



Marine Service Advisor Training Program

Leader's Guide



INSTRUCTIONS

The **Marine Service Advisor Training Program** was designed as an in-house Advisor Training Aid. Benefits of owning and using the program include the following:

- When hiring a Service Advisor who is new in the business, this individual generally gets very little, if any formalized training during the first six weeks.
- Experienced Service Advisors rarely receive continuous motivation and training necessary to maintain peak performance.
- It becomes very difficult to pull a Service Advisor away from the service aisle for long periods to provide formalized training.
- Service Advisors are resistant to outside training because they lose money while away from the dealership.

This **Marine Service Advisor Training Program** is divided into three sections:

- **LEADER'S GUIDE**

The Leader's Guide is utilized by the trainer/manager to provide eleven effective modules of training that can be presented in 20 to 40 minutes. It serves also as an introductory course for new Service Advisors entering an Advisor career. The trainer can add or delete any information necessary. It is meant to be a guide, and not the only training needed to complete the orientation process.

- **WORKBOOK**

This WorkBook is coordinated with the Leader's Guide modules. A WorkBook master copy is provided for in-house duplication. Advisors to be trained should receive their own copies.

- **LESSONS**

Once the Service Advisor is active, the Lessons are used to provide continuous training and motivation without the need to attend formal meetings or seminars. At the beginning of the day, hand out the Lesson(s) you want the Advisor to complete. Check the returned Lesson(s) and provide necessary one-on-one training. Suggested responses are provided in the back of this section. As in the WorkBook, these Lessons are your master copy and should be duplicated for Advisor usage.

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MARINE SERVICE ADVISOR TRAINING PROGRAM

MODULE 1 DEALERSHIP ORIENTATION

■ INTRODUCTION

(Have new employee fill in information on page 1 of workbook)

- Introduce yourself, and have service advisor tell something of himself/herself.

■ COMPANY ORGANIZATION

- Introduce and discuss all dealership departments and explain their relationship to the service department.

— New Boat Sales Department	— Business Office
— Used Boat Sales Department	— Parts Department
— Finance and Insurance	— Service Department
— Boat Preparation Department	— Body Shop

■ MANAGEMENT STRUCTURE

- Introduce and explain dealership management structure.

(each dealership is structured differently)

— Dealer Principal/Owner	— Finance and Insurance Manager
— General Manager	— Service Director
— General Sales Manager	— Service Manager
— New Boat Sales Manager	— Parts Manager
— Used Boat Sales Manager	— Body Shop Manager
— Office Manager/Comptroller	— Customer Relations Manager

- **Tour dealership and introduce employee to everyone.**
- **Tell the history of the dealership.**
- **Talk about the success of the service department.**
- **Review what will take place of over the next several days.**

■ **EMPLOYEE PACKAGE**

(Have new employee fill in information on page 3)

- Job description
- Dress code
- Employee handbook
- Compensation and incentives
- Job performance and evaluations
- Vacation policy
- Employee benefits
- Health and insurance
- Termination policy

MODULE 2

ROLE OF THE SERVICE ADVISOR

An article in the Power Report stated:

“In all probability, consumers’ first impression of a dealership comes when they are greeted by a salesperson. However, the initial meeting that more directly affects the entire ownership experience for new boat buyers is when they are being introduced to a service advisor, hopefully before their first visit for service. That relationship can create enduring positive or negative perceptions of the service department, the dealership, the factory and the boat.”

■ **ROLE OF THE SERVICE ADVISOR**

(Have new service advisor fill out worksheet on page 4, and then debrief. Have advisor supplement worksheet with the following:)

● **To act as the initial contact between the customer and the service department**

A customer’s impression of the service experience begins the moment he/she calls the dealership or pulls the boat into the dealership. The dealership’s reputation is “on-line” with every customer contact. The job of the service advisor is to:

- gather information.
- provide excellent customer service.
- ensure proper treatment.

● **To manage the customer service experience**

Whenever a customer comes in for service, make sure that the customer experience remains pleasant. Pleasant experiences generate loyal customers. Loyal customers return for service regularly and continue to purchase boats from your dealership.

- **To communicate between the customer and other departments**

The repair order is the communication link between service and all other dealership departments. The responsibility of the service advisor is to make sure:

- the service order is filled out completely and properly.
- the customer understands the work to be performed and authorizes the repair.
- the technician understands what needs to be done.
- the parts department supports the technician's request for parts.

- **To gain customer trust**

A customer's trust is based upon the rapport with the advisor. The greater the trust, the more tolerant a customer becomes should problems occur and additional repairs are required.

- **To provide information on products and services**

Service department products and services should be matched against customer needs. Often customers do not understand the service boats need and/or requirements. Therefore by keeping abreast of all products and services available, the advisor can make the necessary recommendations. Some effective ways are:

- service menus (handouts)
- service menu boards
- computerized service pricing guide
- basic factory recommended services (handouts)

- **To observe customer's boat for problems or repairs not mentioned by the customer.**

To minimize additional visits by the customer, the advisor must allow sufficient time to question customers about boat symptoms. This can be accomplished by:

- setting customer appointments in advance.
- doing complete boat walk-around for unmentioned boat repairs and damage.
- reviewing boat repair history.

- **To suggest needed services rather than merely taking orders**

Customers are not experts on boat service needs! Advisors should not be order takers. Service department profitability depends on separate repair concentrations such as:

- mandated factory maintenance.
- customer retail repair/services.
- factory warranty repair per guidelines.
- quick service and easy maintenance to compete with independent shops.

- **To treat the customer the way you would want to be treated**

Put yourself in your customer's shoes and deliver what the customer demands.

Today's customer wants advisors to:

- provide a prompt and pleasant acknowledgment.
- be an active listener to his/her concerns.
- verify and clarify all information received.
- follow-up and provide boat status.
- ensure repairs are completed in a timely manner.
- return boat fixed right and on-time.

- **To keep all promises to the customer**

A Service Advisor needs to be detail-oriented so as not to forget anything that was discussed or mentioned by the customer. This way, it makes it easier to keep all promises made, and retain the trust that was formed by the Service Advisor and the dealership.

MODULE 3

ROLE OF THE SERVICE DEPARTMENT

■ ROLE OF THE SERVICE DEPARTMENT

(Have new service advisor fill out worksheet on page 5, and then debrief. Have advisor supplement worksheet with the following:)

● To be responsible for maintaining and repairing the customer's boat. This is accomplished by having:

- professional service advisors to counsel customers on their service needs.
- current computerized repair order systems.
- adequate numbers of well-trained, qualified and certified technicians.
- state-of-the-art equipment and tools.
- adequate service stalls to accommodate customer traffic.
- up-to-date knowledge of factory repair techniques.
- comfortable waiting area.
- shuttle services.
- a system to meet scheduled promised times.
- a professional level of service.

● To work well with other dealership departments

The service department does not stand alone. Every other department within the dealership has a hand in the successful running of service.

- The Sales Department is responsible to introduce the customer to service and to provide instructions on warranties, service hours, shuttle services, night drop procedures, and where to bring boat in for service.
- The Parts Department is responsible for stocking parts, for finding needed parts outside the dealership, and for ordering parts from the manufacturer.
- The Service Department provides additional support in the areas of warranty claims, preparation and submission, and cashiering for repair orders and over-the-counter parts purchases.

TRAINER CHECK LIST

Service Advisor's Name

Trainer's Name

Module 1

Dealership Orientation

Module 2

Role of the Service Advisor

Module 3

Role of the Service Department

Module 4

Customer Expectations

Module 5

Professionalism and Image

Module 6

How Service Department Gets Customers

Module 7

Service Department Conveniences

Module 8

Service Advisor Appt. Process

Module 9

Who Pays?

Module 10

Potential Areas of Liability

Module 11

Computer Procedures



**Marine
Service Advisor
Training Program**

Workbook



(248) 433-1900 • (800) 453-2787

MARINE SERVICE ADVISOR TRAINING PROGRAM

MODULE 1 DEALERSHIP ORIENTATION

■ INTRODUCTION

■ COMPANY ORGANIZATION

— Dealership departments

- New _____
- Used _____
- Finance and Insurance _____
- Boat Preparation _____
- Business Office _____
- Parts _____
- Service _____
- Body Shop _____

MODULE 1 (cont)

— Management structure

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

— Tour of dealership: introduction of new employee to everyone in the dealership.

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

MODULE 1 (cont)

■ EMPLOYEE PACKAGE

- Job Description
- Dress Code
- Employee Handbook
- Compensation and Incentives
- Job Performance and Evaluations
- Vacation Policy
- Employee Benefits
- Health and Insurance
- Termination Policy

MODULE 2
ROLE OF THE SERVICE ADVISOR

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“In all probability, consumers’ first impression of a dealership comes when they are greeted by a salesperson. However, the initial meeting that more directly affects the entire ownership experience for new boat buyers is when they are being introduced to a service advisor, hopefully before their first visit for service. That relationship can create enduring positive or negative perceptions of the service department, the dealership, the factory and the boat.”

The Service Advisor is one of the most important persons of the dealership. Quality of treatment and service received are the major factors that determine if a customer returns for service and sales.

What do you feel then is the role of the Service Advisor?

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

MODULE 3
ROLE OF THE SERVICE DEPARTMENT

Once a customer buys a boat, the relationship between the customer and the dealership is just beginning. It now becomes paramount to make sure that the customer's ownership experience is as trouble-free as possible.

What is the role of the Service Department?

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

SERVICE ADVISOR CHECK LIST

Service Advisor's Name

Trainer's Name

Module 1

Dealership Orientation

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**Marine
Service Advisor
Training Program**

Lessons



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ROLE OF THE SERVICE ADVISOR

As the initial contact between the customer and the service department, the Service Advisor becomes one of the most important people within the dealership. The customer's impression of the service experience begins with the Service Advisor.

What do you feel then is the role of the Service Advisor?

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

ROLE OF THE SERVICE DEPARTMENT

Whether a customer returns to your dealership for service and/or to purchase additional vehicles depends on the quality of service received. The role of the Service Department then is to support the Advisor's promises to the customer by making the customer's driving experience as trouble free as possible.

What is the role of the Service Department?

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

CUSTOMER EXPECTATIONS

When customers come into the dealership for service, they have certain expectations of both the Service Advisor and the Service Department.

List the customer's expectations of the Service Advisor.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

List the customer's expectations of the Service Department.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

SUGGESTED RESPONSES

Following are some Suggested Responses to the lessons provided. They are merely guidelines to assist Advisors and are not meant to replace Service Advisor creativity and Service Management policy. Suggested Responses are itemized by both topic and page number.

Page 1

Role of the Service Advisor

- To act as a representative of the customer.
- To manage the customer service experience.
- To communicate between the customer and other departments.
- To gain customer trust.
- To provide information on products and services.
- To observe customer's boat for problems or repairs not mentioned by the customer.
- To suggest needed services rather than merely taking orders.
- To treat the customer the way you want to be treated.
- To keep all promises to the customer.

Page 2

Role of the Service Department

- To be responsible for maintaining and repairing customer's boat.
- To provide professional, timely, competent and friendly service.
- To work well with other dealership departments.

Page 3

Customer Expectations

- They expect you to help them solve their problems in the best way.

- They expect you to explain things so even they can understand.
- They expect you to empathize with them.
- They expect you to be honest.
- They expect you to give them help in making the right decision.
- They expect you to be better than independent shops.

Page 5

Professionalism and Image

- Smiling and being eager to assist customers.
- Appearing clean, neat and well-groomed.
- Speaking clearly, avoiding jargon and slang.
- Treating male and female customers with equal respect.
- Approaching your role in the dealership as truly an "advisor" and not merely an "order taker."

Page 6

Communication

Situations

- Dealing with other dealership employees.
- Dealing with customers.
- Handling angry customers.
- Writing a repair order.
- Calling customers on the phone.
- Explaining repairs to the customer so they can understand clearly.
- Conversing with management.
- Explaining repair order to the technician.

Page 29

Questioning

1. Closed
2. Closed
3. Open
4. Open
5. Open
6. Open
7. Closed
8. Closed
9. Open
10. Closed

Page 30

Customer Satisfaction

- Handling irate customers with patience.
- Returning calls in a timely fashion.
- Maintaining a positive attitude.
- Keeping all promises to the customer.
- Smiling and being eager to please.
- Treating all customers with respect.
- Going the extra mile for customers.
- Helping other employees.
- Writing correct repair orders.
- Listening to the customer.

Page 31

Active Listening

Annoying habits

- Interrupting
- Lack of eye contact.
- Holding side conversations.
- No response/feedback.
- Asking questions that have been answered.
- Correcting grammar or word choice.
- Completing sentences of others.
- Showing complete lack of interest.
- Walking away, but claiming to be listening.
- Looking at your watch while customer talks.

- Answering before customer finishes.
- Appearing impatient.
- Conveying false understanding.
- Disagreeing with everything customer says.
- Having bad breath.
- Allowing distractions to interfere.
- Coughing and throat clearing.
- Ignoring customers to answer the phone.
- Grooming, combing hair, putting on make-up.
- Snacking in front of customer.
- Doodling.
- Finger tapping, twisting hair.
- Blank stares.
- Shuffling papers.
- Reading the mail, newspaper.
- Listening to others on the phone.
- Smoking.

Page 45

Goals

Reasons why Advisors don't set goals:

- Fear of attaining goals.
- Don't care.
- Complacent.
- Requires more work.
- Don't know how.
- Too busy.
- Not motivated.
- No rewards.
- No priorities.

Benefits to set goals:

- Build motivation.
- Improve focus.
- Generate confidence.
- Learn to prioritize.
- Increase profit and productivity.
- Establish good habits.
- Improve organization.
- Gain respect.
- Re-establish new goals.

Page 45

Lost opportunities without goals:

- No forward direction.
- No firm priorities.
- Job stability.
- Strong performance.
- Positive attitude.
- Lack of frustration.
- More profit per repair order.

Page 47

Goals: Action Plan

Reasons for planning:

- Insure reaching target.
- Develop feedback.
- Motivation.
- Minimize crises.
- Organization.

Areas worth planning:

- Budgeting time.
- Improving work habits.
- Better customer scheduling.
- Repair order sale increases.

Benefits of planning:

- Improve efficiency.
- Increase productivity and profit.
- Goal achievement.
- Gain confidence.
- Improve work habits.
- Less time wasted.

Negatives from not planning:

- Lack of organization.
- Creates apathy.
- Don't establish priorities.
- Become complacent.
- Lost time.
- Low CSI.

Reasons for not planning:

- Doesn't know how.
- Too busy.
- Avoid accountability.
- Lazy.
- No need.

Page 49

How to Handle a Slump

Four Reasons:

- Slow time of the year.
- Illness.
- Personal problems.
- Problems at work.

Four Ways:

- Improve work habits.
- Work closer with management.
- Talk to more customers.
- Listen to motivational tapes.
- Read more positive attitude books.
- Change mental attitude.

Page 59

Handling Objections

I can't afford it!

- What is the cost of not doing the repair?
- How long do you plan on keeping the boat? (*amortize the cost over months/years.*)
- What happens if the boat breaks down?

I can't afford it right now!

- Can we schedule an appointment after you get your next paycheck?
- I'll make a note in your file so we'll remember it on your next visit.
- We accept most major credit cards.

Page 59

Handling Objections

I can get it cheaper elsewhere!

- Is the technician trained to handle this repair?
- Will you be getting genuine factory parts with a factory warranty?
- Are you sure the parts are in stock? Can you get the repair done today?

It's not convenient!

- We offer courtesy transportation.
- Can we find a day that fits your schedule better?
- Would it be more convenient to do an early-bird dropoff?

I have to think about it!

- May I call you back tomorrow?
- I understand! But be sure you don't let it go too long. You don't want to be stranded without a boat for the summer, do you?
- Certainly. But remember, the coupon expires Friday.

If you'd like to learn more,
you can purchase this program
by visiting the order page.