



# Job Description

Position Title:	Service Advisor/Service Invoicer
Reports to:	Service Manager
Branch:	Palmerston North
Date:	2022

## PRINCIPAL ACCOUNTABILITIES

- **Timely and accurate operation of all service division administrative systems and procedures including:**
  - Service Customer bookings – electronic booking system
  - Forward booking of service & sales customers
  - Service Enquiries
  - Service Complaints
  - Service Reception greeting
  - Service Costing, Invoicing and payment
  - Monitoring work in progress to meet agreed delivery times for the customer
  - “No Show” service customer – follow up
  - Parts arrived calls to book customers in
- **Customer First** - learn the Customer First process and attend all training for Customer First. This process must be followed where ever possible for all service customers. We will be mystery shopped each quarter on this process.
- **Service booking process** through our electronic booking system – balancing the bookings on a daily basis to meet & exceed customer’s expectations and achieve our benchmark productivity level daily.
  - **Customer handling** - Courteous, efficient handling of customers at all times whether face-to-face, electronic or by telephone.
  - **All dealership departments** - Co-operate and support other departments in the dealership to help achieve their objectives.
  - **Professional manner** - Represent the dealership in a professional manner at all times.

## RESPONSIBILITIES

- Daily liaise with the sales division on required internal work.
- Promptly and courteously attend to all customer enquiries whether at service reception, email, text or by telephone.
- Accurately record all service bookings by customers while monitoring workshop loadings to achieve a balance between an even workflow, benchmark productivity levels and meeting customers’ needs.

- Accurately record all the customer's personal details in our customer contact system and vehicle details correctly on the initial book in and ascertain how the customer will be paying.
- Check all customer details if already a current customer to ensure our records are always up to date – make any changes as necessary
- Identify all the work the customer requires by doing a 'walk around' on their vehicle when they come for the service
- Receive vehicles for service:
  - Confirm with the customer the details recorded on the Repair Order and identify any opportunities for any additional work associated with the customer's service request.
  - As required complete a vehicle walk around to identify opportunities for additional work that the customer may have missed (e.g., expired WOF, worn tyres, cracked head/tail lens etc.).
- Go through the work we will be doing on the customer's vehicle and explain to them. Obtain the customer's signature on the repair order for work to proceed
- Liaise closely with the Workshop controller/Foreman to ensure that agreed vehicle availability times are able to be maintained. Where completion is likely to be delayed advise the customer of the revised availability time and the reasons why – always keep the customer informed on what is happening and especially any delays.
- In the event of work additional to that authorized being required, obtain the customer's authority before the additional work is started.
- Assisting and monitoring all Work In Progress (WIP) and maintain WIP numbers to a minimum
- Ensure that the invoice is available for payment by the customer upon collection of their vehicle and ensure that every customer is appropriately briefed on the work undertaken and the charges made.
- If the work done is to go on the customer's account make sure all details on the account are correct and they are aware of what we have done to their vehicle and the cost of the service.
- Ensure payment is taken at time of pick up (unless on account).
- Always try to pre-book the customer for their next service before they leave.
- Escort customer back to their vehicle having ensured all our covers etc are removed, floor mats are secured properly and their vehicle is ready to go.

### **SERVICE ADVISOR/INVOICER ADDITIONAL ROLE REQUIREMENTS**

- Prospecting: Daily customer calling from "No Further Action" list generated by CRM team (customers who we haven't been able to contact for their service / WOF)
- Customer interaction - Toyota Experience: Customer First process is evolving into a more customer-centric process whereby the customer needs/wants are paramount, so a focus on exceptional customer service is required
- Proactively upselling: We have just secured a Bridgestone tyre agency, so upselling of this and other products and services will be a weekly KPI
- Data collection: Consistent process of ensuring all data is collected upon every customer interaction, this data includes mobile / email / preferred contact method etc. This is an integral part of ensuring the CRM Centre can actively prospect and book customers for the Service Department and future sales campaigns throughout the business

- Data integrity / cleansing: There is a responsibility to ensure all data is actively cleansed to adhere to TNZ and Deloitte's benchmark standards. This is also viewed as an exceptionally important process to ensure we have a manageable and accurate database to manage the "Toyota Experience"
- Job coding and pricing: Ensure you have a clear understanding of service job codes and pricing to ensure we meet the customer's needs, expectations and pricing requirements
- Time management: Ensure you are fully aware of time requirements of the customer / sublet work / technician time / invoicing time to ensure a seamless Toyota Experience
- Service retention: Ensuring you are prospecting for new / lapsed / conquest customers, and we are delivering a high level of customer service to keep our retention results within the TNZ and Deloitte's benchmark
- Campaign selling: Promoting service campaigns / price point offers, including Super Gold Card and any price point offers on monthly specials
- DOTS information collection: Collecting data to ensure all future customer interaction is personalised and recorded to maximise the best outcome for the customer in the future
- TNZ Mystery Shop (phone and physical): You understand all processes, including:
  - Greeting
  - Obtaining personal details / vehicle details
  - Setting appointments
  - Walk around processes
  - Collection process (including floor mat security)
  - Explaining invoices
  - Future booking
- This will be audited by TNZ and there is a minimum score that needs to be achieved, which can vary from quarter to quarter.

### Other

- Attend to enquiries and complaints promptly and courteously and when required promptly refer the customer to the service manager or foreman.
- Liaise with the Parts Division to ensure that parts are/will be available for upcoming major jobs to avoid extended work in progress.
- Be personally responsible for quality control by checking that all work required has been satisfactorily completed, the vehicle test driven, groomed and the Company's quality control documentation properly completed.
- Drop off or pick up customers where required – primarily your role is to be at reception as a priority.
- Achieve and maintain a good level and knowledge of our computer system – TUNZ.
- Ensure that the reception area is maintained in a tidy manner and presents a professional image at all times.
- Such other lawful duties as the CEO, or Service Manager shall instruct from time to time