

DACUM Research Chart for Service Advisor

Duties	Tasks											
A <i>Provide Customer Service</i>	A-1 Greet customer (e.g., phone, in person, email)	A-2 Determine customer's basic service needs	A-3 Perform customer check-in	A-4 Generate repair order	A-5 Recommend additional services (e.g., safety inspections,, menu selling, <i>courtesy service</i>)	A-6 Update customer on unit status	A-7 Perform quality check	A-8 Review completed repair order with customer	A-9 Resolve difficult customer issues			
B <i>Coordinate Customer Appointments</i>	B-1 Assess customer need for service appointment	B-2 Establish appointment/ completion time		B-3 Pre-write customer's repair order	B-4 Pre-order parts as required	B-5 Confirm customer appointment (e.g., parts availability, sublet scheduling)	B-6 Provide instructions for drop offs					
C <i>Maintain Daily Operations</i>	C-1 Open/ close service department	C-2 Review daily appointment schedule	C-3 Contact "no show" appointments	C-4 Review open repair orders (e.g., techs, sublet, parts)		C-5 <i>Update</i> customer records (e.g., comment section, authorizations, <i>personal information</i>)	C-6 Obtain authorizations as needed (e.g., sales, warranty, customer)	C-7 Update daily service schedule	C-8 Review productivity/ efficiency & CSI reports	C-9 Process customer requests (e.g., phone, e-mail, fax)		
	C-10 Check on authorizations from OEM's	C-11 <i>Update repair order</i>	C-12 Maintain work area	C-13 Maintain filing system	C-14 Process customer payments	C-15 <i>Report to management (e.g., potential issues, positive feedback, progress updates)</i>						
D <i>Coordinate Technician Workload</i>	D-1 Determine carryover with leads/shop foreman	D-2 Dispatch work to techs	D-3 Confirm authorizations with techs	D-4 Obtain updates from techs	D-5 Reassign work to techs							
E <i>Coordinate With Other Departments</i>	E-1 Coordinate with sales & F&I departments (e.g., new unit check-ins, sales deliveries)	E-2 Coordinate with parts department	E-3 Coordinate with warranty department	E-4 Coordinate with detail department		E-5 <i>Coordinate with body shop</i>	E-6 <i>Coordinate with rental department</i>	E-7 Arrange for sublet repairs and payments	E-8 Schedule customer orientation			
F <i>Pursue Professional Development</i>	F-1 <i>Participate in internal training</i>	F-2 <i>Participate in cross training</i>	F-3 <i>Obtain professional certifications</i>	F-4 <i>Participate in manufacturer/ vendor training</i>		F-5 <i>Participate in industry events (e.g., conferences, trade shows)</i>	F-6 <i>Review professional publications</i>	F-7 <i>Network with industry representatives</i>				

Acronyms

CSI	Customer Satisfaction Index
ETA	Estimated Time of Arrival
F&I	Finance and Insurance
OEM	Original Equipment Manufacturer
PDI	Pre-Delivery Inspection
PO	Purchase Order
RVDA	Recreational Vehicle Dealers Association

Notes:

1. Duties are listed in no particular order.
2. New tasks are shown in *italics*.
3. Changes/additions to original tasks are also noted in *italics*.

Worker Behaviors

Self-motivated
Team player
Friendly
Positive attitude
Willingness to learn
Patient
Proactive
Resourceful

Honest
Dependable
Sense of humor
Creative
Assertive
Multi-tasker
Flexible
Detail oriented

Empathetic
Customer oriented
Respectful
Trustworthy
Safety conscious
Professional
Confident
Courteous
Computer literate

Visionary
Diplomatic
Observant
Tactful
Sociable
Accountable
Competent
Tech savvy

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