine the Personality Type</b>			
18. Adjust to the customer's personality?			

**Instructions**

- You can now share your observations with the other people on your team in order to initiate a discussion among the members of your team (conclusion).

**Notes**

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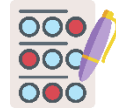
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## Exercise 14:

### Multiple Choice Questions on the Repair Process



These questions are designed to evaluate your understanding of the Repair Process and help you prepare for your post-module evaluation. It is strongly recommended that you not refer to your guide during the question period. If you like, you can record your answers as you go along or complete the questionnaire at home.

**NOTE:** These questions were developed to initiate discussion.

- 1. The following are all objectives of the Repair Process except one. Which one?**
  - a) Improve customer satisfaction.
  - b) Improve the efficiency of service.
  - c) Increase the volume of maintenance sales.
  
- 2. The following statements are all dealer standards for the Repair Process except one. Which one?**
  - a) Dealer provides the sole interface between the customers and offsite, sublet services.
  - b) If a time commitment is not upheld, it is remedied without inconvenience or additional cost to the customer.
  - c) A qualified person explains all services performed and related charges to the customer, and calls are made ahead of time to those customers picking up vehicles after hours.
  
- 3. Which of the following statements pertains specifically to the Repair Process?**
  - a) Provides an excellent sales opportunity.
  - b) A complete check by the Service Consultant to make sure the work done is what the customer had requested.
  - c) A production schedule must be used to take all pertinent information into account.
  
- 4. The following statements all pertain to the Repair Process, except one. Which one**
  - a) Communicate with the Technicians.
  - b) Closely monitor the Service Department work plan.
  - c) Deliver vehicles to customers in perfect condition and on time.
  
- 5. The following statements all pertain to the Repair Process. Which of the following represents a “horror story” for the customer?**
  - a) The vehicle is not ready on time.
  - b) Bills are too high and customers are overcharged.
  - c) Both of the above.

**6. The following procedures must all be applied to comebacks, except one. Which one?**

- a) The Technician to whom the comeback is assigned must be given technical assistance.
- b) The Service Consultant assigns the comeback to a specially trained Technician.
- c) Provide a copy of the previous repair order to the Technician.

**See key to exercises in annex no. 6**



**Part 6:**  
**The After-Service Delivery Process**

## Part 6: The After-Service Delivery Process

### 20. Introduction

In many Service Departments as well as other after-service businesses, the impact the After-service Delivery Process has on customer perception is often underestimated by management and personnel. It is at this point of the transaction that the customer determines whether the Service Department's performance has exceeded or fallen short of their expectations. Over the years, because of inefficient delivery procedures, many customers have chosen to entrust their subsequent vehicle needs to one of our numerous competitors. By implementing a simple but disciplined After-service Delivery Process the dealership improves customer perception and retention. For most customers, the manner in which they have been treated is as important as having the repair work done correctly.

#### 20.1. The After-Service Delivery Process

From the moment Technicians have completed the assigned work, the Service Consultant begins the After-Service Delivery Process which encompasses:

- Closing the repair order.
- Contacting the customer to:
  - ⇒ Confirm the details of work performed.
  - ⇒ Make arrangements concerning delivery.
- Cashiering transactions.
- Availability of express check-out.
- Retrieving of vehicle by customer.

##### 20.1.1. Goals

- On a daily basis, the Service Department handles ten to twenty times more customers than the Sales Department. A professional After-service Delivery Process, as is the case with the Sales Department, increases future sales opportunities.
- More importantly, an effective delivery provides the last opportunity to leave a final and often lasting positive impression of the entire service experience. The delivery procedure produces from the customer's viewpoint, a sense of value received for money and time invested.

The Service Consultant must strive to attain five specific goals. Let us determine what these goals are.

##### *Improving Customer Satisfaction*

- By taking the time to talk to each customer at the time of the vehicle's delivery, Service Consultants eliminate many misunderstandings that can create a negative perception of the dealership. By ensuring that each customer has a complete understanding of what work was performed, what the charges are for each operation and what additional work may be required in the near future, customer confidence towards both the Service Consultant and the dealership

is enhanced. One increases customer confidence by demonstrating efficiency in those elements of the transaction.

- Another interesting result that can be attained from an effective After-Service Delivery Process is that it allows the Service Consultant to measure the level of customer satisfaction, to take whatever corrective measures are necessary, and thereby ensure total customer satisfaction.

#### ***Reducing the Number of Comebacks***

- When the Service Consultant reviews the repair order and performs a quality control inspection, management is assured that all customer requests received proper attention. Therefore, a reduction in the number of comebacks is inevitable.

#### ***Increasing the Volume of Sales Per Customer***

- Once the customer's confidence is gained, chances are that he will come back for their next service or maintenance needs.
- The After-Service Delivery Process allows the Service Consultant to obtain the customer's commitment for their next scheduled maintenance visit as well as any other need that may have been uncovered by the service personnel.
- By paying special attention to each customer, the Service Consultant conveys a strong message that you are serious about keeping their business.
- A satisfied customer will undoubtedly tell friends and family about your excellent performance.

#### ***Maximize Shop Utilization and Increase Pre-Scheduled Appointments***

- Raising customers' awareness as to what their future repair needs are and scheduling their next appointment, will result in an increase in shop utilisation and in the amount of pre-scheduled appointments for the upcoming months. This will enable management to better plan ahead.

#### ***Sell Customer on Advantages and Benefits of Dealership Service***

- In the After-Service Delivery Process, very few service establishments take the opportunity to sell the customer on the advantages and benefits of dealing with their dealership rather than their competitors.
- The After-Service Delivery Process is the best time to ensure the customer leaves the dealership feeling he has made the right decision and investment when he entrusted their vehicle to your service establishment.
- An efficient After-Service Delivery Process also includes professional telephone skills and the Service Consultant will need to set suitable appointment times as to when the customer can retrieve their vehicle (in much the same way the Service Consultant manages service appointments). This will allow the Service Consultant not only to pay greater attention to their customers, but also to reduce congestion during drop-off and pick-up periods.



- Express check-out could also be offered when an efficient and effective After-Service Delivery Process has been established.
- Proceeding in such a manner reduces waiting time throughout the entire service transaction and enables customers to recognize that they are dealing with an efficient, well-organized Service Department.

### 20.1.2. Customer Expectations

All steps that were previously taken in the customer handling process had one purpose, to establish what the customer expectations were and to initiate action aimed at meeting those expectations. The After-Service Delivery Process is the step in which the Service Consultant demonstrates that the customer's expectations were indeed met or exceeded. The customer's attitude and reaction during the After-Service Delivery Process allows management to gauge the customer's perception of whether its performance was satisfactory or exceeded.

Customers expect that service personnel strive to meet the following goals:

- Vehicle fixed right the first time.
- Service work completed on time.
- Service parts readily available insuring there is no delay or waiting period.
- Work performed and associated charges explained.
- Vehicle pick-up handled smoothly.

### 20.1.3. Dealer Standards for the After-Service Delivery Process

No. 18 A qualified person explains all services performed and related charges to the customer, and calls will be made ahead of time to those customers picking up vehicles after hours.

No. 19. Installation of any parts that are not both new and unused and O.E.M. or manufacturer approved, is disclosed to the customer.

No. 21. There is a procedure to assure that customers can drop off and pick up vehicles at their convenience.

No. 22. There is minimal waiting to pick up a vehicle.

## 21. Purpose of the After-Service Delivery Process

### 21.1. Objective of the After-Service Delivery Process

The After-Service Delivery Process ensures that the customer knows that the job was done right. A knowledgeable and professional Service Consultant will make time to meet each customer and make sure that he understands precisely what was done during the visit. The After-service Delivery Process is the active way to make sure every service visit is concluded positively. It also represents the first step towards assuring the Service Department's participation in all of the customer's future service needs.

### 21.2. Characteristics of the After-Service Delivery Process

The delivery is the step of the customer handling experience that is the most neglected by the majority of our competitors. Therefore, it is an opportunity to gain an edge on the competition. The delivery is an active customer-oriented process. By definition a good After-Service Delivery Process is characterised by the following:

- A thorough verification that the work performed conforms to customer requests.
- A designated delivery area for parking vehicles that are ready for customers' pick-up.
- Prompt and courteous greeting of customer upon their arrival. The entire process must minimise customer waiting time.
- A comprehensive and explicit written description of all work performed, including parts and labour charges.
- A verbal description emphasising and clarifying the contents of the invoice either by telephone or when personally delivering the vehicle.
- Availability of the Service Consultant to provide any additional information the customer may request.
- A discussion with each customer regarding any additional service needs and the next scheduled maintenance visit.
- Convenient delivery hours.

**Exercise 15:**

**Instructions:**

- Get together in groups of 3 or 4. Using annex no. 4, list in order the 7mprocedures of the After-Service Delivery Process.

**Length:** 5 minutes

**Notes**

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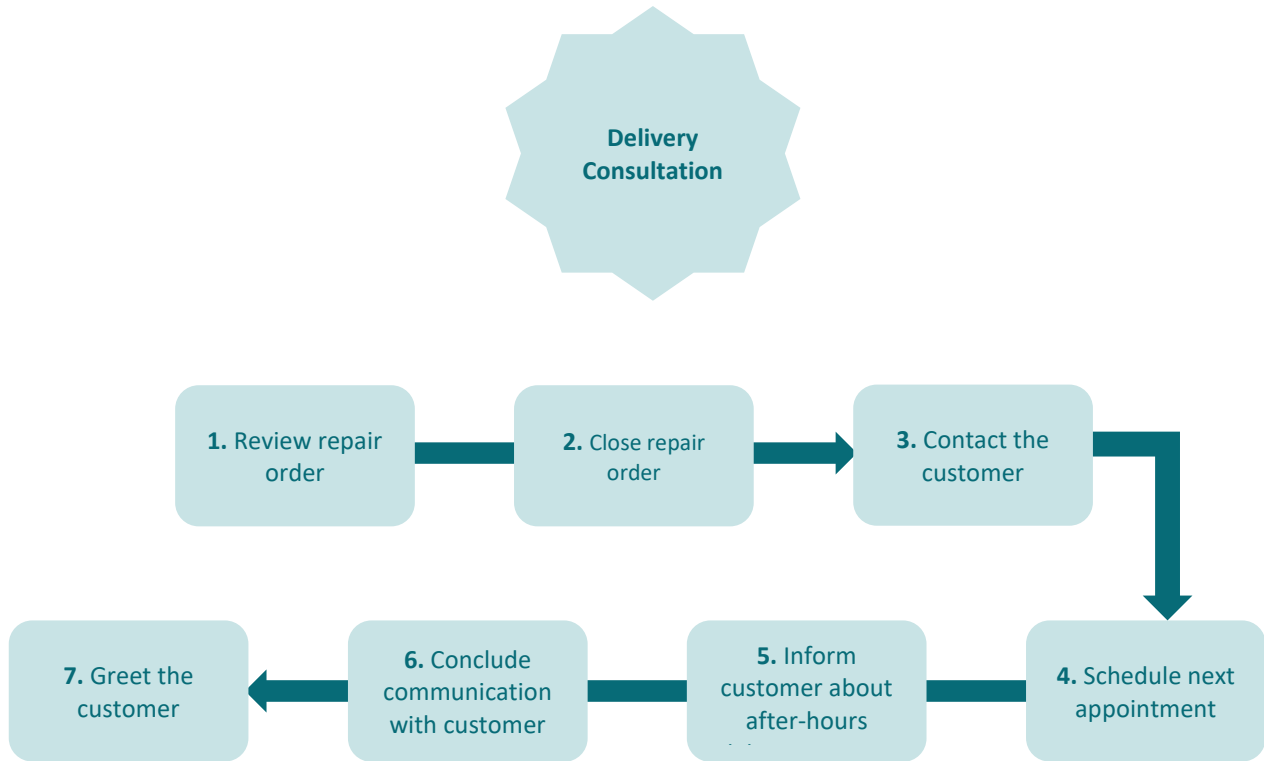
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## 22.The After-Service Delivery Process

### 22.1. Overall Procedures



## 22.2. Detailed Procedures

### The Delivery Consultation (Procedures 1 to 7)

Customer satisfaction surveys reveal that the way the customer is treated is as important as the quality of the repair work performed on their vehicle. Most customers feel that the way they are treated during vehicle pick-up is as important as how they are treated during the Consulting Process.

In order to assure that all service customers receive the special attention they expect and deserve, several dealer service standards have been established. The After-Service Delivery Process allows dealership personnel to abide by these standards and should be a fundamental practice performed by all Service Consultants with each customer.

Since delivery is an active customer-oriented process, the Service Consultant must not wait around for the customer to inquire about their vehicle. Instead, he prepares the delivery immediately upon completion of all repair work. The following steps should be observed by the Service Consultant

#### 1. Review repair order

### 1. Review Repair Work

It is the Service Consultant's responsibility to review the customer's repair order in order to establish that fees charged correspond to work performed and also to ensure that estimates provided originally are exact. By applying this procedure, the Service Consultant will be well prepared to answer the customer's questions when he picks up their vehicle and will definitely reduce comebacks.

Upon reception of the repair order, the Service Consultant must:

- Review the Technician's comments regarding the work performed and compare the information with the customer's initial requests.
- Check whether the time for each job performed corresponds to the original estimate.
- If such is not the case, determine the reasons for such discrepancies and rectify the situation before the customer arrives.
- For each vehicle requiring additional repairs following Technician's diagnosis, an accurate and detailed estimate should be prepared for the customer.

- Before the customer's arrival, measures should be taken to gather all pertinent information so that the Service Consultant can effectively communicate with the customer.



**Acting as the customer's representative, the Service Consultant verifies that all requests received attention.**

## 2. Close repair order

### 2. Close Repair Order

Once the Service Consultant has verified the content for accuracy, he is ready to close the repair order.

Upon completion of the vehicle inspection and confirmation that the repairs and charges will meet the customer's expectations, the Service Consultant must:

- Proceed with closing the repair order.
- Make a final check to ensure that details are correct regarding:
  - ⇒ Description of repairs.
  - ⇒ Cost quotes.

## 3. Contact the customer

### 3. Contact the Customer

The Service Consultant is responsible for keeping the customer well informed about their vehicle's needs. There are two different means of communication that can be used to explain repairs and invoicing to customers.

The Service Consultant must decide whether he should use the phone or if it is preferable to do this in person. In most cases, the phone method is the one that suits both parties because it reduces customer waiting time at the Service Consultant 's desk and cashier's window, as well as the amount of time the Service Consultant will have to spend with them during the late afternoon rush period. For this reason, if the repairs performed are relatively simple and communication to date with the customer has proven successful, the phone option is viable.

**Note: Phone contact is a requirement if express check-out is to be offered.**

### Dealer Standards

No.18. A qualified person explains all services performed and related charges to the customer, and calls are made ahead of time to those customers picking up vehicles after hours.

No. 19. Installation of any parts that are not both new and unused and O.E.M. or manufacturer approved, is disclosed to the customer.

Before calling, the Service Consultant should make sure that:

- Interruptions are minimised.
- He/she ignores distractions.

### Procedures:

Ask the customer if this is an appropriate time to proceed with the information. If it is not, ask them if they would prefer that you call back or if they would rather conclude the transaction in person.

- If the customer is available, ask them to refer to their copy of the repair order that they received during the consulting period.
- Review each item that was discussed during the Consulting Process and explain work performed for each item in detail.
- After completing each explanation, the Service Consultant specifies the amount charged for labour, parts, and then the total amount. If parts were installed that are not new or approved, such as used parts, the Service Consultant must ensure that this information is conveyed verbally and in writing to the customer.
- If during the Repair Process, additional work is required, the Service Consultant must advise the customer and schedule an appointment.
- In situations where a specific customer request could not be fulfilled, give the customer reason to believe that the effort was made to do so.
- If any repairs were not performed, or if additional needs have been noticed that require attention, advise the customer of what they are, then offer to schedule an appointment that will address these repairs.
- Should the customer not be ready to make a reservation, file the estimate copy for future follow-up.
- After reviewing each item, confirm that the customer understands all work and charges by asking if there are any questions.

- As well, after each item, be sure to commend the customer for his wise decision to have the work performed as well as his choice of service establishment.
- If any work performed is free of charge, less expensive than was previously expected, or more than what the customer requested, the Service Consultant must inform the customer.



**Customers who are unaware of this situation will not be able to appreciate the effort made by the dealership and its service personnel.**

- The final step of the invoice explanation involves revealing the total cost of repairs. This is done by quoting the total cost of individual labour charges, parts charges, deductible charges as well as the applicable taxes the customer must cover.
- Once the repairs have been reviewed, the vehicle should be driven to a specially designated area of the parking facilities reserved exclusively for vehicles that are ready for delivery. This policy facilitates the Service Consultant's task of explaining to the customer or service personnel where the vehicle is located. With the objective of customer and personnel convenience in mind, there should also be a designated drop-off and pick-up area for those customers who are unable to coincide their arrival and departure times with the regular service hours.

4. Schedule next appointment

#### 4. Schedule Next Appointment

The next step the Service Consultant must follow is to discuss the next scheduled visit (whether it be special parts order, additional service needs or the next recommended maintenance interval), and then offer to schedule the appointment immediately. By applying this procedure, the Service Consultant increases shop utilisation and volume of sales per customer.

The Service Consultant should suggest to the customer that he will be called and reminded of their appointment a few days beforehand. By proceeding in such a manner, the Service Consultant is able to ensure, or at least evaluate, customer satisfaction and retention levels.



**Service Consultant must discuss additional service needs and the next service visit with every customer.**



5. Inform customer about after-hours delivery process

## 5. Inform the Customer About After-Hours Delivery Procedures

The Service Consultant must inform the customer about the after-hours delivery procedures.

### Dealer Standard

No.21. There is a procedure to assure that customers can drop off and pick up vehicles at their convenience.

#### Procedures:

- The Service Consultant should invite the customer to call them the following day if he has any additional queries.
- Secondly, the Service Consultant must advise the employee responsible for delivery of the approximate time the customer will arrive, their name, where the vehicle is located, (as well as the details related to repairs and charges on the repair order).
- Moreover, billing arrangements and all other information that may be required to assure a smooth delivery should be discussed with the customer.

6. Conclude communication with customer

## 6. Conclude Communication with Customer

The Service Consultant must take this opportunity to ensure that all information provided concerning the customer's next appointment meets their expectations.

Once the appointment is set, offer to schedule a specific appointment time at which the customer can pick up their vehicle. Proceeding in this manner contributes to reducing congestion during peak drop-off and delivery periods, as well as enabling each customer to spend time with the Service Consultant if necessary. It also minimises the amount of waiting time upon the customer's arrival. For those customers who are not available to pick up their vehicle during regular working hours explain the pick-up procedure over the phone.

## 7. Greet the customer

### 7. Greet the Customer

As is the case with the Consulting Process, the customer must be greeted promptly upon their arrival at the Service Department. Thus, the Service Consultant eliminates any misunderstanding and/or embarrassing situations that could occur when a confused customer heads for the cashier's window expecting to receive all the necessary documentation and information.

#### Dealer Standard

No.22. There will be minimal waiting to pick up a vehicle.

#### Procedures:

- For customers who did not receive detailed explanations over the phone, the Service Consultant should attempt to find an interference-free area where he can perform their delivery duties. The steps that must be followed during the explanation are the same as those followed in the phone call conversation. (procedure no. 3: Contact the customer).
- After greeting and giving explanations (if applicable) to the customer, the Service Consultant should ask them if they have any more questions or concerns.
- At this point, the Service Consultant should hand the customer a copy of their invoice as well as their business card.
- Now, it is appropriate for the Service Consultant to thank the customer for their business and invite them to call back should he require any additional information.
- The customer should then be accompanied to the cashier's window and introduced to the cashier.
- While the customer is being served at the cashier's window, the Service Consultant assumes the responsibility of having the vehicle retrieved.
- The retrieval is done either by the Service Consultant themselves or the employee responsible for this task in the dealership.
- Throughout this procedure, the Service Consultant must let the customer know that by entrusting you with their vehicle he 'made a wise decision in terms of:
  - ⇒ Expertise.
  - ⇒ Quality.
  - ⇒ Reliability.
  - ⇒ Details.



## ROLE-PLAYING

## Role-Playing

### Exercise 16:

#### Role Playing Situation 4: Customer

**Player:** Customer  
**Process:** After-Service Delivery  
**Length:** 45 minutes (15 minutes for each role)

#### Instructions:

1. Using the general information for **role playing situations 1, 2, and 3**, simulate a consultation with the After-Service delivery Process with your Service Consultant. Let the Service Consultant control the situation and answer his questions to the best of your ability.
2. **You will not be able to pick up your vehicle before 6:00 pm.** You will therefore need information about delivery after the Service Department closes. Ask the Service Consultant questions (unless he gives you enough information).
3. In this situation, it is important for you to move away from the Service Consultant slightly to simulate a distance situation (**because you are currently at work**).

#### Notes

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## Exercise 16:

### Role Playing Situation 4: Service Consultant

**Player:** Service Consultant  
**Process:** After-Service Delivery  
**Length:** 45 minutes (15 minutes for each role)

#### Instructions:

1. Apply the procedures in the After-Service Delivery Process except those listed below (because they do not apply to this situation).

Procedure 1: Review the repair order.

Procedure 2: Close the repair order.

Procedure 7: Greet the customer.

2. Use the 3 customer's Repair Orders Forms.
3. Apply communication skills.

#### Principles of Active Listening to be Applied

1. Focus your attention.
2. Ask questions to clarify the customer's statements.
3. Reformulate the customer's statements.

#### Principles of Neurolinguistic Programming to be Applied

4. Get in synch with the customer's voice.
5. Get in synch with the customer's state of mind and emotions.

#### Principles of Adjustment to the Customer's Personality Type to be Applied

6. Determine and adjust to your customer's personality type.



## Exercise 16:

### Role Playing Situation 4: Observer

**Player:** Observer  
**Process:** After-Service Delivery  
**Length:** 45 minutes (15 minutes for each role)

**Instructions:**

1. The participants who play the role of observer record on the Observation Form below whether the Service Consultant did or did not carry out the required tasks/procedures or whether the tasks/procedures do not apply to the role-playing situation.
2. It is recommended to follow each step of the After-Service Delivery Process Observation Form while giving feedback to the members of your team.

#### Observation Form

Did the Service Consultant...

	Yes	No	N/A
<b>Procedure 1: Not Applicable (Review Repair Order)</b>			
<b>Procedure 2: Not Applicable (Close Repair Order)</b>			
<b>Procedure 3: Contact the Customer</b>			
1. Ask the customer if it was a good time to review the information?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Review with the customer each item discussed at the time the work was authorised and give details of the repairs completed in connection with each item?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Procedure 4: Schedule the Next Appointment</b>			
3. Discuss additional service needs with the customer?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Offer to set up the customer's next appointment?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Procedure 5: Inform the Customer About the After-Hours Delivery Procedures</b>			
5. Tell the customer about his options and the procedures for picking up a vehicle after the Service Department is closed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Procedure 6: Conclude Conversation with the Customer</b>			
6. Arrange a time for the customer to pick up the vehicle?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Procedure 7: Not Applicable (Greet the Customer When He/She Retrieves His/Her Vehicle)</b>			



Yes No N/A

<b>Active Listening</b>			
7. Focus his attention while listening to the customer?			
8. Use the customer's name frequently?			
9. Ignore distractions and minimise interruptions?			
10. Repeat the last sentence following an interruption?			
11. Adjust to the customer's mood?			
12. Ask clarifying questions?			
13. Listen to the customer with a view to providing assistance?			
14. Reformulate the customer's statements as a way of encouraging the customer to continue the conversation?			
<b>Neurolinguistic Programming</b>			
15. Get in synch with the customer's body movements?			
16. Get in synch with the customer's voice?			
<b>Determine the Personality Type</b>			
17. Adjust to the customer's personality?			

**Instructions**

- You can now share your observations with the other people on your team in order to initiate a discussion among the members of your team (conclusion).

**Notes**

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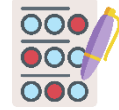
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## Exercise 17:



### Multiple Choice Questions on the After-Service Delivery Process

These questions are designed to evaluate your understanding of the After-Service Delivery Process and help you prepare for your post-module evaluation. It is strongly recommended that you not refer to your guide during the question period. If you like, you can record your answers as you go along or complete the questionnaire at home.

**NOTE:** These questions were developed to initiate discussion.

**1. The following dealer standards are aimed specifically at the After-Service Delivery Process, except one. Which one?**

- a) There is minimal waiting to pick up a vehicle.
- b) Dealer tracks and analyses comeback to identify root cause and implements a process to eliminate recurrence.
- c) Installation of any parts that are not both: 1) new and unused 2) O.E.M or manufacturer approved, is disclosed to the customer.

**2. The following procedures must all be followed when the Service Consultant reports to the customer on the work done and the related charges, except one. Which one?**

- a) Suggest maintenance required in light of the walk around by the quality controller.
- b) If the customer has time, ask them to refer to the repair order he was given during the consultation.
- c) Review the items covered during the consultation and give a detailed explanation of the work done in connection with each one.

**3. At what point should the Service Consultant make the customer's next appointment?**

- a) When the vehicle is delivered to the customer.
- b) After the repair order has been reviewed.
- c) Before the end of the conversation with the customer.

**4. What is the ultimate goal in reviewing the customer's repair order?**

- a) To be ready to sell additional repairs.
- b) To determine whether quality control has been carried out.
- c) To be better prepared to answer questions when the customer picks up the vehicle.

**5. Why must the Service Consultant apply the procedure "Conclude Communication with Customer"?**

- a) To obtain the correct information about the customer's next appointment.
- b) To minimise the time the customer has to wait when picking up the vehicle.
- c) Both of the above.

**See key to exercises in annex no. 6**



**Part 7:**  
**The After-Service Follow-Up Process**

## Part 7: The After-Service Follow-Up Process

### 23. Introduction

The objective of the After-Service Follow-up Process is to establish good communication with customers before and after their service visits. This module provides Service Consultants with tools and strategies that will enable them to better understand their role and obtain direct feedback from customers.

#### 23.1. The After-Service Follow-Up Process

##### **Step 1**

The first step begins after the customer has taken delivery of the vehicle and left the dealership. The most effective way of following up is to contact the customer no more than three days after he has been to the Service Department. A telephone call does not take up a great deal of the customer's or the Service Consultant's time. That does not mean, however, that Service Department staff can get away with the least amount of effort. A call that is short but friendly, personal and productive requires some preparation, analysis and discipline.

The Service Consultant should:

- Review the repair order and the customer's file before making the call.
- Summarise the information and examine the results.
- Plan and implement any corrective measures that may be needed.

##### **Step 2**

The second step consists in identifying the customer's needs and determining when the customer should be contacted again. Follow-up is complete when a designated Service Department employee contacts the customer again to remind them that it is time for another service visit and to set up an appointment.

##### 23.1.1. Goals

Let us take a closer look at the objectives of the first step in the After-Service Follow-up Process.

##### ***Improving Customer Satisfaction and Loyalty***

By demonstrating concern for the customer, the Service Consultant will:

- Maintaining telephone or other contact with customers is one way of improving their perception of the services provided by the dealership (staying in touch with them before and after each service visit).
- By talking to customers, the Service Department employee can determine the level of satisfaction and implement procedures that will enable the dealership to correct the situation.

- The employee will also be able to identify customers who are planning to take their future servicing needs to competitors and find out why they have made that decision.
- The Service Department employee can then use that information to take action to win back the customer's loyalty.

### ***Increasing Customer Retention and Repair Vehicle Purchases***

- Customers whose expectations are met or exceeded will probably come back to the dealership on a regular basis. The dealership will thus be able to build a solid relationship with the customer that will encourage the customer to come back for reasons other than the warranty or very specialised repairs.
- The dealership can maintain an active relationship with each customer until the time comes for the customer to purchase another vehicle. For the dealership, this means increased service sales and customer retention and better chances of being the customer's first choice when the time comes to look for another vehicle.

### ***Improving Parts Inventory Management***

- Confirming or setting appointments when specially ordered parts come in improves parts inventory management.
- The managers of most Parts Departments in which no service follow-up is carried out by the dealership will say they are very frustrated by the high cost of storing parts that are specially ordered but not picked up.

### ***Making Customers Aware of the Advantages of Dealer Servicing***

- Regular maintenance helps keep the vehicle in good running condition as it ages, thereby reducing the cost of reconditioning after the vehicle is traded in.
- Regular maintenance by the dealership also helps the customer get maximum trade-in value because the records will serve as proof that the vehicle has been well looked after. The vehicle should therefore sell more quickly and/or at a higher price through the dealership's Used Vehicle Department.

### ***Increasing the Volume of Service Department Sales***

- By calling customers to tell them that specially ordered parts are in or that their vehicle needs servicing, you let them know that they can count on you. Any increase in customer satisfaction and loyalty and shop utilisation will almost always translate into increased sales.

### ***Maximising Shop Utilisation and the Work Schedule***

- If a customer forgets or is unable to keep an appointment, measures must be taken to set a new date and time that are convenient for both the customer and the Service Department.

- This proactive approach fosters customer confidence and enables the Service Department to put in place procedures that will ensure maximum shop utilisation.

### 23.1.2. Customer Expectations

Follow-up is important because customers expect and deserve to be in ongoing contact with the dealership regarding their opinions and experiences. Customers expect Service Department staff to meet or exceed the following expectations, in particular:

- Service Department employees are friendly and competent.
- The Service Department ensures prompt follow-up of each maintenance visit.
- The dealership contacts the customer each time the vehicle needs repairs or specific maintenance.
- The dealership listens to customers' comments or complaints and takes corrective action as needed.

### 23.1.3. Dealer Standards for the After-Service Follow-Up Process

- No. 24. Dealer maintains contact with customers to remind them of required maintenance and other available services.
- No. 25. Service customers are contacted within three business days of vehicle pick-up to determine satisfaction unless the customer has requested not to be contacted.
- No. 26. Dealer tracks and analyses comebacks to identify the root cause and implements a process to eliminate recurrence.



**By following up customer satisfaction and customer needs, the dealership can establish a solid relationship with the customer that will continue through a lifetime of service visits and vehicle purchases. The employees who specialise in customer contact, that is, Service Consultants, have to become regular participants in this process.**



## 24. Purpose of the After-Service Follow-Up Process

### 24.1. Characteristics of the After-Service Follow-Up Process

Follow-up is the primary means by which the dealership can determine whether customers are satisfied with the service and the way they are treated. Each dealership must have a system in place to ensure that follow-up is well organised, consistently managed and applied in a timely manner.

An After-Service Follow-up Process includes the following elements:

- A planned, structured script to be used for each telephone call.
- A follow-up staff that is dedicated, attentive and sensitive.
- Telephone contact with all Service Department customers, regardless of the type or amount of work done and a letter sent by mail to customers who cannot be reached.
- Contact with the customer within 72 hours following the service visit.
- A log to record customers' reactions and analysis of these reactions by management.
- A reminder system to ensure that all customers are contacted when their vehicle needs repairs, when specially ordered parts come in or when it is time for recommended maintenance.

#### Exercise 18:

##### Instructions:

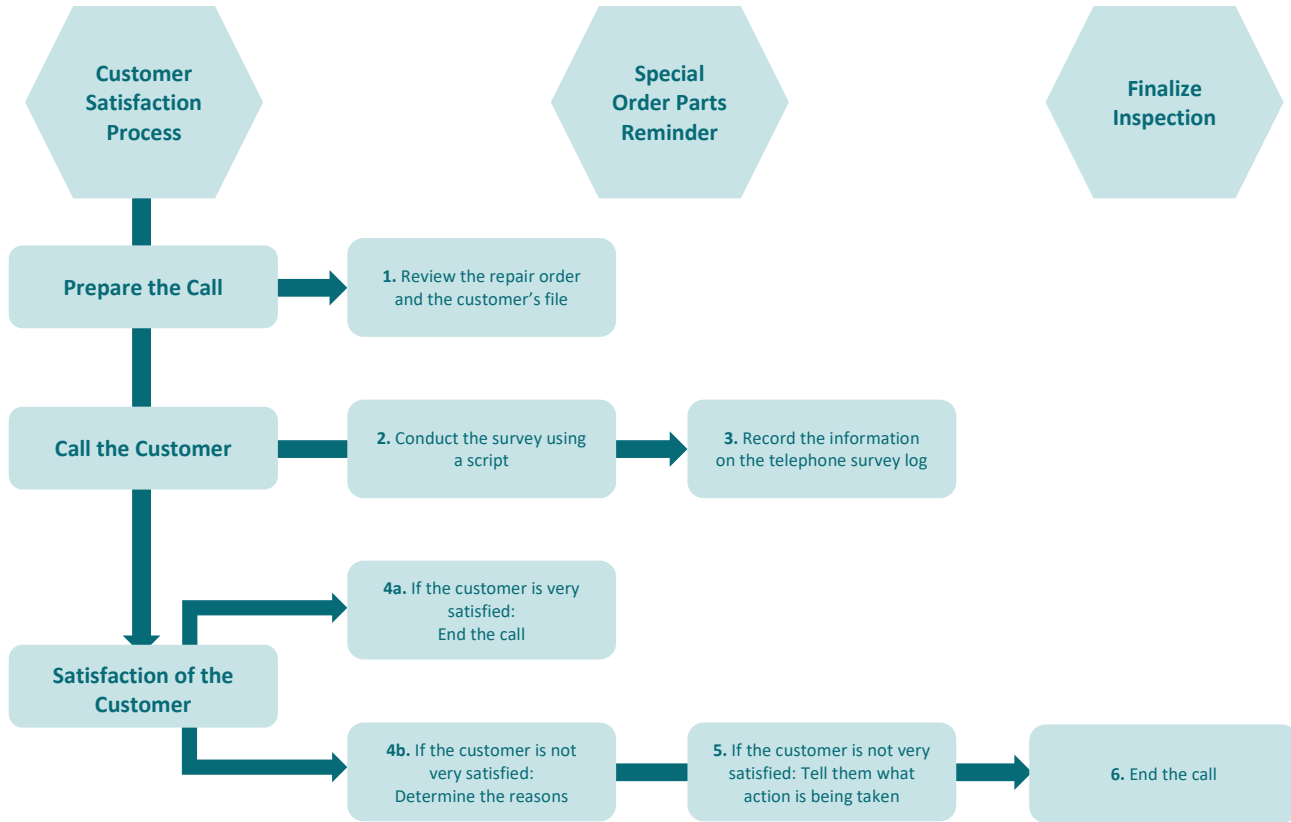
- Get together in groups of 3 or 4. Using annex no. 5, list in order the 6 procedures of the After-Service Follow-Up Process.

**Length:** 5 minutes



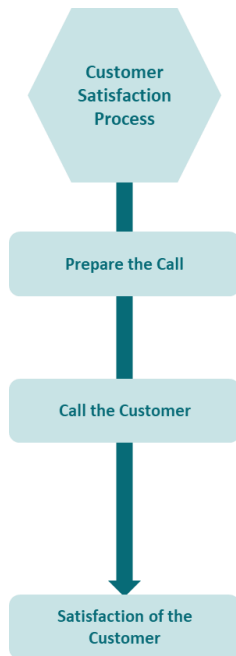
## 25.The After-Service Follow-Up Process

### 25.1. Overall Procedures



## 25.2. Detailed Procedures

### Customer Satisfaction Surveys (Procedures 1 to 6)



#### Prepare the call:

1. Review the repair order and the customer's file.

#### Call the customer:

2. Conduct the survey using a script.
3. Record the information on the telephone survey log.

#### If the customer is very satisfied:

- 4a. End the call.

#### If the customer is not very satisfied:

- 4b. Determine the reason.
5. Tell the customer action is being taken.
6. End the call.

#### Prepare the call:

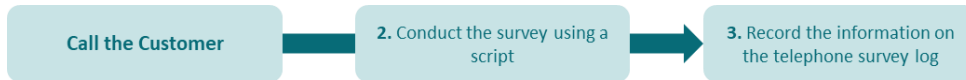


#### **1. Review the Repair Order and the Customer's File.**

This procedure will make the Service Consultant better equipped to react to questions and comments the customer may come up with.

- Become familiar with the customer's most recent repair(s) and their vehicle's repair history.
- Consider possible scenarios:
  - ⇒ questions.
  - ⇒ answers.

## **Call the customer:**



## **2. Conduct the Survey Using a Script**

### **Dealer Standard**

No.25. Service customers are contacted within three business days of vehicle pick-up to determine satisfaction unless the customer has requested not to be contacted.

The follow-up script of telephone calls is included on the telephone survey log (annex no.9).

*First, the Service Consultant must:*

- Be courteous.
- Ask the customer if he/she can spare a few minutes.
- If the customer cannot, agree on a time to call back.

*Second, the Service Consultant must:*

- Use a script to conduct the survey.
- Adapt to the customer's personality.
- Use a non-threatening tone of voice.

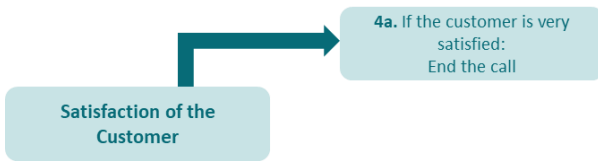
## **3. Record the Information on the Telephone Survey Log**

The Service Consultant must record all survey results on the telephone survey log so that the dealership can identify and correct the causes of customer dissatisfaction or simply track customers' options.

- As each customer is contacted, the Service Consultant must record any comment, special request or promise, the time of the call and any other information that might be of interest to the Service Manager.
- After each call, the telephone survey log must be updated.



### If the customer is very satisfied:



#### 4a. End the Call

The Service Consultant must thank the customer and say that their co-operation in the survey will help the dealership serve its customers better.



### If the customer is not very satisfied:



#### 4b. Determine the reason

#### Dealer Standards

No.26. Dealer tracks and analyses comebacks to identify the root cause and implements a process to eliminate recurrence.

- Use active listening techniques.
- Display empathy.

(Determining the reason for dissatisfaction will be covered in detail in Customer Satisfaction Skills module - anger, defusing techniques, etc.).



**Remember that the customer's objective is to get the dealership to offer a faster solution.**

## 5. Tell the Customer what Action is Being Taken

- First make sure that you fully understand the situation.
- Identify the customer's expectations.
- Tell the customer what action will be taken:  
⇒ What you plan to do to solve the problem.

## 6. End the Call

- Confirm the next contact.
- Recap the action plan.
- Thank the customer for their comments and the opportunity to make them happy.

## 26.Special Order Parts Reminders

When a repair cannot be done because the parts are not in stock and the customer is willing to let the dealership order the parts and install them at a later date, the Service Consultant must determine roughly when the parts should come in before the customer picks up the vehicle. When the customer comes in to pick up the vehicle; the Service Consultant should arrange an appointment for shortly after the date on which the parts are supposed to arrive. The customer must then be told that the order will be monitored and that he will be notified if the appointment has to be rescheduled because of a delay.



### Who is responsible for monitoring special order parts?

⇒ **The Service Department!**

- At the beginning of each day, reminders that special parts have come in must be confirmed and referred to the appropriate Service Consultant, who will then contact the customer to confirm the appointment.
- If, however, the Service Department has not indicated that the parts are in, the Service Consultant must check the status of the order
- Once the status has been determined, the reminder file must be updated if parts are not in. The customer must then be informed of the situation and a new appointment arranged.
- When the Service Consultant is unable to say for sure when the parts will be in, the customer must be told that he will be contacted to set up an appointment as soon as they arrive.
- The customer must be told tactfully that parts cannot be kept indefinitely. This will convey to the customer the importance of making and keeping an appointment.

## 27. Maintenance Reminders

The best way to show customers how important they are to you is to stay in touch with them after each maintenance visit. Follow-up is the most effective means of determining whether you have met their expectations. Follow-up related to recommended maintenance and special order parts is also a good way to generate more business. Follow-up activities are part of a proactive process that helps strengthen the long-term relationship with the customer.

The Service Consultant is the person responsible for scheduling the next appointment at the time the vehicle is delivered. However, it is not easy to convince every customer to set up an appointment so far in advance. Moreover, it is impossible to call customers to confirm their appointment unless there is a well-organised system in place and responsibilities are fairly well distributed.

The fast pace of life today makes it hard for many customers to keep track of when their vehicle needs servicing and find the time to get the work done. Many service establishments have developed a simple, yet very effective system that allows them to remind their customers. A simple analogy would be a family physician or a dentist who takes the time before a patient leaves the office to set up the next visit and to call the patient a day or two before the appointment.

### The Dentist's Approach:

Thirty years ago, another industry was grappling with the same problems we are facing today. Our parents were accustomed to going to the dentist only when they had a toothache or a cavity. They went to the dentist because they needed to get something **fixed**. Dentists got together and decided to get out of the repair business and focus on **maintenance**. The question is, "**How successful were they?**".

Question: "What is the last thing the dentist's office does before you leave?"

Answer: Set up your next appointment

Question: "What does the dentist's office do a week before your appointment?"

Answer: Call to remind you.

**But the most important question is:**

Question: "Between visits to the dentist, do you look for another dentist?"

Answer: No.

**Why?**

**Because mentally the dentist has taken you off the market.  
It is very powerful!**



### Dealer Standards

No.24. Dealer maintains contact with customers to remind them of required maintenance and other available services.

Let us look at the reasons why you need a reminder system.

**Note:** The reminder system is a key element of the service program.

#### **Key Elements of a Reminder System**

- Service reminders must be personalised; the customer's name and the model of the vehicle must be included.
- The recommended maintenance must reflect the specific needs of the vehicle based on the service records and vehicle use.
- If the customer has declined suggested service or repair, re-contact the customer to re-inform and try to help them make their decision.
- Reminders must be specific to the model and consistent with the manufacturer servicing schedule and price menu, especially in terms of intervals, maintenance items and driving conditions.
- There must be a procedure at some point in the process for contacting the customer to let management know which customers have been "potentially lost" or did not respond to the last contact so that appropriate corrective measures can be taken.
- Service Consultants must have proper tools (service menus, price menu, calendars, reminder sheets, vehicle records, advanced telephone system, etc.) and a suitable workplace (office, workstation, privacy, etc.).

#### **Reminders Tied to the Maintenance Schedule**

- If, at the time of the last visit, the customer agreed to set up the next appointment, send a card or letter or call two days to a week before the scheduled date. The letter, card or call simply reminds the customer of the day, time and maintenance needs.
- Ask the customer to call you if he needs additional work you did not previously discuss or if he/she cannot keep the appointment so that you can make other arrangements.
- If the customer did not set up an appointment with the Service Consultant at the time of the last service visit, the letter, card or call must state the purpose of the visit (the vehicle is due for maintenance) and identify the vehicle's maintenance needs.

- The customer must also be encouraged to call and set up an appointment on a date and at a time that would be convenient if a letter or card system is used.
- If the customer does not respond to the first contact, other measures must be taken (for example, send a second notice or call back).
- This allows the dealership staff to contact any customer who does not respond to the reminders and find out why, so that problems leading to customer dissatisfaction can be resolved.
- The dealership's policy should also require that any person who does not show up for an appointment be contacted by telephone the same day. The Service Consultant should remind the customer that he missed the appointment and then reschedule.

### **Other Service Reminders**

If, during a recent service visit, the Service Consultant or Technician noted that the vehicle needed other work, the Service Consultant must discuss and recommend that work to the customer.

Conscientious follow-up of required repairs by the Service Consultant can save the customer time and money and also generate sales for the Service Department.

- The recommended procedure is for the Service Consultant to begin by setting a date to have the work done when the vehicle is delivered or ask the customer if he would be willing to have the dealership send out a reminder at the appropriate time.
- Each Service Consultant must have a filing system or calendar that can be used to contact customers before the date on which the work should be done.
- The Service Consultant must then call the customer to set up an appointment.
- The appointment must be recorded in the appointment book.
- If the customer does not show up for the appointment, he must be contacted through the telephone follow-up procedure for no-shows.

(Consultative selling techniques will be covered in more detail in Professional Selling Skills module.)





## ROLE-PLAYING

## Role-Playing

### Exercise 19:

#### Role Playing Situation 5: Customer

**Player:** Customer  
**Process:** After-Service Follow-Up  
**Length:** 45 minutes (15 minutes for each role)

#### Instructions:

1. Using the general information for **role playing situations 1, 2, 3 and 4** simulate the After-Service Follow-Up process with your Service Consultant. Let the Service Consultant control the situation and answer his questions to the best of your ability.
2. In this situation, it is important for you to move away from the Service Consultant slightly to simulate a distance situation (**because you are currently at home**).
3. You are NOT VERY SATISFIED WITH THE SERVICE YOU RECEIVED (because you had to come in twice to the Service Department with the same condition: an oil leak).

#### Notes

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## Exercise 19:

### Role Playing Situation 5: Service Consultant

**Player:** Service Consultant  
**Process:** After-Service Follow-Up  
**Length:** 45 minutes (15 minutes for each role)

#### Instructions:

1. Apply all the procedures in the After-Service Follow-Up Process.
2. In this situation, it is important for you to move away from your customer slightly to simulate a distance situation (because he is currently at home).
3. Apply communication skills.

#### Principles of Active Listening to be Applied

1. Focus your attention.
2. Ask questions to clarify the customer's statements.
3. Reformulate the customer's statements.

#### Principles of Neurolinguistic Programming to be Applied

4. Get in synch with the customer's voice.

#### Principles of Adjustment to the Customer's Personality Type to be Applied

5. Determine and adjust to your customer's personality type.





## Exercise 19:

### Role Playing Situation 5: Observer

**Player:** Observer  
**Process:** After-Service Follow-Up  
**Length:** 45 minutes (15 minutes for each role)

#### Instructions:

1. The participants who play the role of observer record on the Observation Form below whether the Service Consultant did or did not carry out the required tasks/procedures or whether the tasks/procedures do not apply to the role-playing situation.
2. It is recommended to follow each step of the After-Service Follow-Up Process Observation Form while giving feedback to the members of your team.

#### Observation Form

Did the Service Consultant...

	Yes	No	N/A
<b>Procedure 1: Review the Repair Order and the Customer's File</b>			
1. Review the repair order and the customer's file before contacting them?			
<b>Procedure 2: Conduct the Survey Using a Script (Included in the Telephone Survey Log)</b>			
2. Serve the customer in a polite manner?			
3. Ask the customer if he/she could spare a few minutes?			
4. Use the script included in the telephone survey log?			
<b>Procedure 3: Record the Information on the Telephone Survey Log</b>			
5. Record all survey results on the Telephone Survey Log?			
<b>(If the Customer is Very Satisfied)</b>			
<b>Procedure 4a: End the Call</b>			
6. Thank the customer and say that his co-operation in the survey will help the dealership make its customer service more effective?			
<b>(If the Customer is Not Very Satisfied)</b>			
<b>Procedure 4b: Determine the Reason</b>			
7. Clearly identify the reason why the customer was dissatisfied?			
<b>Procedure 5: Tell the Customer What Action is Being Taken</b>			
8. Ask the customer what action he expected to be taken?			
9. * Tell the customer that he will let the Service Manager know why he was dissatisfied and that the Service Manager will be in touch shortly to discuss the matter?			

	Yes	No	N/A
<b>Procedure 6: End the Call</b>			
10. Thank the customer and say that his/her co-operation in the survey will help the dealership make its customer service more effective?			
<b>Active Listening</b>			
11. Focus his attention while listening to the customer?			
12. Use the customer's name frequently?			
13. Repeat the last sentence following an interruption?			
14. Adjust to the customer's mood?			
15. Ask clarifying questions?			
16. Listen to the customer with a view to providing assistance?			
17. Reformulate the customer's statements as a way of encouraging the customer to continue the conversation?			
<b>Neurolinguistic Programming</b>			
18. Get in synch with the customer's voice?			
<b>Determine the Personality Type</b>			
19. Adjust to the customer's personality?			

\* 9. *The preferred method would be to have established dealership policies empowering Service Consultants to resolve customer dissatisfaction issues.*

### Instructions

- You can now share your observations with the other people on your team in order to initiate a discussion among the members of your team (conclusion).



## Exercise 20:



### Multiple Choice Questions on the After-Service Follow-Up Process

These questions are designed to evaluate your understanding of the After-Service Follow-Up Process and help you prepare for your post-module evaluation. It is strongly recommended that you not refer to your guide during the question period. If you like, you can record your answers as you go along or complete the questionnaire at home.

**NOTE:** These questions were developed to initiate discussion.

**1. Identify one customer expectation of the After-Service Follow-Up Process?**

- a) Appointments are made without a hitch.
- b) Customers are contacted to determine how satisfied they were with the service.
- c) Customers are contacted every time their vehicle needs repairs or specific maintenance.

**2. Which of the following statements pertains specifically to the After-service Follow-up Process?**

- a) Makes it possible to draw up a suitable schedule and thus avoid under or over-utilisation of the shop.
- b) Development and implementation of action plans based on management review of the follow-up log.
- c) For each customer, update in the follow-up log for the next scheduled maintenance visit and any discussion of additional information.

**3. Which department of the dealership is responsible for following up special order parts?**

- a) Parts Department.
- b) Administration.
- c) Service Department.

**4. Which of the following communication concepts must the Service Consultant use when conducting a telephone survey with a customer?**

- a) Overcome objections.
- b) Use statements of fact.
- c) Adapt to the customer's personality type.

**5. Which of the following would be an option for a Service Consultant when communicating his action plan to a customer who is unhappy with the service he has received?**

- a) Offer a free oil change.
- b) Make an appointment to discuss the customer's complaints.
- c) Discuss the situation with the Service Manager and then get back to the customer.

**See key to exercises in annex no. 6.**

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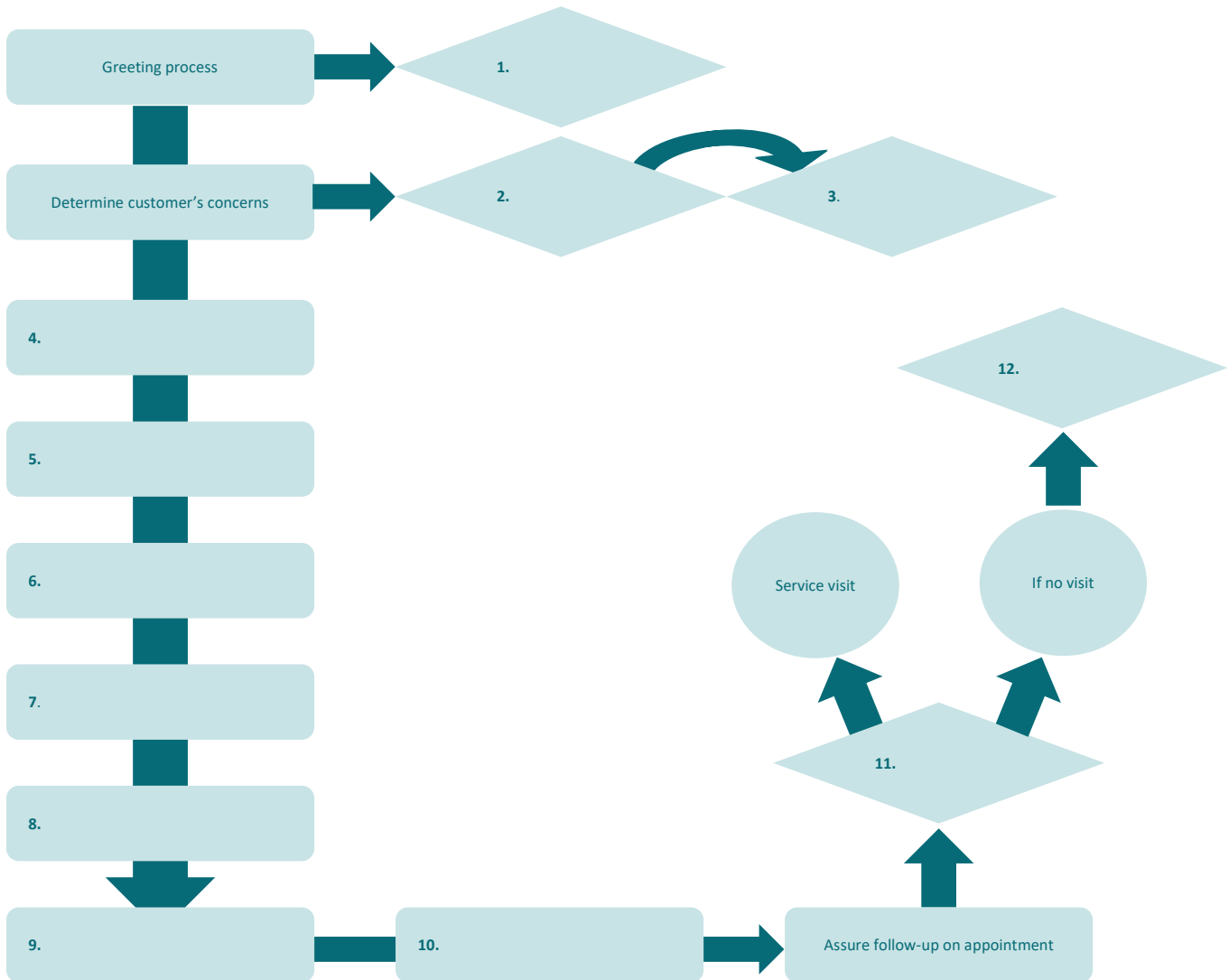
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# Annex

## Annex No. 1: Exercise 6 (The Appointment Process)

See instructions on page 184.



**Annex No.1: Exercise 6 Instructions**

For each numbered box in the diagram of the Appointment Process, indicate the corresponding letter that reflects the appropriate action required:

- A. Write data on Appointment Form and Control of Available Time Schedule.
- B. Call no-shows to reschedule appointment.
- C. Suggest needed maintenance according to history file.
- D. Set a date for the appointment.
- E. Recap the appointment and thank the customer for calling.
- F. Confirm the appointment 24 to 48 hours prior.
- G. Manage customer's expectations.
- H. Identify customer's needs and priorities.
- I. Service consultant receives calls.
- J. Estimate time to do work
- K. Set a time for the appointment.
- L. Retrieve the customer's file.

**Notes**

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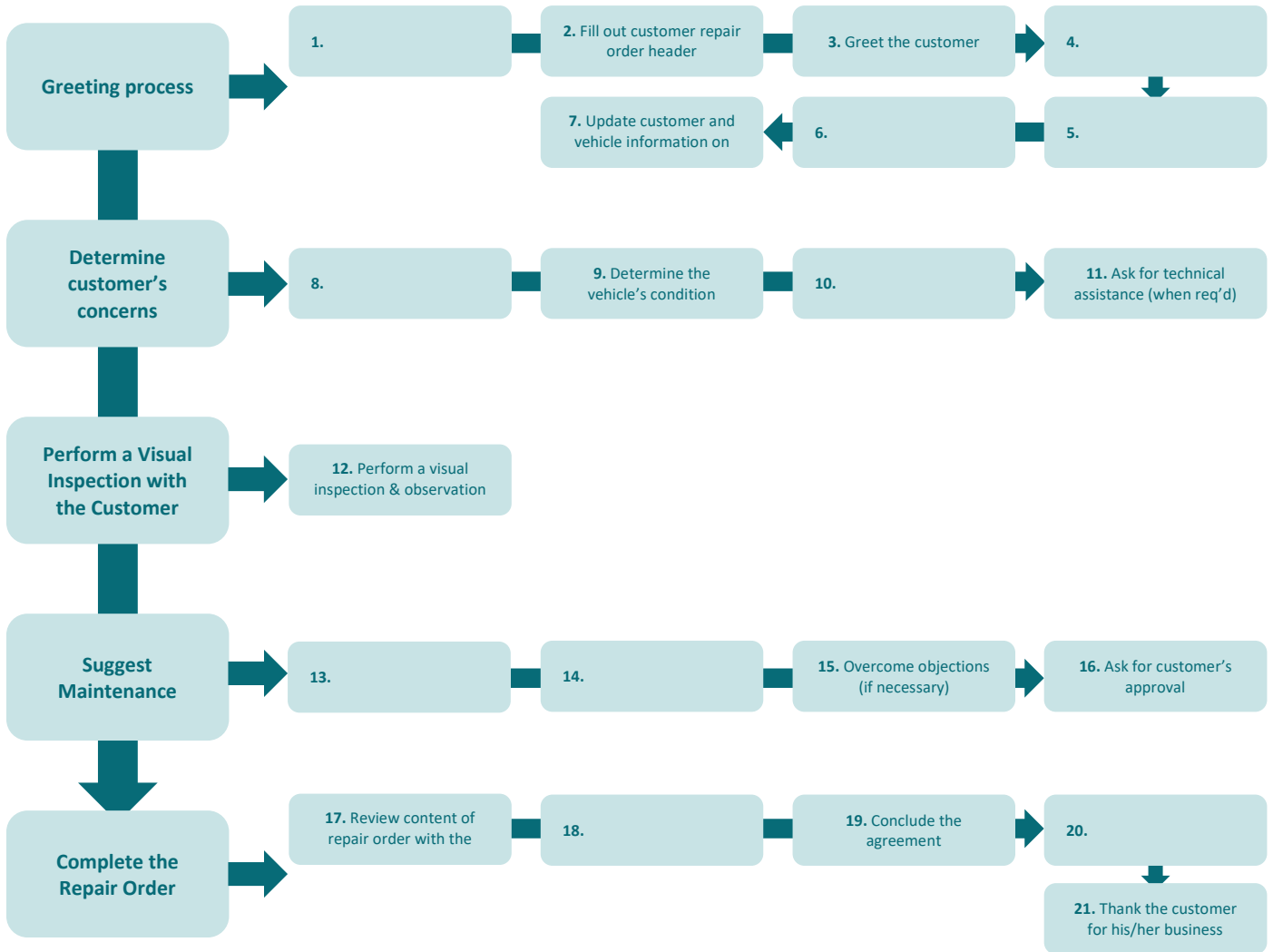
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## Annex No. 2: Exercise 9 (The Consulting Process)

See instructions on page 186.



## Annex No. 2: Exercise 9 Instructions

For each numbered box in diagram of the Consulting Process, indicate the corresponding letter that reflects the appropriate action required:

- A. Confirm alternate transportation.
- B. Determine vehicle' s condition according to customer's needs.
- C. Retrieve confirmed customer's file.
- D. Gather customer's file and pre-written repair order.
- E. Confirm customer and vehicle data.
- F. Review the customer's vehicle history file.
- G. Present solution by stating features, advantages and benefits.
- H. Manage customer's expectations.
- I. Identify the type of visit (repair, body).
- J. Confirm the information concerning the vehicle's condition.

### Notes

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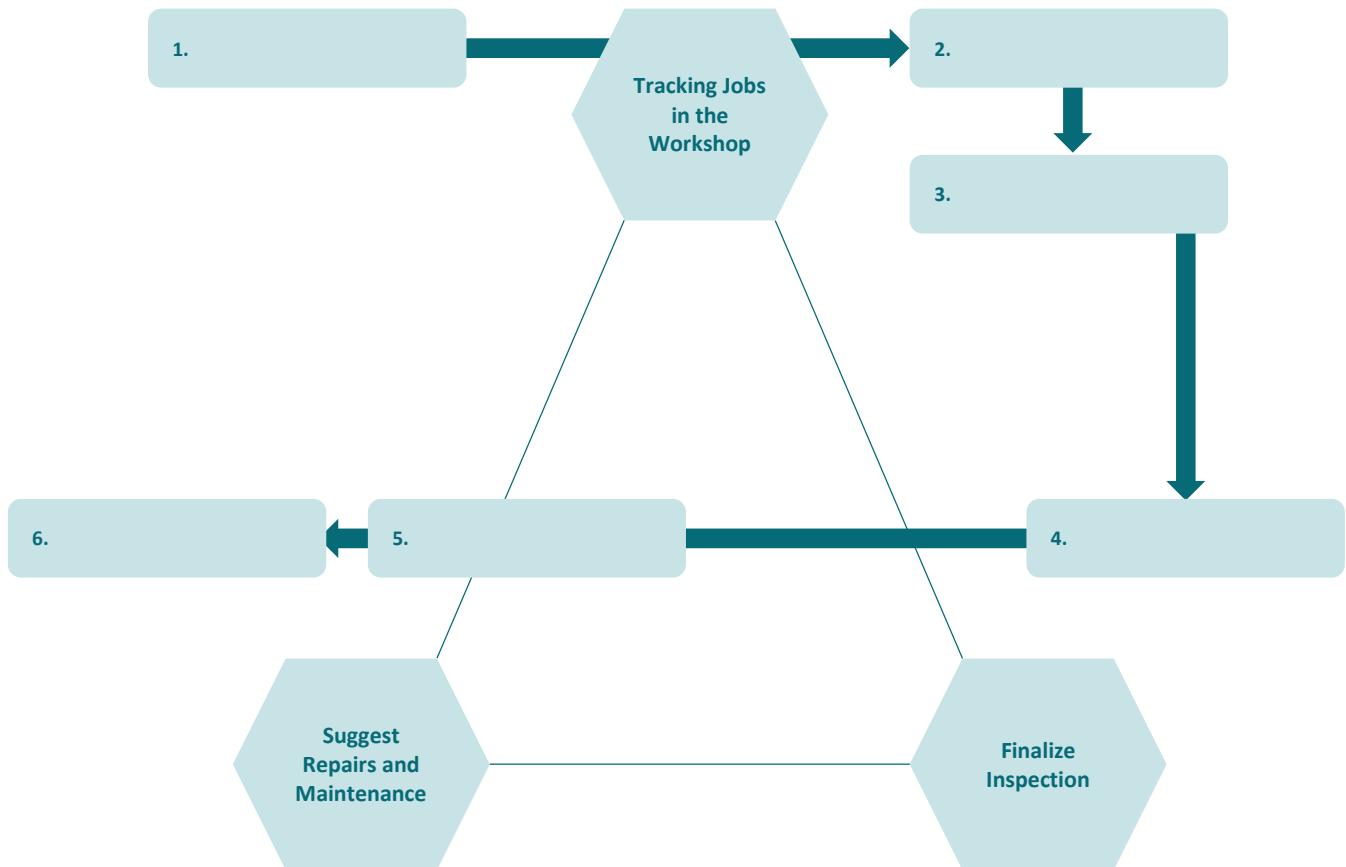
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## Annex No. 3: Exercise 12 (The Repair Process)

See instructions on page 188.



### Annex No. 3: Exercise 12 Instructions

For each numbered box in diagram of the Repair Process, indicate the corresponding letter that reflects the appropriate action required:

- A. Modify data on the repair order (when applicable).
- B. Ensure that all the work has been done.
- C. Suggest additional repair work.
- D. Checking on the progress of repairs.
- E. Confirming that the problem has been solved.
- F. Informing the customer of job status.

#### Notes

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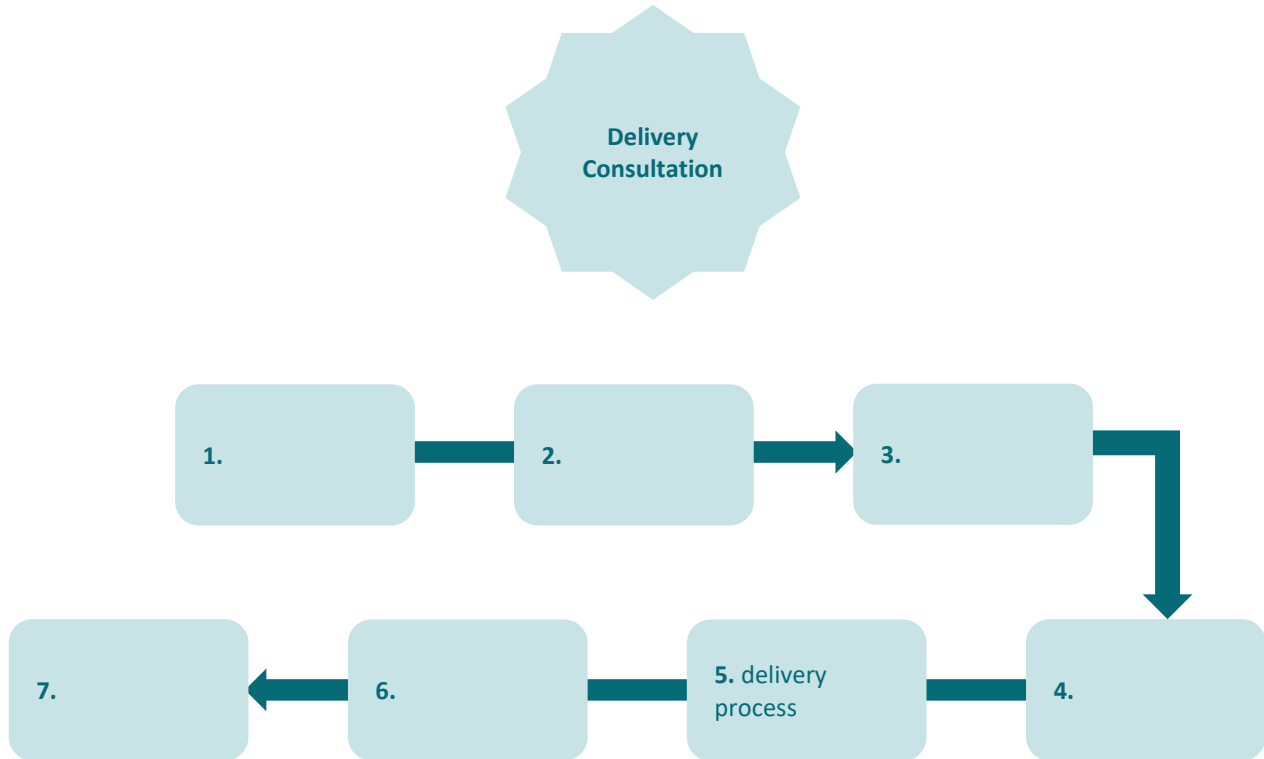
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## Annex No. 4: Exercise 15 (The After-Service Delivery Process)

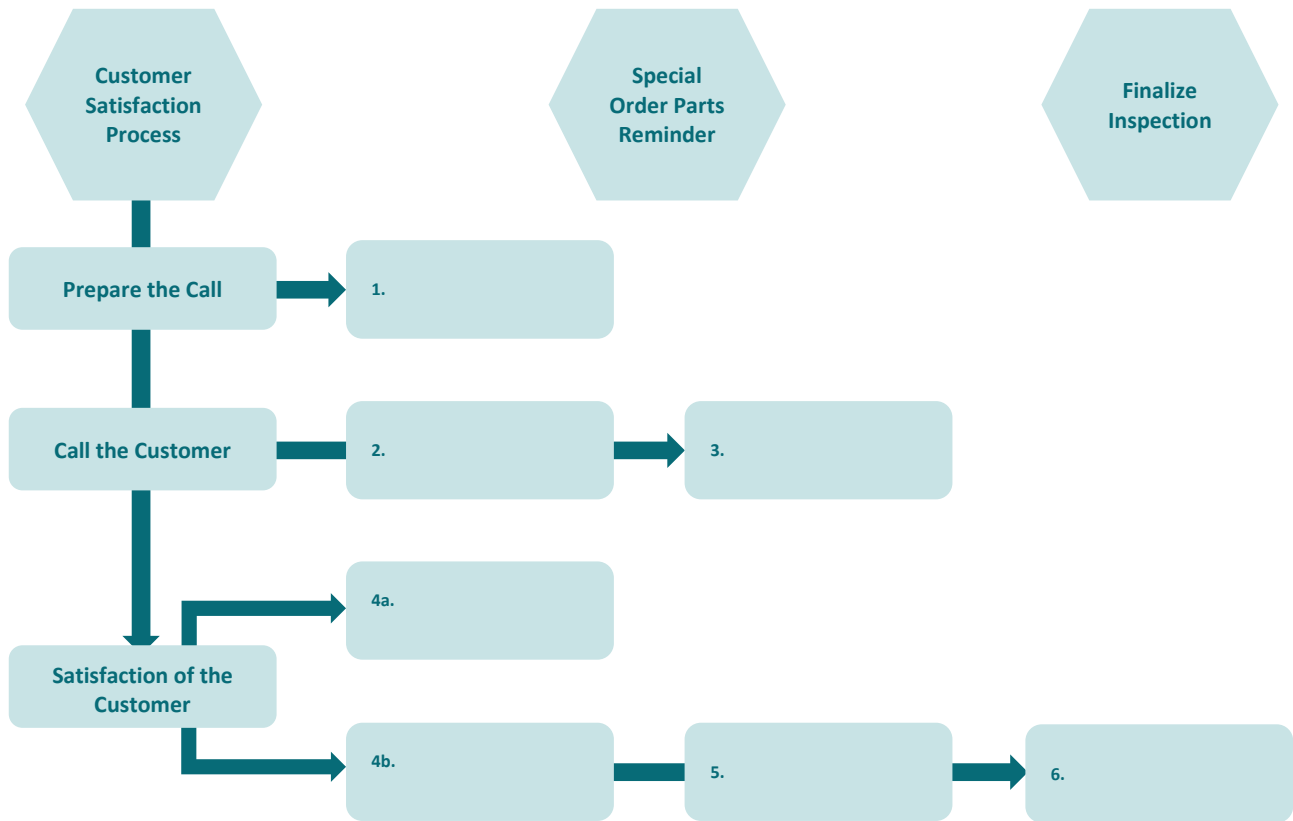
See instructions on page 190.





**Annex No. 5: Exercise 18 (The After-Service Follow-Up Process)**

See instructions on page 192.



## Annex No. 5: Exercise 18 Instructions

For each numbered box in diagram of the After-Service Follow-Up Process, indicate the corresponding letter that reflects the appropriate action required:

- A. If the customer is not very satisfied determine the reason.
- B. Review the repair order and the customer' s file.
- C. If the customer is satisfied, end the call.
- D. Conduct the survey using a script.
- E. If the customer is not very satisfied tell the customer what action is being taken.
- F. Record the information on the Telephone Survey Log.

### Notes

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## Annex No. 6: Answer Key for Exercises 8-11-14-17-20

Questions	Appointment (Exercise 8)	Consultation (Exercise 11)	Repair (Exercise 14)	Delivery (Exercise 17)	Follow-Up (Exercise 20)
1.	c	c	c	b	b
2.	b	a	c	a	b
3.	a	c	c	c	c
4.	b	b	c	c	c
5.	see below	c	c	c	c
6.	b	c	b	-	-
7.	C	c	-	-	-
8.	C	b	-	-	-
9.	b	a	-	-	-
10.	a		-	-	-
11.	b		-	-	-
12 .	a		-	-	-

### Appointment Process

5. Every time a customer comes in contact with any aspect of the service organization and forms a perception of the quality of service.

## Annex No. 7: Control of Available Time Form (Example)

	AM					PM				
	8	9	10	11	12	1	2	3	4	5
Technicians										
Mike		①			⑧				⑭	
Herb	⑮		②		⑮		⑨			⑮
Mario		⑪			⑬			④		
Bob		⑮		⑮		③		⑮		⑮
Richard		⑮		⑤			⑮			
Terry	○		○		○		○			○
Philip	○	○			○		○		○	
Etc.										

**Annex No. 8: Service Control Form**

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Repair Order Number	Customer Name	Customer Phone Number	Service to be Performed	Model	Time Promised	Actual Status	Customer Contacted	Comments

## Annex No. 10: Symptoms and Diagnosis Charts

<b>SYMPTOMS CHART</b>	
<i>Common Name</i>	<i>Required Information</i>
Misfires (Cuts Out/Misses)	<ul style="list-style-type: none"> <li>Steady pulsation or jerking that follows engine speed, usually more pronounced as engine load increases. Not normally felt above 1500 RPM or 30 mph. The exhaust has a steady spitting sound at idle or low speed.</li> </ul>
Backfires	<ul style="list-style-type: none"> <li>Fuel ignites in intake manifold, or in exhaust system, making a loud popping noise.</li> </ul>
Rough Idle (Rough Unstable, Or Incorrect Idle)	<ul style="list-style-type: none"> <li>The engine runs unevenly at idle. If bad enough, the car may shake. Also, the idle may vary in RPM. Either condition may cause stalling. Engine idles at incorrect speed.</li> </ul>
Engine Run On (Dieseling, Run-On)	<ul style="list-style-type: none"> <li>Engine continues to run after key is turned off and runs roughly.</li> </ul>
Hard to Start (Hard Start)	<ul style="list-style-type: none"> <li>Engine cranks OK, but does not start for a long time. Does eventually run.</li> </ul>
Spark Knock (Detonation Spark Knock)	<ul style="list-style-type: none"> <li>A mild to severe ping, usually worse under acceleration. The engine makes sharp metallic knocks that change with throttle opening. Sounds like popcorn popping.</li> </ul>
Hesitates Or Sags (Hesitation, Sag, Stumble)	<ul style="list-style-type: none"> <li>Momentary lack of response as the accelerator is pushed down. Can occur at all car speeds. Usually most severe when trying to make the car move, as from a stop sign. May cause the engine to stall if severe enough.</li> </ul>
Poor Fuel Economy	<ul style="list-style-type: none"> <li>Fuel economy, as measured by actual road test, is noticeably lower than it was on this car at one time.</li> </ul>
Poor Performance	<ul style="list-style-type: none"> <li>Engine delivers less than expected power. Little or no increase in speed when accelerator is pushed down part way. Sluggish, lack of power.</li> </ul>
Excess Exhaust Odor	<ul style="list-style-type: none"> <li>Car fails an emission test. May have an excessive rotten egg smell (hydrogen sulfide).</li> </ul>

SYMPTOMS DIAGNOSIS CHART	
Condition	Required Information
Driveability	<ul style="list-style-type: none"> <li>• Is it a starting, stalling, hesitation or power problem?</li> <li>• During acceleration, deceleration, constant throttle or idle?</li> <li>• When engine is cold or hot?</li> <li>• Is condition constant or intermittent?</li> <li>• Is weather a factor?</li> <li>• How long has problem been evident?</li> <li>• Does anything else happen when problem occurs, or just prior?</li> <li>• Has problem been worked on before?</li> </ul>
Water Leaks	<ul style="list-style-type: none"> <li>• Where does water collect?</li> <li>• Will leak occur when vehicle is parked?</li> <li>• Is vehicle parked level, front up or front down?</li> <li>• Is water clean or dirty?</li> <li>• Does vehicle only leak in car wash?</li> <li>• How long has problem been evident?</li> <li>• Has problem been worked on before?</li> </ul>
Vibrations	<ul style="list-style-type: none"> <li>• Is vibration speed sensitive or engine R.P.M. sensitive?</li> <li>• Does vibration peak? If so, at what speed or engine R.P.M.</li> <li>• Does vibration occur during acceleration, deceleration, constant throttle or idle?</li> <li>• Is vibration felt in steering wheel or seat?</li> <li>• Is problem intermittent?</li> <li>• How long has vibration been evident?</li> <li>• Has problem been worked on before?</li> </ul>

FUEL CONVERSION CHART							
14	L/100 km	-	20 M.P.G.	8	L/100 km	-	36.0 M.P.G.
13	L/100 km	-	22 M.P.G.	7.5	L/100 km	-	37.5 M.P.G.
12	L/100 km	-	24 M.P.G.	7	L/100 km	-	40.5 M.P.G.
11	L/100 km	-	26 M.P.G.	6.5	L/100 km	-	43.5 M.P.G.
10	L/100 km	-	28 M.P.G.	6	L/100km	-	47.0M.P.G.
9.5	L/100 km	-	30 M.P.G.	5.5	L/100 km	-	52.0 M.P.G.
9	L/100 km	-	32 M.P.G.	5	L/100 km	-	56.5 M.P.G.
8.5	L/100 km	-	34 M.P.G.	4.5	L/100 km	-	62.5 M.P.G.