

The customer experience is the foundation of a successful service department. In Fixed Operations, one of the most overlooked yet impactful aspects of this experience is how your team handles phone interactions. Every phone call represents an opportunity to connect with a customer, build trust, and set the tone for future business. Yet, all too often, service departments fail to meet expectations, leading to frustration, lost revenue, and damaged relationships.

This guide outlines a seven-point action plan for Service Managers who want to elevate their phone practices and customer experience. By implementing these strategies, you can identify key gaps, train your team for success, and foster a culture of continuous improvement. Let's explore the steps that will help you transform phone interactions into a cornerstone of your service department's excellence.

1. Conduct Mystery Calls Regularly

The first step to improvement is awareness. Make anonymous calls to your service department to experience what customers encounter. Use various scenarios, such as scheduling maintenance or asking about diagnostics, and observe how your team responds. Track metrics like hold times, the clarity of responses, and overall professionalism.

Pro-tip:

- Schedule these calls during peak and off-peak hours to identify consistency in service quality.

Tripping point:

- Avoid announcing this initiative to your team ahead of time. If employees know they're being monitored, the results won't reflect typical interactions.

Thought starter:

- What did the experience make you feel as a customer? Would you trust your service



department with your vehicle based on that call?

2. Set Clear Standards for Phone Etiquette

Establish clear, written guidelines for handling calls. These should include how to greet customers, tone of voice, response times, and the information to be gathered during the call. Standards help your team deliver consistent, professional service that customers can rely on.

Pro-tip:

- Create call scripts for common scenarios, but train your team to use them as a framework rather than a rigid formula. The goal is authentic communication.

Tripping point:

- Don't let scripts make conversations feel robotic. Customers value human connection over rehearsed responses.

Thought starter:

- How can you balance efficiency with personalization in every customer interaction?

3. Invest in Training and Coaching

Training is not a one-time event—it's an ongoing process. Equip your team with the tools and knowledge they need to handle calls effectively. Focus on soft skills like active listening and empathy, as well as technical knowledge about services and pricing.

Pro-tip:

- Use recorded calls to coach employees. Highlight what they did well and where they can improve. M5 consultants can assist in creating tailored training programs to address specific needs in your department.

Tripping point:

- Don't assume that experience equals expertise. Even seasoned employees benefit from coaching and refreshers.

Thought starter:

- Are your training sessions interactive and engaging, or are they just "check-the-box" activities?



4. Optimize Phone Systems for Efficiency

Your phone system is as important as your team. Outdated or poorly configured systems create friction, from excessive hold times to dropped calls. Ensure your system routes calls effectively and provides employees with the tools to access customer data quickly.

Pro-tip:

- Integrate your phone system with your DMS to streamline workflows and ensure customer data is readily accessible. Use call tracking or analytics tools to monitor performance and identify trends in customer interactions.

Tripping point:

- Avoid over-complicating the system. Too many layers of automation can frustrate customers rather than help them.

Thought starter:

- How easy is it for a customer to get the answers they need on their first call?

5. Make Empathy a Core Value

Empathy transforms routine transactions into meaningful interactions. Train your team to listen actively and respond with genuine care. Simple phrases like, “I understand how that might be frustrating,” can make a customer feel valued and heard.

Pro-tip:

- Encourage employees to take notes on conversations so they can follow up with personalized service when the customer visits.

Tripping point:

- Don't let empathy slow down the process. It's about balancing understanding with efficiency.

Thought starter:

- How often does your team practice empathy during role-playing exercises?



6. Monitor and Measure Performance

Tracking performance is key to improvement. Use tools like call analytics and customer feedback surveys to assess how well your team is meeting expectations.

Pro-tip:

- Share call performance metrics with your team regularly to foster accountability and celebrate progress.

Tripping point:

- Don't focus solely on negative feedback. Acknowledge successes to maintain team morale.

Thought starter:

- Are you using data to drive meaningful changes in your phone practices?

7. Foster a Culture of Continuous Improvement

Improving phone interactions isn't a one-time effort; it's an ongoing commitment. Encourage your team to view every call as an opportunity to learn and grow. Regularly review your processes, gather input from your staff, and adjust as needed.

Pro-tip:

- Hold monthly team meetings to discuss challenges and share best practices. M5's consulting services can facilitate these discussions and provide expert guidance.

Tripping point:

- Avoid becoming complacent after initial improvements. Customer expectations evolve, and so should your processes.

Thought starter:

- How can you empower your team to take ownership of their role in creating great customer experiences?

Conclusion

Every phone call is an opportunity to create a lasting impression. By focusing on the steps outlined in this guide, Service Managers can elevate their service



departments, turning phone interactions into a key driver of customer loyalty and retention. From regular mystery calls to fostering a culture of continuous improvement, these actions set the stage for long-term success.

M5 Management Services is here to support you every step of the way. Whether you need help with training, systems integration, or tools like ROSE+, we provide the expertise and resources to make meaningful changes. Start implementing these strategies today and watch as your service department becomes a leader in customer care.

Need help with your Fixed Operations department? We've got you covered.

Visit www.m5ms.com and fill out our Free Consultation form. One of our experienced consultants will be in touch to assist you with all your Fixed Ops needs.

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