



**Train the Team.
Transform the Business.**

www.shiftpointacademy.com

Service Advisor One-on-One Coaching

As an independent automotive repair center, how we present ourselves and interact with Clients (and potential Clients) is extremely important. Our goal is not just to sell repairs and maintenance. Because of this idea that many shops in the industry hold, many new/non-customers feel that this is how we all think in the industry-We will change this together! To be successful longterm, our goal should be taking the best possible care of our Clients and thoroughly assisting them in the repair process of their vehicle. In order to get here, we need to reframe our Service Advisors' mindsets to ensure that their goals align with the goals of your company. We need to teach them how to appropriately handle many different situations and properly present your business to existing and potential Clients! We want them to be confident, happy and helpful as they assist your Clients through the repair process. **My goal is to build your Service Advisor's confidence and boost their sales by giving them the tools necessary to present your business well and take the best possible care of your Clients. When the Clients are happy, the sales follow.**



Who is Samantha Schearer-Higdon?

I unintentionally fell into the automotive industry in 2017 after leaving Nursing School. What was intended to be a pit stop to help my family business while I took time to find myself and figure out what I wanted to do with my life quickly turned into a passion as I found myself soaking up *everything* around me and teaching myself new things every single day. I began my career as a Customer Service Representative, however I then quickly became somewhat of a Service Advisor Assistant as my family's business was growing and needed more help. Over time, I began observing and learning more and more about the Service Advisor position, eventually moving into that position about a year later in 2018.

In 2024 I was recognized by the Auto Care Alliance as the AAPEX Service Advisor of the Year. Afterwards, I began to move out of my role as a Service Advisor and into my role as my family business's Marketing Manager. In this transition, I trained my replacements, becoming our in-house Service Team Trainer-Teaching them the ins and outs of our business and how to take any prior knowledge and translate it into our company's daily operations by learning our business's processes and procedures which I developed alongside our Service Manager.

I now strive to help independent automotive repair centers grow their business's Team members through individual coaching. I didn't intend to work in the automotive industry, but I fell in love with it and I want to leave it better than I found it. How do I plan to do that? By changing the way that we as service providers care for our Clients, thus changing the way that we as service providers are seen by them.



Welcome to ShiftPoint Training Academy!



Getting Started

In order to get started, I need to know a bit about how your shop is run: What processes you have in place, what tasks you expect your Service Advisor to complete throughout the day, etc. so that we are on the same page and can ensure that we will be a good fit for each other (The same way that we want to ensure our Clients are a good fit for our automotive repair shops). To establish this, I will have a one-hour Zoom meeting with you, the owner of the shop *or* the Service Manager who will correspond with me regularly in regards to the Service Advisor and their progress, to discuss the shop's SMS, CRM, workflow, day-to-day, maintenance schedules, etc. From there, we can discuss expectations on both ends and next steps with the program if we decide we are a good fit for each other.

If we decide that we seem to be a good fit for each other, I will then meet for approximately thirty to forty-five minutes via Zoom with the Service Advisor to perform a needs analysis. This will assist me in individualizing this program and the coaching content specifically to them to ensure that they get the most out of it. Once the needs analysis has been completed, I will need approximately one week to build their program before we can begin.

Each Service Advisor is very different and comes with their own history. For example, I began as a Service Advisor with zero experience, however the Service Advisors we currently have in my home shop, Scheerer's Sales & Service, Inc., came to us with years of dealership experience. The training I required versus the training they required was *not* the same. That is why it is important to perform the needs analysis and individualize the program to your Service Advisor and company.



Time Commitment from Service Advisor

I will meet with your Service Advisor three times per month for one hour each meeting via Zoom at a regularly-scheduled time. This needs to be time set aside for your Service Advisor, so someone else must be able to cover their duties during these meetings. They will be emailed 3-5 phone call recordings and 3-5 invoices of their own approximately one week prior to the end of the month to listen, review and debrief to prepare for our first meeting of the month. If your Service Advisor is experiencing any struggles they are also welcome to email me and I can add specific content to our next meeting to address these issues or attempt to help with advice via email. There will be some homework (Completing a personality test, identifying and providing a work order where x, y or z happened, listening to, reviewing and debriefing upon 3-5 phone calls and 3-5 invoices per month, listening to and reflecting upon podcast episodes, etc.), however the biggest time commitment will be implementing the new skills learned each month.

Implementation Commitment from Service Advisor

Your Service Advisor must be committed to improving themselves. Spending three hours per month together is not, alone, going to enhance their skills. They need to dedicate the time and effort to implement what they are learning during our meetings. Your Service Advisor must also commit to implementing Key Performance Indicators (KPIs) and working toward meeting those goals to help track and monitor their progress.



Time Commitment from Owner/Service Manager

I will correspond with you via email at least once per month, and we will meet via a thirty- to sixty-minute Zoom meeting once during the fourth week of each month to review your Service Advisor's progress. If you see that your Service Advisor is experiencing any specific struggles, you will let me know so that I can add specific content to our meetings to address these issues. You will provide 3-5 of your Service Advisor's phone call recordings and 3-5 of your Service Advisor's invoices per month: At least one of each that went well and at least one of each that needs improvement. These will be sent to me one week prior to the end of the month so that the Service Advisor and I can both review them and prepare to discuss them during our first meeting of the month. There will be Key Performance Indicators (KPIs) developed individually for your Service Advisor that will need to be measured and tracked so that we can determine their progress together. These numbers will be used as a *tool* in tracking your Service Advisor's skills.

Implementation Commitment from Owner/Service Manager

You must be committed to supporting your Service Advisor's improvement. If they do not have a culture in which they can grow, they will never be able to enhance their skills. As their owner/service manager, you have a responsibility to support their development and training throughout this program and beyond, as well as provide them an atmosphere in which they can flourish. You need to hold your Service Advisor accountable for keeping up with the program, implementing their new skills, meeting their KPIs and performing their assigned tasks.



On-Site Training Availability

I am available to bring your Service Advisor to my home shop, Scheerer's Sales & Service, Inc., for one week (4 business days) of in-person on-site training to work with and learn from myself and one of the Service Advisors that I have trained and worked alongside here in my own business. We will utilize the EDGE Training Model in this situation where we Explain, Demonstrate, Guide and Empower, meaning that by the end of the week, your Service Advisor will be working at our counter. If this is of interest to you, further details can/will be provided.

I am also available to come to you at your shop for in-person on-site training to work alongside your Service Advisor and observe them in their Home atmosphere, how they interact with their fellow Team members, Clients, etc. This can be extremely useful for immediate implementation of skills and immediate correction/improvement of issues. If this is of interest to you, further details can/will be provided.



ShiftPoint Coaching Program Content

Throughout our Coaching relationship, your Service Advisor and I will cover multiple different facets of their position in your company including but not limited to (Depending upon the results of their needs analysis performed prior to onboarding):

- 1. Customer Interaction Skills**
- 2. Professionalism**
- 3. Client Interview Process**
- 4. Scheduling Appointments Effectively**
- 5. Accountability**
- 6. Sales Excellence**
- 7. Workflow Coordination & Shop Flow Management**
- 8. Delivering Tough News**
- 9. Technician-to-Client Translation**
- 10. Leadership & Initiative**
- 11. Performance Ownership & KPIs**
- 12. Strategic Follow-Ups & Retention**



Meeting Agenda

Each month the first time I meet with your Service Advisor, we will review and discuss the 3-5 phone calls and 3-5 invoices sent to me. I will email them to your Service Advisor after I have reviewed them so that they can also listen, review and debrief ahead of time to prepare. During this first meeting of the month, we will discuss their phone calls: What went well, what could use improvement, etc., and we will roleplay situations to help improve their skills.

During the remainder of that first meeting of the month and the other two meetings, we will also progress through the coaching program content as time permits. Depending on the time involved in discussing the phone calls and the work your individual Service Advisor requires with each topic, things may progress slower or faster than one lesson topic per month (Introducing the topics during the remainder of the first call of the month followed by one lesson to span each of the other two meetings). This program is heavily individualized to your Service Advisor and their needs so that they (And you) can get the most out of it.

NOTE: This program is expected to take anywhere from 9-12 months, however if you wish to continue a one-on-one coaching relationship beyond this program, this is available.

