



**Service
Receptionist**

Body
Specialist
Technician

TRAINER GUIDE

Service Organisation and Service Quality

CT-RL2010



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Training Services**

Symbols Used in this Guide



Pre-Course Work



Handout



Slide



Activity/Role-Play



Symbols Used in this Guide

1.	Introduction and Objectives.....	½ hour
2.	Customer Expectations	2½ hours
3.	Mazda Service Quality	3 hours
4.	Organising Service Jobs	3 hours
5.	Practical Skills	2 hours
6.	Learning Check	1 hour

DISCLAIMER: This course has been written for the whole of Europe. The Trainer must check that any legal aspects apply in their own country, and modify the course content where necessary.



Introduction and Objectives

1. Introduction and Objectives

1.1 Welcome



1 – The Course

Welcome the delegates, introduce yourself, and explain the domestic arrangements for the period of the course.

Go through those items appropriate to the venue:

- ***Times: Start/Finish/Breaks - Coffee, Tea and Lunch***
- ***Smoking rules***
- ***Toilet locations***
- ***Fire alarm procedures***

Leave immediately if the alarm rings

Evacuation Points/Fire Exits

Muster Point

- ***Check that all delegates are present – advise reception of any missing.***

1.2 Workbooks and Course Evaluations

Explain the purpose of the Workbooks that each delegate has been given – both during and after the course.

Also advise delegates that at the end of the course you will be asking them to consider the learning they have been given, and comment upon it by completing a Course Evaluation Form.

1.3 Passion for Driving



2 – Passion for Driving

Show this slide to delegates, and explain that this concept lies at the heart of these courses. The aim is to give delegates the ability to live up to the 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



3 – Purpose and Scope

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.

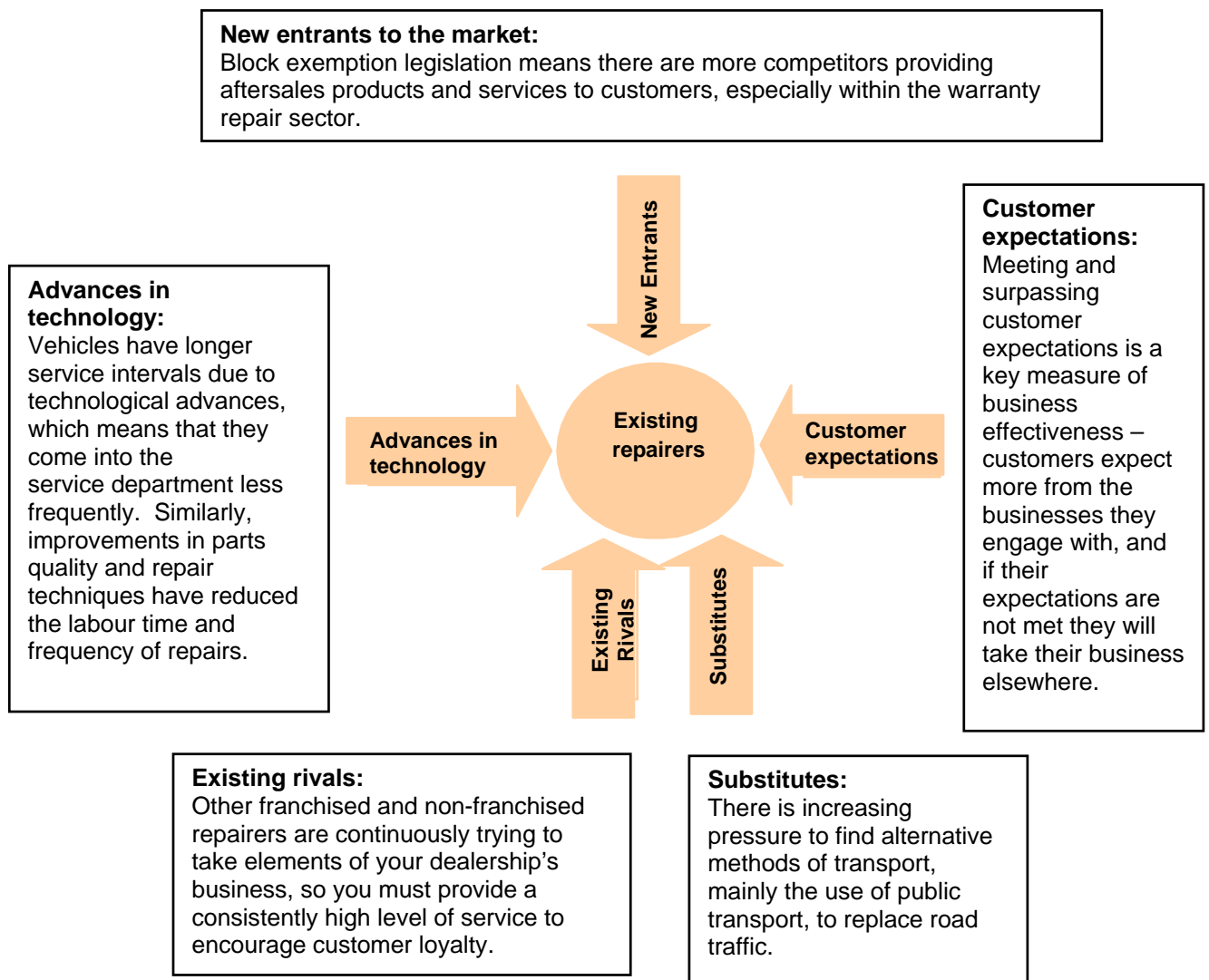
This course concentrates on how we organise all our work – and the communication, information and documentation that we use to give the customer excellent service.

The Pressures

Discuss the following chart that shows the pressures now faced by dealerships – and service departments in particular.



4 – The Pressures



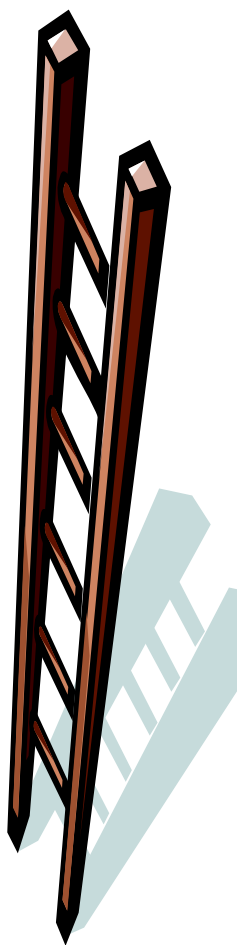
Explain also that there are other recent additional pressures to be added to this existing model: environmental regulations; taxes; cost increases; financial regulations

Remind delegates of the Customer Service Ladder, or explain it to them if they have not attended the Service Communication – Advanced course.

Describe how the aim is to make sure all customers reach the top of this ladder, through the provision of excellent customer service by dealership staff.



5 – 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	
	APATHETIC	<i>Tells no-one about you, is not likely to refer anyone but may buy again</i>
	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

Ask delegates to briefly state how they think customers can be moved up the ladder.

Look for examples such as:

- ***being dealt with quickly and efficiently***
- ***making no mistakes during the process***
- ***high competence of staff***
- ***not being over-charged***
- ***keeping to delivery dates.***

1.5 Course Objectives



6 – 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.

End the Introduction by asking delegates for their own objectives.

Write these on a flipchart and refer to them during the course as the points are dealt with.

2. Customer Expectations

By the end of this session you will have:



7 – Customer Expectations: Objectives

- 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



Ask delegates to refer to their pre-course work, and the section headed 'What do our customers expect of the service we offer them?'

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:



8 – If we are disappointed

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.



Discuss the pre-course work and delegates' own ideas on what customers expect. List them on a flipchart and then ask delegates, in full group, to prioritise them.

Look for examples such as:

- *answering the telephone quickly*
- *not being left on hold for long periods*
- *knowing the price of everything – and being accurate*
- *general politeness.*

Agree a final list of the most important – no more than FIVE – in order of importance.

List these on the flipchart.

Move on to discuss the changes that have taken place over the last few years.

- *Have customer expectations changed?*
- *What things used to be important to them that are not now?*
- *Are their service expectations exactly the same?*
- *Is service more important than the quality of work?*
- *Do they matter equally as much?*

Encourage delegates to make notes.

Your Notes

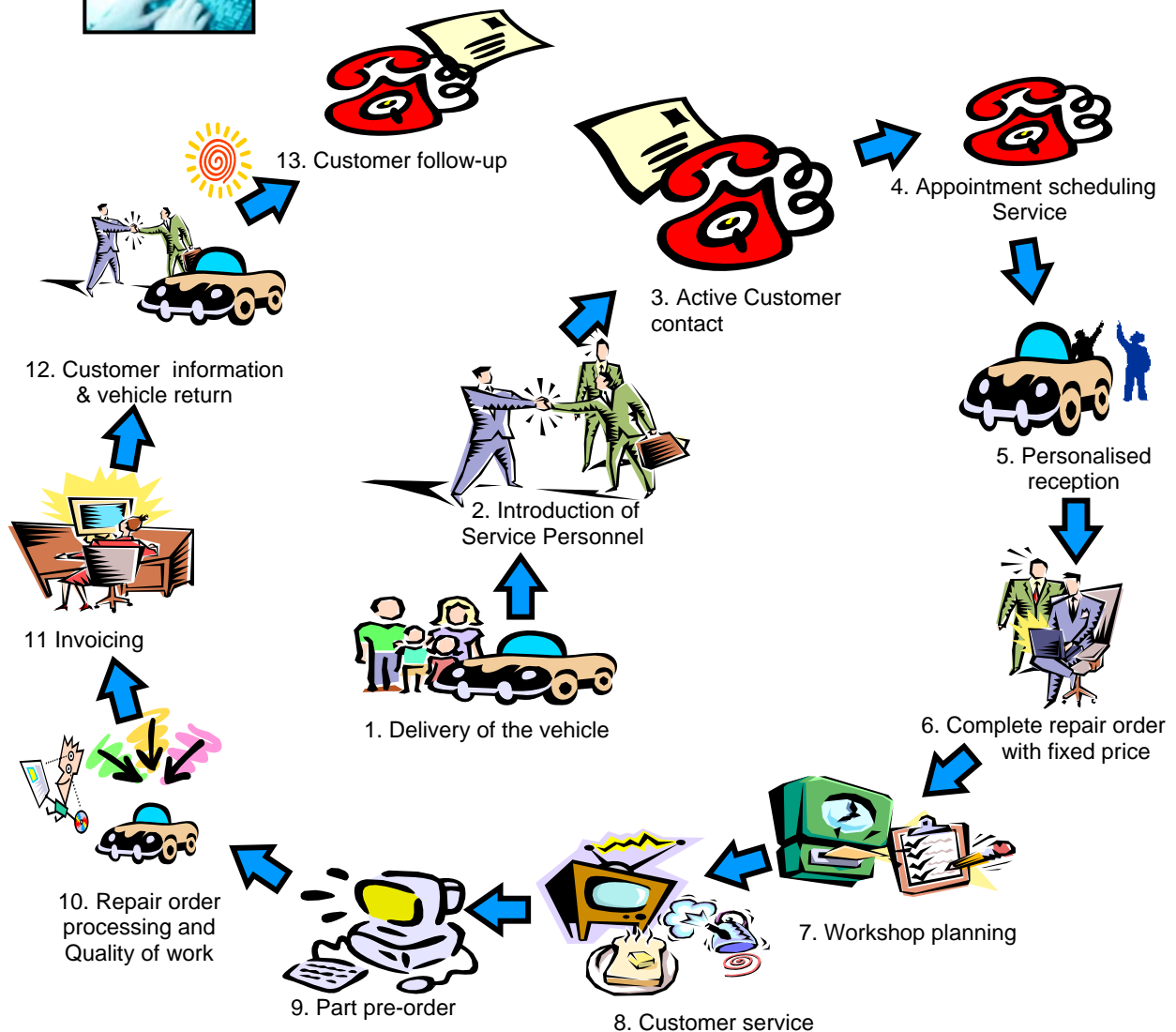
2.2 The Customer Process

Show the following slide and point out that:

- *This slide illustrates the same typical customer process that was introduced in the two Service Communication courses.*
- *This process starts before the service department gets involved – but shows the importance of meeting customer expectations that may have been set when the vehicle is originally sold to them in Stage 1.*
- *The customer has expectations of excellence at every stage in this customer journey.*



9 – A Typical 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

Split the delegates into two or three groups to consider the question:

“What personal actions can we take that will make sure our customers are completely satisfied with the service we provide them at all stages of the Customer Process?”

Ask delegates to consider the question at each stage of the process.

Allocate different stages to each group.

Allow about 10 minutes’ preparation time, bring the groups back together, and allow 15 minutes to agree a list of appropriate actions.

Customer Expectations

1. Delivery of the Vehicle	<ul style="list-style-type: none"> – <i>The exact specification ordered</i> – <i>The vehicle in perfect condition – fully checked</i> – <i>A memorable handover – with gifts</i> – <i>Clear explanation of the vehicle</i>
2. Introduction of Service Personnel	<ul style="list-style-type: none"> – <i>Clear explanation of the service organisation</i> – <i>Introduction to the Service Advisor</i> – <i>Clear explanation of maintenance requirements</i> – <i>Next scheduled visit – or a reminder promise</i> – <i>Information on other beneficial services</i>
3. Active Customer Contact	<ul style="list-style-type: none"> – <i>Follow-up call and action to ensure all is well</i> – <i>Reminders for service</i> – <i>Information on special offers of benefit to them</i> – <i>Finding out all work and planning timescales</i> – <i>Flexible times (morning or afternoon, etc.)</i> – <i>Courtesy facilities (courtesy car, lift to work)</i>
4. Appointment Scheduling Service	<ul style="list-style-type: none"> – <i>Immediate response on the phone</i> – <i>An appointment immediately or in a few days' time</i> – <i>Finding out all work and planning timescales</i> – <i>Flexible times (morning or afternoon, etc.)</i> – <i>Courtesy facilities (courtesy car, lift to work)</i>
5. Personalised Reception	<ul style="list-style-type: none"> – <i>Friendly welcome</i> – <i>Checking all work</i> – <i>Immediate diagnosis</i> – <i>Courtesy car, lift etc.</i>

6. Complete Repair Order with Fixed Price	<ul style="list-style-type: none"> – Full explanation of all work – Correct identification of what is under warranty – Fully explained fixed price including parts, labour and taxes, and agreement before proceeding – Promised contact on further work and agreement before proceeding
7. Workshop Planning	<ul style="list-style-type: none"> – Effective planning of work and parts, so promised timescales are met
8. Customer Service	<ul style="list-style-type: none"> – Comfortable waiting area and facilities – Courtesy car or lift – Immediate information on problems or delays, with options offered – Correct explanation of extra work, with fixed price and agreement before proceeding – Organisation of extra work that day or on a convenient day
9. Part Pre-order	<ul style="list-style-type: none"> – Parts in for planned work in stock – Excellent access to parts for extra work so most problems fixed that day
10. Repair Order (RO) Processing and Quality of Work	<ul style="list-style-type: none"> – All details carefully noted – Good communication to workshop – Trained technicians and strong supervision – Excellent facilities and equipment – Accurate time estimates – Immediate information on problems or delays – Quality checks on the work done – Clear explanation of healthchecks, further work and further fixed-price quotations – Professional offers of extra services, if they are based on knowledge of their needs and are therefore of real benefit to them

11. Invoicing	<ul style="list-style-type: none"> – <i>Accurate and detailed invoice</i> – <i>Price that matches quotation exactly</i> – <i>Clear reports on work done or still to be done (e.g. Healthchecks)</i>
12. Customer Information & Vehicle Return	<ul style="list-style-type: none"> – <i>Clear explanation of what has been done – in terms that the person can understand</i> – <i>Clear explanation of the invoice</i> – <i>Advice on further things to watch or to be done</i> – <i>Car cleaned if possible</i> – <i>Evidence of care (such as stamped service book on seat; seat and floor covers)</i>
13. Customer Follow-up	<ul style="list-style-type: none"> – <i>Phone-call within a few days</i> – <i>Knowledge of their name, their requirements and their needs (e.g. further information on something discussed)</i> – <i>Being asked if everything is perfect</i> – <i>Immediate and effective action if anything is not perfect</i>

IMPORTANT: Sum up the key point from this activity: the customer expects, and demands, **NO SURPRISES** (except pleasant ones).

This includes professionally managing the customer's expectations at all stages (so, if there is a problem, the customer knows early on how serious it COULD be).

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

Split the delegates into pairs and ask them to think about the three most important learning points from this session.

Ask them to write the points down in the table below and be prepared to present their findings.

If pairs come up with the same points, get them to add to the previous pairs' comments. Coming up with the same points shows their importance.

Your Notes

End by asking delegates to turn to Session 6 and add any learning points to their learning checklist.

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:



10 – Mazda Service Quality: Objectives

- 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

Split the delegates into two or three groups.

The activity involves each group thinking of TEN of the things about themselves and their dealership that can give a BAD impression to their customers.

Ask them to record them all in the table below in the column headed: BAD.

BAD	GOOD

Once the BAD impressions are recorded, ask them to think about the opposite – the GOOD.

Delegates should write in the GOOD column what effect they can have on customer service if they turn the BAD into GOOD.

3.2 Best Practice

Explain that in this part of the course you are going to work with the delegates to agree best practice in a number of areas – best practice that aims to make sure customers remember the service they are been given – and like it so much that they are very happy to return.



SO4 – BEST PRACTICE IN THE DEALERSHIP

In this activity the aim is to examine three areas of the dealership and decide on best practice in customer service for each.

This is a practical session in which delegates will be able to agree a set of guidelines everyone can follow.

Split the delegates into three groups – one to examine each stage in the process – see below for the three stages.

Remind delegates of the Customer Process. Point out that in this activity you will be focusing on the steps that relate directly to service, in three stages:

- *Vehicle Acceptance – Steps 4 to 6 – from making the appointment to agreeing a fixed-price repair order*
- *In the Dealership – Steps 7 to 11 – from workshop planning to invoicing*
- *During Return of the Vehicle – Steps 12 and 13 – vehicle return and follow-up.*

Ask the groups to consider the practical actions they should take, including the forms they use to improve communication with customers.

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

- **GROUP A:** during the vehicle acceptance – *when making the appointment and then taking the vehicle over from the customer: steps 4, 5 and 6 in the Process*
- **GROUP B:** in the dealership – *all the time when the vehicle is in the care of the workshop: steps 7 to 11 in the Process*
- **GROUP C:** during return of the vehicle – *when handing the vehicle back to the customer and making sure all is well: steps 12 and 13.*



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.

At the end of each presentation open the debate to all delegates and get those in the other groups to question any ideas they do not agree with.

At the end all delegates should record the ideas in the appropriate table.

Some guidelines are shown below in bold and italic; these should be mentioned if the delegates do not think of them on their own.

DURING VEHICLE ACCEPTANCE – STEPS 4, 5 and 6
Actions
MAKE THE APPOINTMENT <ul style="list-style-type: none"> – <i>Respond immediately on the phone – and be welcoming</i> – <i>Offer the earliest possible date – depending on requirements (courtesy car, anticipated parts, specialist skills)</i> – <i>Offer flexible times that match customer need with workshop loading (morning or afternoon etc.)</i> – <i>Agree all services (such as courtesy car)</i> – <i>Pre-order any non-stock parts</i>
WELCOME THE CUSTOMER <ul style="list-style-type: none"> – <i>Where possible on the forecourt, to help them with parking, but in any case in the reception area</i> – <i>If they have to wait for attention, make them comfortable (seat, coffee etc.)</i>
PREPARE THE DOCUMENTATION <ul style="list-style-type: none"> – <i>Have the Repair Order ready</i> – <i>Have any booked courtesy car/lift ready</i> – <i>Have any forms for courtesy car insurance ready</i> – <i>Mark missing or partial details (such as telephone number; VIN; extra work needed) so you can ask.</i>
INSPECT THE VEHICLE WITH THE CUSTOMER <ul style="list-style-type: none"> – <i>Use the Repair Order – add missing details</i> – <i>Suggest obvious extra services – such as tyres</i>

DURING VEHICLE ACCEPTANCE – STEPS 4, 5 and 6	
Actions	
CHECK THE REPAIR ORDER WITH THE CUSTOMER <ul style="list-style-type: none"> – <i>Complete all the details</i> – <i>Ask if there is anything else</i> – <i>Get initial symptoms of any faults</i> – <i>Tell them you will carry out the Visual Healthcheck</i> 	
COMMUNICATE WITH THE CUSTOMER <ul style="list-style-type: none"> – <i>Find out about their motoring – so any extra services you offer will be relevant to them (such as a spares pack if they are going on holiday).</i> 	
QUOTE AND AGREE A FIXED PRICE <ul style="list-style-type: none"> – <i>Use menu pricing; quote for agreed work</i> – <i>Agree further investigation and how long it will take</i> – <i>Promise further quotation before more work is done</i> – <i>Agree payment method (to avoid problems later).</i> 	
LOOK AFTER THE CUSTOMER <ul style="list-style-type: none"> – <i>Make them comfortable if they are waiting</i> – <i>Organise courtesy car or lift</i> – <i>Make sure you can contact them during the day.</i> 	



DURING VEHICLE ACCEPTANCE – STEPS 4, 5 and 6
Actions

IN THE DEALERSHIP – STEPS 7 to 11	
Actions	
PLAN THE WORK <ul style="list-style-type: none"> – <i>Check that pre-booked work has been scheduled</i> – <i>Plan any investigation or checks</i> – <i>Identify and plan specialist skills where necessary</i> 	
INVESTIGATE FAULTS <ul style="list-style-type: none"> – <i>Arrange a test drive with the right person – you or another</i> – <i>Do this early – to give time to fix it during the day</i> 	
CARRY OUT THE VISUAL HEALTHCHECK <ul style="list-style-type: none"> – <i>Do this early – so work can be agreed and done today</i> 	
REPORT FAULTS AND AGREE A FIXED PRICE <ul style="list-style-type: none"> – <i>Combine results from investigation and Healthcheck</i> – <i>Create a fixed-price quotation</i> – <i>Check parts availability</i> – <i>Explain the situation – with another technician if needed</i> – <i>Agree price and timescale – try to do it today</i> – <i>Book another appointment if needed</i> 	

IN THE DEALERSHIP – STEPS 7 to 11	
Actions	
ORDER PARTS <ul style="list-style-type: none"> – <i>Check that parts for planned work are available</i> – <i>Immediately order parts for extra work</i> 	
KEEP LOOKING AFTER THE CUSTOMER <ul style="list-style-type: none"> – <i>Check that they are still comfortable</i> – <i>Sort out any problems caused by delays or extra work</i> 	
LOOK AFTER THE VEHICLE <ul style="list-style-type: none"> – <i>Use seat and floor covers</i> – <i>Protect bodywork when working on the engine</i> – <i>Follow safe practice when driving or lifting vehicles</i> – <i>Clean the car</i> 	
USE PROFESSIONAL GUIDANCE IN ALL WORK <ul style="list-style-type: none"> – <i>Diagnostic processes</i> – <i>Mazda service and repair guidance</i> – <i>Mazda technical information</i> – <i>Parts information</i> – <i>Guidance from experienced colleagues</i> – <i>Quality checks and tests</i> 	

IN THE DEALERSHIP – STEPS 7 to 11
Actions
<p>COMMUNICATE BETWEEN DEPARTMENTS</p> <ul style="list-style-type: none"> – <i>Make sure that workshop knows what has been promised to the customer – and by when</i> – <i>Plan specialist work – and check it can be done on time</i> – <i>Check constantly on progress</i>
<p>KEEP THE CUSTOMER INFORMED</p> <ul style="list-style-type: none"> – <i>Keep in constant touch with the work – parts, workshop progress, any problems</i> – <i>Prepare options in case of problems – another appointment?</i> – <i>Tell the customer immediately – good or bad news</i> – <i>Agree any change of plans</i>
<p>COMPLETE THE REPAIR ORDER AND INVOICE</p> <ul style="list-style-type: none"> – <i>Check Repair Order against the invoice</i> – <i>Mark all points on Repair Order that need to be explained (such as items that will soon need work)</i> – <i>Prepare any reports (such as Visual Healthchecks or diagnostic reports)</i> – <i>Prepare for the return of the vehicle (positive information on problems solved and improved running; professional advice on extra services or extra work needed)</i>
<p>GET THE VEHICLE READY FOR RETURN</p> <ul style="list-style-type: none"> – <i>Check that any service book has been stamped and completed</i> – <i>Place service book, alloy wheel key and any complimentary items (such as free gifts) on the passenger seat</i> – <i>Park the vehicle in a specific place</i> – <i>Do a final check from the customer's point of view</i>

DURING RETURN OF THE VEHICLE – STEPS 12 and 13
Actions
EXPLAIN THE WORK CLEARLY <ul style="list-style-type: none"> – <i>Use relevant documents to explain</i> – <i>Give positive information on problems solved and improved running</i> – <i>Give professional advice on extra services that will benefit the customer, and extra work that will be needed (and when</i> – <i>Give a fixed-price quotation for any of this extra work</i>
EXPLAIN THE INVOICE CLEARLY <ul style="list-style-type: none"> – <i>Relate it clearly to the work done</i> – <i>Confirm that it matches fixed-price quotations exactly</i>
TAKE PAYMENT <ul style="list-style-type: none"> – <i>In the form originally agreed</i>
TAKE THE CUSTOMER TO THE CAR <ul style="list-style-type: none"> – <i>Point out positive points (service book stamped, alloy wheel key, free gifts, clean car, obvious visual improvements if any)</i> – <i>Ask if there is anything else you can do</i> – <i>Thank the customer for their business and say goodbye.</i>
MAKE A FOLLOW-UP PHONECALL <ul style="list-style-type: none"> – <i>Prepare for the call – remind yourself of the work done and still to be done, and know the customer's name and details</i> – <i>Phone 3-5 days after the work</i> – <i>Ask the customer if they are fully satisfied</i> – <i>Act immediately on any problems</i> – <i>Ask about extra work and make an appointment if necessary</i> – <i>Log the call in the customer's records</i>



DURING RETURN OF THE VEHICLE – STEPS 12 and 13
Actions

3.3 Service Quality

Discuss the following with delegates:

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

Keep the delegates in the same groups as the last activity.

Ask each group to create a scenario, as complex as possible, that illustrates problems that can occur in their work, whether during vehicle acceptance, in the dealership or during the return of the vehicle.

Ask them to create a scenario that is difficult but not impossible to solve. Get the groups to write down their scenarios, giving clear information about what happened and the result of the actions.

Once the scenarios are written ask the groups to pass their scenario to another group so that each has to resolve a problem created by another group.

The group receiving the problem decides how best to handle the situation, based on the guidelines developed during the last activity. They present their thoughts to the full group who can discuss the ideas.

At the end of each presentation/discussion review the guidelines agreed earlier and amend as appropriate.



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

Split the delegates into pairs and ask them to think about the three most important learning points from this session.

Ask them to write the points down in the table below and be prepared to present their findings.

If pairs come up with the same points, get them to add to the previous pairs' comments.

Your Notes

End by asking delegates to turn to Session 6 and add any learning points to their learning checklist.



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:



11 – Organising Service Jobs: Objectives

- 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

Explain to delegates that this short section will introduce the importance of information and documentation in giving the customer excellent service.

Explain also that these two elements will also be covered in more detail later in this session.

Definitions

Ask delegates for their definitions of information and documentation. Then show the following slide and get them to note down the definitions.



12 – Information and Documentation

INFORMATION

- ***Sources of guidance that we use to help us to give excellent service, by meeting legal, warranty and quality requirements.***

DOCUMENTATION

- ***Forms that we have to complete for legal, warranty and quality reasons.***



SO7 – INFORMATION AND DOCUMENTATION – EXAMPLES

Using a flipchart with the columns and rows shown below, ask delegates to come up with a few examples in each category. Stress that this is only to get the definitions clear at this stage. Some examples are shown to help the Course Leader to guide the delegates if necessary.

Information	Documentation
Legal	
Regulations for such items as: <ul style="list-style-type: none"> – Emissions – Tyre wear – Winter tyre use (in some countries) – Regular technical and emissions testing (different for each country) 	<ul style="list-style-type: none"> – Certificates for regular technical and emissions testing
Warranty	
Electronic or paper records of: <ul style="list-style-type: none"> – Vehicle registration (for the warranty that is applicable) – Vehicle age (for warranty expiry) – What is and is not covered – Additional cover (such as extended warranty insurance) – Service history – to ensure that the customer complies with the warranty regulations 	<ul style="list-style-type: none"> – Warranty claim form
Quality	
<ul style="list-style-type: none"> – Mazda Service Standards – Appointment details – Repair Order information – Road-test report (oral or written) – Standard repair times – Diagnostic guides – Testing protocols – Help from experienced colleagues – Help from customers (e.g. symptoms) 	<ul style="list-style-type: none"> – Vehicle Healthcheck Form – Repair Order – Parts Order – Delivery notes – Fixed-price quotation for work – Invoice

4.2 The Flow of Work and Documentation

Refer delegates to their pre-course work and the request to bring the information and documents they use, including any checklists (such as Visual Healthchecks).

Explain that you are now going to work with them to agree the best ways to use such information and documents to organise excellent customer service.

So the first thing is to agree all the possible information and documents that will help in this.

Agree this list, and add any others that delegates come up with.

- 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?

If they use items that they cannot bring with them, such as planning boards or computer-based information, note down on a flipchart what they use – with a simple diagram to illustrate how it works.



Your Notes

4.3 Using Information and Documentation to Organise



SO8 – USING INFORMATION AND DOCUMENTATION TO ORGANISE

In this activity the aim is to examine how all the information and documentation, including checklists, can best be used to organise the best-practice service steps agreed in the previous session.

This is again a practical session in which delegates will be able to agree a set of guidelines everyone can follow.

Split the delegates into the same three groups – one to examine each stage in the process.

But this time, move the groups around:

- **GROUP C:** during the vehicle acceptance – *when making the appointment and then taking the vehicle over from the customer: steps 4, 5 and 6 in the Process*
- **GROUP A:** in the dealership – *all the time when the vehicle is in the care of the workshop: steps 7 to 11 in the Process*
- **GROUP B:** during return of the vehicle – *when handing the vehicle back to the customer and making sure all is well: steps 12 and 13.*

Ask the groups to consider the best way to use the information and documentation to organise their work.

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.

At the end of each presentation open the debate to all delegates and get those in the other groups to question any ideas they do not agree with.

At the end all delegates should record the ideas in the appropriate table.

Some guidelines are shown below in bold and italic; these should be mentioned if the delegates do not come up with their own.

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

DURING VEHICLE ACCEPTANCE – STEPS 4, 5 and 6	
Actions	Best use of Information/documents
WELCOME THE CUSTOMER	<p>Repair Order:</p> <ul style="list-style-type: none"> – Refer to the work – it shows you have planned and are ready <p>Courtesy car paperwork/insurance forms:</p> <ul style="list-style-type: none"> – Refer to this – it shows again that you are ready
PREPARE THE DOCUMENTATION	<p>Repair Order:</p> <ul style="list-style-type: none"> – Mark missing or partial information, ready to ask the customer <p>Courtesy car paperwork/insurance forms:</p> <ul style="list-style-type: none"> – Mark missing or partial information, ready to ask the customer
INSPECT THE VEHICLE WITH THE CUSTOMER	<p>Repair Order:</p> <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	<p>Repair Order:</p> <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 <p>Visual Healthcheck:</p> <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	<p>Customer records (on computer or paper):</p> <ul style="list-style-type: none"> – Record useful information – Use it to offer services that will be of real benefit to them <p>Marketing or Point-of-Sale Information:</p> <ul style="list-style-type: none"> – Use it to present services that are of real benefit to the customer

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

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

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>Checksheets 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 –

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

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"> – <i>Make sure that it is fully completed</i> – <i>Place it on the passenger seat with other items, such as the alloy wheel key</i> <p>Final checklist:</p> <ul style="list-style-type: none"> – <i>Use this to check everything from the customer's point of view</i> – <i>In particular, check that main faults have been corrected (test them)</i>

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



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

Your Notes



HO1 – BEST USE OF INFORMATION AND DOCUMENTS

Hand out this document to delegates at the end of the activity.

Explain that it provides a consistent guide to all delegates that they should use for reference.

4.4 Working as a Team

Refer delegates to their pre-course work and the question, “Who do you consider to be part of your dealership team, and how can you make sure everyone works together in an effective way?”

Discuss the importance of other staff and departments in achieving excellent service for customers.

Make sure the delegates agree that the delivery of excellent customer service is the responsibility of all.



13 – A single aim

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?



SO9 – PRACTICAL TEAMWORK

Part 1 – Who is in the Team?

Firstly, in the full group, ask delegates for all the people who make up the total team that serves the customer. Get them to use job titles where possible.

Write their answers on a flipchart – with the same headings as given below.

Make sure that they have a similar list to the following (there will be differences in different countries and sizes of dealership) – so that they understand the importance of the wider team:

Your Notes on Who is in the Team	
Service: <ul style="list-style-type: none"> – Service receptionist – Workshop controller – Workshop manager – Administrator/clerk – Senior technician – Technician – Labourer – Vehicle cleaner – Driver Parts: <ul style="list-style-type: none"> – Parts manager – Parts administrator – Parts staff person – Delivery driver 	Sales: <ul style="list-style-type: none"> – Sales manager – Salesperson – Sales administrator – Vehicle finance expert Dealership Management: <ul style="list-style-type: none"> – Service Manager – Dealer Principal/General Manager Mazda: <ul style="list-style-type: none"> – Technical support (literature, bulletins etc.) – Technical helpdesk (immediate technical help) – Warranty Department

Part 2 – How does the team work together?

Split the delegates into three groups. Their task is to suggest ways in which the following groups might help each other:

- 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?

They have 10 minutes to come up with simple bullet points.

Write each group's ideas on a flipchart – encourage the other groups to make notes in the tables below.

Use the guidance given in these tables to help the groups if they do not come up with these ideas.

Group A – how can Sales support Service and Parts?

- ***Respond to interest shown by a service customer in a new or used vehicle***
- ***Provide a spare vehicle in urgent situations***
- ***Keep the showroom in immaculate condition***
- ***Introduce the Service and Parts people to new customers***
-
-

Group B – how can Mazda help Service?

- ***Technical help – with literature, diagnostic information and technical bulletins***
- ***Technical help – from a helpdesk in case of difficult problems***
- ***Decisions and support on difficult warranty situations***
- ***Marketing offers and literature – such as seasonal checks***
-
-
-

Group C – how can Service and Parts support Sales?

- *Keep the workshop and service reception in immaculate condition*
- *Watch for and listen to any interest in a new or used vehicle when a customer is in for service work to be done – and pass the customer on to Sales*
- *Excellent work for Sales – for example on pre-delivery inspections or preparation of used vehicles*
- *General excellence of service – to promote loyalty to the dealership and the Mazda brand*
- *Rapid response if Sales have a problem on any of their vehicles*
-
-

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

Split the delegates into pairs and ask them to think about the three most important learning points from this session.

Ask them to write the points down in the table below and be prepared to present their findings.

If pairs come up with the same points, get them to add to the previous pairs' comments.

Your Notes

End by asking delegates to turn to Session 6 and add any learning points to their learning checklist.

5. Practical Skills

This session is devoted to allowing delegates to pull together the learning from the course.



SO11 – PRACTICAL LEARNING

Split the delegates into three groups. Their task is to suggest how they can best deal with the following situations by combining:

- *Best Practice Customer Service*
- *Use of Information and Documentation*
- *Use of Teamwork.*

The groups can add more detail to the basic situations as they wish.

They should present their ideas in a presentation which has two parts:

- *A simple slide or flipchart presentation on the main points from the course which can be applied in these situations*
- *A role-play to demonstrate an important stage in dealing with the situation, and how they would deal effectively with the customer's concerns.*

They have 30 minutes to prepare the presentation and role-play.

They each have 10 minutes to present their findings, and 10 minutes for the role-play. For each group, allow 10 minutes for a discussion of what they have presented and role-played.

- 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.

New entrants to the market – customer expectations – substitutes – existing rivals – advances in technology

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

Loyal Advocate

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

We are delighted and very happy about the service

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

We complain until problem is solved and are happy again

We complain until problem is solved, but are still disappointed

We say nothing and never use the supplier again

We say nothing, never use the supplier again and tell everyone we meet not to use them

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

Examples: answering telephone quickly – not being left on hold – knowing prices – general politeness

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

From:

- ***Immediate response on the phone***
- ***An appointment immediately or in a few days' time***
- ***Finding out all work and planning timescales***
- ***Flexible times (morning or afternoon, etc.)***
- ***Courtesy facilities (courtesy car, lift to work)***

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

From:

- **Friendly welcome**
- **Checking all work**
- **Immediate diagnosis**
- **Courtesy car, lift etc.**

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

From:

- **Clear explanation of what has been done – in terms that the person can understand**
- **Clear explanation of the invoice**
- **Advice on further things to watch or to be done**
- **Car cleaned if possible**
- **Evidence of care (such as stamped service book on seat; seat and floor covers)**

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?

If the best customer service is to be given it is very important that information provided is full and accurate – good cooperation is essential. If a technician can explain the work carried out this is better than a third party trying to do the same

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

Warranty and quality.

11. What is the definition of INFORMATION?

Sources of guidance that we use to help us to give excellent service, by meeting legal, warranty and quality requirements.

12. What is the definition of DOCUMENTATION?

Forms that we have to complete for legal, warranty and quality reasons.

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

From:

- ***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***

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

From:

Checksheets Generator
Mazda technical information
Service checklists
Procedures for quality checks and tests
E-parts manual
Suggested repair times manual

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

Service, Parts, Sales, Dealership management, Mazda

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: