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**NEW HIRE ORIENTATION
BOOT CAMP**

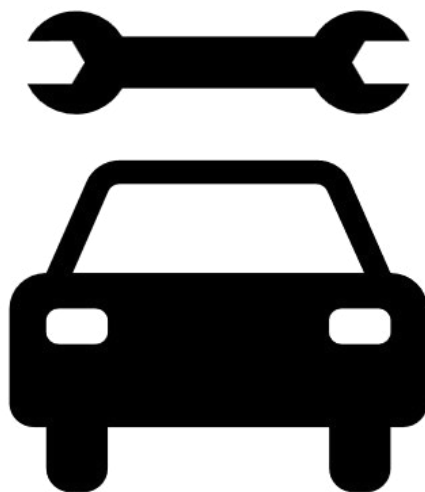
STEVE SHAW UNIVERSITY

Service Advisor Boot Camp Training Workbook

Associate Name: _____

Date: ____|____|20____

Car line(s) supported at my Dealership:



OVERVIEW OF DEALERSHIP DEPARTMENTS

The Office - Controller

- Store Controller – Responsible for the financial side of the business
- Accounts receivable – Ensure charge accounts are current
- Accounts Payable – Ensure invoices from vendors and dealership bills
- Human Resources – Works with hiring, training, performance review
- Titling and Registration – Ensures new and used vehicles are titled and license plates provided

The Business – General Manager

Variable Operations

- General Manager – Manages Sales, Finance, Service, Parts, and possible collision center.
- Sales Manager – Responsible for selling new or used cars
- Finance Manager – Responsible for finance the sale and offering extended coverage

Fixed Operations

- Parts Manager – Inventory levels and selling to retail, wholesale, and service.
- Service Manager – Repairing vehicles
- Collision – Providing customer pay and insurance repairs. Including warranty

Parts Department

Front Counter: _____

Wholesale or Internet: _____

Back Counter: _____

Service Center

Call In: _____

Surf In: _____

Drive-In: _____

Business Development Center

Switchboard: _____

Making Appointment: _____

Outboard Campaigns: Driving business into our dealership's service center

SERVICE DEPARTMENT

THE GOAL OF THE SERVICE DEPARTMENT IS?

Service Department Bills: _____

Parts Department sells: _____

The two departments works with a Repair Order

The Repair Order tuns into an _____ to accept payment



WHAT IS A FACTORY WARRANTY?

Provided from the Manufacture or OE

Valid at ANY Franchise Dealer

General Motors: 4,500

Ford Dealers: 3,000

Chrysler: 2,500

Toyota: 1,500

Nissan: 1,082

BMW & Mini: 469

Mercedes-Benz: 368

Infinity: 211

Based on time or mileage

Whichever comes first

Generally Speaking

Domestic 3/36

Imports 3/36

Luxury: 4/50

Some items vary by manufacture

Paint | Emissions | Adjustments

FACTORY WARRANTY

Time and/or Mileage

Examples

12|12 = 12 months or 12,000 Miles

3|36 = 3 Years or 36,000 Miles

4|50 = 4 Years or 50,000 Miles

8|80 = 8 Years or 80,000 Miles

10|100 = 10 Years or 100,000 Miles

FACTORY WARRANTY

Rules of the Road

A **manufacturer's warranty** is a carmaker's promise to cover certain problems with your vehicle. The **warranty** is usually valid over a certain period of time or miles. ... That's why automakers may provide **manufacturer's warranties** with your purchase, which if provided is usually built into the price of your new **car**.

Warranty valid for Canada vehicles: YES NO

Factory Warranty: Basic: _____ Years OR _____ Miles

Factory Warranty: Adjustments: _____ Years OR _____ Miles

Factory Warranty: Maintenance: YES NO If Yes, Details _____

Factory Warranty: Driveline: Same as Basic YES NO
If Yes, _____ Years OR _____ Miles

Factory Warranty: Emissions: Same as Basic YES NO Details: _____
If Yes, _____ Years OR _____ Miles

Factory Warranty: Paint and Glass: Same as Basic YES NO
If Yes, _____ Years OR _____ Miles
Special Instructions to process claims: _____

Note: 3/36 warranty provides a 3 year (36 months) OR 36,000 miles, whichever comes first.

Example: Vehicle in service for 24 months, with 36,001 miles. The vehicle's warranty has expired.

Example: Vehicle has 24,001 miles, and 37 months in service, the warranty has expired.

FACTORY MAINTENANCE WARRANTY

Basic maintenance items are covered by the manufacture warranty. This service must be performed at an authorized dealership.

Included with the purchase of the vehicle

Bought from the manufacture and redeemed at authorized dealership

Examples of coverage: _____

_____ Years OR _____ Miles

Examples of coverage: _____

_____ Years OR _____ Miles

Special Instructions: _____

Special Op Codes Required: _____

Source of validation (OE Site): _____

See YOUR Manager or Warranty Admin for details and special instructions.

Always make sure to review history, before performing maintenance. Services performed, but claims not processed, might appear open or due.

EXTENDED WARRANTIES AVAILABLE IN

Finance & Insurance (F&I)

Factory Extended Warranty

Warranties offered and supported by the Manufacture

Repairs are only performed at and authorized manufacture location

Aftermarket Extended Warranty

Warranties offered and supported by aftermarket companies and sold at random dealerships or other retails. Example: CarMax

Repair performed at various locations, including automotive dealership.

EXAMPLES OF EXTENDED WARRANTIES

Circle those your dealership sells

Mechanical Repairs

Maintenance – Prepaid

Tires – Road Hazard

Windshield Protection

Dent Removal

Rental Coverage

Interior Protection

Key Fob Replacement

EXTENDED WARRANTIES AVAILABLE IN

Rules of the Road

An extended auto warranty is a service contract that extends coverage from the manufacturer.

Repair performed at an authorized dealership.

Coverage varies

Special Instructions:

Warranty Claims approval process:



WARRANTY GOODWILL

Warranty goodwill gives the dealership the ability to assist a customer with an out of warranty item, to obtain goodwill with the customer. Depending on YOUR store and the OE Factory rep, the process will differ.

An example would be:

- Vehicle is slightly out of the warranty time or mileage parameters.
 - a. Vehicle has 36,001 miles; the vehicle is officially out of warranty.
 - b. Vehicle is over 36 months of 'in service', officially out of warranty.
 - c. Vehicle is within warranty, but repair is NOT covered – water damage.

Action Required – Review with your Service Manager or assigned personal (warranty admin) and document the following items

Process to obtain Factory Goodwill, as defined by your store's policy.

Am I required to complete a form or submit for consideration? Yes No

Define the steps required if Denied: _____

Define the steps required if 'Approved': _____

Example: Add an Operation Code to note the action and the result

Note: Submitted for factory goodwill assistance and approved by " _____ " with approval Number " _____ "

FACTORY PARTS WARRANTY

When a part is purchased over the retail counter or wholesale counter, the part will come with a warranty. Some manufactures will only replace the part, others might include labor (See your Service Manager).

The customer must produce the original invoice the part was purchased under.

Action Required – Review with your Service Manager or assigned personal (warranty admin) and document the following items”

Do we have a form that must be filled out? Yes No

What is our current process? _____

Which department is responsible for completing this step?

Notes: _____



FACTORY PARTS WARRANTY

Rules of the Road

YES | NO

Warranty valid for Canada vehicles: YES | NO

Example of Item: _____
_____ Years OR _____ Miles

Example of Item: _____
_____ Years OR _____ Miles

Example of Item: _____
_____ Years OR _____ Miles

MANUFACTURER'S TIRE WARRANTY

Only performed at an Authorized Tire Dealer

Covers - Materials and workmanship

Firestone / Bridgestone

Michelin

Goodyear

Notes:



TIRE WARRANTY

Road Hazard

Coverage can be obtained during

New Car Purchase

Used Car Purchase

Buying New Tires

FACTORY RECALLS

Rules of the Road

A recall is issued when a manufacturer or NHTSA determines that a vehicle, equipment, car seat, or tire creates an unreasonable safety risk or fails to meet minimum safety standards. Most decisions to conduct a recall and remedy a safety defect are made voluntarily by manufacturers prior to any involvement by NHTSA.

A recall is a notice sent by a vehicle manufacturer to owners of a vehicle advising them that the vehicle has or may have a serious defect that may compromise the safety of the vehicle and that the service departments of that manufacturer's dealers will make any necessary replacements or repairs free of charge.

Factory Recalls: Do they expire YES NO

Special Instructions: _____

Website designed to give public access to all open recalls for any VIN) Vehicle Identification Number)

<https://www.nhtsa.gov/recalls>

<https://vinrcl.safercar.gov/vin/>

Consumer Websites designed to assist customers with open recalls and common questions

Ford Consumer website: <https://help.ford.com/recall/>

Chrysler Consumer website: <https://www.mopar.com/en-us/my-vehicle/recalls/search.html>

TECHNICAL SERVICE BULLETINS (TSBS)

Recalls should not be confused with technical service bulletins (TSBs) which are issued by the manufacturer to assist the technician with diagnose and repairs. TSBs cover known problems and provide repair instructions for service technicians and accordingly are distributed to all of the manufacturer's dealerships.

Unlike recall-related repairs, which are performed on a no-question-asked basis, TSB repairs are made only to resolve problems that can be verified by dealer service technicians. These repairs are covered at no charge during warranty and customer pay when outside warranty guidelines.

LEMON LAW

Rules of the Road

Generally Speaking ~ While these laws vary from state to state (see Resources), a lemon is generally defined as a new car, truck, or van that's been back to the dealer at least four times for the same repair or has been off the road for service a total of 30 days during the first 12-24 months/12,000-18,000 miles after delivery. So, the first or even second occurrence doesn't mean automatic lemon status: Manufacturers provide warranties and have the right to attempt repairs.

And the vehicle's problems must be substantial, affecting safety, value, and/or reliability. Peeling paint, "funny noises," or a faulty ashtray don't qualify.

Best Practice: _____

Do I get my Manager involved: YES NO

If Yes, When: _____



WHAT IS A BUY BACK?

Manufacture works with the customer to help them stay within the brand

Most Vin queries will report if vehicle is currently going through the process or has been processed as a Buy Back

Helps reduce the number of vehicles processed through the Lemon Law process.

Manufacture has more leeway to assist the customer

See your Service Manager for details.

THE REPAIR ORDER (RO)

Customer File Includes

Customer Name: _____

Customer Address: _____

Customer Phone Numbers:

Home

Work

Mobile (Texting)

Customer emailAddress: _____

Second owner (company name): _____

Complete and updated information ensures

Manufacturer pays the claims

Appointment confirmations and reminders are received

Marketing to customers with dealership promotions

THE REPAIR ORDER (RO)

Vehicle (VEH) File Includes:

Complete VIN with breakdown

Year	Make	Model
------	------	-------

In-Service Date:

Warranty Start Date:

Extended Warranty Information:

Color of exterior and interior:

License Plate :

WHAT IS AN OPERATION CODE?

Operation Code Definition: Tells us what we are going to do.

Examples:

A diagnostic operation: Check Engine Light on

Maintenance operation: Oil Change

Request: Install running boards

Note: Shuttle Ride

ion: Check Engine Light on

Might be a maintenance operation: Oil Change

Might be a request: Install running boards

be a Note: Shuttle Ride

Add an operation code (or a line) on a ticket for each item that needs to be addressed.

THE THREE C' OF AN OPERATION CODE

An Operation Code has three main parts, commonly know as the 3 C's.

First C: _____
 Second C: _____
 Third C: _____

Service Advisor's Role – Write the Concern or Complaint

Complaint line always starts with these words

_____ Customer States _____

Questions to ask a customer – depending on their complaint

- What are your symptoms?
 - a. Running rough?
 - b. What speeds? Changes with speed?
- When does this happen?
- How long has then been happening?
- Who is this happening to?

Concern lines MUST follow this process

Practice writing a great complaint: Check engine light is on

WHAT IS A LABOR TYPE?

Who is paying for the repairs?

What is our pricing structure?

Do we charge tax?

Do we charge shop supplies?

THREE MAIN REVENUE STREAMS

Customer Pay

Warranty Pay

Internal Pay

CALCULATING STRAIGHT LABOR TIME

Multiply the hours by a specific dollar amount

Example the job pays 1.0 hour
Straight labor rate (door rate) is \$100.00

What is the dollar amount we charge the customer? _____

LABOR GRID-HOW TO USE

Vertical → Solid hour

Horizontal → Tenth of an Hour

Start with the hour, then move across for the tenth

Using the grid below

Labor Grids (Course Grids Not Your Store)										
Flat	0.00	0.10	0.20	0.30	0.40	0.50	0.60	0.70	0.80	0.90
1	\$ 125.00	\$ 137.50	\$ 150.00	\$ 162.50	\$ 175.00	\$ 187.50	\$ 200.00	\$ 212.50	\$ 225.00	\$ 237.50
2	\$ 250.00	\$ 262.50	\$ 275.00	\$ 287.50	\$ 300.00	\$ 312.50	\$ 325.00	\$ 337.50	\$ 350.00	\$ 362.50
3	\$ 375.00	\$ 387.50	\$ 400.00	\$ 412.50	\$ 425.00	\$ 437.50	\$ 450.00	\$ 462.50	\$ 475.00	\$ 487.50
4	\$ 500.00	\$ 512.50	\$ 525.00	\$ 537.50	\$ 550.00	\$ 562.50	\$ 575.00	\$ 587.50	\$ 600.00	\$ 612.50
5	\$ 625.00	\$ 637.50	\$ 650.00	\$ 662.50	\$ 675.00	\$ 687.50	\$ 700.00	\$ 712.50	\$ 725.00	\$ 737.50
6	\$ 750.00	\$ 762.50	\$ 775.00	\$ 787.50	\$ 800.00	\$ 812.50	\$ 825.00	\$ 837.50	\$ 850.00	\$ 862.50
7	\$ 875.00	\$ 887.50	\$ 900.00	\$ 912.50	\$ 925.00	\$ 937.50	\$ 950.00	\$ 962.50	\$ 975.00	\$ 987.50

Calculate the total amount we would charge for 2.0 labor hours: \$ _____

Calculate the total amount we would charge for 5.5 labor hours: \$ _____

See your Service Manager for details and store specific labor grid.

WHAT IS A DISPATCH CODE?

Dispatch codes are used to direct the repair operation to a specific team or technician

Most stores use one generic code

See your Service Manager for a list

Questions to ask your Service Manager

Do we have dispatch codes at our location? _____

How and when do we use a dispatch code? _____

Can I get a list of our Dispatch codes?



Adding an operation to a Repair Order after printing

Defined as: Once the Repair Order has printed, the system assigns a number.

After the Repair Order (RO) has been printed – the system assigns a: _____

Customer Pay line(s) or operation can be added

Internal Pay line(s) or operation can be added

Warranty Pay line(s) or operations must follow this store process:

See your Service Manager for details

QUOTING AND BILLING TAX

What is our tax rate? _____ %

We apply tax to Just Part: Yes No

We apply tax only to Parts? Yes No

We apply tax only to Labor? Yes No

Exceptions to this rule?

*Tax exempt customer must complete a form with their tax
ID Number*

SHOP SUPPLIES

Ask Your Manager...

Do we charge shop supplies? Yes No

Do we have a set fee or amount? Yes No

If so, what is the amount? \$ _____

We apply tax only to Labor? Yes No

If percentage, what is the percent? _____

Shop charges on...circle one

Just Parts | Just Labor | Parts & Labor

What is the maximum shop supply charge per visit? \$ _____

Exercise: This scenario applies shop supplies of 10% of parts and labor. The total is \$100.00

What is the total charge for shop supplies? \$ _____

GET YOUR STORY STRAIGHT!

A Service Advisor's responsibility is to Communicate!

While we ensure the customer's needs are addressed, we ensure the three C' are complete and billing is accurate.

Questions to Ask

- Are the three C's noted correctly?
- Did the technician run time?
- Are parts billed out correctly, both price and quantity?
- Charges properly billed to the correct person or department? Warranty vs Customer

PUNCH TIME

Running Time

This is a Technician Task

Generally Speaking...

A technician will electronically clock on when starting the repair(s).

A technician will electronically clock off each job, once the repair is complete.

Punch time is mandatory when the manufacture is paying the claim.

See your Service Manager for Details

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