



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

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Client Service Representative One-on-One Coaching

As an independent automotive repair center, how we present ourselves and interact with Clients (and potential Clients) is extremely important. The first contact point for most people is oftentimes our Client Service Representative (CSR). Because of this, we need to make sure that they know how to appropriately handle many different situations and present our business to existing and potential Clients! We want them to be confident, happy and helpful when they pick up the phone, greet someone walking through the door or respond to electronic correspondence. **My goal is to build your CSR's confidence by giving them the tools necessary to present your business well and take the best possible care of your Clients.**

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 CSR 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 CSR 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.



Time Commitment from CSR

I will meet with your CSR three times per month for forty-five minutes each meeting via Zoom at a regularly-scheduled time. This needs to be time set aside for your CSR, so someone else must be able to cover the phones/counter during these meetings. They will be emailed 3-5 phone call recordings of their own approximately one week prior to the end of the month to listen and debrief to prepare for our first meeting of the month. If your CSR 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 and debriefing upon 3-5 phone calls 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 CSR

Your CSR must be committed to improving themselves. Spending a little more than two hours per month together once per month 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 CSR must also commit to implementing a phone call/source tracking sheet. This sheet will be discussed during our first meeting and filled in throughout your CSR's day.



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 CSR's progress. If you see that your CSR 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 CSR's phone call recordings per month: At least one that went well and at least one that needs improvement. These will be sent to me one week prior to the end of the month so that the CSR and I can both review them and prepare to discuss them during our first meeting of the month. You will also collect your CSR's phone call/source tracking sheet to calculate their phone call lead conversion rates for New and Existing Clients. The following numbers will be reported to me in the same email as the call recordings every month: Total number of phone calls answered, Number of New appointments scheduled/Number of New appointment opportunities, Number of Existing appointments scheduled/Number of Existing appointment opportunities, Number of New appointment cancellations, Number of Existing appointment cancellations, New appointment conversion rate%, Existing appointment conversion rate%. These numbers will be used as a *tool* in tracking your CSR's phone skills.

Implementation Commitment from Owner/Service Manager

You must be committed to supporting your CSR'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 CSR accountable for keeping up with the program, implementing their new skills and performing their assigned tasks.



On-Site Training Availability

I am available to bring your CSR to my home shop, Schearer's Sales & Service, Inc., for one week (4 business days) of in-person on-site training to work with and learn from myself and the CSR 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 CSR 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 CSR 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 CSR and I will cover multiple different facets of their position in your company:

- 1. Customer Interaction Skills**
- 2. Professionalism**
- 3. Client Interview Process**
- 4. Automotive Knowledge for CSRs**
- 5. Scheduling Appointments Effectively**
- 6. Collaboration**
- 7. Time Management**
- 8. Down-Time**
- 9. Accountability**



Meeting Agenda

Each month the first time I meet with your CSR, we will review and discuss the 3-5 phone calls sent to me. I will email them to your CSR after I have reviewed them so that they can also listen 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. Depending on the time involved in discussing the phone calls and the work your individual CSR requires with each topic, things may progress slower or faster than two lessons per month (Introducing the topics during the remainder of the first call of the month followed by one lesson in each of the other two meetings). This program is individualized to your CSR 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.

