

The Sales to Service Handoff is a multi-step process that involves the collaboration of various dealership team members. Here's a step-by-step breakdown of how the handoff should take place, along with roles, expectations, and suggestions to ensure an superior customer experience:

1. Vehicle Purchase and Delivery

- **Sales Consultant:** Completes the vehicle purchase process and prepares the customer for the handoff to the service department.
- **Customer:** Signs necessary paperwork and receives keys to their new vehicle.

2. Introduction to Service Department

- **Sales Consultant:** Escorts the customer to the service department and introduces them to the Service Advisor.
- **Service Advisor:** Greets the customer warmly and welcomes them to the dealership's service family.
- **Suggestion:** Provide a comfortable waiting area for customers with refreshments and amenities.

3. First Service Appointment Scheduling

- **Service Advisor:** Discusses the importance of regular maintenance and helps the customer schedule their first service appointment.
- **Customer:** Provides preferred date and time for the first service visit.
- **Suggestion:** Offer flexible scheduling options, including online booking, to accommodate the customer's busy schedule.

4. Service Department Tour (Optional)

- **Service Advisor:** If time permits, gives the customer a brief tour of the service department, highlighting state-of-the-art equipment and introducing them to key team members.
- **Customer:** Familiarizes themselves with the service department and asks any questions they may have.



5. Informative Materials

- **Service Advisor:** Provides the customer with a service department information packet, including a welcome letter, maintenance schedule, and promotional offers.
- **Customer:** Reviews the materials and asks any additional questions.
- **Suggestion:** Ensure the materials are well-organized, visually appealing, and easy to understand.

6. Follow-up Communication

- **Service Advisor:** Sends a follow-up email or text message to the customer, confirming their first service appointment and providing contact information for the service department.
- **Customer:** Confirms the appointment and saves the contact information for future reference.

7. Day of First Service Appointment

- **Service Advisor:** Greets the customer upon arrival, reviews the planned maintenance, and provides an estimated completion time.
- **Technician:** Performs the required maintenance and inspections, noting any additional recommendations.
- **Suggestion:** Offer complimentary amenities such as Wi-Fi, coffee, or a shuttle service to enhance the customer's experience.

8. Service Completion and Follow-up

- **Service Advisor:** Reviews the completed work with the customer, discusses any additional recommendations, and schedules the next service appointment if needed.
- **Customer:** Asks any final questions, pays for the service, and provides feedback on their experience.
- **Suggestion:** Follow up with a thank-you email or survey to gather valuable feedback and show appreciation for the customer's business.

Throughout the Sales to Service Handoff process, all dealership team members should prioritize clear communication, attentive listening, and a commitment to exceeding the customer's expectations. By following this step-by-step approach and incorporating the suggested best practices, dealerships can create a seamless and memorable experience that lays the foundation for long-term customer loyalty.



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