

# Maximize Service Revenue with AI Agents



## Your Monday Morning Outcome

By following this guide, you will have the Tekion AI Agent for Service enabled and configured – so your advisors spend less time pulling vehicle history and manually logging follow-ups, and more time on the upsell conversation that actually requires their expertise.

### Before You Start



## Pre-Implementation Checklist

### ✓ Service AI enabled in subscription

Confirm with your inside sales rep that Tekion Service AI is included in your subscription.

### ✓ Advisor and technician roles configured

AI agents function for technicians and advisors by role. Confirm advisor profiles and technician profiles are assigned correctly.

### ✓ Baseline captured

Pull current Advisor Recommendation Channel and Advisor Performance baselines before enabling. Track approval rate, recommendations per RO, and revenue per RO so you can measure AI impact.



# Enable Service AI and Review Existing Workflows

**Time:** 30 minutes

Setting	Configuration
<b>Contact Your Inside Sales Representative</b>	Service AI must be added to your subscription before functionality will display. Contact your Tekion Inside Sales Representative to confirm that Service AI is active on your account.
<b>Assess Existing MPVI and Recommendation Workflows</b>	Review workflows with technicians and service advisors. Ensure that MPVI and recommendations are being submitted by technicians and advisors are reviewing Consumer Portal process with their customers.
<b>Note Your Baseline Metrics</b>	Before going live, record your current average recommendations per RO and customer approval rate. Pull from Reports > Service > Advisor Recommendations. This gives you a before/after comparison when you review your AI Dashboard results.
<b>Schedule Technician and Advisor Training</b>	Block 30 minutes each for your technician team and advisor team within the first week of activation to ensure understanding of new process.

# Align Your Workflows With Service AI

**Time:** 30 minutes

Setting	Configuration
<b>Technician MPI Process</b>	Walk your technicians through the MPI screen and confirm they know how to access the Inspection Recommendations panel at the top. Verify they understand how to click "Add" to include a recommendation with their MPI submission.
<b>Advisor Recommendation Review</b>	Confirm advisors know where to find the AI-rewritten Marketable Recommendations when they receive completed MPIs from technicians. Advisors should review these before contacting the customer.
<b>Customer Approval Process</b>	Ensure customers are aware of Consumer Portal functions and set expectations for recommendations to be sent. Leverage the AI optimization for the sent order and AI summary in the portal, and coach advisors to utilize the new order of recommendations unless specifically needed to undo.
<b>Thumbs-Up Feedback</b>	Train your team to thumbs-up AI rewrites they keep and thumbs-down rewrites they revert. Feedback trains the model to improve output over time.

# Utilize the AI Dashboard

**Time:** 10 minutes | **Navigation:** Repair Order > View AI Dashboard

Setting	Configuration
<b>Executive Summary</b>	Review to see changes before and after adoption of Service AI. Allows executive level tracking of performance and ROI.
<b>Review Detailed Breakdown</b>	Utilizing the Detailed Metrics in the dashboard review AI generated revenue as well as monthly trends and customer engagement. Track your dealership's improvement in real time with interactive charts.
<b>Track Advisor Adoption and Performance</b>	Track adoption and usage per advisor to identify top contributors and view revenue splits. Easily review the impact AI has had on your department, comparing against traditional recommendations.

# Build and Track the Adoption Routine

**Time:** 15 minutes | **Navigation:** Repair Orders > View AI Dashboard

Routine	Configuration
<b>Daily AI Dashboard Review</b>	Each morning, the service manager reviews the AI dashboard. Yesterday's utilization rate by advisor, AI recommendation acceptance rate, AI-influenced revenue. This allows coaching and guidance to be provided to those well below the department average.
<b>Weekly Recommendation Audit</b>	Compare AI-influenced approval rates against pre-AI baseline. Track the lift in approvals and the lift in revenue per RO over the first eight weeks.
<b>Monthly Service Gross Profit Review</b>	Review the Service Gross Profit Trend month-over-month against your pre-AI baseline. Service AI should produce measurable lift in approval rates, recommendations presented per RO, and hours sold per RO. Track all three.



## Measure Your Results

Metric	Navigation	What to Look For
<b>AI Recommendation Acceptance %</b>	Service AI Dashboard > Detailed Metrics	How often advisors keep AI-rewritten recommendations versus reverting to original.
<b>AI Assisted Recommendation \$ per RO</b>	Service AI Dashboard > Detailed Metrics	The amount per RO that is being generated from recommendations using AI.
<b>Total Revenue Split</b>	Service AI Dashboard > Detailed Metrics	Breakdown of where revenue is coming from, with AI vs non-AI recommendations and jobs.



## Best Practices

### ✓ Review your AI Dashboard weekly for the first 30 days

Early adoption varies by advisor. Use the individual KPI breakdown in the AI Dashboard to identify who is using Service AI consistently and who may need additional coaching. A short 10-minute one-on-one review of the dashboard data with any lagging advisor is more effective than a group retraining.