

Service Advisor Hiring Kit

Job description template, interview questions, scorecard, KPI checklist, and first 30-day onboarding plan

For auto repair shops hiring or training a service advisor

How to use this kit

- Use the job description template to define the role before publishing the vacancy.
- Use the interview questions and scorecard to compare candidates consistently.
- Use the KPI checklist to set clear performance expectations from day one.
- Use the 30-day onboarding plan to help the new advisor learn your workflow, customers, technicians, and tools.

What a service advisor owns

Area	What the advisor handles	Why it matters
Customer intake	Understand the issue, collect vehicle details, and set expectations.	Good intake prevents missed details and repeat calls.
Booking and workflow	Schedule jobs, update customers, and coordinate with technicians.	A busy shop needs clean handoffs and fewer bottlenecks.
Estimates and approvals	Explain recommended work, pricing, timelines, and customer approvals.	This affects revenue, trust, and repair order conversion.
Follow-ups	Remind customers, request reviews, and encourage repeat visits.	Follow-up turns one-time customers into repeat business.
Records and invoices	Keep customer notes, job cards, approvals, and invoices organized.	Clean records protect the shop and improve service quality.

1. Service advisor job description template

Copy, edit, and use this as the base for your job post. Keep it specific to your shop size, services, opening hours, and software tools.

Section	Template content
Job title	Service Advisor / Automotive Service Advisor
Role summary	We are looking for a service advisor to manage customer communication, bookings, estimates, job updates, approvals, invoices, and follow-ups in a busy auto repair shop.
Key duties	Book customers, open repair orders, collect vehicle details, prepare estimates, explain recommended work, update customers, coordinate with technicians, issue invoices, and follow up after service.
Required skills	Clear communication, organization, customer service, basic vehicle knowledge, confidence explaining estimates, and ability to manage multiple jobs at once.
Nice to have	Experience with garage management software, CRM tools, estimating systems, parts workflows, or service desk roles.
Working style	Calm under pressure, detail-oriented, honest with customers, and able to work closely with technicians and shop owners.
Success in this role	Higher estimate approvals, fewer missed updates, better customer reviews, cleaner job records, and more repeat bookings.

2. Core duties checklist

Customer and booking duties

Task	Owner / notes	Done
Answer calls, messages, and walk-in enquiries professionally.		☐
Collect customer name, phone, vehicle details, symptoms, and requested service.		☐
Create or update the customer and vehicle record.		☐
Book the appointment and confirm date, time, and expected next step.		☐
Explain what happens during diagnosis or inspection.		☐

Job flow and estimate duties

Task	Owner / notes	Done
Open the repair order or job card with clear customer notes.		☐
Assign or hand off work to the correct technician or bay.		☐
Prepare or review estimates before sending them to customers.		☐
Explain recommended work in plain language.		☐
Record customer approvals or declined work clearly.		☐
Update customers when timelines or costs change.		☐

Follow-up and admin duties

Task	Owner / notes	Done
Issue invoices and confirm payment status.		☐
Schedule next service, recheck, or follow-up visit before the customer leaves.		☐
Send reminders for approved work, declined work, or upcoming service.		☐
Ask happy customers for reviews.		☐
Keep notes clean for the next visit.		☐

3. Service advisor interview questions

Ask a mix of customer handling, workflow, sales, and software questions. Look for clarity, calmness, honesty, and process discipline.

Question	What to listen for	Score 1-5
How would you explain an unexpected repair cost to a customer?	Clear explanation, empathy, no pressure, offers options.	
How do you handle a customer who is angry about a delay?	Calm response, ownership, updates, realistic next step.	
What information should be included when opening a repair order?	Customer, vehicle, symptoms, authorization, notes, photos if used.	
How do you prioritize jobs when technicians are fully booked?	Urgency, customer commitments, parts availability, technician workload.	
How would you follow up with a customer after a repair?	Check satisfaction, explain next service, request review, note history.	
What shop software, CRM, estimating, or scheduling tools have you used?	Comfort with systems, accurate data entry, willingness to learn.	
How do you increase approved work without sounding pushy?	Trust, education, safety, prioritization, transparent pricing.	
What would you do if a technician finds extra work after the estimate is approved?	Pause, document, communicate, get approval before proceeding.	

4. Candidate scorecard

Criteria	What good looks like	Score 1-5	Notes
Communication	Explains clearly, listens well, stays calm with customers.		
Organization	Can manage bookings, job updates, notes, and follow-ups.		
Automotive understanding	Understands basic repair terms and asks sensible questions.		
Customer trust	Can explain price, urgency, and options without sounding pushy.		
Software comfort	Can use scheduling, repair order, CRM, estimate, or invoice tools.		
Team coordination	Can work with technicians, parts, and management without creating confusion.		
Commercial judgment	Understands approvals, average repair order value, and repeat bookings.		

5. KPI checklist for service advisors

A service advisor should not only be judged by being busy. Track the KPIs that show whether customers are informed, jobs are approved, and follow-ups are happening.

KPI	What it measures	Target / notes	Track?
Quote-to-repair-order conversion	How many estimates turn into approved jobs.	Set baseline, then improve month over month.	☐
Average repair order value	Average revenue per completed job.	Useful for sales quality and service mix.	☐
Hours sold per repair order	How effectively labor is presented and approved.	Track by advisor if possible.	☐
Customer update response time	How quickly customers receive status updates.	Reduces complaints and repeat calls.	☐
Comeback / complaint rate	How often customers return unhappy or confused.	High rates may show poor expectation-setting.	☐
Exit scheduling rate	How many customers book the next visit before leaving.	Strong indicator for retention.	☐
Review request rate	How often happy customers are asked for reviews.	Supports local reputation and SEO.	☐
Follow-up completion rate	Whether declined work and reminders are followed up.	Supports future revenue and safety recommendations.	☐

6. First 30-day onboarding plan

Period	Focus	Training tasks	Done
Week 1	Shop workflow and customer intake	Learn services, pricing basics, appointment process, customer greeting, vehicle intake, and repair order notes.	☐
Week 2	Estimates, approvals, and updates	Practice explaining estimates, sending approvals, updating customers, and documenting declined work.	☐
Week 3	Follow-ups and retention	Learn service reminders, review requests, declined-work follow-ups, and next-visit scheduling.	☐
Week 4	Independent workflow	Handle bookings, job updates, approvals, invoices, and follow-ups with manager review.	☐

7. AutoGMS setup checklist for advisors

Set up the advisor workflow

Task	Owner / notes	Done
Add advisor users and permissions.		☐
Set booking slots and service categories.		☐
Create job card templates for common services.		☐
Create estimate and invoice templates.		☐
Set customer follow-up and reminder workflows.		☐
Track advisor KPIs such as approvals, bookings, and follow-ups.		☐
Keep customer, vehicle, job, invoice, and communication history in one place.		☐

Final notes before hiring

- Do not hire only for friendliness. The role needs process discipline and commercial awareness.
- A weak advisor can create missed bookings, unclear estimates, unhappy customers, and messy job records.
- A strong advisor improves trust, approvals, technician workflow, repeat visits, and reviews.

For a smoother advisor workflow, use autoGMS to manage bookings, job cards, estimates, invoices, customer records, and follow-ups in one place.