



**Service
Receptionist**

Body
Specialist

Technician

PRE-COURSE PACK

**Service Organisation and
Service Quality**

CT-RL2010



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Training Services



Introduction

The Service Organisation and Service Quality Course takes a close look at what our customers have a right to expect from us – the quality of service and the efficiency we display.

The course covers:

- customer expectations and how we can match them
- the quality of service we must offer if we are to make a good impression on our customers
- organising service jobs, and the use of information, documentation and teamwork to match customer needs.

To prepare you for this course, please complete the following activities. The information you note down here will be used during the 2 days.

1. What do our customers expect of the service we offer them?

Based on these expectations, how can we make a good impression on our customers?

2. Who do you consider to be part of your dealership team, and how can you make sure everyone works together in an effective way?

3. Information and Documentation

On the course we shall be examining the information and documents you use:

- to do work correctly (such as Mazda checklists for servicing, healthchecks and diagnosis)
- to organise your work effectively (such as planning boards and appointment calendars)
- to explain things to your customer (such as Repair Orders).

Please bring any checklists and documents used in your dealership with you to the course so they can be discussed.

If you have other sources of information you use, but that you cannot bring with you (such as planning boards or computer-based guides), please be ready to discuss how you use them.

Make a note of any of these, so you can remember them easily:

Notes on other information I use

Thank you for completing this pre-course pack.

Please remember to bring this pre-course pack with you on the day of your course.





**Service
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TRAINING MANUAL

Service Organisation and Service Quality

CT-RL2010



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1. Introduction and Objectives
2. Customer Expectations
3. Mazda Service Quality
4. Organising Service Jobs
5. Practical Skills
6. Learning Check



1. Introduction and Objectives

1.1 Welcome

1.2 Workbooks and Course Evaluations

1.3 Passion for Driving

Through excellent service to customers, we aim to live up to the “Passion for Driving” statements:

- As a Mazda driver you can feel the little bit of sports car in every Mazda - Zoom-Zoom !
- We at Mazda Service are here to ensure this special feeling continues throughout your ownership experience.
- We share your passion for cars and we are dedicated to taking care of you and your Mazda. That shows in the way we treat you, the way we look after your car and the good value we provide.
- Making sure every drive leaves a smile on your face - that's what we work for.

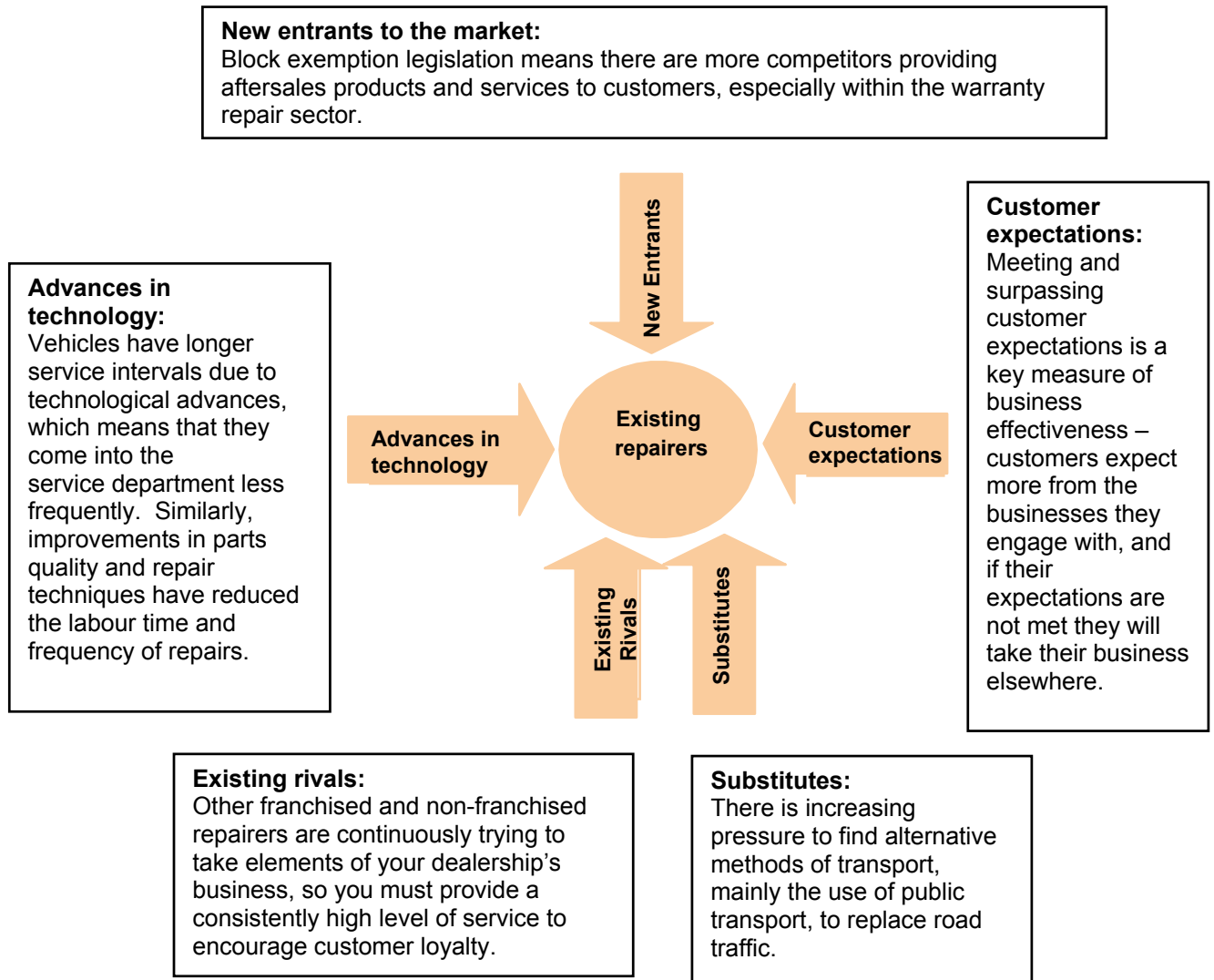
1.4 Purpose and Scope of the Course

The skills we use to organise work in our dealerships have a major impact on our customers – for good and for bad.

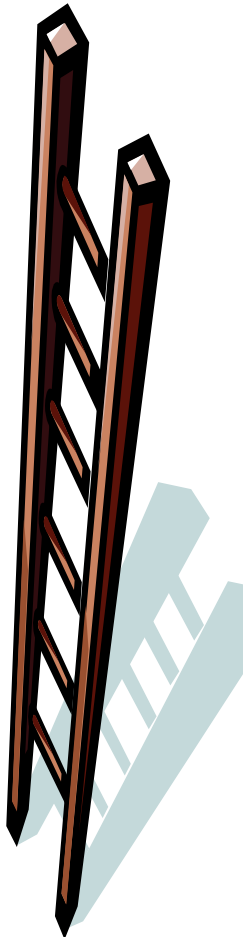
It is also important that everyone in the dealership helps you to provide customer satisfaction.

This course concentrates on how we organise all our work – and the communication, information and documentation that we use to give the customer excellent service.

The Pressures



The Customer Service Ladder



CSI Level	Effect on Customer	Customer Action
EXCELLENT	LOYAL ADVOCATE	<i>Tells everyone about you, refers other people to you and always returns to buy</i>
VERY GOOD	VERY SATISFIED	<i>Tells a few people about you, refers a few people and sometimes returns</i>
GOOD	SATISFIED	<i>May tell someone about you, if asked, and may refer others to you and will buy if convenient to them</i>
FAIR	LOWEST ACCEPTABLE LEVEL	
FAIR	APATHETIC	<i>Tells no-one about you, is not likely to refer anyone but may buy again</i>
FAIR	UNHAPPY	<i>Tells at least 10 people how bad you are, will never refer you to anyone but may come back after a few years</i>
POOR	VERY DISSATISFIED	<i>Tells anyone who will listen how terrible you are, will never refer you to anyone and will never come back</i>

Your Notes

1.5 Course Objectives

By the end of the training, you will have:

- discussed customer expectations, and their importance in delivering excellent service
- agreed the tasks you need to carry out to meet these expectations
- reviewed how all areas of the dealership can support each other in delivering customer satisfaction
- examined the provision of customer service during the acceptance of the vehicle, inside the dealership and during its return
- agreed a set of best-practice rules that can be used as future guidelines during these periods
- reviewed the use of checklists in a range of situations and how they can be used to deliver excellent service
- examined teamwork in the dealership and how it can be used to provide a high level of customer service
- practised the skills learned during the course
- completed a plan for the future.

2. Customer Expectations

By the end of this session you will have:

- discussed customer expectations, and their importance in delivering excellent service
- agreed the tasks you need to carry out to meet these expectations.

2.1 Customer Expectations

We are all customers, and we all expect a certain level of service when we buy something – whether a suit, a meal or a motor vehicle.

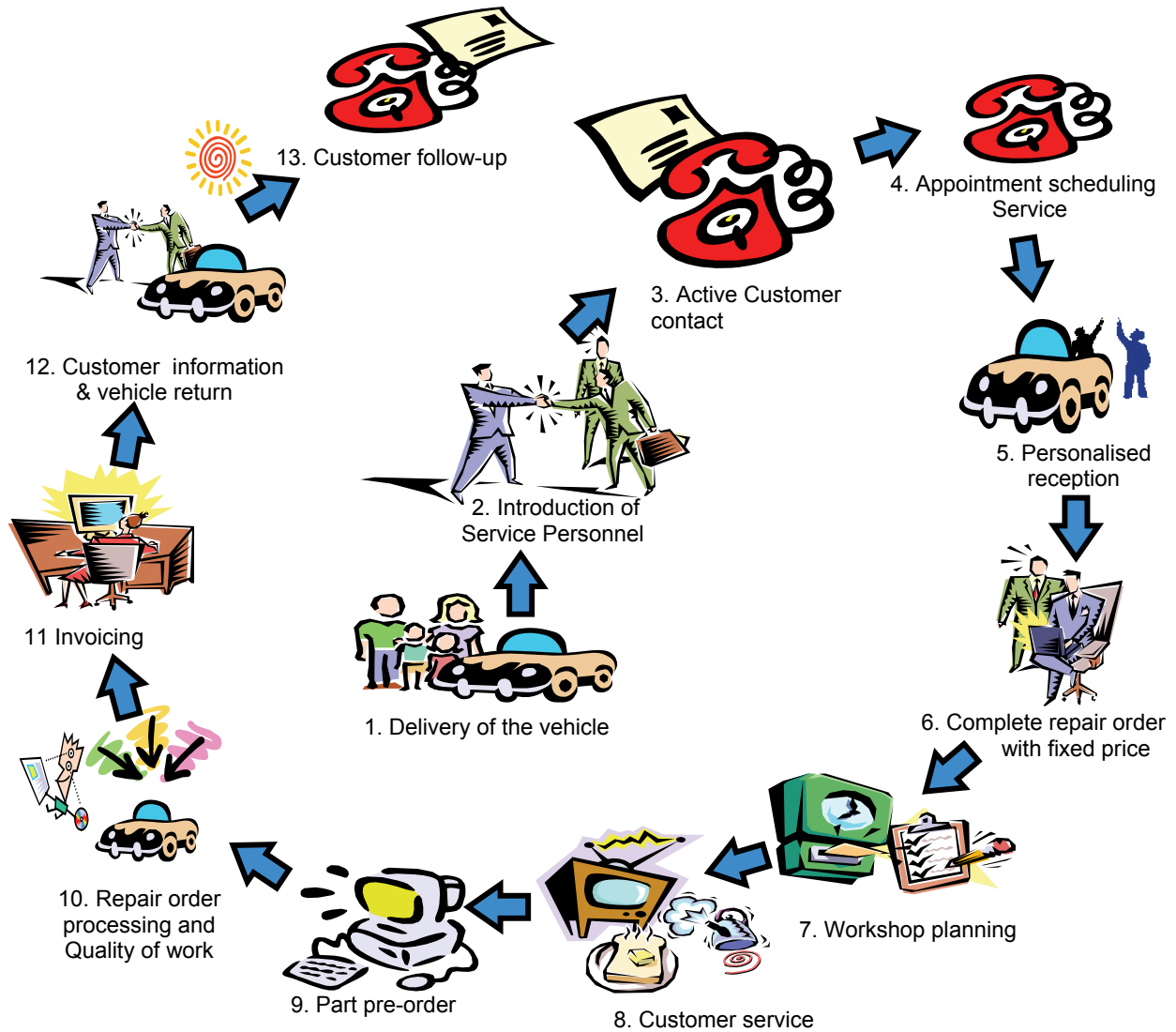
- If these expectations are met we are pleased and satisfied with the service.
- If they are exceeded we are delighted and will be very happy.
- But if our expectations are not met, we are unhappy and disappointed with the service.

If we are disappointed we will do one of a number of things:

1. We complain until the problem is solved, become satisfied with the result and are happy enough to use the supplier again.
2. We complain until the problem is solved, but are still disappointed and never return to that supplier.
3. We say nothing but go away unhappy and determined not to use that supplier again.
4. We say nothing but go away unhappy, advising others not to use that supplier.

Your Notes

2.2 The Customer Process



2.3 Providing Customer Satisfaction

We may know what customers expect.

But what do we have to do to deliver the expectations, and make sure the customer is completely satisfied?



SO1 – PROVIDING CUSTOMER SATISFACTION



Customer Expectations

1. Delivery of the Vehicle		
2. Introduction of Service Personnel		
3. Active Customer Contact		
4. Appointment Scheduling Service		
5. Personalised Reception		

6. Complete Repair Order with Fixed Price		
7. Workshop Planning		
8. Customer Service		
9. Part Pre-order		
10. Repair Order (RO) Processing and Quality of Work		

11. Invoicing	
12. Customer Information & Vehicle Return	
13. Customer Follow-up	

/

2.4 Review of the Session

In this session we have examined the expectations that customers have of the service they will receive from you.



SO2 – SESSION REVIEW

Your Notes



Customer Expectations

3. Mazda Service Quality

The experience that the customer receives during their time at your dealership has to meet Mazda standards – in short, excellent service at every stage of our contact with them.

If we can do this, we have the best possible chance of getting the customer to return, again and again.

By the end of this session you will have:

- discussed the impressions you can make on your customers – for bad as well as good
- examined how to make sure customers keep coming back to you by providing excellent service at various stages of your contact with them
- worked to agree a set of best-practice guidelines that can be used in your dealership.

3.1 Good Impressions



SO3 – IMPRESSIONS

BAD	GOOD

3.2 Best Practice



SO4 – BEST PRACTICE IN THE DEALERSHIP

What is best practice in meeting all the customer's expectations?

- **GROUP A:** during the vehicle acceptance
- **GROUP B:** in the dealership
- **GROUP C:** during return of the vehicle

How can each area impress customers with their skill and expertise?

How can each area provide a service the dealership can be proud of?

How can each area help each other?

Agree a set of best-practice rules based on these questions.

Agree on the TEN best ideas and record these as your Best Practice List.

At the end you will present your ideas and be questioned by the other groups on your thinking.

DURING VEHICLE ACCEPTANCE – STEPS 4, 5 and 6
Actions
MAKE THE APPOINTMENT
WELCOME THE CUSTOMER
PREPARE THE DOCUMENTATION
INSPECT THE VEHICLE WITH THE CUSTOMER



DURING VEHICLE ACCEPTANCE – STEPS 4, 5 and 6
Actions
CHECK THE REPAIR ORDER WITH THE CUSTOMER
COMMUNICATE WITH THE CUSTOMER
QUOTE AND AGREE A FIXED PRICE
LOOK AFTER THE CUSTOMER



DURING VEHICLE ACCEPTANCE – STEPS 4, 5 and 6
Actions



IN THE DEALERSHIP – STEPS 7 to 11
Actions
PLAN THE WORK
INVESTIGATE FAULTS
CARRY OUT THE VISUAL HEALTHCHECK
REPORT FAULTS AND AGREE A FIXED PRICE



IN THE DEALERSHIP – STEPS 7 to 11
Actions
ORDER PARTS
KEEP LOOKING AFTER THE CUSTOMER
LOOK AFTER THE VEHICLE
USE PROFESSIONAL GUIDANCE IN ALL WORK



IN THE DEALERSHIP – STEPS 7 to 11
Actions
COMMUNICATE BETWEEN DEPARTMENTS
KEEP THE CUSTOMER INFORMED
COMPLETE THE REPAIR ORDER AND INVOICE
GET THE VEHICLE READY FOR RETURN

DURING RETURN OF THE VEHICLE – STEPS 12 and 13
Actions
EXPLAIN THE WORK CLEARLY
EXPLAIN THE INVOICE CLEARLY
TAKE PAYMENT
TAKE THE CUSTOMER TO THE CAR





DURING RETURN OF THE VEHICLE – STEPS 12 and 13
Actions

3.3 Service Quality

Service quality depends upon good service organisation:

- planning the work, the communication and the cooperation that delivers excellence to the customer
- delivering to the plan – getting it Right First Time wherever possible
- problem-solving whenever something disrupts the plan
- keeping the customer informed at every stage – with proposed solutions to any problems.

Let's see if we can achieve this in challenging situations.



SO5 – SERVICE QUALITY

Your Notes

3.4 Review of the Session

In this session we have examined service quality; the techniques and skills to be used.



SO6 – SESSION REVIEW

Your Notes



4. Organising Service Jobs

In the previous session we dealt with all the ways in which we can ensure excellent service quality in our contacts with the customer.

In this session we go into more detail on how we organise ourselves, as a team, to achieve that excellent quality.

By the end of this session you will have:

- considered the importance of information and documentation – and where to use it to achieve excellent customer service
- discussed the organisation of that flow of work – from a customer first contacting the dealership to book in their vehicle to collecting it at the end of the process
- examined the checklists, information and documentation that guide us through that flow and enable us to make the best use of resources
- examined the teamwork involved in achieving the work – including contacts between vehicle sales, service reception, the parts department, the workshop and Mazda Motors.

4.1 Information and Documentation

INFORMATION

-

DOCUMENTATION

-



SO7 – INFORMATION AND DOCUMENTATION – EXAMPLES

Information	Documentation
Legal	
Warranty	
Quality	

4.2 The Flow of Work and Documentation

- Appointments calendar
- Checklist for booking appointments
- Planning sheets for specialist requirements
- Repair Order
- Visual Healthcheck
- Vehicle history file
- Digital Service Book
- Paper Service Book
- Customer information sheet
- Service checklists – work to be done at each service
- Suggested repair times
- Diagnostic checksheets (e.g. driveability, steering, audio)
- Vehicle care standards
- Menu prices
- Safe working instructions
- Mazda technical information, including technical bulletins
- E-parts manual
- Checksheets for quality checks and tests
- Checksheets for customer follow-up
- Any others?



Your Notes

4.3 Using Information and Documentation to Organise



SO8 – USING INFORMATION AND DOCUMENTATION TO ORGANISE

How can you use your information and documentation, including checklists, to organise the best-practice service that we have already agreed?

At the end you will present your ideas and be questioned by the other groups on your thinking.



DURING VEHICLE ACCEPTANCE – STEPS 4, 5 and 6	
Actions	Best use of Information/documents
MAKE THE APPOINTMENT	
WELCOME THE CUSTOMER	
PREPARE THE DOCUMENTATION	
INSPECT THE VEHICLE WITH THE CUSTOMER	

DURING VEHICLE ACCEPTANCE – STEPS 4, 5 and 6	
Actions	Best use of Information/documents
CHECK THE REPAIR ORDER WITH THE CUSTOMER	
COMMUNICATE WITH THE CUSTOMER	
QUOTE AND AGREE A FIXED PRICE	
LOOK AFTER THE CUSTOMER	



Organising Service Jobs

DURING VEHICLE ACCEPTANCE – STEPS 4, 5 and 6	
Actions	Best use of Information/documents

IN THE DEALERSHIP – STEPS 7 to 11	
Actions	Best use of Information/documents
PLAN THE WORK	
INVESTIGATE FAULTS	
CARRY OUT THE VISUAL HEALTHCHECK	
REPORT FAULTS AND AGREE A FIXED PRICE	



IN THE DEALERSHIP – STEPS 7 to 11	
Actions	Best use of Information/documents
ORDER PARTS	
KEEP LOOKING AFTER THE CUSTOMER	
LOOK AFTER THE VEHICLE	
USE PROFESSIONAL GUIDANCE IN ALL WORK	

IN THE DEALERSHIP – STEPS 7 to 11	
Actions	Best use of Information/documents
COMMUNICATE BETWEEN DEPARTMENTS	
KEEP THE CUSTOMER INFORMED	
COMPLETE THE REPAIR ORDER AND INVOICE	
GET THE VEHICLE READY FOR RETURN	



DURING RETURN OF THE VEHICLE – STEPS 12 and 13	
Actions	Information/documents to use
EXPLAIN THE WORK AND INVOICE CLEARLY	
TAKE PAYMENT	
TAKE THE CUSTOMER TO THE CAR	
MAKE A FOLLOW-UP PHONECALL	

DURING RETURN OF THE VEHICLE – STEPS 12 and 13	
Actions	Information/documents to use

Your Notes



HO1 – BEST USE OF INFORMATION AND DOCUMENTS

4.4 Working as a Team

It is vital that all areas of your dealership work together with a single aim:

- Everyone consistently delivering an excellent level of service to every customer, **regardless of who has the main contact with them.**

If a customer is dealing with sales – the service department must do everything they can to help

and

If a customer is dealing with servicing – the sales department must do everything they can to help.

How do we do this – and not just between sales and servicing?



Your Notes on Who is in the Team	
Service:	Sales:
Parts:	Dealership Management:
	Mazda:

Part 2 – How does the team work together?

- Group A – how can Sales support Service and Parts?
- Group B – how can Mazda help Service?
- Group C – how can Service and Parts support Sales?

Group A – how can Sales support Service and Parts?

Group B – how can Mazda help Service?

Group C – how can Service and Parts support Sales?

4.5 Review of the Session

In this session we have examined the ways in which you organise service jobs, and the teamwork necessary for this to be successful.



SO10 – SESSION REVIEW

Your Notes

5. Practical Skills



SO11 – PRACTICAL LEARNING

- Situation 1 – GROUP A:
 - A customer has an older Mazda, which has been very reliable up to now. The customer phones the dealership with a problem: it is becoming more difficult to change gear.
 - Initial diagnosis indicates a worn clutch – but after replacement it becomes clear that the gearbox needs to be repaired or replaced – an expensive job, and one that cannot be done immediately.
 - During the wait in the dealership, the customer seems to be very interested in the new Mazda in the showroom.
 - Who would be involved, and how would the team handle this situation so that the customer gets few surprises and excellent service?
- Situation 2 – GROUP B:
 - A customer brings her Mazda in for a service and the replacement of an alternator – the part has been on order and has now arrived.
 - The alternator cannot be fitted until the afternoon – the customer needs the car back soon. But the part is incorrect – it cannot be fitted.
 - Who would be involved, and how would the team handle this situation so that the customer gets the best possible resolution of the problem, in the shortest possible time?
- Situation 3 – GROUP C:
 - A customer has had an intermittent fault with the cruise control – very difficult to diagnose.
 - Two sensors are replaced, and the car is thoroughly road-tested – all is now well.
 - But the customer phones up a week later, very annoyed – the fault has come back.
 - This is beyond the normal knowledge of the dealership team – they need help from Mazda. But they also need to deal with the unhappy customer, who has demanded an immediate courtesy car, even though they are all booked up for a week.
 - Who would be involved, and how would the team handle this situation so that the customer gets the best possible resolution of the problem, in the shortest possible time?



6. Learning Check

Now we will:

- review the two day's learning
- complete a Commitment Plan for implementation on return to work

6.1 Learning Checklist

Make a note of your learning at the end of each session. Note down the information that will be of most use to you on your return to work.

6.2 Learning Quiz

1. List the five main pressures we face today.

2. What is the top rung of the Customer Service Ladder as regards the effect on the customer?

3. If our expectations of the service we receive are exceeded, how do we feel?

4. When we are disappointed we tend to do one of four things. Name two of these.

5. What type of things do customers expect of us these days?

6. State two things that the customer expects during appointment scheduling.

7. State two things that the customer expects during a personalised reception

8. State two things that the customer expects during the return of the vehicle to them.

9. Why is it so important that you are given all the help you need from colleagues when dealing with a customer in the dealership?

10. We use forms for three reasons – one is legal. What are the other two?

11. What is the definition of INFORMATION?

12. What is the definition of DOCUMENTATION?

13. Name two best-practice ways of using the Visual Healthcheck document.

14. Name two pieces of information you would use to give you professional guidance when carrying out the work.

15. Which are the five main groups that make up the total team?

6.3 Commitment Plan

Think back to the learning from the last two days (use the learning check completed at the end of each session to help you) and commit to 5 actions you will carry out on your return to work.

1.
2.
3.
4.
5.

Thank you for your contribution over the last two days and good luck implementing your learning on your return to work.



Learning Check

Notes:

Best Use of Information and Documents

DURING VEHICLE ACCEPTANCE – STEPS 4, 5 and 6	
Actions	Best use of Information/documents
MAKE THE APPOINTMENT	<p>Digital Service Book:</p> <ul style="list-style-type: none"> – Check on history of service, warranty, repairs, accessory sales, breakdowns, parts sales, marketing contacts – Use this information to decide on what the customer needs for this appointment <p>Appointment calendar/planning sheets:</p> <ul style="list-style-type: none"> – Decide on daily capacity for specialist requirements (courtesy car, annual vehicle checks, special diagnostic work, large jobs, specialist technicians) – Decide on daily capacity for hours – Use Suggested Repair Times to plan the use of those hours – Leave gaps for unforeseen problems – Leave gaps for extra work found during routine servicing, so it can be done on the same day – Agree morning and afternoon time-slots with customers – don't plan for all jobs to start first thing in the morning <p>Courtesy car paperwork/insurance forms:</p> <ul style="list-style-type: none"> – Get these ready for anyone wanting a courtesy car – Ask any important questions when organising this service (such as age, driving licence details) <p>Repair Order:</p> <ul style="list-style-type: none"> – Complete Repair Order details as you speak to the customer – Print out the Repair Order ready for them to arrive on the day <p>Parts Order:</p> <ul style="list-style-type: none"> – Pre-order any non-stock parts <p>Customer information:</p> <ul style="list-style-type: none"> – Ask the customer for initial symptoms and take careful note – Discuss possible causes, to prepare the customer's expectations of small or large work, but NEVER suggest the cause until after inspection in the workshop and/or on a road test



Service Organisation and Service Quality – Handout 1

Best Use of Information and Documents

DURING VEHICLE ACCEPTANCE – STEPS 4, 5 and 6	
Actions	Best use of Information/documents
WELCOME THE CUSTOMER	Repair Order: <ul style="list-style-type: none">– Refer to the work – it shows you have planned and are ready Courtesy car paperwork/insurance forms: <ul style="list-style-type: none">– Refer to this – it shows again that you are ready
PREPARE THE DOCUMENTATION	Repair Order: <ul style="list-style-type: none">– Mark missing or partial information, ready to ask the customer Courtesy car paperwork/insurance forms: <ul style="list-style-type: none">– Mark missing or partial information, ready to ask the customer
INSPECT THE VEHICLE WITH THE CUSTOMER	Repair Order: <ul style="list-style-type: none">– Have it with you on a clipboard – add details as you go
CHECK THE REPAIR ORDER WITH THE CUSTOMER	Repair Order: <ul style="list-style-type: none">– Clearly mark all additional work– Ask the customer about initial symptoms of any problems – and record them clearly on the Repair Order Visual Healthcheck: <ul style="list-style-type: none">– Explain what it is – an important safety check for them– Tell them that you will use it
COMMUNICATE WITH THE CUSTOMER	Customer records (on computer or paper): <ul style="list-style-type: none">– Record useful information– Use it to offer services that will be of real benefit to them Marketing or Point-of-Sale Information: <ul style="list-style-type: none">– Use it to present services that are of real benefit to the customer

Best Use of Information and Documents

DURING VEHICLE ACCEPTANCE – STEPS 4, 5 and 6	
Actions	Best use of Information/documents
QUOTE AND AGREE A FIXED PRICE	<p>Suggested repair times:</p> <ul style="list-style-type: none">– Use them to build a fixed price for any work <p>Menu Pricing information:</p> <ul style="list-style-type: none">– Use it to quote a fixed price– Explain exactly what will be done – to ensure no surprises <p>Repair Order:</p> <ul style="list-style-type: none">– Explain the details of further investigation– Use the Repair Order to note the exact process – and when you will come back with a report and any extra work– Use it to record agreed payment method
LOOK AFTER THE CUSTOMER	<p>Repair Order:</p> <ul style="list-style-type: none">– Record customer contact information, so that you can contact them about extra work, delays or successful completion of work



Service Organisation and Service Quality – Handout 1

Best Use of Information and Documents

IN THE DEALERSHIP – STEPS 7 to 11	
Actions	Best use of Information/documents
PLAN THE WORK	<p>Appointment calendar/planning sheets:</p> <ul style="list-style-type: none"> – Check that pre-booked work has been scheduled – Fill in gaps in the schedule for investigations, checks and the use of specialist skills
INVESTIGATE FAULTS	<p>Test drive report:</p> <ul style="list-style-type: none"> – Use it to start the diagnostic process – Do this early – to give time to fix as many faults as possible during the day <p>Diagnostic guidance (such as diagnostic checksheets):</p> <ul style="list-style-type: none"> – Use them to ensure thorough diagnosis and to get to the real cause
CARRY OUT THE VISUAL HEALTHCHECK	<p>Visual Healthcheck:</p> <ul style="list-style-type: none"> – Carry it out thoroughly – Do it early – to give time to fix as many faults as possible during the day – Use it to offer extra services – Attach it to fixed-price quotations
REPORT FAULTS AND AGREE A FIXED PRICE	<p>Fixed-price quotation:</p> <ul style="list-style-type: none"> – Use it to present a professional solution to the customer – Link it to diagnostic reports and the Visual Healthcheck – Bring in another technician who has inspected or driven the vehicle, to explain the situation professionally – Use it to confirm the customer's agreement to extra work <p>Parts information:</p> <ul style="list-style-type: none"> – Use it to check price and availability – Try to get parts to do the extra work today <p>Appointment calendar/planning sheets:</p> <ul style="list-style-type: none"> – Use them to book any agreed work

Best Use of Information and Documents

IN THE DEALERSHIP – STEPS 7 to 11	
Actions	Best use of Information/documents
ORDER PARTS	<p>Parts Order:</p> <ul style="list-style-type: none"> – Order agreed parts immediately, for the agreed date
KEEP LOOKING AFTER THE CUSTOMER	<p>Customer contact information:</p> <ul style="list-style-type: none"> – Use it to keep the customer informed <p>Customer's time constraints and location:</p> <ul style="list-style-type: none"> – Use this information to offer solutions caused by delays or extra work
LOOK AFTER THE VEHICLE	<p>Vehicle care standards:</p> <ul style="list-style-type: none"> – Use these as the checklist for vehicle care <p>Safe working instructions:</p> <ul style="list-style-type: none"> – Use these as the checklist for safe handling of vehicles
USE PROFESSIONAL GUIDANCE IN ALL WORK	<p>Checksheet Generator:</p> <ul style="list-style-type: none"> – Use this for any relevant guidance documents <p>Mazda technical information, including technical bulletins:</p> <ul style="list-style-type: none"> – Use this to ensure that work is done to the correct standard <p>Service checklists – work to be done at each service:</p> <ul style="list-style-type: none"> – Use these as the lists of the work that must be carried out <p>Procedures for quality checks and tests:</p> <ul style="list-style-type: none"> – Use these as checklists for effective quality checks – Ensure that the customer gets a job done right first time <p>E-parts manual:</p> <ul style="list-style-type: none"> – Use it to select the correct part for each vehicle <p>Suggested repair times manual:</p> <ul style="list-style-type: none"> – Use it to plan the work – Use it to check on productivity



Service Organisation and Service Quality – Handout 1

Best Use of Information and Documents

IN THE DEALERSHIP – STEPS 7 to 11	
Actions	Best use of Information/documents
COMMUNICATE BETWEEN DEPARTMENTS	<p>Planning boards:</p> <ul style="list-style-type: none">– Use these as a visual display of the work to be done– Have discussions with team members, around these boards– Use them to plan, monitor and control work <p>Information boards:</p> <ul style="list-style-type: none">– Use these to communicate important information, such as technical issues or priority work
KEEP THE CUSTOMER INFORMED	<p>Information from colleagues or suppliers:</p> <ul style="list-style-type: none">– Check constantly on the progress of all work you have promised– Check on supply of parts against promised deliveries– (unless you are doing all the work on the vehicle) <p>Repair Order:</p> <ul style="list-style-type: none">– Record any problems on the repair order – so anyone can see the situation and answer customer questions– Develop options and record them here– Contact the customer and record the agreed solution – such as another appointment
COMPLETE THE REPAIR ORDER AND INVOICE	<p>Repair Order:</p> <ul style="list-style-type: none">– Use all the information here to prepare a correct invoice– Check against the invoice– Mark all points that need to be discussed with the customer– Use it to prepare a professional and positive return of the vehicle to the customer <p>Visual Healthcheck:</p> <ul style="list-style-type: none">– Prepare your report to the customer on what this document says <p>Diagnostic reports (such as emissions or annual vehicle check):</p> <ul style="list-style-type: none">– Prepare your report to the customer <p>Invoice:</p> <ul style="list-style-type: none">– Prepare the way you will present the positive solutions that you are invoicing for <p>Quotations for extra work:</p> <ul style="list-style-type: none">– Prepare fixed-price quotations for extra work– Prepare how you will present the quotation, and the benefits of carrying out the work at an agreed appointment

Best Use of Information and Documents

IN THE DEALERSHIP – STEPS 7 to 11	
Actions	Best use of Information/documents
GET THE VEHICLE READY FOR RETURN	<p>Service book (Digital or paper):</p> <ul style="list-style-type: none">– Make sure that it is fully completed– Place it on the passenger seat with other items, such as the alloy wheel key <p>Final checklist:</p> <ul style="list-style-type: none">– Use this to check everything from the customer's point of view– In particular, check that main faults have been corrected (test them)



Service Organisation and Service Quality – Handout 1

Best Use of Information and Documents

DURING RETURN OF THE VEHICLE – STEPS 12 and 13	
Actions	Information/documents to use
EXPLAIN THE WORK AND INVOICE CLEARLY	Repair Order, Visual Healthcheck, Diagnostic reports, invoice and quotations for extra work: <ul style="list-style-type: none">– Present these in the way you have prepared– Start with all the positive things – completion of all work; solution of all problems; price matching the fixed-price quotation– Give advice on extra work to be done – and when– Agree extra work – and an appointment
TAKE PAYMENT	Payment rules (such as credit limits and personal identification): <ul style="list-style-type: none">– Ensure that payment meets the rules – so that there are no bad debts
TAKE THE CUSTOMER TO THE CAR	Service Book and other information for the customer: <ul style="list-style-type: none">– Point out that everything has been correctly completed– Make sure that the customer has all the correct documentation
MAKE A FOLLOW-UP PHONECALL	Customer contact log: <ul style="list-style-type: none">– Use this to call the customer at the correct time– Record the result of the conversation Satisfaction or Complaint Action Report: <ul style="list-style-type: none">– Complete these carefully and send to the correct person for action– Speak to the appropriate manager to explain any action required – you have been the most direct contact with the customer's needs and problems



**Service
Receptionist**

Body
Specialist

Technician

LEVEL TEST

Service Organisation and Service Quality

CT-RL2010



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Training Services



Introduction

This document contains the Level Test for the CT-RL2010 Service Organisation and Service Quality Course.

Delegates carry out a Level Test to confirm their capability after attending the course.

Instructions

Hand the Situation and Solution pages for the Level Test to the delegate.

Explain the following to the delegate:

- This tests the delegate's knowledge of what should be done in each of the situations
- The delegate has 30 minutes to complete this test
- The delegate should write his or her answers in the Solution pages, under the relevant numbered headings for each situation
- In the Solution pages, for each situation, we show the main categories of learning being tested (for example, 'Best practice when making the appointment') – this avoids the delegate having to repeat learning aspects that they have already covered in an earlier situation
- In marking the delegate's solution, we award approximately half the available marks for mentioning each aspect (such as 'Responding immediately on the phone') that demonstrates application of the learning from the course
- We award, as a maximum, the other half of the marks, if the delegate gives a brief description of how they would carry out that aspect (such as, under 'Responding immediately on the phone', using a welcoming and relaxed tone; recognising and using the name of the customer) – but we are not looking for a lot of detail.

At the end of the 30 minutes, review the answers and ask the delegate to clarify any answers that are unclear or illegible. Do not attempt to correct the delegate's answers or indicate whether the answers are right or wrong.

Mark this test later, using the Marking Sheet included in this document.

Send all the paperwork for that delegate to the necessary reviewer for checking, the final decision on whether the Level test has been passed, and the award of any certificate.

THE SITUATION

You are the Service Advisor in a medium dealership. Your prime role is customer service – booking services/repairs, answering customer enquiries over the phone and face-to-face, sourcing parts, scheduling for the workshop, liaising with the bodyshop and accepting and handing over new vehicles. Today is like any other day, there is a busy schedule of vehicles arriving for service/repair and a delivery of new vehicles. Detailed below are four scenarios from your typical day. Read through each one and then note down in the space provided how you would handle each one.

NUMBER ONE

Mr Holmes is a long-standing customer who has bought four Mazda vehicles in the last ten years. He can be awkward at times, but he is loyal. He has had his current Mazda6 for almost two years and it is due for a 25,000 mile/2 year service. Historically, he has always bought petrol driven cars, but he has been enquiring about a 2 litre diesel and when he telephones you to book his car in for service, he asks that instead of the usual courtesy car that he is provided with a MazdaTS2 2 litre diesel to test drive for the day. You don't have the vehicle he wants available. What can you do to manage his expectations and retain his business?

NUMBER TWO

Mrs Jackson loves her six year old MX5. It is in excellent condition and has been maintained very well by your dealership. Normally when it is being serviced she is happy to wait in reception until the work is done or to go into town for a couple of hours and return around lunch time.

Today the car is due for a major service and the technicians need to investigate a scraping sound from the front brakes and what appears to be a knocking noise from the exhaust. Considering the type of customer Mrs Jackson is, and the vehicle she drives, put together a plan of action that will provide a level of customer service that will delight her so much she will want to tell her friends about you.

NUMBER THREE

Maintaining up-to-date information and documentation is not a priority in your business. Too often mistakes are made because incorrect information has been taken, key information missed or critical documents mislaid. You decide it is time to put things right.

Write down the main pieces of information or documentation that you need, and one idea for making best use of each, for each of the following actions in the dealership:

- Making the appointment
- Welcoming the customer
- Inspecting the vehicle with the customer
- Reporting faults and agreeing a fixed price
- Explaining the work and invoice clearly, when returning the vehicle.

THE SOLUTION

NUMBER ONE

Best practice when making the appointment – including teamwork

NUMBER TWO

Best practice when making the appointment, when welcoming and communicating with the customer, when investigating and reporting extra work, when carrying out the work and when returning the vehicle

THE SOLUTION

NUMBER THREE

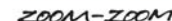
Best use of information and documentation, when:

- **Making the appointment**
- **Welcoming the customer**
- **Inspecting the vehicle with the customer**
- **Reporting faults and agreeing a fixed price**
- **Explaining the work and invoice clearly.**



zoom-zoom

SOLUTIONS FOR NUMBER ONE		
ACTION	MAXIMUM MARKS TO AWARD	MARKS GIVEN
Best practice when making the appointment – including teamwork		
– Responding immediately on the phone:	5	
– Items such as: using a welcoming and relaxed tone; recognising and using the name of the customer	5	
– Offering the earliest possible date – depending on requirements:	5	
– Items such as: offering the customer the earliest date with a courtesy car, but offering another convenient solution for the test-drive in a diesel car; offering the alternative of waiting until the diesel is available	5	
– Offering flexible times:	5	
– Items such as: matching customer needs and workshop loading	5	
– Agreeing all services – including teamwork:	5	
– Items such as: briefing Sales on the potential sales opportunity from the customer; organising someone from Sales to demonstrate the diesel car when it is available; asking about any other work required	5	
– Pre-ordering non-stock parts:	5	
– Items such as: checking all parts are available	5	
	50	
Supporting comments (continue on reverse if necessary)		



SOLUTIONS FOR NUMBER THREE		
ACTION	MAXIMUM MARKS TO AWARD	MARKS GIVEN
Best use of information and documentation:		
When making the appointment: appointment calendar or planning sheets	5	
Items such as: using appointment calendar and planning sheets to schedule main jobs and specialists; leaving gaps for unforeseen problems; agreeing morning and afternoon slots for customers	5	
Welcoming the customer: repair order or courtesy car paperwork	5	
Items such as: using the repair order to show you have planned and are ready; using courtesy car paperwork and insurance forms properly	5	
Inspecting the vehicle with the customer: repair order or Visual Healthcheck	5	
Items such as: using the repair order on a clipboard; adding details as you go; explaining the importance of the Visual Healthcheck and telling the customer you will use it	5	
Reporting faults and agreeing a fixed price: fixed-price quotation, Visual Healthcheck, parts information or planning sheets	5	
Items such as: linking the fixed-price quotation to the diagnostic reports and Visual Healthcheck; bringing in a technician to explain the work needed; using parts information to check availability; using planning sheets to plan the extra work	5	
Explaining the work and invoice clearly, when returning the vehicle: repair order, Visual Healthcheck, diagnostic reports, invoice or quotations for extra work	5	
Items such as: present all the items that have been dealt with; start with the positives – things done, price as quoted; give advice on extra work to be done; agree extra work – and an appointment	5	
	50	
Supporting comments (continue on reverse if necessary)		