

DACUM Research Chart for Service Advisor

Duties		Tasks											
A	Provide Customer Service	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-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					
B	Coordinate Customer Appointments	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>						
C	Maintain Daily Operations	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-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				
D	Coordinate Technician Workload	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>					
E	Coordinate With Other Departments												
F	Pursue Professional Development												

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

Produced by



Originally Conducted: February 22-23, 2006. Updated: May 16, 2016

Conducted at the Center on Education & Training for Employment on The Ohio State University campus in Columbus, OH.

DACUM Research Chart for Parts Manager & Parts Specialist

February 13, 2017

Duties		Tasks											
A	Merchandise the Store	A-1 Manage store layout	A-2 Install in-store signage	A-3 Create products tags (e.g., pricing labels, barcodes, etc.)	A-4 Manage product displays (e.g., permanent, seasonal, promotional)	A-5 Manage store appearance (e.g., straightening, front facing, cleaning)	A-6 Rotate product stock	A-7 Update product information (e.g., pricing, SKU, bar codes)	A-8 Coordinate store resets				
		B-1 Manage discount pricing (e.g., promotional, sale, program)	B-2 Conduct customer seminars and webinars	B-3 Conduct special events (e.g., customer appreciation, open houses)	B-4 Coordinate parts marketing campaigns (e.g., email blasts, flyers, direct mail)	B-5 Manage website parts catalog	B-6 Participate in off-site events (e.g., shows, rallies, campgrounds)	B-7 Evaluate competition (e.g., products, prices)	B-8 Participate in social media/web presence				
B	Market Parts & Accessories	C-1 Maintain parts inventory system	C-2 Determine best parts supplier(s)	C-3 Order parts and accessories	C-4 Receive parts (e.g., price, stock on shelf)	C-5 Manage inventory level (e.g., back stock, front end)	C-6 Monitor inventory variances (e.g., internal, external)	C-7 Return parts (e.g., RGA, defective, warranty, obsolete)	C-8 Perform cycle counts	C-9 Conduct physical parts & accessories inventory	C-10 Control freight income and expenses		
		D-1 Prepare for daily operations	D-2 Wait on customer in person (e.g., greet, assess, direct)	D-3 Wait on customer electronically (e.g., phone, email)	D-4 Wait on internal customers (e.g., warranty, sales, technician)	D-5 Introduce new customer to Parts Department staff	D-6 Generate special orders for parts	D-7 Promote product features & benefits					
C	Manage Parts Inventory	D-8 Track lost part sales	D-9 Complete parts sales transactions (e.g., credit card, cash, check)	D-10 Follow up on special orders (e.g., customers, vendors)	D-11 Perform end of day operations								
		E-1 Maintain customer information (e.g., birthday, contact information)	E-2 Maintain contact with customers (e.g., personal events, follow up)	E-3 Solicit customer feedback	E-4 Respond to customer feedback	E-5 Resolve customer issues							
D	Sell Parts & Accessories	F-1 Identify staffing needs and requirements	F-2 Recruit prospective employees	F-3 Interview prospective employees	F-4 Hire new staff	F-5 Conduct staff onboarding	F-6 Assign staff tasks & responsibilities (e.g., schedule employees)	F-7 Assist with risk management training (e.g., OSHA, EPA, ADA)	F-8 Coach staff	F-9 Conduct employee reviews	F-10 Counsel staff (e.g., discipline, mediate)		
		G-1 Analyze parts inventory forecasts	G-2 Review parts department budget & goals	G-3 Manage expenditures (e.g., inventory, policy, supplies)	G-4 Approve invoices for payment	G-5 Monitor special order deposits							
E	Manage Customer Relations	H-1 Troubleshoot daily issues	H-2 Manage quote book	H-3 Maintain office equipment	H-4 Maintain customer files	H-5 Participate in staff meetings	H-6 Maintain references and contacts (e.g., supplier, vendor)	H-7 Prepare expense reports	H-8 Order office supplies				
		I-1 Participate in internal training	I-2 Participate in cross training	I-3 Obtain professional certifications	I-4 Participate in manufacturer/vendor training	I-5 Participate in industry events (e.g., conferences, trade shows)	I-6 Review professional publications	I-7 Network with industry representatives					
F	Manage Human Resources												
G	Manage Financial Resources												
H	Perform Administrative Functions												
I	Pursue Professional Development												

Notes:

1. The Parts Specialist is expected to achieve the competencies that are shaded.
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Acronyms

PDI Pre-delivery Inspection
MSDS Material Safety Data Sheet
CSI Customer Satisfaction Index
SA Service Advisors
QC Quality Control
WIP Work in Process
P&L Profit & Loss
RO Repair Order

SOP Special Order Part
DOC Daily Operating Control
RVIA Recreational Vehicle Industry Association
RVDA Recreational Vehicle Dealers Association
OSHA Occupational Safety & Health Administration
PPE Personal Protective Equipment
DMS Dealer Management Software

Produced by

DACUM Research Chart for Warranty Administrator

Duties		Tasks																					
A	Process Open/Closed Repair Orders	A-1 Verify customer vehicle information (e.g., mileage, signature, DOP)		A-2 Check vehicle for open recalls/TSBs (e.g., chassis, OEM, mfg.)		A-3 Review repairs & parts for prior authorization (e.g., photos, videos, documentation)		A-4 Check vehicle service history (e.g., DAF)		A-5 Verify CCC & component information		A-6 Verify that parts are billed correctly		A-7 Verify technician punch time (e.g., signature or initials)		A-8 Facilitate extended service contracts							
		B-1 Prepare warranty claim form (e.g., header, CCC)		B-2 Complete warranty claim (e.g., extend claim, close RO)		B-3 Submit warranty claim into dealer's/manufacturer's systems		B-4 Assemble claim documents for submittal (e.g., freight invoices, part invoices, sublet bills)		B-5 Process defective warranty parts (e.g., storing, shipping, scrapping)		B-6 Monitor digital manufacturer claim status											
C	Process Warranty Claims & Parts	C-1 Reconcile payments with claims		C-2 Maintain warranty journal (e.g., write off labor & parts)		C-3 Follow up on warranty accounts receivables		C-4 Analyze adjusted claims (e.g., shorted, denied)		C-5 Appeal warranty shortages													
		D-1 Negotiate payment responsibility		D-2 Inform manufacturer & service advisor of repair status		D-3 Explain manufacturer warranty to service advisor		D-4 Follow up on open recalls & TSBs (e.g., mail outs)		D-5 Mediate resolutions between customer and manufacturers		D-6 Report quality concerns to manufacturers											
D	Maintain Customer & Manufacturer Relations	E-1 Participate in development of department goals & budget		E-2 Process correspondence (e.g., e-mail, phone, mail)		E-3 Adjust technician repair times		E-4 Maintain warranty files		E-5 Request manufacturer labor rate increase		E-6 Maintain recalls & TSBs (e.g., new & used RVs)		E-7 Update supervisor on work progress		E-8 Appeal manufacturer's flat rate time		E-9 Monitor manufacturer's authorization		E-10 Analyze department gross profit & loss		E-11 Notify manufacturer of potential lemon law repairs	
		E-12 Update manufacturer's flat rate manual		E-13 Update dealership personnel (e.g., meetings, memos, job aids)				E-14 Conduct OJT for support staff															
E	Perform Administrative Tasks	F-1 Verify unit specifications		F-2 Perform new unit inspections		F-3 Complete DAF		F-4 Initiate service documentation															
		G-1 Participate in internal training		G-2 Participate in cross training		G-3 Obtain professional certifications		G-4 Participate in manufacturer/ vendor training		G-5 Participate in industry events (e.g., conferences, trade shows)		G-6 Review professional publications		G-7 Network with industry representatives									
F	Check in New Units																						
G	Pursue Professional Development																						

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Originally Conducted: October 24-25, 2006. Updated: May 16, 2016

Conducted at the Center on Education & Training for Employment on The Ohio State University campus in Columbus, OH.

Acronyms

PDI	Pre-delivery Inspection	SOP	Special Order Part
MSDS	Material Safety Data Sheet	DOC	Daily Operating Control
CSI	Customer Satisfaction Index	RVIA	Recreational Vehicle Industry Association
SA	Service Advisors	RVDA	Recreational Vehicle Dealers Association
QC	Quality Control	OSHA	Occupational Safety & Health Administration
WIP	Work in Process	PPE	Personal Protective Equipment
P&L	Profit & Loss	DMS	Dealer Management Software
RO	Repair Order		

DACUM Research Chart for Service Manager

Duties		Tasks											
A	Manage Service Department Work Flow	A-1 Review sold units requiring delivery	A-2 Review service units requiring delivery	A-3 Review daily appointment schedule (e.g., pre-PDI stock/delivery)	A-4 Review RO write-ups	A-5 Prioritize ROs	A-6 Assign repair jobs to techs	A-7 Verify service approvals have been obtained	A-8 Determine parts needed	A-9 Oversee work in progress	A-10 Update ROs	A-11 Review closed ROs	
	Provide Customer Service	B-1 Provide customer hospitality (e.g., greet customer, overnight accommodations)	B-2 Process customer correspondence (e.g., mail, phone, fax, e-mail, texts)	B-3 Perform follow-up call (e.g., repair, delivery)	B-4 Survey customer satisfaction	B-5 Perform courtesy contacts (e.g., appointments, parts, SOP)	B-6 Provide after-hours drop off (e.g., night drop/early bird service)	B-7 Provide emergency assistance referral (e.g., dealership referral, technical information)	B-8 Authorize goodwill expenses				
C	Generate Service Department Revenue	C-1 Market service specials (e.g., print, digital)	C-2 Determine service options and/or referrals	C-3 Create incentive up-sell program (e.g., spiffs)	C-4 Develop technician performance pay program (e.g., incentives, flat rate)	C-5 Manage technician time (productivity and unapplied)	C-6 Manage trade agreements with insurers (e.g., insurance companies, manufacturer warranties)	C-7 Determine specialized labor rates	C-8 Maintain saleable condition of stock units				
D	Review Administrative Reports	D-1 Review profit and loss report	D-2 Review open RO report (e.g., missing DOC, work-in-progress, sublets)	D-3 Review productivity/efficiency reports	D-4 Review CSI report	D-5 Review DOC report	D-6 Audit technician time tickets	D-7 Review service advisor performance report	D-8 Review warranty reports	D-9 Review effective labor rate report	D-10 Set service department productivity goals		
E	Manage Service Personnel	E-1 Recruit qualified employees	E-2 Hire employees (e.g., drug testing, background checks, driver's license checks)	E-3 Conduct employee orientation	E-4 Manage employee work schedule	E-5 Provide employee counseling (e.g., discipline, work)	E-6 Evaluate employee performance	E-7 Maintain employee personnel files					
F	Train Service Department Staff	F-1 Identify training/certification needs	F-2 Coordinate preparation of service department training materials	F-3 Document service department training and resources	F-4 Provide customer information security training to staff	F-5 Provide required training (e.g., sexual harassment, MSDS, PPE)	F-6 Schedule service department training (e.g., vendor, internal)						
G	Promote Public Relations	G-1 Maintain facility appearance	G-2 Maintain staff professional appearance	G-3 Maintain relationships with industry organizations	G-4 Participate in community activities & events (e.g., customer appreciation, charitable donations, disaster relief)	G-5 Maintain online service reputation							
H	Perform Administrative Tasks	H-1 Perform management walk-around of facility	H-2 Coordinate building repair	H-3 Perform shop safety inspections	H-4 Schedule equipment maintenance	H-5 Review legal issues	H-6 Maintain reference resources (e.g., print, digital)	H-7 Manage shop expenses	H-8 Monitor security procedures	H-9 Monitor parts fill ratio	H-10 Inventory shop equipment	H-11 Propose service department budget	H-12 Manage safety committee
I	Pursue Professional Development	H-13 Perform service unit audit											
		I-1 Participate in internal training	I-2 Participate in cross training	I-3 Obtain professional certifications	I-4 Participate in manufacturer/vendor training	I-5 Participate in industry events (e.g., conferences, trade shows)	I-6 Review professional publications	I-7 Network with industry representatives					

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