

BMW Service Advisor

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BMW SERVICE ADVISOR.

IMPROVING THE LEVEL OF ENGAGEMENT AND CUSTOMER FOCUS.



BMW SERVICE ADVISOR ARTICLE.

Introduction.

Recent survey results and customer feedback suggests that BMW is not meeting their customer expectations when it comes to Service Advisor courtesy and effectiveness. In fact, BMW trails their competitors in many categories that are critical to customer satisfaction.

At the recent "Leading Your Future" workshop, a group of General Managers was challenged with the task of brainstorming ideas about how to improve

the Service Advisors' level of engagement and customer focus. The following article is the culmination of their ideas. This article is not meant to be an exhaustive list of everything a General Manager and their Service Managers can do, rather a collection of thoughts and best practices from their Centers. Information on each of the authors is located at the end of this article.

SELECT THE PERFECT SERVICE ADVISOR.

The most important traits for these individuals are to be upbeat and energetic.

When it comes to Service Advisors, we begin by identifying important personality traits that translate to success in the role. While it is not always possible to guarantee getting the perfect person during the interview process, your chances of success increase when you seek references, get staff and managers involved in the interview, and ask behavioral based questions.

There is a definite movement to selecting Service Advisors who do not come from an automotive background, shifting the emphasis to personality and the ability to have a customer first mindset. If you are looking for experience then consider

people with great references from the hospitality or retail industries. Another skill that should be considered is comfort with technology since this will make the learning process easier. The most important traits for these individuals are to be upbeat and energetic. They must be a people person, someone who cares about customers. You also want someone with organizational skills, strong communication abilities, career aspirations, and a high level of comfort in selling and making recommendations.



WELCOME YOUR NEW SERVICE ADVISORS WITH AN EXPERIENCE.

This is a great opportunity to share your philosophy on service and the importance of taking care of the customer.

If you want your new Service Advisor to understand customer experience, then deliver an ultimate experience to them on his or her first day. This first day should be memorable and involve the General Manager, Service Manager, and assigned Mentor.

The day should begin at 10am to avoid the early morning rush and busy period. The new Service Advisor should be welcomed by the Service Manager and escorted around the dealership highlighting the various areas and key points of contact such as managers in parts, sales, administration, and the workshop. If possible, the General Manager should also be involved in some part of this walk through, letting everyone know the value and importance you place on the Service Advisor role. This is a great opportunity to share your philosophy on service and the importance of taking care of the customer.

Conclude the walk through at the Service Advisor's desk, which should be set up and ready for use. Even though the Advisor may not use the technology on the first day, it is unacceptable to not have it properly set up. Also ensure their business cards are waiting for them; this

also demonstrates that you are prepared. A nice touch is to have a welcome card or gift waiting for them as well.

Have the Service Manager introduce the Advisor to their Mentor and take him or her to lunch. Ideally this involves a short drive, giving the new Advisor the opportunity to drive a BMW vehicle. The purpose of the lunch is to emphasize getting to know everyone.

Once back from lunch, the Service Manager or Mentor then conducts a detailed walk through of the Service area, observing some of the customer interactions and continue the familiarization of the area. During the afternoon provide an overview of Customer First and the Modern Luxury Moments; this introduction presentation is located on www.linkbmw.com. By 5pm, finish the day with a review of the upcoming weeks training schedule.



ESTABLISH BRAND EXPECTATIONS.

The Service Advisor needs to understand why the customer must be at the heart of everything that they do.

In both the interview and onboarding process it is critical for the new Service Advisor to understand the BMW brand's customer experience expectations.

The General Manager and Service Manager must establish clear expectations for the Service Advisor around what it means to put the customer at the heart of everything they do. Their role has a huge impact on the customer's experience and perception of the Center and BMW brand. Continue to reinforce these expectations through the initial on-boarding and training in the Service Area.

Begin with explaining the importance of value of the BMW brand to our business: the marketing impact, brand recognition, ability to command a premium price and margin, and loyal customer following. It is important to ensure that the experience with the product, brand, and people meets both BMW and the customers' expectations of being friendly, timely, responsive, and authentic.

The Service Advisor needs to understand why the customer must be at the heart of everything that they do. The modern customer has plenty of choices and high expectations. While the BMW vehicle creates an emotional connection with customers, so do the interactions with a Center's people. If the customer does not feel the Service Advisor makes them a priority and cares about their experience, then they will begin looking at other brands for their next vehicle, tell family, friends, and third party review sites of their dissatisfaction, and minimize any opportunity to interact and upgrade their product.



TRAIN THOROUGHLY.

Always begin training with covering the most important priorities. As indicated in the onboarding process, there must be an emphasis on the customer and their expectations.

Since there are many areas to cover in training, create a schedule of when which trainings will occur (including required training) and a checklist of topics to be covered. Appoint an initial Mentor, who will be responsible for the overall training and ensuring the schedule is followed and the checklist completed. However, it is important to expose the new Service Advisor to a number of experts and people throughout the Center so an overview of the Sales, Service, Technical, and Parts departments is provided. To ensure a consistent and thorough process, it is suggested to have both the Mentor and the new Service Advisor sign off on the checklist as various training skills have been mastered. This will provide a level of accountability to everyone involved that the training process was completed.

Always begin training with covering the most important priorities. As indicated in the onboarding process, there must be an emphasis on the customer and their expectations. Utilize the Customer First training materials and videos located on www.linkbmw.com to showcase the right way of doing things and the Customer First habits that will stand out with the customer. These topics should be the focus for the first few days of training and a constant reminder throughout all the process training.

In the first couple of weeks, ensure the new Service Advisor is introduced to the products and brand, especially since previous automotive and brand knowledge are not

required for hiring. Have them spend time in Sales becoming familiar with the products via the BMW Genius and the general Sales process. Create opportunities over the first month to have them drive vehicles and spend time with the technicians learning how to trouble shoot simple problems. These shadowing experiences ensure a higher degree of teamwork and collaboration in the Center and are considered an important best practice for new Advisors.

After the first couple of weeks, shift the focus to the processes and details of the Service department. Focus on the 8 Modern Luxury Moments and the process, behaviors, and environment required in each moment for a successful customer experience. Pay special attention in training to customer communications, selling, and DMS/CRM. To help reinforce these topics, look for resources on TMSI and ensure the Service Advisor is scheduled for the BMW-Fast Track training in their first 90 days.

When teaching a new process, always follow with the introduction of new skills. Explain why a task or responsibility is important first, and then explain the way the task needs to be done. Next, demonstrate each step in the process while showcasing modern luxury habits and a customer first attitude. Then finally allow the new Service Advisor to practice, initially without customers and then with just a few customers while someone observes. Provide consistent and appropriate feedback on areas of success and areas they can improve.



ESTABLISH POSITION EXPECTATIONS.

Throughout this whole customer experience, it is critical that the Service Advisor is organized, engaging, and considerate.

When it comes to setting expectations, it is important to not only set the brand expectations, but also the position expectations of the Service Advisor role. Train the new Service Advisor on the following essential habits and best practices to teach them what the ultimate customer experience looks like in their position from beginning to end.

These expectations begin with preparation and organization. Each day the Service Advisor must be prepared and organized for their arriving customers, this includes their workspace and paperwork. For the customers coming in, the Service Advisor is familiar with their history, preferences, warranty status, length of lease or purchase, and if they have a loaner car reserved. They need to also ensure that the loaner car is an upgraded model or at the very least not a downgrade or alternative brand.

Upon guest arrival, it is important that the Service Advisor provides a warm greeting, using their name to indicate a relationship. One best practice is to have greeters on the Service drive utilize radios with earpieces to notify the Service Advisor of a customer's arrival. The Advisor can then come outside and greet their customers personally, even if they have never met before.

Time is always important to the customer. The Service Advisor should be conscious of the customer's time constraints and demeanor, adjusting their interactions accordingly. If the customer appears relaxed

and not too hurried, the Service Advisor can engage in personal conversation learning more about the customer and creating a sense of being known.

They should be willing to review requested or required services and provide information on additional products, services, or features that fit the customer's lifestyle and needs.

If the customer is going to wait, the Service Advisor escorts them to the lounge and introduces the amenities offered. They then ensure the customer is familiar with the Wi-Fi access, has their preferred beverage, and is comfortable. If the customer has a loaner car then they would escort them to their car or the person responsible for their loaner.

Customer communication is a critical aspect of the Advisor's role. They must keep the customers up to date, in the method they prefer, on how their service is progressing. Whether via technology or visiting the customer in the lounge, it is important that the Advisor is organized and planning for checking in.

That organization and planning must continue for the vehicle pick-up. The Advisor should walk the customer through the work performed and charges. If the Service Advisor is unavailable, then they need to ensure someone is available to assist.

If the customer will be picking up after hours, then perhaps the Service Advisor can leave a video message for the customer explaining the work and charges.

When the pick up occurs, the Service Advisor needs to ensure the delivery specialist or valet brings around the car and provides a great handover and farewell. This partnership is critical as everyone involved in the pick up are seen as an extension of the Service Advisor team.

The Service Advisor should always ensure there is a follow up with the customer after a vehicle service. Time should be set aside each day for contacting customers from the previous day via the method the customer prefers.

Throughout this whole customer experience, it is critical that the Service Advisor is organized, engaging, and considerate. These position expectations are not negotiable and must be reinforced throughout the training. If a Service Advisor is not putting these behaviors into action within the first 60 days, then consider making a change. While there will be a cost to losing someone after an investment in training there will be an even greater cost if they are left to take care of your guests. This highlights the importance of partnering the new hire with the right Mentor, someone who can not only train effectively but also coach appropriately.



PROVIDE EFFECTIVE COACHING.

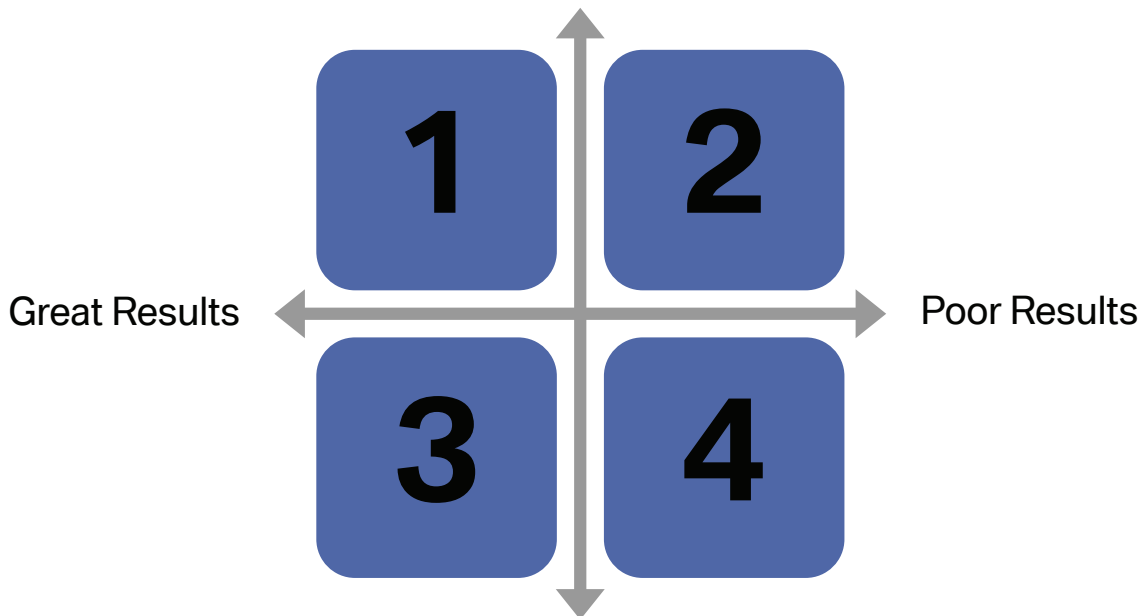
Work with each of your managers to ensure they understand how to identify performance needs and follow up on the necessary steps to continually improve performance.

As the General Manager you must ensure that all your managers are coaching and giving feedback to their staff. Work with each of your managers to ensure they understand how to identify performance needs and follow up on the necessary steps to continually improve performance. You must ensure programs are in place for recognition, training, disciplinary action, and to respectfully remove people who do not contribute to the success of the brand and the business. We utilized GE's four types of employees to rate and develop a

performance plan for our Service Advisors. Rate each Service Advisor on the grid below honestly and then review some of our following notes.

For Service Advisors who rate as 1's, it is important to be able to reward and recognize their efforts in a way that is meaningful to them. The best way to do this is to speak with them and ask how they want to be rewarded.

Puts the customer at the heart of everything you do



Does not put the customer at the heart of everything you do

It is important to also have a discussion about their career aspirations and invest time to establish a path for achievement. This path should include overcoming challenges, delegating tasks, and being utilized to help develop and train others. It is important that these people know you value their efforts and commitment to the business and brand.

For the 2's, the Service Advisors that require some training, it is important to establish an improvement plan with the necessary training. Set up a meeting and have a discussion with the employee about clear expectations for goal achievements within a specified time frame. Ensure the employee and you both walk away with the same message. Ideally partner them with a 1 who can mentor them in the processes they need to improve upon. Remember to recognize their contributions to the team and the culture. Don't forget there is only so much training you can do. If they do not improve their results within a specified amount of time, we would recommend looking for alternate positions within the Center.

Our 3's are those Service Advisors that need to be counseled in a one-on-one situation on the vision and expectations for their position as it pertains to the customer. Since these people are maybe some of your best producers and have been considered untouchable in the past, it is important to be very respectful of their disposition. They have been very successful under a different business model but that model has changed and so must they. We recommend meeting them outside of work and keeping the conversations initially confidential. Ensure you are well prepared with examples and ways they can be aligned with customer first mentality. We recommend putting them through the Culture of Customer First training when available at your Center.

For the Service Advisors you rated a 4, we don't know why they are still with you. To be fair, provide them with documented feedback on their performance and what needs to change. Provide assistance as required but be willing to quickly remove them from the operation so they no longer affect those around them and the customers.





ENSURE THEY HAVE THE TOOLS TO DO THE JOB.

One of the most important tools for the Service Advisor is the Service Lounge.

As discussed in the on-boarding section, it is important that the basic tools, such as computers, email, desks, office supplies, and phones, are in place from day one.



One of the most important tools for the Service Advisor is the Service Lounge. The Service Lounge should allow the customers to relax and recharge while they wait for their vehicle. It is important that the lounge is properly stocked with premium beverages and snacks, is always clean and organized, and offers ways to connect with the world, whether via iPads, television, or current magazines and newspapers. Ensure the Wi-Fi is always working and easily accessible and there are options for charging phones available. One best practice seen is having a dedicated person or concierge in the lounge. This has shown a significant impact on customer satisfaction and it adds a key support person to the Service Advisor team. With a concierge, the Service Advisor has a point of contact and knows their customers are being well taken care of. Having a great lounge with a concierge provides an environment where customers don't mind to wait and reduces the number of loaner cars required on hand.

A consistent and seamless loaner car process is another essential tool for the Service Advisor. There needs to be enough cars in the inventory to meet the demands of all the service. Some General Managers assign a group of vehicles to each Advisor, modifying their count based on production and ability. This enables the Service Advisors to be in control of their customer satisfaction and requires them to make good decisions and invest in more planning each day.

One last important tool is empowering your Service Advisors to be able to take care of the customers as required, especially if problems arise. There should be an amount of money that a Service Advisor is able to comp or remove from a Service Bill if there are issues. Make the guidelines easy to understand and the amount at least \$100 so that the Service Advisor can actually make a difference.



SHOW THAT YOU CARE.

It is important to be seen throughout the Center making connections and showing your people that their worth extends beyond their daily tasks.

It is important for General Managers to show their people that they care. While the main focus of your attention should be your immediate managers and their needs, it is important to be seen throughout the Center making connections and showing your people that their worth extends beyond their daily tasks. Schedule time each day to walk around the Center and have informal and quick interactions, asking about family, hobbies, sports, and interests. Remember to listen and make a note of what you learn.

With the new Service Advisors, take the time in the first 90 days to learn about their interests outside of work and make a note

for future reference. If we are asking them to engage with the customers then we should set the example by engaging with them.

As the General Manager, you often have the opportunity for access to tickets for local events, gift cards, or discounts. Share these throughout your staff, creating occasions that are memorable for your team. Look for opportunities to engage multiple members in sports teams like a baseball league, community activities like a charity run, and establish sponsorship opportunities for local children's sports teams. Establish a small budget to be utilized for staff and community activities.



VALUE THEIR INPUT AND FEEDBACK.

Getting feedback on how to improve the Service operation and how they are feeling will keep your Service Advisors engaged and a part of the Customer First culture.

It is important that the General Manager and Service Manager seek out and value the insights and feedback of the Service Advisors. Getting initial feedback on the onboarding and training process after about 90 days is a good place to start. Also remember that a new Service Advisor is a fresh set of eyes on the Center, so before they get too socialized into all the mindsets, processes, and local way of doing things, ask them if they see opportunities for improvement. This is a great conversation to have between 30 and 60 days on the job. Both of these conversations set the tone regarding the expectation of the management team for the Service Advisor to contribute ideas.

Utilize all the tools and best practices available to collect employee feedback through multiple channels. One best practice that will allow you to keep a pulse on your Service Advisors' engagement and ideas is to facilitate a daily walk through, where you select one person from various areas to have an informal five minute chat.

Setting up organized luncheons every month with a cross section of employees is another great way to get feedback on the employee satisfaction. Utilizing the bi-annual employee satisfaction survey also helps ensure your staff needs are being catered to. Department managers should be urged to utilize a part of monthly meetings to brainstorm ideas on what needs to be improved or fixed in the department. It is important that these brainstorm sessions are just a collection and not a discussion - otherwise you will be there all day. Engage Service Advisors after the meeting to elaborate on points and to help formulate a plan for improvement. These ideas can then be taken and worked on in the following month, with updates given in the next meeting.

Getting feedback on how to improve the Service operation and how they are feeling will keep your Service Advisors engaged and a part of the Customer First culture.



COMMUNICATE EFFECTIVELY.

The most important communication tool is the daily ten-minute meeting within the departments with all the staff.

Finally, communication is the most important tool a manager has to bring all of these leadership responsibilities together. As the General Manager, you must ensure communication is happening throughout the Center on priorities, business scores, dealership happenings, and customer expectations and results. You must inspect what you expect when it comes to communication; don't assume because you say something to the managers that it is reaching the team in the Service Area.

The most important communication tool is the daily ten-minute meeting within the departments with all the staff. Use the 'Dealership Daily' template located on www.linkbmw.com to organize thoughts and messages. The daily meeting should be interactive, involve some training, be led by different people, and energize the team for the day. With a number of these meetings occurring each day, you should schedule at least one to attend per day to check in with the different teams and promote the importance of the customer experience.

CONCLUSION.

There are many other responsibilities for the General Manager to focus on; however, if you fail to ensure these activities are occurring in your Center then you will constantly be following up on customer issues and manufacturer requirements, have poor employee engagement, and ultimately lose money from a lack of sales and customer focus and high turnover and employee mistakes. As a business person, brand ambassador, and leader, focusing on the success of your Service Advisors is the smart thing to do.

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