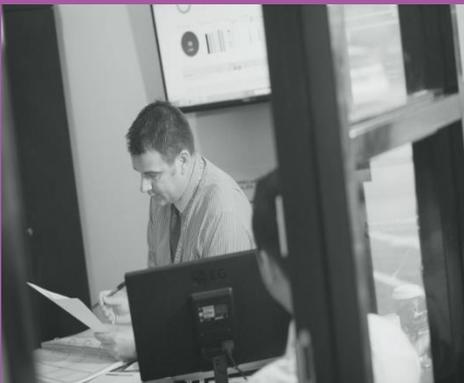




INSTITUTE
OF THE MOTOR
INDUSTRY

IMI QUALIFICATION



ASSESSMENT CRITERIA

FOR

IMI Level 5 Diploma in Automotive Management (VRQ)

OFQUAL I.D: 600/0353/4

Note: This guidance is supported by the following documents:

- Unit Assignments
- Candidate Assessment Summary

CENTRE INFORMATION

Please be aware that any **legislation** referred to in this qualification may be subject to amendment/s during the life of this qualification. Therefore IMI Approved Centres must ensure they are aware of and comply with any amendments, e.g. to health and safety legislation and employment practices.

Please be aware that **vehicle technologies** referred to in this qualification reflect current practice, but may be subject to amendment/s, updates and replacements during the life of this qualification. Therefore IMI Approved Centres must ensure they are aware of the latest developments and emerging technologies to ensure the currency of this qualification.

Please note: the relevance of the information contained in the **unit content** will vary depending upon the vehicle types being worked upon. The unit content is for guidance only and is not meant to be prescriptive.

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Requests should be made in writing and addressed to:
Institute of the Motor Industry (IMI)
Fanshaws, Brickendon, Hertford SG13 8PQ



QUALIFICATION STRUCTURE (Rule of Combination)

IMI Level 5 Diploma in Automotive Management OFQUAL I.ID NO.:600/0353/4

To complete this qualification learners must achieve a minimum of 39 credits.
(At least 26 credits need to be achieved at Level 5.)

Group A (Mandatory Units): All 17 credits must be achieved from this group.

Group B (Level 5 Optional Units): A minimum of 12 credits must be achieved from this group.

Group C (Level 4 Optional Units): A minimum of 10 credits must be achieved from this group.

Group A: Mandatory Units

Learners must achieve all 17 credits from this group.

| Unit Ref: | Unit Title & I.D. Number | GLH | Unit Level | Credit Value |
|-----------|---|-----|------------|--------------|
| DIAM1 | Leadership in the Retail Automotive industry (L/502/8340) | 41 | 5 | 7 |
| DIAM2 | Business Planning in the Retail Automotive industry (H/502/8344) | 41 | 5 | 7 |
| CIAM4 | Customer service and quality in automotive retail operations (K/502/7938) | 19 | 4 | 3 |
| | TOTAL AVAILABLE | | | 17 |

Group B: Level 5 Optional Units

Learners must achieve a minimum of 12 credits from this group.

| Unit Ref: | Unit Title & I.D. Number | GLH | Unit Level | Credit Value |
|-----------|---|-----|------------|--------------|
| DIAM3 | Develop people in automotive retail operations (T/502/8347) | 36 | 5 | 6 |
| DIAM4 | Business finance in the retail automotive industry (J/502/8448) | 32 | 5 | 6 |
| DIAM5 | Marketing the retail automotive business (F/502/8447) | 36 | 5 | 6 |
| DIAM6 | Managing automotive business compliance (F/502/8450) | 35 | 5 | 6 |
| | TOTAL AVAILABLE | | | |

**Group C: Level 4 Optional units**

Learners must achieve a minimum of 10 credits from this group.

| Unit Ref: | Unit Title & I.D. Number | GLH | Unit Level | Credit Value |
|-----------|---|-----|------------|--------------|
| CIAM6 | Working with people in automotive industry disciplines (H/502/79400) | 19 | 4 | 3 |
| CIAM7 | Recruitment, selection and reward in automotive operations (K/502/7941) | 19 | 4 | 3 |
| CIAM8 | Appraisal and development of automotive industry people (M/502/7942) | 19 | 4 | 3 |
| CIAM9 | Planning and Budgeting the automotive department (T/502/7943) | 28 | 4 | 4 |
| CIAM10 | Local marketing for automotive products and services (A/502/7944) | 19 | 4 | 3 |
| CIAM11 | Managing Vehicle accident repair operations (F/502/7945) | 19 | 4 | 3 |
| CIAM12 | Managing automotive parts operations (J/502/7946) | 20 | 4 | 4 |
| CIAM13 | Information communication technology for automotive operations (L/502/7947) | 19 | 4 | 3 |
| CIAM14 | Managing automotive service and workshop organisations (R/502/7948) | 28 | 4 | 4 |
| CIAM15 | Managing F and I operations in the motor industry (Y/502/7949) | 19 | 4 | 3 |
| CIAM16 | Managing new vehicle sales operations (Y/502/7952) | 28 | 4 | 4 |
| CIAM17 | Managing used vehicle sales operations (R/502/7934) | 28 | 4 | 4 |
| CIAM18 | Managing fleet sales operations (L/502/7950) | 27 | 4 | 4 |
| CIAM19 | Managing vehicle short term rental operations (R/502/7951) | 27 | 4 | 4 |
| | TOTAL AVAILABLE | | | |



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| UNIT REF:DIAM1 | UNIT TITLE: LEADERSHIP IN THE RETAIL AUTOMOTIVE INDUSTRY |
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|--|-------------------------|------------------------|----------------|
| Level: 5 | Route: Knowledge | Credit Value: 7 | GLH: 41 |
| Rationale: This unit addresses the knowledge required to be able to motivate, enthuse and direct a dealership team through skills of leadership | | | |

| LEARNING OUTCOMES | ASSESSMENT CRITERIA |
|--|---|
| The Learner will: | The Learner can: |
| 1. Be able to apply leadership skills in directing and developing the dealership team | 1.1 Explain the differences between management and leadership 1.2 Define the key tasks a leader undertakes 1.3 Set appropriate standards of operation and conduct for the dealership 1.4 Explain cognitive complexity and how it assists the leader in working with others 1.5 Describe the humanitarian responsibilities of the leader |
| 2. Understand interpersonal and intrapersonal competencies and how to use them in effective leadership | 2.1 Explain personal identity and how identities shape leadership and followership. 2.2 Develop personal values of confidence and belief in one-self and one's own ideas. 2.3 Translate personal confidence and values into a formula that others can respect and follow |
| 3. Understand the importance of communication with subordinates, peers and seniors | 3.1. Explain the process of communication and how the leader varies their communication style to ensure all intellectual levels can understand and correctly interpret the message. 3.2. Explain the different communication methods needed to communicate effectively |
| 4. Be able to communicate effectively with subordinates, peers and seniors | 4.1 Use a range of communication styles to ensure all levels intellect are able to understand and correctly interpret the message 4.2 Apply methods of communication appropriate to the purpose of the message to be delivered 4.3 Develop relationships, manage conflicts and handle differences through effective communication. 4.4 Plan and deliver management and team meetings |



| | |
|--|---|
| <p>5. Be able to apply change in the work place</p> | <p>5.1 Explain how the need for change arises.</p> <p>5.2 Describe how change is driven by foresight to realise the potential of change</p> <p>5.3 Plan change and consider its effects on people and other aspects of the business</p> <p>5.4 Communicate, implement and measure the effect of change</p> |
| <p>6. Be able to apply the practices of a good leader in delivering dynamic leadership and developing others</p> | <p>6.1. Practise positive time management and explain the importance of setting and maintaining priorities and deadlines</p> <p>6.2. Practise group dynamics, team development and the skill of fair delegation.</p> <p>6.3. Establish and maintain discipline in the business operation</p> <p>6.4. Handle and resolve matters of conflict that may arise within the team.</p> |

Content:

The learner should understand and/or be able to apply:

- 1.a. Fundamentals of leadership including:
 - i. the importance of leadership to the productivity and success of the business operation
 - ii. leadership qualities and attitudes
 - iii. how leadership models are put into practice personally, locally, and globally
 - iv. corporate visions, mission statements and goals
 - v. diverse cultures and factors that affect staff motivation, satisfaction and contentment
 - vi. building a reputation for expertise and achievement that can be respected, valued and trusted
- 1.b. Role of the leader in directing and developing the team including:
 - i. a definition of the leadership role *
 - ii. developing an objective team focus.
 - iii. creating an objective vision for the future that others will respect and strive to achieve
 - iv. a comparison between the roles of the leader and the manager and how they co-exist
 - v. identifying and separating activities into the categories of leadership or management
 - vi. activities of leadership and management that may overlap *
 - vii. responsibilities and accountability of the leader
 - viii. assessing and understanding cognitive complexity and how it can be used to manage others *
 - ix. factors to consider when determining the standards of operation and conduct that people in the dealership can be expected to adopt *
 - x. the leader's concern with humanitarian responsibilities *
- 2.a. Interpersonal competencies and how to use them in effective leadership including:
 - i. understanding intrinsic and extrinsic motivational factors
 - ii. applying the processes of intrinsic and extrinsic motivation in supporting a successful business outcome
 - iii. gain a greater understanding of own personal identity
 - iv. methods of improving self-confidence to inspire confidence in others
 - v. practice team leadership through involvement and active group participation
 - vi. qualities that make leaders and qualities that make followers
 - vii. the importance of appreciating and recognising the values that leaders and followers each contribute
 - viii. the value in consulting at all levels over matters of business *



Content:

- 2.b. Intrapersonal competencies and how to use them in effective leadership including:
 - i. apply the practices and qualities of cognitive complexity *
 - ii. exploring and employing the personal values and potential of others
 - iii. encouraging others to develop a sense of self confidence and belief in themselves and their ideas
 - iv. how confident people can be challenged to become more valuable to the business
 - v. how to build empathic, mutually trusting working relationships that achieve corporate objectives

- 3.a. Communication with subordinates, peers and seniors including:
 - i. the importance of communication in developing and maintaining a successful business
 - ii. the importance of communicating essential content and its related context
 - iii. who to communicate with and why selected people need to be included in the communication *
 - iv. methods and appropriate use of formal and informal communication

- 3.b. Communicating effectively including:
 - i. types of communication *
 - ii. methods of communication *
 - iii. how to prepare and deliver messages effective in achieving their objective *
 - iv. circumstances that determine which methods of communication may be most effective or required.
 - v. planning structuring and delivering team and management meetings *
 - vi. maintaining records of communication with others

- 3.c. Develop relationships, manage conflicts, and work with alternative styles including:
 - i. understanding the four dimensions of human behaviour and how they influence individual character *
 - ii. handling conflict relating to given tasks, responsibilities and willingness to work as directed.
 - iii. how to be aware of and adjust own personal behaviour to earn the respect and trust of others
 - iv. showing empathy and interest in the performance and welfare of others
 - v. identifying what constitutes a difficult team member and how to deal with the difficulty *
 - vi. handling personal conflict between colleagues *
 - vii. handling issues of conflict with employees.
 - viii. Adopting a neutral position in resolving conflict and gaining commitment to the outcome

- 4.a. Tools of good leadership in delivering direction including:
 - i. planning and organising personal working time to accommodate own tasks
 - ii. planning and organising working time to direct and support others in the performance of their roles.
 - iii. managing deadlines to ensure adequate working time
 - iv. prioritising work and tasks
 - v. factors that enable fair delegation of tasks and roles
 - vi. interpreting group dynamics and how the group interacts *
 - vii. identifying and developing key strengths of individuals
 - viii. understanding and directing team member interactions in goal achievement *

- 4.b. Helping to develop others including:
 - i. understanding and developing the dynamics of the team
 - ii. identifying and developing key strengths of individuals
 - iii. using delegation as a tool of motivation and personal development
 - iv. delegating tasks to increase the skill base of the team.
 - v. balancing team dynamics *

Content:

- 5.a. Change in the work place including:
 - i. understanding the need for change and how it can arise and be identified.
 - ii. how to plan the change that needs to happen *
 - iii. factors that can help or hinder the effect of change *
 - iv. causes of and methods of handling negative and positive reactions to change
 - v. how to implement and manage change to establish positive long-term effects
 - vi. reviewing and measuring the effects of change
 - vii. measuring and reviewing progress towards achievement of the objectives of change
 - viii. giving feedback to, and receiving feed back from, the team and individuals.
- 6.a. Setting and maintaining standards of behaviour and discipline including:
 - i. defining a standard for corporate operations and representation for staff members
 - ii. determining acceptable standards of conduct and behaviour appropriate to each job role.
 - iii. communicating standards for conduct and behaviour
 - iv. establishing and maintaining a standard of discipline *
 - v. measuring conduct and compliance with declared standards
 - vi. managing occurrences of misconduct and appropriate penalties *

NOTES:

- 1.b.i visionary, director, figurehead, versatile participator, innovator, relater, listener, decision-maker etc.
- 1.b.vi management of people, setting objectives, empowerment, measuring performance, delegation
- 1.b.viii psychological characteristics, psychological variables, indicators of complexity in assessing perceptual skill, perception of nuances, etc.
- 1.b.ix local culture and environment, customer expectations, resources available, catchment area demographics etc.
- 1.b.x committed to justice and social responsibility in the welfare of staff and customers, acting as a social change agent in the improvement of business, engage with diplomacy in matters of controversy,
- 2.a.viii calling on the knowledge and experience of relevant staff at all levels when planning, setting objectives, making decisions, etc.
- 2.b.i differences indicating less or more complex cognitive structure for the task or activity performance, GOMS (Goals, Operators, Methods, and Selection rules), etc
- 3.a.iii task performers, task beneficiaries, accountable persons, others work-related to the task, etc.
- 3.b.i verbal, physical, remote, visual, subliminal, direct, assumed, etc.
- 3.b.ii interpersonal physical, interpersonal remote, written, recorded, etc.
- 3.b.iii motivational, inspirational, formal, compassionate, supportive, informative, etc.
- 3.b.vi setting meeting objectives, understanding the benefits of the meeting, preparing an agenda, organising events, delegating roles, maintaining minutes and records, etc.
- 3.c.i dominance, influence, steadiness, compliance and the effects of varying scales in each field, etc
- 3.c.v establishing the cause, identifying the nature of the person, understanding the grievance or issue, applying the rational over emotional, drawing out and resolving issues through discussion, etc.
- 3.c.vi determining cause, identifying differences, discovering factors for a satisfactory outcome, mediating in the issues, gaining a supported resolution, etc.
- 4.a.vi inter-personal relations, team interaction, group formation, function and dissolution etc.
- 4.a.viii character type, tolerance, working style, skill, competence, amenability, focus, need for supervision, ability to supervise, potential to coach, harmony grouping, etc.
- 4.b.v balancing individual team factors such as skills, potential, character, style, enthusiasm, ego etc
- 5.a.ii what needs to change, why the change is needed, what is the potential outcome of the change, setting the objectives of change, what is going to happen when the change occurs, how will the changes be communicated, when and to whom will they be communicated etc.
- 5.a.iii creating awareness of change by others and those that it will affect, early communication of change to those that it will affect, training and up-skilling to ensure competence and the ability to cope, thorough planning to ensure that all questions can be answered, involvement for all in the change process, etc.
- 6.a.iv dress, conduct, behaviour, language, habitual (smoking etc.), respect, etc.
- 6.a.vi ground rules for penalties, matching penalty to the severity of offence, informal and formal discipline, recording offences, cautioning and warning offenders, etc



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| UNIT REF: DIAM2 | UNIT TITLE: BUSINESS PLANNING IN THE RETAIL AUTOMOTIVE INDUSTRY |
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| Level: 5 | Route: Knowledge | Credit Value: 7 | GLH: 41 |
| Rationale: This unit is about providing the automotive retail operation with a clear direction to guide it towards achieving the long-term objectives | | | |

| LEARNING OUTCOMES | ASSESSMENT CRITERIA |
|---|--|
| The Learner will: | The Learner can: |
| 1. Be able to establish a clear direction to guide the automotive business to achieve its long-term objectives. | 1.1. Explain long and medium term planning and its importance to the success of the automotive operation 1.2. Define the principles and purpose of a strategic business plan 1.3. Determine and set retail automotive business plan objectives |
| 2. Understand market analysis and the assessment of market potential for the purposes of business planning | 2.1 Explain the principles of market analysis 2.2 Identify and locate documentation that will assist in identifying market potential 2.3 Explain how appropriate documentation can be used to set business objectives and budgets 2.4 Segment a local market into automotive industry and socio-demographic sectors 2.5 Assess the potential for automotive retail sales and service within a local market catchment area |
| 3. Be able to prepare a detailed plan for automotive retail operations that objectively guides the business towards the achievement of its goals. | 3.1. Explain how to structure a business plan to satisfy local market opportunity 3.2. Describe factors that should be taken into account when preparing a plan 3.3. Plan the physical resources required to satisfy the medium and long-term objectives of an automotive operation 3.4. Plan the human resources required to achieve the goals of the plan 3.5. Explain the qualities required from human resources in order to satisfy the market opportunity 3.6. Define the profit factors the automotive retail operation and its departments can gain by performing to plan 3.7. Prepare, structure and explain a sales and services operating plan for an automotive business |



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| <p>4. Be able to implement a medium to long-term budget plan for an automotive business</p> | <p>4.1. Explain the contents and purpose of a budget for an automotive retail business</p> <p>4.2. Explain the process for structuring a business budget for an automotive operation</p> <p>4.3. Structure and prepare a budget for the business plan addressing all departments of the automotive retail operation</p> <p>4.4. Prepare and explain strategies that will address budget and performance variances in order to achieve objectives</p> <p>4.5. Implement the plan and monitor performance against plan</p> |
| <p>5. Understand risk management and measure the level of risk involved in achieving the goals of a business plan</p> | <p>5.1 Explain risk assessment</p> <p>5.2 Explain innovation in a business plan and how it can be introduced to compliment established practice</p> <p>5.3 Assess the risk factors that may affect a business plan</p> <p>5.4 Plan business strategy with due consideration for the identified risk factors</p> <p>5.5 Prepare and use management controls that will report performance and give indicators to the cause of underperformance</p> <p>5.6 Explain methods and actions that could be employed to reverse underperformances</p> <p>5.7 Explain methods used to assess and manage a performance area that exceeds budget objectives</p> |

Content:

The learner should understand and be able to apply:

- 1.a. A clear direction from which to guide the automotive business including:
 - i. the importance of business planning and creating a business plan
 - ii. time frames relating to short, medium and long-term planning
 - iii. how each time frame is applied in a retail automotive operation
 - iv. how to identify and set realistic, achievable and stretching medium and long-term objectives
 - v. planning and justifying gross profit, net profit and expenditure
 - vi. methods and practices for creating a business plan for a retail automotive operation
 - vii. key factors and information to be included in a business plan *

- 2.a. Assessment and analysis of market potential including:
 - i. the importance of conducting a thorough assessment of the catchment area market
 - ii. the importance of establishing market share potential for all departments
 - iii. information available to assist with the assessment of market potential *
 - iv. where to locate and how to obtain market information *
 - v. how to use available information in the assessment of market potential
 - vi. how to assess and monitor actual market penetration of vehicle sales, hours sold and parts sold
 - vii. key factors that determine market potential *
 - viii. automotive retail market segmentation *

Content:

- 3.a. Prepare a detailed plan to achieve the goals of the automotive retail operation including:
 - i. how to structure a detailed business plan
 - ii. how to establish the foundation of the plan *
 - iii. identify and prioritise SMART based objectives in the plan
 - iv. encourage innovation in the plan and balance it with proven solutions
 - v. how to determine what the business will need to do to meet the market opportunity
 - vi. identify the physical resources required to meet the market opportunity for each department in the automotive retail operation *
 - vii. calculate the human resource required to produce sufficient output from each department *
 - viii. plan the qualities and skills needed to achieve the business plan *

- 4.a. Prepare a detailed budget for an automotive retail operation business plan including:
 - i. the importance of developing a structured budget to support the business plan
 - ii. how to structure a detailed budget
 - iii. the importance of using accurately calculated facts and statistics in an automotive retail budget
 - iv. the importance of justifying the facts, figures and projections included in a plan
 - v. the level of detail that is required to make the budget a structured working document *
 - vi. key components required in a budget *

- 5.a. Understanding risk management including:
 - i. a clear definition of risk management
 - ii. how to conduct a risk assessment
 - iii. the importance of assessing risk when planning business improvement
 - iv. definitions of physical risk and business risk
 - v. assessing the risk elements in a business project*
 - vi. preparing a risk analysis report
 - vii. balancing risk against desired outcome and potential for achievement
 - viii. accounting for the risk factors included in the business plan

- 5.b. Minimising risk and controlling results including:
 - i. the importance of controlling under and over performances against budget
 - ii. identifying areas for performance control to minimise failure or under performance
 - iii. prepare and apply appropriate controls to monitor performance and illustrate variance
 - iv. interpreting control information to identify trends in performance
 - v. benchmarking performance against market information and budget
 - vi. calculating the effect of negative trends on performance against budget and plan
 - vii. planning and implementing actions to reverse unacceptable trends and variances
 - viii. identifying and managing an over performance against budget.



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- 1.a.vii foundation for success in the identified market, volume potentials, profit potentials, expenses incurred in acquiring and maintaining market share, strategies required to gain and maintain market share, resources required to achieve objectives, etc.
- 2.a.iii registration reports, service parc reports, competitive market reports, local user and owner profiles, business location directories, residential location and demographic reports, etc.
- 2.a.iv SMMT, local councils, county councils, vehicle manufacturers, database management agencies, etc.
- 2.a.vii demographics, socio-economic structure, employment ratio, types of local business and industry, local communications infrastructure, natural barriers to accessing the market, brand acceptance, etc.
- 2.a.viii size of vehicles, types of vehicles, fuel type, ages of vehicles, business, corporate and private sectors new : used ratio of local sales, etc.
- 3.a.ii background of the business, history of the business, experience and competence of management to handle the identified market, appropriate type of products and services available to sell, financial resource available, financial resource needed, etc.
- 3.a.vi display space, workshop facilities, parts storage capacity, tooling and equipment requirements, administrative and support resources, etc.
- 3.a.vii technicians, parts people, sales people, administrative, support and maintenance people required for each department and general roles, etc.
- 3.a.viii technical, inter-personal, advisory, selling, financial, management skills, etc.
- 4.a.v precise calculations for sales units for each department, refined turnover and profit forecasts per unit of sale, precise average expenditure per unit of sale, human performance factors, core KPI objectives, etc.
- 4.a.vi sales volume projections and justifications, gross profit, direct profit and net profit projections, projections of costs and expenses, productive capacities, stock requirements, etc.
- 5.a.v potential for the success of a project, cost of project verses potential revenue, market acceptance, skill and resource to achieve, potential to satisfy order intake, project viability, reliability, competence and commitment of people, etc.



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| UNIT REF: CIAM4 | UNIT TITLE: CUSTOMER SERVICE AND QUALITY IN AUTOMOTIVE RETAIL OPERATIONS |
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| Level: 4 | Route: Knowledge | Credit Value: 3 | GLH: 19 |
| Mapping: This unit is mapped to MSC D6 Allocate and monitor the progress and quality of work in their area of responsibility, MSC F5 Resolve customer service problems, MSC 6 Monitor and solve customer service problems, MSC F7 Support customer service improvements, MSC F11 Manage the achievement of customer satisfaction, MSC F14 Prepare to carry out a quality audit, MSC F15 Carry out a quality audit | | | |
| Rationale: This unit addresses the core functions of work quality and customer service in the automotive sector | | | |

| LEARNING OUTCOMES | ASSESSMENT CRITERIA |
|--|---|
| The Learner will: | The Learner can: |
| 1. Understand the practices and benefits of effective quality control and customer service in automotive retail operations | 1.1. Explain how customer service benefits an automotive operation 1.2. Explain how quality control service benefits an automotive operation 1.3. Evaluate current procedures in their area of responsibility relating to customer service and quality control to identify areas of strength and weakness |
| 2. Be able to set the correct standards for work quality and customer service in automotive retail operations | 2.1. Explain high quality and good performance standards in relation to customer service and customer care 2.2. Set appropriate standards of quality and service in their area of responsibility 2.3. Apply and control correct standards of quality and performance in the work place |
| 3. Be able to rectify low levels of quality and resolve poor performance within automotive operations | 3.1 Explain the effects of not resolving low quality and poor performance 3.2 Carry out a quality audit 3.3 Identify and apply ways to improve poor quality of products and work |
| 4. Understand how to assess and evaluate customer satisfaction in automotive retail operations | 4.1. Explain a range of methods used to measure customer service 4.2. Assess current methods and techniques used in their area of responsibility to evaluate effectiveness in analysing customer satisfaction 4.3. Propose and apply methods to improve feedback of customer concerns, issues and satisfaction where appropriate |
| 5. Be able to apply procedures for handling customer complaints in automotive retail operations | 5.1. Describe a range of reasons for customer complaints in a vehicle operations environment 5.2. Implement actions necessary to deal with customer complaints 5.3. Handle complaints effectively resolving them to a satisfactory outcome 5.4. Evaluate current procedures for handling customer complaints in their area of responsibility and identify areas of strength and weakness |

Content:

The learner should understand and/or be able to apply:

- 1.a. Quality and performance of work including:
 - i. the importance of monitoring the quality and performance of work
 - ii. the role and responsibility of the manager in ensuring high quality and performance of work
 - iii. identify issues that affect quality of work and performance *
 - iv. methods of measuring and controlling quality of work
 - v. apply methods to monitor and check the quality and performance of work within the manager's area of responsibility.
- 1.b. Identifying and rectifying poor performance and quality including:
 - i. outcomes of poor work quality and performance
 - ii. conduct a quality audit
 - iii. effects of not rectifying poor standards of work immediately
 - iv. methods and procedures for measuring and identifying poor quality and performance
 - v. identify ways in which poor quality and performance of work can be resolved.
 - vi. benefits of high quality and good performance of work *
- 2.a. Features of effective customer service including:
 - i. definitions of customer service, customer satisfaction and customer care
 - ii. the importance of achieving high standards of quality in all three functions described in 2.a.i.
 - iii. relationships between customer service and aspects of profitability and business improvement.
 - iv. the importance of quality and service to both internal and external customers.
 - v. factors that contribute to the achievement of customer satisfaction
 - vi. the importance of the team leader demonstrating customer-focused behaviour & attitude
 - vii. setting, communicating and monitoring standards to provide the required levels of customer service and care.
- 2.b. Factors which affect the delivery of good customer service including:
 - i. values, vision, ethos and policies for delivering customer service and achieving customer satisfaction.
 - ii. factors relating to premises that impact on customer perceptions and satisfaction *
 - iii. factors relating to staff that impact on customer perceptions and satisfaction *
 - iv. the importance of identifying customer needs, resolving problems and effective communication in achieving customer satisfaction.
 - v. processes and procedures that are used to provide good customer service and care
 - vi. standards and policies determined by third parties *
- 3.a. How to measure performance standards that relate to customer service including:
 - i. dealer composites, key performance indicators (KPIs), benchmarks etc
 - ii. how to prepare customer service questionnaires and analyse the feedback they provide
 - iii. methods and techniques used for evaluating the standard of customer service offered
 - iv. methods used to monitor and evaluate customer service, perceptions and satisfaction *

Content: contd

3.b. Actions required to improve customer service including:

- i. the causes of poor performance and low standards of behaviour and operation
- ii. how performance standards are calculated
- iii. the actions necessary to improve the quality of customer service
- iv. the importance of continuously measuring and monitoring customer service and care activities

4.a. Reasons for customer complaints occurring including:

- i. varying levels of individual customer expectations
- ii. causes of customer complaints
- iii. ways in which customers express their dissatisfaction *
- iv. the importance of monitoring customer complaints

5.a. Actions to deal with customer complaints including:

- i. policies and procedures used by the manager's organisation for dealing with customer complaints
- ii. the customer's rights under consumer protection legislation.
- iii. methods and procedures for handling customer complaints *
- iv. the importance of maintaining a professional attitude and procedure when handling customer complaints
- v. the importance of resolving complaints promptly and effectively to maintain customer loyalty

5.b. Actions necessary to monitor and follow up complaints including:

- i. the importance of monitoring the actions carried out to deal with customer complaints
- ii. following-up the customer after a complaint has been handled
- iii. methods used for handling complaints
- iv. ways in which customers' perceptions are influenced by their experience of complaint handling.

* NOTES:

- 1.a.iii low levels of skill or competence, poor practises or procedures; ineffective or non-available equipment
- 1.b.v improved efficiency, improved profitability, customer retention and satisfaction, improved image, growth of business
- 2.b.ii image, presentation, lighting, parking, décor, cleanliness, customer facilities (refreshments, seating) etc.
- 2.b.iii personal presentation, customer recognition, speech, attitude, politeness, interest, reliability, knowledge, communication etc
- 2.b.vi ISO, IIP, vehicle manufacturer's policies, dealership standards, company policies etc
- 3.a.iv mystery shoppers, customer surveys and questionnaires, feedback forms, independent organisations, vehicle manufacturer's satisfaction surveys, analysing complaints etc
- 4.a.iii verbal, formal and informal comments, body language, facial expressions, letters, feedback forms, loss of custom etc
- 5.a.iii made by the customer at a) the motor retail premises b) by remote methods of communication, etc.
- 5.a.iv remaining calm & polite, listening to the customer, recognising and understanding concerns, identifying the reasons for complaint, investigating problems, taking remedial action, recognising limits of authority, referring to manager/senior manager, the need for regular communication with customer etc



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| UNIT REF: DIAM3 | UNIT TITLE: DEVELOP PEOPLE IN AUTOMOTIVE RETAIL OPERATIONS |
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| Level: 5 | Route: Knowledge | Credit Value: 6 | GLH: 36 |
| Rationale: This unit discusses the management and development of people in the automotive retail operation | | | |

| LEARNING OUTCOMES | ASSESSMENT CRITERIA |
|---|---|
| The Learner will: | The Learner can: |
| 1. Be able to facilitate and influence behavioural change to gain support for company values | 1.1. Apply a range of strategies and actions to influence behavioural changes 1.2. Develop and support productive working relationships within their operation 1.3. Build productive relationships with other departments and operations of the company |
| 2. Be able to build team dynamics in the organisation | 2.1. Develop team commitment to the corporate goal 2.2. Generate common loyalty and commitment within the team 2.3. Build a culture within the organisation that explores creativity and innovation 2.4. Explain diversity and styles of management and leadership that will support diversity. 2.5. Develop a team of motivated individuals 2.6. Recognise success and give praise for efforts and achievement by others |
| 3. Understand the principles, procedures and techniques for employing performance management in an automotive operation | 3.1. Explain the main aims and objectives of performance management 3.2. Explain performance objectives and how they can be established and assessed for achievement 3.3. Implement a performance management process to maintain day-to-day awareness of employee productivity and quality of work. 3.4. Implement a performance review procedure, and explain its objectives and how it is delivered fairly and without prejudice. 3.5. Describe courses of action that may be undertaken when encountering poor performance in the work of an employee. 3.6. Explain 'employee capability' and the procedures for handling capability issues |



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| <p>4. Understand the principles of and procedures for handling matters of grievance and indiscipline</p> | <p>4.1. Describe behaviour that may constitute indiscipline or be unacceptable in the work place</p> <p>4.2. Explain considerations that may be given and courses of action to be taken in the event of minor issues of misconduct</p> <p>4.3. Explain disciplinary procedures that may be invoked in cases of serious misconduct</p> <p>4.4. Describe procedures required to be implemented should a matter escalate to dismissal</p> <p>4.5. Take action to justify or rectify concerns or complaints raised by team members</p> <p>4.6. Describe typical situations that may give cause to issues of grievance and how grievance may be prevented from occurring</p> <p>4.7. Explain procedures for receiving a grievance complaint and courses of action to follow when handling the matter</p> |
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Content:

The learner should understand and be able to apply:

- 1.a. Behavioural change in the automotive retail organisation including:
 - i. types of personal behaviour and related characteristics *
 - ii. the causes of behaviour and spontaneous behavioural change in the work place *
 - iii. influencing behavioural change through management style and strategy
 - iv. how to adjust management behaviour to compliment effective team working styles
- 1.b. Productive working relationships with other organisations including:
 - i. the importance of supplier and other organisations connected to the automotive retail operation
 - ii. identifying related organisations and their role in the success of the automotive operation
 - iii. understanding and recognising objectives, strategies and policies of related organisations
 - iv. recognising the benefits good working relationships bring to the automotive retail operation *
 - v. how to adjust own operating behaviour to improve working relationships with other organisations
 - vi. how to influence other organisations to adjust their behaviour to improve working relationships
 - vii. how to communicate with other organisations to maintain good working relationships *
- 2.a Build team dynamics in the organisation including :
 - i. understand and communicate the corporate goal
 - ii. determine the corporate goal to be quantifiable, measurable and achievable
 - iii. define roles and tasks and their relevance to the achievement of the corporate goal
 - iv. review performance, communicate achievement, and give credit to the team
 - v. assess individual skill values and identify gaps in the team skill base*
 - vi. how to support the team with motivational strategies and tactics *
 - vii. handle individual cases of underperformance with regard for team spirit and motivation
- 2.b Develop creativity and innovation within the team including :
 - i. define creativity and innovation within the scope of the working roles
 - ii. methods of challenging individuals to explore their potential within and outside their role
 - iii. plan and setting challenging tasks
 - iv. set and supporting stretching, achievable objectives
 - v. processes of considering and thinking through new ideas
 - vi. modify management style to encourage and accept ideas and innovation from others
 - vii. give feedback, critique and praise to the team and individuals

Content:

- 3.a. Identify and satisfy training needs within the team including :
- i. the importance of training, coaching and personal development in the achievement of objectives and business growth
 - ii. identify and agree training needed to develop an individual or team *
 - iii. methods of developing current skills and introducing new skills
 - iv. determine the most effective method of skill development to employ
 - v. select the person or organisation to deliver the skill development
 - vi. mentor the implementation of newly learned skills and knowledge.
 - vii. measure the effect of training on performance, productivity and profitability
- 4.a. Principles of performance management including:
- i. a definition of performance management and its objectives
 - ii. set SMART objectives for individuals and the team
 - iii. apply quantifiable and measurable criteria to objectives
 - iv. agree strategy to achieve the objectives
 - v. develop controls to enable details of progress to be monitored
 - vi. identify short falls in performance and propose solutions *
 - vii. review progress and performance with the team and individuals
 - viii. record performance, outcomes, issues and solutions
- 4.b. Procedures and techniques for employing performance management including:
- i. assess the skill base of the team
 - ii. individual performance development plans for team members
 - iii. agree performance objectives, reviews and methods of measurement
 - iv. handle and apply solutions to incidences of underperformance
 - v. recognise and appreciate team and individual improvement and achievement
- 5.a. Principles of and procedures for handling matters of indiscipline including:
- i. codes of conduct, corporate standards and contract of employment
 - ii. appropriate involvement of human resource specialists and expertise *
 - iii. define terms of conduct that are unacceptable in the work place *
 - iv. levels of indiscipline and misconduct and the levels of gravity they import
 - v. handle issues of indiscipline and misconduct *
 - vi. courses of action to consider at each level of indiscipline and misconduct *
 - vii. agree and apply remedial actions and penalties
 - viii. review developments and improvements with offenders
 - ix. disciplinary and dismissal procedures (Unit 7 Level 5)
- 5.b.. Principles of and procedures for handling matters of grievance including:
- i. define grievance and explain the legal interpretation of grievance
 - ii. when to involve human resource specialists
 - iii. tribunals and legal representation in a case of grievance
 - iv. awareness and handling of a grievance complaint before formal notification
 - v. how to resolve matters and gain commitments before a formal notification of grievance is issued
 - vi. how a grievance must be formally notified to and accepted by the employer
 - vii. the employers response to a formal notification
 - viii. meet with the complainant
 - ix. qualify the issues and assess the true cause of grievance
 - x. propose and agree solutions to grievance
 - xi. set up and maintain a grievance record

Content:

- 5.c. Principles of and procedures for handling matters of grievance lodged by a team or group including:
- i. receive and handle a complaint from the team
 - ii. who to involve with a team grievance or complaint *
 - iii. assess potential for informal resolution of the complaint
 - iv. prepare, propose and gain commitment to an informal resolution
 - v. how a collective grievance must be formally notified to, and accepted by, the employer
 - vi. the employer's response to a formal notification
 - vii. meet with the team or appointed representatives of the team
 - viii. qualifying the collective grievance and assess the cause of complaint
 - ix. propose, agree and gain universal acceptance of a solution
 - x. confirm resolution of the issue

NOTES:

- 1.a.i Transactional Analysis characteristics and sub-characters, behavioural style characteristics, blends and combinations influencing behaviour, etc.
- 1.a.ii work conditions, colleague behaviour, management style, respect, privacy, career potential, etc.
- 1.b.iv smooth operational working, good working environment, goods and services available on time, cash flow benefits of good credit, long term mutually beneficial relationships etc.
- 1.b.vii frequently, professionally, without personal slight, written confirmation, verbal relationship maintenance, brief, structured, time effective, pleasant experience, respectful of character, etc.
- 2.a.v monitor work quality and times, observe skills in operation, observe disposition at work, performance and character profiling etc.
- 2.a.vi working with the team, identifying team ethos and culture, incentivising and motivating all team members etc.
- 3.a. ii related to job performance, personal potential, new work skill and knowledge requirement, new products and services, revised corporate objective, changes in business profile or style, etc
- 4.a.vi motivation, skill,, knowledge, environment, colleagues, personal issues, etc.
- 5.a.ii Human Resources management, counselling, consultants, supervisors, unions, etc
- 5.a.iii anger, abusive behaviour and language, inappropriate use of tools and equipment, lateness affecting the work capabilities of colleagues, threatening behaviour, alcohol or drug abuse, etc.
- 5.a.v causes, provocation, penalties, formal and informal procedures etc.
- 5.c.ii Human Resources management, third party support, union representatives, top level management, consultants, etc



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| UNIT REF: DIAM4 | UNIT TITLE: BUSINESS FINANCE IN THE RETAIL AUTOMOTIVE INDUSTRY |
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| Level: 5 | Route: Knowledge | Credit Value: 6 | GLH: 32 |
| Rationale: This unit is about taking ownership of and being responsible for the financial status and profitability of an automotive operation | | | |

| LEARNING OUTCOMES | ASSESSMENT CRITERIA |
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| The Learner will: | The Learner can: |
| 1. Understand the fundamentals of money in the automotive retail business and the tools of financial management that report its movement | 1.1. Explain how money moves within and through a business to generate profit and growth 1.2. Explain where money comes from and how it is used in a retail automotive operation 1.3. Explain business finance terminology and how it relates to automotive retail operations 1.4. Use tools of financial information in the automotive retail business 1.5. Operate financial controls 1.6. Monitor the financial liquidity of the business |
| 2. Be able to use management accounts and business information to maintain viable trading and profit-oriented decision making | 2.1. Explain the different functions of management accounts and financial accounts 2.2. Interpret and use management accounts including the source data of the account information 2.3. Explain how management account information relates to the financial status of the business 2.4. Describe how operational management activity can influence the financial stability and profitability of the business |
| 3. Be able to use the tools of management to monitor and control the financial performance of the automotive retail operation | 3.1. Identify and explain the factors of an automotive retail operation that influence the financial status of the business 3.2. Explain how vehicle and replacement parts stock management directly influences the financial status of the business 3.3. Explain how customer and supplier credit strategies directly influence the financial status of the business 3.4. Prepare a strategy to maximise the profit potential from an automotive retail business |



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| 4. Understand how to manage priorities, potential issues, and risks to the business | 4.1 Explain the risk aspects of an automotive retail operation 4.2 Assess and describe a business situation and establish short and medium-term operational priorities 4.3 Explain how to identify potential issues and risks that may pose threats to the business 4.4 Explain how to handle, minimise or eradicate potential issues and risks 4.5 Delegate priority tasks and issues to maximise business performance |
| 5. Be able to develop a master budget to achieve the financial objectives of an automotive retail operation. | 5.1. Explain how to consult on and develop a master budget 5.2. Explain how the master budget can generate the results expressed in the business accounts 5.3. Separate a master budget into operational budgets 5.4. Establish systems and procedures to monitor and evaluate performance against operational budgets and the master budget 5.5. Put contingency plans in place |

Content:

The learner should understand and be able to apply:

- 1.a. The fundamentals of money in the automotive retail business including:
 - i. what happens to money between entering the business and emerging as profit or loss *
 - ii. how money can be used to generate growth and profit in automotive retailing
 - iii. how money can be misused to result in loss and business vulnerability
 - iv. key terms of financial management reporting and planning
 - v. how key financial terms relate in automotive retail business *
 - vi. how to use financial information and tools to direct and improve business performance
 - vii. how to use financial information as controls and to maintain the liquidity of the business
- 2.a. Sourcing input information from automotive retail operations including:
 - i. the importance of accurate and detailed recording of business transactions and commitments
 - ii. how best practice in management underpins the financial stability of the retail automotive business
 - iii. how management best practice provides a stable foundation for decision making
- 2.b. Cohesive structures of management accounts and financial information including:
 - i. management accounts and how they differ in function and structure from financial reports
 - ii. how management accounts and financial reports inter-relate to form a foundation for business
 - iii. source data that provides critical information for the structures of a financial management account
 - iv. how accurate management information delivers critical input for financial analysis
- 3.a. Methods of financial management that control the liquidity of an automotive retail operation including :
 - i. the importance of measuring and reacting to the 'quick ratio'
 - ii. factors of automotive retail operations that effect the financial integrity of the business*
 - iii. routines and tasks in operational management that constitute best practice for financial management*
 - iv. methods of funding stock and services and the advantages and drawbacks of each method
 - v. controlling funds to maximise profit and return on investment*
 - vi. resource control to maximise profit *

Content:

- 4.a. Identify and manage priorities including :
 - i. assess a business situation and identify priorities within it
 - ii. creating roles and tasks to ensure that the business priorities are met
 - iii. identifying and assessing customer and market priorities
 - iv. creating an infrastructure to meet and deliver customer and market priorities

- 4.b Identify and manage potential issues and risks including :
 - i. the importance of considering issues and risk factors in business planning
 - ii. risk aspects involved in automotive retail trading and operations *
 - iii. potential short and long term consequences of not conducting risk assessment
 - iv. how to conduct risk assessment and identify potential issues and threats
 - v. determining action to control or minimise issues and risks
 - vi. determining and assessing skills and resources available to overcome threats *
 - vii. delegating tasks to control issues and minimise risks
 - viii. preparing contingency for continuation or option in the case of risks being realised

- 5.a Develop a master budget to achieve operational and financial objectives including :
 - i. the principles of developing a master budget without precedence *
 - ii. where to source the information from which to construct a master budget
 - iii. how to consult and who to consult with when preparing a master budget
 - iv. converting source information into a structured forecast
 - v. assessing limitations that may restrict performance and budget potential
 - vi. creating, agreeing and confirming a master budget

- 5.b Develop a master budget into operational sectors including :
 - i. methods of developing operational budgets from a master budget *
 - ii. preparing and detailing an operational budget
 - iii. delegating responsibility and authority for the management and achievement of plan
 - iv. how to develop systems and controls to monitor performances against budget plan

- 5.c Reviewing performance and invoking contingencies including :
 - i. measuring performances against plan and assessing their effects on the master budget
 - ii. identifying 'on-budget' performances and determining methods of maintaining performance
 - iii. measuring the effects of underperformances of the master budget plan
 - iv. who to involve, frequency, content and structure of performance reviews
 - v. how to deploy contingency plans in the event of irreversible circumstances

NOTES:

- 1.a.i receipts in from sales, loans, investors etc. used to finance stock, settle debts, meet internal commitments, re-invest, etc.
- 1.a.v cash flow, working capital, profit & loss, balance sheet, creditors, debtors, assets, reserves, etc.
- 3.a.ii stock turn, stock funding, stock write-back, efficiency of operation, resource funding, etc.
- 3.a.iii invoicing, credit control, debt control, stock turn, resource management, overdraft, etc.
- 3.a.v credit control, creditor control, investment capital, term loans, overdraft, etc
- 3.a.vi efficiencies, unit cost, expenses per unit, outsourcing tasks, controlling overheads, optimising facilities, etc.
- 4.b.ii market trends, economic change, environmental issues, changes in policy, competitor activity, competitor product or service, staff turnover, supply chain issues, excess demand, etc.
- 4.b.vi team skills, team effort, outsourced resources, manufacturer or supplier support, financial support, etc.
- 5.a.i defining business goals from market opportunity (Unit 2), calculating business income, overheads, profit, costs and expenses, sectioning the budget into areas of responsibility, etc
- 5.b.i sectioning the budget into departmental areas of responsibility, giving focus to individual profit centres, adding detail entries to manage issues of performance, consulting with and agreeing departmental expectations and goals



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| UNIT REF: DIAM5 | UNIT TITLE: MARKETING THE RETAIL AUTOMOTIVE BUSINESS |
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| Level: 5 | Route: Knowledge | Credit Value: 6 | GLH: 36 |
| Rationale: This unit is about creating awareness of the products and services the automotive retail organisation provides for business and private consumers in the catchment area | | | |

| LEARNING OUTCOMES | ASSESSMENT CRITERIA |
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| The Learner will: | The Learner can: |
| 1. Understand the principles of marketing retail automotive products and services to the business and private sectors of a catchment area. | 1.1. Explain in detail what marketing is, how it can be applied effectively in the automotive industry and what it can achieve for the motor retail operation 1.2. Apply the 'customer first' principle in addressing the local market 1.3. Explain the tools, resources and strategies of marketing and their direct relationship to the sales of product and services |
| 2. Know how to conduct a market analysis in preparation for promoting products and services to the automotive market | 2.1. Explain marketing strategy and the importance of market analysis in making the marketing effort effective. 2.2. Apply the theories and practices of market segmentation and marketing mix in local catchment area marketing strategy 2.3. Conduct an internal and external marketing audit in the retail automotive operation |
| 3. Be able to implement and maintain quality of service and achieve customer satisfaction | 3.1. Describe customer satisfaction and its importance to the marketing message 3.2. Explain the importance of being able to offer quality products and services as key factors of marketing and dealership promotion. 3.3. Explain customer-based values as the foundation of service and quality 3.4. Describe customer care and its value to an automotive business 3.5. Plan, implement and measure the effect of a customer care policy 3.6. Describe methods and frequencies of measuring the level of customer service delivered by an automotive retail operation |



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| <p>4. Be able to plan and implement marketing strategies to the automotive private and business customer sectors</p> | <p>4.1. Explain product strategy and how it relates to the products and services of the retail automotive industry</p> <p>4.2. Explain market diversification and how it can be effectively deployed in the retail automotive operation.</p> <p>4.3. Plan core marketing objectives for a retail automotive operation</p> <p>4.4. Develop and explain a detailed marketing plan and the strategy employed to achieve the plan</p> <p>4.5. Implement the organisation and qualities required to deliver a results-based marketing strategy</p> |
| <p>5. Be able to measure response to and effects resulting from automotive retail marketing efforts.</p> | <p>5.1. Devise controls that will measure the delivery of and response to the marketing effort</p> <p>5.2. Explain performance factors and a range of results that indicate when the marketing effort is achieving its goals</p> <p>5.3. Prepare and use marketing campaign reports to review and control the marketing effort.</p> <p>5.4. Review and revise strategy of the marketing plan to maintain on-target performance and achieve objectives.</p> |

Content:

The learner should understand and be able to apply:

- 1.a. Principles of marketing and market research including:
 - i. a definition of marketing*
 - ii. explanation of an automotive market and its sectors*
 - iii. explain how automotive market sectors relate to the consumer market*
 - iv. types of market research that produce valuable information for automotive retailing*
 - v. how market research is conducted and who can do it
 - vi. how the retail business profile is built between marketing and dealership qualities*
- 1.b. Market assessment and analysis including:
 - i. how to analyse researched information and assess market opportunity and potential
 - ii. how to identify and assess customer groups and types*
 - iii. planning stock and services to satisfy local market needs and expectations*
 - iv. using outsourced assistance for market analysis
- 2.a. Fundamental market analysis for an automotive retail catchment area including:
 - i. how to determine automotive market needs for vehicles, service and parts
 - ii. how to identify current and future customer needs and expectations
 - iii. how to determine what the local market will pay for vehicles, service and parts
 - iv. how to determine conditions controlling vehicle replacement cycles *
 - v. how to assess the vehicle parc for customer after-sales services requirements
 - vi. identifying local competitor qualities and activities and the results they realise
 - vii. identifying developments in the local market and automotive related sectors
 - viii. assessing and exploiting new opportunities to meet customer's needs*
 - ix. defining and understanding what creates success for a manager's automotive business

Content:

- 3.a. Internal involvement in the marketing of automotive retail products and services including:
- i. consulting with others in the planning and preparation of marketing
 - ii. establishing team qualities required to achieve marketing objectives
 - iii. communicating marketing plans, activity and strategy to the team
 - iv. determining and delegating campaign roles, tasks and responsibilities with the team
 - v. controlling marketing projects and the marketing effort
 - vi. feeding back performances, results and successes of marketing to the team
- 4.a. Strategies of quality and customer service including:
- i. aspects relating to customer satisfaction and retention*
 - ii. how to define a standard of quality and service that will exceed customer expectations
 - iii. how to establish and share a vision of standards and quality
 - iv. determine how staff must perform to deliver desired standards of quality and service
 - v. how to prepare and establish customer-based values, beliefs, behaviours and attitudes
 - vi. methods of gaining true measurement of customer satisfaction
 - vii. using satisfaction reports to modify and improve products, services and standards
- 4.b. Philosophy and practice of customer care including:
- i. definition of customer care and how it fits with customer service
 - ii. how to define a standard of customer care that will exceed customer expectations
 - iii. determine how staff must perform to ensure customer care is valued and appreciated
 - iv. how to establish customer care values, behaviours and attitudes
 - v. methods of measuring the effect of customer care in customer satisfaction
- 5.a. Planning marketing to the catchment area including:
- i. define short, medium and long term marketing strategies
 - ii. using outsourced assistance to deliver a marketing campaign
 - iii. preparing and setting clear, demanding and achievable marketing aims and objectives
 - iv. setting the long term marketing theme to project business ethos
 - v. setting operational objectives and aims for short and medium term marketing campaigns
 - vi. determining conditions that define success in a marketing project *
 - vii. developing a fair and competitive pricing strategy and the underpinning principles of pricing
- 5.b. Deliver a marketing theme or campaign to the market catchment area including:
- i. methods of delivering the marketing message and issues to consider with each method *
 - ii. developing leading strategies, themes and titles to attract attention and create market appeal *
 - iii. preparing appropriate and appealing marketing statements
 - iv. how to develop and maintain a high profile in private and business sectors of the market
 - v. fundamental restrictions imposed by the Data protection Act 1999
- 6.a. Create a marketing plan to communicate standards, qualities and services to the market including:
- ix. defining the structure of a standards and quality marketing plan
 - x. setting a plan duration and criteria to determine a successful campaign
 - xi. preparing actions and delegating roles and tasks within the plan
 - xii. how to put the plan in to operation
- 7.a. Measure and control the effects, benefits and outcomes of marketing including:
- i. aspects of a marketing campaign to monitor and control
 - ii. measuring the effectiveness of campaign processes and results
 - iii. determining the break-even point and key performance points within a plan
 - iv. designing controls to measure campaign progress against objective
 - v. planning the frequency of measurement and review
 - vi. assessing customer reaction to a campaign
 - vii. reviewing a campaign performance
 - viii. delivering feedback and reacting to under and over performance findings
 - ix. identifying and planning actions to be taken resulting from campaign analysis and feedback

Content:

NOTES:

- 1.a.i matching goods and services to needs and expectations, identifying the opportunity to sell products and services, categorising opportunities in sectors and styles, assessing value of potential, identifying opportunities for diversity, identifying barriers to trade, establishing support services needed, etc.
- 1.a.ii selling opportunities, social sectors and infrastructures, population factors, business sectors, utilities, public sector, buyer preferences, etc.
- 1.a.iii passenger car sectors by vehicle size, price and engine capacity, passenger and commercial vehicle sectors by type of vehicle, use of vehicle, ownership of vehicle, fleet, corporate and business sectors, etc.
- 1.a.iv population analysis by socio-economic and demographic sectoring, business by sic classification, logical flow patterns of movement of population, barriers blocking population flow, etc
- 1.a.vi analysis findings linked to dealership resources, limitations, objectives, brand acceptance, etc
- 1.b.ii life style, dwelling, income factors, work type, family, retirement etc.
- 1.b.iv sales vehicle types, brands, ages, engine sizes, fuel types, workshop services and facilities, parts stock to suit age of parc, etc to suit market opportunity
- 2.a.iv market conditions, financial climate, demographic profiles of buyers, social factoring, work styles, income factors, employment ratios, etc.
- 2.a.viii assessing opportunity for diversity e.g. vehicle rental, fast fit, vehicle storage, after sales convenience services, fleet sales, bodyshop, etc
- 4.a.i quality, right first time, efficiency factors, meeting promise, exceeding expectation, interpersonal skills and courtesy, standards of presentation, standards of facility, customer terms and conditions, etc.
- 5.a.vi order take, responses, enquiries, follow-ups, repeat business, profit, database increments, etc.
- 5.b.i verbal, press, radio, direct mail, electronic communication, telephone etc. methods unacceptable to the public, TPS, FPS, email sectoring, bylaws, Data Protection Act etc.
- 5.b.ii money saving offers, discounts, free benefits, quality, reputation, brand prestige, etc.



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| UNIT REF: DIAM6 | UNIT TITLE: MANAGING AUTOMOTIVE BUSINESS COMPLIANCE |
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| Level: 5 | Route: Knowledge | Credit Value: 6 | GLH: 35 |
| Rationale: This unit is about understanding the legal implications and responsibilities of a senior management role in an automotive retail organisation | | | |

| LEARNING OUTCOMES | ASSESSMENT CRITERIA |
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| The Learner will: | The Learner can: |
| 1. Understand the origins and basic principles of the United Kingdom legal system. | 1.1. Explain the types of law currently in force 1.2. Describe the basic principles of the legal system and how it operates 1.3. Explain the origins of common law and statutes 1.4. Explain how common law and statutes have evolved to address issues and practices of the automotive industry 1.5. Describe the influences common laws and statutes have over automotive business. 1.6. Apply and observe key elements of legislation in the operation of an automotive business. |
| 2. Understand the basic principles of Company Law and its impact on automotive retail operations and trading | 2.1. Explain the concepts of Company Law and its origins 2.2. Describe key standards set by statutes that determine company law and the reasons for their enforcement in law 2.3. Explain how company law determines behaviours of management and employees within the company 2.4. Explain accountability and liability accepted by employers and management when operating an automotive retail business |
| 3. Understand the principles of consumer legislation and the control it places on automotive retail operations | 3.1. Describe critical aspects of consumer legislation and how it affects the retail automotive industry 3.2. Describe the purpose of the rules set by key Acts of Parliament related to consumer contracts and trading with consumers 3.3. Describe how rules set by the statutes are interpreted into the retail automotive industry 3.4. Explain responsibilities that are accepted by customer-facing staff and their management when dealing with customers of the business 3.5. Explain accountability and the responsibility accepted by management and technical staff when carrying out work on customer vehicles 3.6. Explain penalties that may be applied for non-compliance with the legislation |



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| <p>4. Understand the basic principles of employment legislation and the standards it places on employees and employers</p> | <p>4.1. Explain purpose and function of employment legislation</p> <p>4.2. Describe primary statutes that determine the laws of employment</p> <p>4.3. Explain the responsibilities and accountability of management for the welfare and development of employees</p> <p>4.4. Apply procedures and structures required for the recruitment and selection of an employee</p> <p>4.5. Apply procedures for the appointment of a current employee to a new post</p> <p>4.6. Apply procedures that must be adopted in the disciplining or dismissal of an employee</p> |
| <p>5. Understand Health and Safety responsibilities of management and staff in the retail automotive operation</p> | <p>5.1. Explain Health & Safety and how it is applied in the retail automotive industry</p> <p>5.2. Explain the responsibilities and liabilities of management in complying with health and safety regulations</p> <p>5.3. Explain procedures for compliance with Health and Safety records and administration</p> <p>5.4. Apply processes for ensuring standards of Health and Safety are maintained in the automotive operation</p> |

Content:

The learner should understand and/or be able to apply:

- 1.a. Origins and workings of the legal system including:
 - i. types of law governing the land *
 - ii. structure of the legal system and how it operates and is delivered *
 - iii. establishment and history of law
 - iv. how early laws and legal history continue to form part of and relate to the automotive industry
 - v. typical retail automotive industry issues that may invoke each type of law

- 2.a. Basic principles of Company Law including:
 - i. origins of the Limited Company and the implications and responsibilities it implies in current business
 - ii. forms of business structure and the responsibilities and implications of each type *
 - iii. legal framework which regulates the publication of company information
 - iv. law relating to businesses and how it regulates important areas of business operations
 - v. connection between company law and the way in which people think and behave
 - vi. a summary understanding of the Acts which directly affect company senior management*

- 2.b. Impact of Company Law on automotive retail operations and trading including :
 - i. vicarious liability and the structure of accountability within a company
 - ii. accountability of the company for delivering honesty and truthfulness
 - iii. primary standards for reporting company performance and declaring outcomes
 - iv. accountability of senior management for the conduct of fair trade with customers and suppliers
 - v. senior management accountability for the conduct of fair business with state authorities
 - vi. translating the terms of company law into operating standards and individual work profiles

Content:

- 3.a. Principles of consumer legislation including:
- i. range and scope of 'consumer law' *
 - ii. statutes that determine and directly affect ways in which a business operates*
 - iii. purpose and objectives of the rules set down in the statutes*
 - iv. define contract and tort*
 - v. operational standards imposed by statutes controlling sales of goods and service
- 3.b. Effects and controls consumer legislation places on automotive retail operations including:
- i. trading standards regulations and rules for product and service descriptions compliance
 - ii. duty of care in the automotive retail operation
 - iii. consumer statutory rights, warranty and guarantee
 - iv. consumer protection and the liabilities of the automotive retail operation
 - v. management accountability for improper, inaccurate or poor quality work and communications
 - vi. staff responsibility for compliance when dealing with all customer related matters
 - vii. methods of ensuring that staff deliver fair and honest standards to the customer
 - viii. penalties that may be applied for non-compliance
 - ix. Data Protection Act rules and controls
- 4.a. Basic principles of employment legislation including :
- i. aspects of the Employment Relations Act 1999 relating the automotive retail business
 - ii. employment legislation in place prior to the Employment Relations Act 1999
 - iii. maternity and paternity rights and issues
 - iv. key aspects of the Employment Act 2002 relating the automotive retail business
 - v. aspects of diversity and consideration to be given to sectors addressed by laws of discrimination
 - vi. equal opportunities and aspects of equality in the automotive retail business
 - vii. key aspects of a Contract of Employment relating to the employer and employee
 - viii. the role of a tribunal and causes and issues that may lead to a tribunal hearing
- 4.b. Requirements and standards employment legislation places on employers including:
- i. the importance of staff induction, direction and appraisal
 - ii. the importance of job descriptions and performance reviews
 - iii. establishing fair management expectations of staff performance
 - iv. management behaviour towards staff *
 - v. maintenance of working conditions and standards
 - vi. accountability for employee welfare *
 - vii. fair delegation of work and tasks to individuals and the team*
 - viii. responsibilities for staff competence and development *
 - ix. conducting staff appraisals and acting on the outcomes of each appraisal
 - x. definitions and examples of bullying and harassment
 - xi. methods and requirements for the handling of harassment or bullying of staff *
- 5.a. Health and Safety responsibilities of management and staff in the retail automotive operation including:
- i. the importance of Health and Safety standards in the work place
 - ii. introduction to the Health and Safety At Work Act 1974 and Regulations 1999
 - iii. key aspects of the Act and Regulations relating to the automotive retail operation*
 - iv. how to prepare and set up a compliant Health and Safety procedure and function in the work place
 - v. select appoint and train an appropriate Health and Safety Officer for the business

Content:

NOTES:

- 1.a.i UK: Common Law, Civil Law, Criminal Law, etc.
- 1.a.ii Legislature, judicial system, executive, enforcement agencies, court system etc.
- 2.a.ii sole trader, partnership, private limited company, public limited company, etc.
- 2.a.vi Companies Act 2006, Insolvency Act 1986, Company Director Disqualification Act 1986, etc
- 3.a.i marketing, advertising, behaviour of selling staff, quality of goods and services, delivery of goods and services, contract, tort, etc.
- 3.a.ii Sale of Goods Act 1979, Trading Standards Act 1968, Consumer Protection Act 1987, Sale and Supply of Goods and Services Act 1982, etc
- 3.a.iii true and honest descriptions of the performance of a good or service, ensure the buyer receives fair value for money, ensure that the buyer receives goods and services that will perform effectively and durably to needs, ensure the trader is able to deal fairly with customers under all circumstances of trading, etc.
- 3.a.iv contract as defined in the Sale Of Goods Act 1979, etc
- 4.b.iv controlled, diplomatic, aware of staff member disposition, etc.
- 4.b.vi comfort at work, aware of domestic needs, issued with appropriate work, control pressure from work colleagues, aware of stress factors and other issues that may affect employee health, etc.
- 4.b.vii maintains close observation of the delegation factors of employee level of need, skill, time, competence, desire, ability, etc
- 4.b.viii training needs, ability, desire to improve, assessment of potential, etc
- 4.b.xi awareness of the issue, cause of the issue, maintenance of staff welfare, determining responsibility, actions to prevent re-occurrence, etc
- 5.a.iii provision for medical care in the event of illness or injury, Reporting of Injuries, Diseases and Dangerous Occurrences, standards of cleanliness, facilities for rest and washing, control of substances hazardous to health, correct usage of equipment, limitations of access to unauthorised persons, etc



| | |
|------------------------|---|
| UNIT REF: CIAM6 | UNIT TITLE: WORKING WITH PEOPLE IN AUTOMOTIVE INDUSTRY DISCIPLINES |
|------------------------|---|

| | | | |
|--|-------------------------|------------------------|----------------|
| Level: 4 | Route: Knowledge | Credit Value: 3 | GLH: 19 |
| <p>Mapping: This unit is mapped to MSC D1 Develop productive working relationships with colleagues, MSC D10 Reduce and manage conflict in your team, MSC D11 Lead meetings, MSC D14 Initiate and follow disciplinary procedure, MSC D15 Initiate and follow grievance procedure, MSC B6 Provide leadership in your area of responsibility</p> | | | |
| <p>Rationale: This unit is concerned with developing the manager’s understanding of working with people in automotive operations</p> | | | |

| LEARNING OUTCOMES | ASSESSMENT CRITERIA |
|---|--|
| The Learner will: | The Learner can: |
| 1. Be able to develop positive working relationships with colleagues within automotive operations | 1.1. Discuss a range of aspects that affect the working relationships with colleagues 1.2. Explain the processes and behaviours that promote good working relationships 1.3. Plan team meetings and individual meetings to communicate issues and business matters |
| 2. Be able to maintain positive disciplines and motivation in staff and colleagues | 2.1. Explain the importance of keeping colleagues informed about the standards of conduct and performance expected of them 2.2. Explain character variances between individuals and how this affects working relationships 2.3. Apply the principles of motivational strategy when working with subordinates, peers and seniors. |
| 3. Be able to manage instances of conflict and misconduct in subordinates | 3.1. Explain the differences between conflict, misconduct, gross misconduct and unsatisfactory performance 3.2. Handle instances of conflict, misconduct, gross misconduct and unsatisfactory performance |
| 4. Be able to utilise individual and team strengths in automotive operations | 4.1. Identify expertise, knowledge, skills and attitudes within individuals and teams 4.2. Explain how different skills sets are suited to differing roles within the team 4.1 Identify skill gaps and provide training solutions |
| 5. Be able to identify development needs from work performance in automotive operations | 5.1 Gather and check information required to identify problems with work performance 5.2 Evaluate current procedures for managing people and their performance in their area of responsibility and identify areas of weakness in the system |

Content:

The learner should understand and/or be able to apply:

- 1.a. Processes, behaviours and aspects of work that affect the working relationships with colleagues including:
 - i. aspects that can provide a positive impact on the working relationships with colleagues *
 - ii. aspects that can have a negative impact on working relationships with colleagues *
 - iii. processes, behaviour and methods that promote good working relationships with individuals & teams
 - iv. personal character styles, personal ability limitations and the motivational needs of colleagues
 - v. benefits to individuals, the team and the organisation of developing harmonious working relationships
 - vi. methods for resolving disagreements that can occur with or between colleagues
 - vii. diversity - managing its impact on work and working relationships
- 1.b. Principles of team leadership including:
 - i. the importance of a manager to provide leadership for their team *
 - ii. the role and responsibility of the team leader in developing and maintaining working relationships
 - iii. how team working improves productivity and performance
 - iv. factors that can encourage team working *
 - v. factors that can damage team working *
 - vi. plan and deliver team and departmental meetings
- 1.c. Processes for the delegation and control of tasks including:
 - i. a definition of delegation and what makes it an essential factor in organising work and achieving goals.
 - ii. the balance of retaining accountability whilst delegating authority and responsibility
 - iii. benefits of delegation for the manager *
 - iv. benefits of delegation to the team and individuals in the team *
 - v. benefits of delegation to the company *
 - vi. issues to consider when delegating tasks or projects to members of the team *
- 2.a. Processes for allocating and checking the work of a team including:
 - i. issues to consider when planning work to allocate or delegate to team members *
 - ii. setting standards of quality and performance for a task to be delegated
 - iii. requirements for checking the work in progress of a team or an individual *
- 2.b. Methods of developing team spirit and co-operation including:
 - i. the factors that encourage team spirit and co-operation *
 - ii. the ways in which the factors in (i) above can be developed
- 3.a. Aspects involved in team management including:
 - i. factors involved in managing a team *
 - ii. the need to set clear objectives
 - iii. the need to resolve conflict within the team or between individuals
 - iv. when and how to use authority to direct the team or individuals
 - v. the role of informal and formal meetings in the direction of the team
- 3.b. Role of communication including:
 - i. the importance of communicating with the team and individuals *
 - ii. ways in which communication can impact on team spirit *
 - iii. the importance of communicating the requirements and terms of a task *
 - iv. the importance of communicating the conduct expected of team members
 - v. the importance of communicating aspects relating to team and individual performance
- 3.c. The methods used for communicating including:
 - i. ways in which communication can take place *
 - ii. methods of communicating with the team and individuals *
 - iii. the appropriateness of different methods of communication

Content:

* NOTES:

- 1.a.i developing mutual trust and respect, showing consideration for others, showing interest in others, being open and honest, providing direction and guidance, recognising the knowledge, skills and achievements of others, good communication, setting clear standards, etc.
- 1.a.ii the opposites of the factors listed above(1.a.i); criticism of colleagues to others, failing to keep promises, failing to deliver on own work commitments or performance, failure to involve others, etc.
- 1.a.iii recognising, agreeing and respecting roles and responsibilities of colleagues; formal and informal discussion of work plans, work standards and achievements; holding informal and formal meetings, regular verbal and written communication, prompt action to deal with issues, regular monitoring of performance, providing feedback, keeping people informed, networking, empathising, valuing, supporting, involving, informing
- 1.b.i role model providing direction, guidance and advice; setting and maintaining standards, communicating with the team
- 1.b.iv open and honest communication, feedback, collective praise and reward, shared tasks, social events, etc
- 1.b.v claiming credit for the team's efforts and achievements, favouring individuals in the team, criticising one team member to others, etc
- 1.c.iii reduces work load, enables concentration on more important tasks, utilises the strengths of colleagues, builds the confidence of team members, develops trust, evaluating the potential of colleagues, etc
- 1.c.iv provides opportunities to develop skills and knowledge, provides an opportunity to demonstrate personal potential and ability, broadens experience, earns the respect of colleagues, etc.
- 1.c.v can improve skill and knowledge base, improved performance, increased flexibility, succession planning, etc.
- 1.c.vi empowerment, authority, responsibility, accountability, explaining duties tasks and outcomes clearly and concisely, ensuring colleagues are competent, setting specific deadlines, providing guidance and support, reviewing progress, recognising the achievements of colleagues, etc.
- 2.a.i planning departmental work load, prioritising work, assessing important and confidential work, assessing resource requirements, establishing health and safety factors, assessing risk, allocating work fairly, providing guidance, encouraging and motivating, monitoring progress, problem solving, implementing additional support/resources to ensure completion of work
- 2.a.iii identifying and resolving quality issues, controlling work standards, maintaining deadlines, identifying training needs, etc.
- 2.b.i creating trust, gaining respect, showing loyalty, empathising with others, showing genuine interest in others, listening to the views of others, helping others, open communication, sharing of information, involving team members, recognising achievements, sharing success, being seen to deal with problems, giving feedback, dealing with conflict, dealing with non-team players, etc
- 3.a.i planning, organising, controlling, evaluating, consulting, decision making etc
- 3.b.i the exchange of information, giving context to the work done, communicating praise, giving instruction, etc.
- 3.b.ii encourages the views and involvement of team members, informs team of decisions and issues that impact on them, shows honesty and openness etc
- 3.b.iii standards of work, deadlines, priorities, importance etc.
- 3.c.i verbal, remote, written, electronic, personal, communal, etc.
- 3.c.ii informal and formal meetings, discussions, quality evaluations, memos, newsletters, walking the shop floor etc.



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| UNIT REF: CIAM7 | UNIT TITLE: RECRUITMENT, SELECTION AND REWARD IN AUTOMOTIVE OPERATIONS |
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|--|-------------------------|------------------------|----------------|
| Level: 4 | Route: Knowledge | Credit Value: 3 | GLH: 19 |
| Mapping: This unit is mapped to MSC B8 Ensure compliance with legal, regulatory, ethical and social requirements, MSC B11 Promote equality of opportunity, diversity and inclusion in your area of responsibility, MSC D3 Recruit, select and keep colleagues, MSC D4 Plan the work force | | | |
| Rationale: This unit provides managers and supervisors with the knowledge and understanding to conduct effective recruitment of staff and develop appropriate reward packages within automotive operations. | | | |

| LEARNING OUTCOMES | ASSESSMENT CRITERIA |
|---|---|
| The Learner will: | The Learner can: |
| 1. Understand the principles and requirements of the recruitment process within automotive operations | 1.1. Explain the skills, experience, qualifications and personal attributes required by staff in a range of positions 1.2. Explain the documentation used in the recruitment process 1.3. Be able to review and plan the work force for the area of responsibility |
| 2. Be able to evaluate knowledge and ability of staff within automotive operations. | 2.1. Explain a range of methods used to determine a candidate's skills and knowledge 2.2. Describe the process for delivering skills and knowledge tests 2.3. Explain the assessment and evaluation of test results 2.4. Present the findings of test results and propose solutions to skill and knowledge needs |
| 3. Understand procedures for selecting candidates for positions in automotive operations | 3.1. Explain the different stages in the recruitment and selection process 3.2. Describe a range of different methods used in the recruitment and selection process 3.3. Deliver a recruitment interview 3.4. Select a candidate suited to the job |
| 4. Understand employment law relating to recruitment and selection within automotive operations | 4.1. Explain current employment law and its effect on the recruitment and selection process 4.2. Review the current recruitment and selection process in their area of responsibility and identify areas of strength and weakness |
| 5. Be able to prepare appropriate reward packages for staff within automotive operations | 5.1 Explain the assessment process of individuals' needs, abilities and preferences for reward and incentive 5.2 Prepare reward packages which reflect fairness and benefit to both parties |

Content:
The learner should understand and/or be able to apply:

- 1.a Specifications and personal attributes required by staff in positions within a vehicle operation including:
 - i. the importance of thorough preparation for recruitment.
 - ii. how to define job skills, experience, qualifications and personal attributes to satisfy the vacancy *
 - iii. mapping experience, qualifications and personal attributes to prepare a foundation for candidates *
 - iv. content and structure of information and documentation used in the recruitment and selection of staff
 - v. information, tools and guidance provided by ACAS and where to locate such information.
- 2.a A range of methods used to determine a candidate's skills and knowledge including:
 - i. the benefits and uses of differing methods of candidate evaluation in the selection process
 - ii. subjective and objective techniques, assessments and tests relating to candidate evaluation
 - iii. the applications and benefits of psychometric testing and analysis.
 - iv. the use, benefits and disadvantages of personal references
- 3 Stages in the recruitment and selection process including:
 - 3.a Establishing the need for a job:
 - i. assessing current and future work requirement matched to the capacity and skills currently available
 - ii. measuring the gap between available resource and work load
 - iii. measuring the gap between available skills and work requirement
 - iv. preparing candidate selection criteria to satisfy the job need
 - 3.b Defining the specification of a job:
 - i. the functions of the job
 - ii. the tasks of the job
 - iii. positioning the job within the organisation and the employer's hierarchy
 - iv. what is expected of the job holder
 - v. the level of responsibility and authority delegated to the job holder
 - vi. the reporting line of the job holder
 - 3.c Preparing a job profile:
 - i. relative merits of considering internal applicants and external applicants
 - ii. structure, purpose and function of the job profile *
 - iii. the purpose and function of a job description
 - iv. how a job profile is used in the recruitment process
 - v. create a job description from a job profile
 - 3.d Defining and preparing a candidate profile:
 - i. the structure, purpose and function of the candidate profile
 - ii. the presentation of a candidate profile
 - iii. how a candidate profile is used in the recruitment process
 - 3.e Candidate interview process including:
 - i. methods of attracting candidate applications *
 - ii. reading applicant curriculum vitae and identifying key criteria
 - iii. using a balanced score system to select candidates for interview
 - iv. methods and procedures for notifying candidates at each stage of the interview process *
 - v. preparing and maintaining an appropriate interview environment
 - vi. determining who should attend each stage of the interview process *

Content:

- 4.a Formal interviewing techniques including:
 - i. the importance of a planned and consistent style of interview through out the job recruitment process
 - ii. how to put the applicant at ease
 - iii. the importance of determining the applicant's understanding of the job role and its responsibilities
 - iv. the importance of evaluating factual information provided by applicants *
 - v. questioning techniques and the importance of using open questions
 - vi. fair and equal questioning strategy for all candidates
 - vii. how to set and receive a candidate presentation
 - viii. the importance of getting applicants to talk and the need for interviewers to listen
 - ix. how to get applicants to expand or clarify aspects they have discussed
 - x. techniques for determining attitudes, values, interest and commitment
 - xi. the importance and use of selection criteria in determining the successful applicant
 - xii. the importance of retaining recruitment and selection documentation

- 5.a Candidate selection process including:
 - i. reviewing candidate portfolios and selecting key qualities
 - ii. short listing job applicants matched to the selection criteria
 - iii. eliminating bias, personal preference and discrimination in the selection process
 - iv. making a justifiable, documented decision of candidate selection
 - v. procedures for informing the successful and unsuccessful applicants

- 6.a Current employment law and its effect on the recruitment and selection process including:
 - i. Legislation affecting recruitment and employment including the Employment Relations Act 1999
 - ii. Laws relating to Diversity and Discrimination
 - iii. Trade Union and Labour Relations (consolidation) Act1992
 - iv. Data Protection Act 1998/2000
 - v. Asylum and Immigration Act
 - vi. minimum wage and hours of work
 - iv. company policy and procedures for the recruitment and selection of staff
 - vii. the manager's responsibility and liability when recruiting staff

- 7.a Processes involved in assessing and preparing appropriate reward packages for staff including:
 - i. methods used to assess the needs, abilities and preferences of staff for reward and recognition
 - ii. staff rewards including salary/wage structures and bonus, incentive schemes and benefits
 - iii. alternative salary and incentive structures such as performance-related pay and group bonus schemes
 - iv. the appropriate application of benefits in kind as additional reward or remuneration
 - v. the effect benefits-in-kind may have on a staff members' income tax liabilities
 - vi. alternative incentives that apply benefits without additional taxation implications *

Content:

* NOTES:

- 1.a.ii range of levels of experience, skill and qualifications that may be acceptable to perform the defined job. personal qualities and characteristics independently defined. use of BPS approved methods, etc
- 1.a.iii Job profile, Skills profile, Candidate profile, Job description, etc.
- 1.a.iv Curriculum Vitae, Application form, match score sheet, Contract of Employment, Letters of application, acceptance and rejection, Induction Programme etc.
- 2.a.ii Informal interview and discussion, skills and knowledge tests, problem solving tests, presentations given by applicants, formal interview, psychometric testing, etc
- 3.c.i Tasks, responsibilities, authority, performance expectations, methods of performance measurement, etc
- 3.e.i The benefits, drawbacks and liabilities incurred when using recruitment agencies, independently placed recruitment advertising, 'head hunters', referrals, etc
- 3.e.iv Appointment to interview, requirements for the interview, acceptance, rejection, stage advancement, etc.
- 3.e.vi Those who need to attend to ensure fair play in the interview process and those who need to be present to input into the selection process, etc
- 4.a.iv As contained in their CV, application form, letter of application etc. e.g. qualifications, training, experience, knowledge, etc
- 7.a.vi Training and personal development opportunities, flexible working hours, additional holiday time for long service or over achievement, personal praise (written and verbal), increased autonomy and authority in their job role, etc



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|------------------------|--|
| UNIT REF: CIAM8 | UNIT TITLE: APPRAISAL AND DEVELOPMENT OF AUTOMOTIVE INDUSTRY PEOPLE |
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| Level: 4 | Route: Knowledge | Credit Value: 3 | GLH: 19 |
| <p>Mapping: This unit is mapped to MSC B6 Provide leadership in your area of responsibility, MSC B11 Promote equality of opportunity, diversity and inclusion in your area of responsibility, MSC D1 Develop productive working relationships with colleagues, MSC D3 Recruit, select and keep colleagues, MSC D7 Provide learning opportunities for colleagues, MSC D8 Help team members address problems affecting their performance</p> | | | |
| <p>Rationale: This unit is concerned with conducting constructive appraisals and planning staff development within automotive operations</p> | | | |

| LEARNING OUTCOMES | ASSESSMENT CRITERIA |
|---|--|
| The Learner will: | The Learner can: |
| 1. Understand the requirements, methods and benefits of performance reviews and appraisals within automotive operations | 1.1. Explain the principles, methods, tools and techniques used to assess an individual's performance 1.2. Explain benefits to the individual and to the automotive retail operation of a structured and timely performance review or appraisal |
| 2. Understand causes of staff turnover within automotive operations and how to minimise it | 2.1. Explain the main reasons for staff turnover and its impact 2.2. Conduct exit interviews to identify the causes of staff leaving and how these can be used to improve staff retention |
| 3. Know the procedures for preparing, delivering and documenting staff appraisals or performance reviews within automotive operations | 3.1. Describe principles, methods, tools and techniques used to plan and provide support before a staff appraisal or performance review 3.2. Describe principles, methods, tools and techniques used during a staff appraisal or performance review 3.3. Describe the principles and methods used when recording the agreed outcomes of staff appraisals and performance reviews |
| 4. Understand the commitments, obligations and actions that arise from a staff appraisal | 4.1. Explain the importance of establishing with the individual any courses of action and/or areas of performance or development to be targeted 4.2. Action agreed projects for personal development or performance improvement to be achieved by the individual 4.3. Explain the importance of setting timescales for follow-up interviews to evaluate progress |
| 5. Know how to assess development potential and training needs within automotive operations and implement personal development plans | 5.1 Apply the principles, methods, tools and techniques used to assess knowledge, skills and personal qualities 5.2 Apply the principles, methods, tools and techniques used to identify learning and development needs and opportunities 5.3 Apply the content of a personal development plan and how it is implemented within an automotive operation |

Content:
The learner should understand and/or be able to apply:

- 1.a. The difference between review and appraisal including:
 - i. objectives of review and of appraisal
 - ii. benefits of a review and an appraisal to both the employer and the employee
 - iii. frequency with which reviews and appraisals should be delivered
 - iv. topics and issues that a review and an appraisal should address

- 1.b. Methods of assessing skill levels, training and development needs of staff including:
 - i. conducting a training needs analysis
 - ii. tools, methods and practises used in assessing performance and identifying skills gaps
 - iii. tools, methods and practises used in assessing current knowledge, skills and personal qualities
 - iv. tools, methods and practises used to identify learning and development potential
 - v. identify the need for an individual's development.*
 - vi. identify the need for team development.*
 - vii. ways of determining an employee's potential for development in preparation for a more senior role *
 - viii. benefits of a scheduled, structured performance and appraisal plan

- 2.a. Issues relating to staff turnover including:
 - i. causes of staff turnover *
 - ii. ways in which staff can be retained within the job or organisation
 - iii. resolving issues that cause staff turnover
 - iv. use of exit interviews for establishing the cause of staff leaving the organisation's employment
 - v. use of information from exit interviews in reducing staff turnover

- 3.a. Procedures relating to the preparation of staff appraisals and performance reviews including:
 - i. the importance of conducting regular formal staff appraisals and reviews
 - ii. legal protocols to be observed in the preparation, delivery and follow-through of appraisals and reviews
 - iii. preparing an environment appropriate to an appraisal meeting.
 - iv. tools and methods used in planning of staff appraisals and performance reviews *
 - v. briefing and preparing employees for their review or appraisal
 - vi. techniques of delivering staff appraisals and performance reviews
 - vii. methods used to document the findings and outcomes of staff appraisals and performance reviews

- 4.a. Commitments, obligations and actions that arise from a staff appraisal including:
 - i. proposing, agreeing and planning any courses of action arising from the appraisal or performance review
 - ii. agree targets for improvement based on areas of under performance
 - iii. agree objectives for development based on new technology or changing profiles of work.
 - iv. agree objectives for personal development based on career potential
 - v. explain the expected standards of performance of any courses of action arising from the appraisal or performance review

Content:

4.b. Delegation and control of tasks including:

- i. the importance of delegation as an essential factor in organising work and achieving goals.
- ii. benefits of delegation for the organisation, the manager, the team and individuals in the team
- iii. issues that must be considered when delegating tasks or projects to team members *
- iv. reviewing the progress and quality of delegated tasks or projects
- v. supporting individuals when performing delegated tasks
- vi. retaining management accountability for delegated tasks or projects

4.c. Assisting a staff member in the planning, writing and implementation of a personal development plan including:

- i. the importance of personal development plans in business and career development
- ii. the structure and content of a personal development plan
- iii. identifying own training needs and setting training and development objectives
- iv. planning and implementing training and development to achieve objectives
- v. measuring the effect of training and achievement of objectives

NOTES:

- 1.b.iv work performance, motivation, changes in work requirements, new or revised objectives, working with new technology, etc.
- 1.b.v team performance, working harmony, cohesive working style, collective responsibility, productivity, etc.
- 1.b.vi competency assessment, skills assessment, work placement, task delegation, development potential assessment, etc
- 2.a.i working conditions, lack of recognition, bullying or harassment, discrimination, lack of training and development, undervalued, personal issues, lack of prospects, low pay, etc.
- 3.a.iii meeting environment, prepared appraisal/review record format, questions to ask, employee performance history
- 3.a.iv performance self assessment documentation, customer feedback, quality analysis, previous development plans, development activities, analysis of performance against objectives/targets, achievement of tasks, meeting of deadlines. appraisee / reviewee self-preparation documentation and guidance, etc
- 3.a.vi asking fair and correct questions, delivering praise and critique proportional to performance, remaining unbiased, encouraging discussion, recording the conversation, proposing actions, agreeing and/or redefining objectives
- 4.b.iii willingness to accept the task, competence, skill, time available, confidential nature of task, importance of task



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|------------------------|---|
| UNIT REF: CIAM9 | UNIT TITLE: PLANNING AND BUDGETING THE AUTOMOTIVE DEPARTMENT |
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|--|-------------------------|------------------------|----------------|
| Level: 4 | Route: Knowledge | Credit Value: 4 | GLH: 28 |
| Mapping: This unit is mapped to MSC B1 Develop and implement operational plans for your area of responsibility, MSC B 4 Put the strategic business plan into operation, MSC B6 Provide leadership in your area of responsibility, MSC E1 Manage a budget, MSC F1 Manage a project | | | |
| Rationale: This unit addresses the process of preparing a budget and how budgets are used to control business performance in the automotive industry | | | |

| LEARNING OUTCOMES | ASSESSMENT CRITERIA |
|---|--|
| The Learner will: | The Learner can: |
| 1. Understand the principles and terminology of business finance in the automotive industry | 1.1. Explain a range of financial terms commonly used in automotive operations 1.2. Explain the methods and requirements for recording financial information and maintaining financial records |
| 2. Know how to interpret financial concepts and processes in relation to automotive industry departmental performance | 2.1. Explain the purpose and format of the main financial reports used in automotive operations 2.2. Be able to review the financial performance of their area against stated objectives |
| 3. Be able to input goals targets and objectives in to a automotive industry budget | 3.1. Explain the purpose of budgetary systems 3.2. Be able to source and evaluate appropriate information from which to structure a budget 3.3. Prepare a realistic operating budget |
| 4. Be able to use a budget to measure, report on and correct business performance in an automotive operation | 4.1. Be able to use a budget to monitor and control performance for their area of responsibility 4.2. Assess risks incurred by the budget plan 4.3. Identify main causes of variances against the budget 4.4. Explain types and methods of corrective action that can be employed to address identified variances |

Content:
The learner should understand and/or be able to apply:

1. a. Financial terminology used in automotive operations including:
 - i. the importance of financial controls in daily operations
 - ii. revenue, sales, turnover, cash flow, working capital
 - iii. cost centres and profit centres
 - iv. gross profit, direct profit, operating profit and net profit
 - v. retained profit/retained loss
 - vi. costs and expenses and their sub-variants *
 - vii. fixed assets (tangible and intangible) and current assets *
 - viii. types of liability *
 - ix. methods of asset and stock depreciation *

- 2.a. The purpose of the main financial reports and documents including:
 - i. trading account
 - ii. management account
 - iii. profit and loss
 - iv. departmental budget
 - v. breakeven chart
 - vi. formats of the reports and documents identified in (i–v) above

- 2.b. How to prepare a budget including:
 - i. the importance of budgets in departmental operations
 - ii. different types of budget that can be prepared
 - iii. process of producing a departmental budget
 - iv. where to find data and information from which to construct and justify a departmental budget
 - v. internal factors affecting a department's budget planning *
 - vi. external factors affecting a department's budget planning *
 - vii. who to consult with and why when preparing a budget
 - viii. how to prepare a departmental budget
 - ix. assess the risks to the business plan and departmental performance incurred by the budget plan

- 3.a. Use a budget to achieve departmental objectives including:
 - i. layout of and information contained in a departmental budget
 - ii. where to find and how to use management information
 - iii. cross-referencing budget and management report information
 - iv. terms associated with budgets and budget planning *
 - v. control and measure progress towards target achievement
 - vi. measuring variances and trends
 - vii. identifying causes of over and underperformance from budget and management information

- 3.b. Use a budget to control short term performances including:
 - i. confirm departmental incentives and targets
 - ii. to sub divide the budget into short and medium term objectives
 - iii. measure individual performance areas
 - iv. identify under performance and the need for rectification
 - v. identify over performance and the need for control
 - vi. identify causes of under or over performance against budget goals



Content:

- 4.a. Principle KPIs and their calculations for measuring performance including:
 - i. key profit measurement KPIs *
 - ii. key operational departmental KPIs
 - iii. using KPIs in the management of daily operations

- 4.b Managing and adjusting a budget including:
 - i. the importance of justifying a budget
 - ii. how to confirm a budget with subordinates, peers and senior management
 - iii. how to use a budget as an active monitor and control for departmental activity
 - iv. how to identify the causes of routine variances between budget and actual performances
 - v. how to react to and rectify under-performance and justify over-performance
 - vi. the importance of not adjusting a budget unless circumstances dictate the need to do so
 - vii. acceptable factors that may necessitate a budget adjustment *
 - viii. how to prepare, justify and propose an budget adjustment

*** NOTES:**

- 1.a.vii direct, indirect, fixed, semi-fixed, variable, overheads, etc.
- 1.a.viii Land and premises, tools and equipment, vehicles etc. Current assets, stock, debtors, work in progress, bank balance, cash-in-hand etc
- 1.a.viiii Long term liabilities, current liabilities, share capital, debentures & loans, creditors, overdrafts etc
- 1.a.ix straight line, reducing balance, instant write-off, etc
- 2.b.v last year's performance, company decisions, company plans, market trends, forecast revenue, costs and expenses etc
- 2.b.vi inflation, interest rates, economic factors, competition, brand objectives etc.
- 3.a.iv target, plan, negative variance, positive variance, trends, current & previous year, etc
- 4.a.i % gross profit, % direct profit, % operating profit % net profit, etc
- 4.c.ii Involve, present, discuss, justify, negotiate, agree, etc
- 4.c.vii necessitated by external factors, product factors, resource factors etc. that may directly affect performance during the term of the budget



| | |
|-------------------------|---|
| UNIT REF: CIAM10 | UNIT TITLE: LOCAL MARKETING FOR AUTOMOTIVE PRODUCTS AND SERVICES |
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|--|-------------------------|------------------------|----------------|
| Level: 4 | Route: Knowledge | Credit Value: 3 | GLH: 19 |
| Mapping: This unit is mapped to MSC F1 Manage a project, MSC F3 Manage Business processes, MSC F4 Develop and Implement marketing plans for your area of responsibility, MSC F16 Manage the development and marketing of products/services in your area of responsibility | | | |
| Rationale: This unit addresses proactive local marketing as a means of increasing sales of vehicles, parts and sold hours using either own or outsourced resources | | | |

| LEARNING OUTCOMES | ASSESSMENT CRITERIA |
|--|---|
| The Learner will: | The Learner can: |
| 1. Understand the fundamentals of local marketing and the marketing process for automotive products and services | 1.1 Explain how to identify products and services required by existing and potential customers 1.2 Explain the principle of competitive advantage in the marketing process 1.3 Evaluate their current products and services against market demand 1.4 Evaluate the extent to which current products and services meet existing and potential customers' requirements |
| 2. Know how to identify market sectors, segments and potential for the marketing of automotive products and services | 2.1. Explain the principle of market segmentation and its importance 2.2. Be able to identify and target local market opportunity 2.3. Evaluate potential amendments or additions to products and services to meet and exceed existing and potential customers' requirements |
| 3. Be able to prepare a short-term local marketing plan for the promotion of automotive products and services | 3.1. Be able to identify and develop short term marketing objectives for the local area 3.2. Develop appropriate strategies for realising marketing objectives within their organisation's overall business plan 3.3. Prepare a detailed marketing plan for the promotion of automotive products and services |
| 4. Be able to action a short-term local marketing plan | 4.1. Assess the need for amending or adjusting products and services to meet changes in customer needs 4.2. Evaluate the effectiveness of using own or outsourcing resources |
| 5. Understand how to measure the effect of an automotive product campaign and revise strategy to effect the results | 5.1 Analyse, measure and assess data and turn it into information which is suitable for business purposes 5.2 Explain how to monitor and report on the performance of a campaign against milestones and budgets 5.3 Be able to take timely and appropriate action to address any significant variances in performance |

Content:

The learner should understand and/or be able to apply:

- 1.a. The fundamental principles of local marketing of motor products and services including:
 - i. aspects relating to marketing of automotive products and services*
 - ii. processes for determining customer needs and expectations
 - iii. processes for assessing and determining customer satisfaction
 - iv. evaluate, appreciate and utilise competitive advantage in marketing strategy*
 - v. evaluate and appreciate how own products and services meet and exceed customer needs
 - vi. how products and services can be extended to meet and satisfy identified customer needs and expectations *

- 2.a. Market sectors and segments including:
 - i. the composition of vehicle market sectors and subsectors
 - ii. the importance of market segmentation in the marketing of automotive products and services
 - iii. determining the primary marketing area
 - iv. identify relevant market segments and target markets within those segments *
 - v. assessing the needs wants and desires of the target markets
 - vi. assess the potential and value of each of the segments

- 2.b. Products and service positioning including:
 - i. compare and contrast current products and services against existing and potential customer requirements
 - ii. create a list of unique selling points and compare them fairly to competitors' products
 - iii. modifying services offered to meet the requirements of the target market
 - iv. extending or adjusting available products to satisfy the requirements of the target market

- 3.a. Planning and preparation of short-term local marketing plans including:
 - i. planning a local marketing campaign of automotive products and services
 - ii. analyse effectiveness of using own or outsourcing resources
 - iii. parties to be involved with the planning and organising of the marketing campaign *
 - iv. identifying and setting appropriate and achievable market objectives
 - v. methods available for communicating with and promoting to the market *
 - vi. selecting the marketing methods most appropriate to target market segments
 - vii. planning market strategy to support the organisation's business objectives
 - viii. communicating the marketing campaign plan within the organisation
 - ix. processes involved in planning and documenting a short-term local marketing plan *
 - x. preparation of a detailed costing for a local marketing plan
 - xi. calculations for establishing the break-even point in a plan
 - xii. processes for defining and projecting the profit factors of a local marketing plan
 - xiii. methods to measure the plan in operation and set frequency of measurement
 - xiv. executing the plan into action

Content:

- 3.b. Communicating the marketing message to the target market including:
- i. complying with the Data Protection Act 1998 / 2000
 - ii. sourcing individual prospects to contact *
 - iii. build, maintain and manage a database of customer contacts
 - iv. using dealer management systems to build and maintain a functional marketing contact database
 - v. developing a customer relations management strategy to maintain and develop the market
 - vi. managing the design and preparation of marketing material *
 - vii. managing distribution of the marketing material

- 4.a. Measurement of the effect of an automotive product campaign including:
- i. the importance of regularly monitoring marketing campaigns
 - ii. methods and processes for measuring the performance of a marketing plan in operation
 - iii. reviewing a campaign's effectiveness and identifying strengths and weaknesses in performance
 - iv. revise strategy to address any significant variances from the planned objectives
 - v. interpret reported performance and assess and forecast under/over achievement of objective
 - vi. compare performance with manufacturer or group composite averages or KPIs
 - vii. adjust an under-performing strategy to achieve the objective part-way through a campaign
 - viii. manage an on-target performance of the campaign to ensure achievement of the objective
 - ix. plan and review the cut-off point of the campaign
 - x. debrief to review the results, strengths and weaknesses of the campaign

NOTES:

- 1.a.i Types of external customer, types of internal customer, technical developments (vehicles and equipment), local and national market trends, local and national economic trends, BER and its ongoing effects on trading, legal changes (emissions etc), environmental issues, competitors etc
- 1.a.iv Price, product USPs', economy and environmental advantages, location, reputation, hours of opening etc.
- 1.a.vi the range of products, type, quality, brand and quantity stocked, price of products matched to market economies and levels of disposable income
- 2.a.iv vehicle product type, vehicle product sector, customer type, business type, demographic infrastructures, socio-economic divides etc.
- 3.a.iii suppliers, other departments, agencies, colleagues, etc.
- 3.a.v telephone, SMS, letters, direct mail, referrals, e-mail, website, poster campaign, local radio / TV, press etc.
- 3.a.ix plan objective, strategy and actions, operating dates, duration of plan, methods of measurement, persons responsible etc.
- 3.b.ii own database, other databases within own organisation, purchased databases, local information directories, agency databases etc.
- 3.b.vi using agencies and design centres. creating material appropriate to the objective. controlling costs and quality, outsourcing production of material etc



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| UNIT REF: CIAM11 | UNIT TITLE: MANAGING VEHICLE ACCIDENT REPAIR OPERATIONS |
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|---|-------------------------|------------------------|----------------|
| Level: 4 | Route: Knowledge | Credit Value: 3 | GLH: 19 |
| Mapping: This unit is mapped to MSC D6 Allocate and monitor the progress and quality of work in your area of responsibility, MSC E1 Manage a budget, MSC F6 Monitor and solve customer service problems, MSC F8 Work with others to improve customer service | | | |
| Rationale: This unit addresses the effective management and organisation of vehicle accident repair operations | | | |

| LEARNING OUTCOMES | ASSESSMENT CRITERIA |
|---|--|
| The Learner will: | The Learner can: |
| 1. Understand the principles of efficient vehicle accident repair workshop operations | 1.1. Explain the costs incurred in a vehicle accident repair workshop operation 1.2. Explain the aspects of the vehicle accident repair operations that affect customer satisfaction 1.3. Explain the aspects of the vehicle accident repair operation premises which affect customer satisfaction 1.4. Explain the aspects of vehicle accident repair staff that affect customer satisfaction |
| 2. Be able to use performance information in a vehicle accident repair workshop | 2.1. Explain a range of methods used to monitor and report the performance of vehicle accident repair operations 2.2. Explain the key performance indicators and benchmarks used in vehicle accident repair operations |
| 3. Be able to deliver the process of notification of claim or loss | 3.1. Explain the process for dealing with claim or loss notifications |
| 4. Know how to structure the estimate and the workshop job card for a vehicle accident repair | 4.1. Explain the difference between a repair estimate and the workshop job card 4.2. Explain the importance of reviewing the estimate with the vehicle present 4.3. Produce an estimate for repair from a prepared scenario 4.2 Present an estimate for a repair ensuring customer appreciation of the values, qualities and need for the work to carried out 4.3 Evaluate the estimate and produce a workshop job card for the vehicle repair |

Content:
The learner should understand and/or be able to apply:

- 1.a Costs incurred within an accident repair operation including:
 - i. identification of the cost centres and analysis of costs that may be incurred
 - ii. direct and indirect departmental expenses
 - iii. controlling departmental expenses to maximise profits
- 2.a Requirements for effective customer service in accident repair operations including:
 - i. the importance of customer service, care and satisfaction to the accident repair organisation
 - ii. corporate values and policies for delivering customer service in accident repair operations.
 - iii. the importance of providing excellent customer service and building strong relationships with customers
 - iv. internal and external customers, how they differ and the significance of both to the vehicle repair operation
 - v. aspects of repair operations customer service that influence customer satisfaction*
 - vi. how the quality of the department premises can influence customer satisfaction*
 - vii. factors relating to repair staff that influence customer satisfaction*
 - viii. the importance of demonstrating a customer focused attitude through management actions and behaviour
- 2.b. KPIs and benchmarks for accident repair operations including:
 - i. financial terms associated with accident repair operations *
 - ii. construction and layout of a Profit and Loss Account for an accident repair operation
 - iii. KPIs related to accident repair operations *
 - iv. how to calculate the KPIs using typical data from management controls
- 3.a Procedures for handling new accident repair claim or loss notifications including:
 - i. the importance of a documented vehicle damage appraisal procedure
 - ii. the importance of providing an excellent service to third party organisations *
 - iii. employ a documented process for advising and engaging third parties who will be involved with the repair and/or claim
- 4.a Estimates and job cards including:
 - i. the difference between an estimate and the workshop job card
 - ii. the positive impact of reviewing the estimate at the vehicle could have on the repair cycle time
 - iii. how to produce an estimate to include anticipated labour hours required and an appropriate list of parts *
 - iv. how to ascertain, from an estimate, whether a vehicle is required to be mounted to a jig *
 - v. how to identify and manage work items that may be recorded in an estimate that may not generate repair shop sold hours or may require scheduling
 - vi. how to ascertain the workshop hours required and balance the mix for the disciplines of mechanical, electrical, trim, panel and paint
 - vii. how to allocate the bodyshop hours for the above disciplines and maintain effective performances *

*** NOTES**

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|---------|---|
| 2.a.iii | customer satisfaction, customer retention, referrals, profitability, business growth, reputation |
| 2.a.v | lead time for repair flexibility and range of repair services offered, reception facilities & organisation, courtesy vehicles, menu pricing, right first time fix, quality of communication, presentation of vehicle etc. |
| 2.a.vi | condition of premises, facilities, signage, parking, comfort & cleanliness, presentation etc |
| 2.a.vii | appreciating the customer, interpersonal skills, identifying customer needs & expectations, taking ownership of problems, knowledge, explaining technical issues etc. |
| 2.b.i | gross profit, direct profit, operating profit, return on capital employed etc |
| 2.b.iii | labour efficiency, productive efficiency, first-time fix ratio, hours sold, revenue per technician, debtors days, profit percentage%, staff ratios, etc |
| 3.a.ii | insurance companies, insurance assessors, parts suppliers, VOSA etc. |
| 4.a.iii | including remove repair & refit, replace with new part, paint and blend etc. |
| 4.a.iv | for pulling, pulling and measuring, assessing required mechanical work etc. |
| 4.a.vii | utilisation of labour, high efficiency productivity, customer satisfaction, produce a detailed workshop job card for the vehicle repair, etc |



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|-------------------------|---|
| UNIT REF: CIAM12 | UNIT TITLE: MANAGING AUTOMOTIVE PARTS OPERATIONS |
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|---|-------------------------|------------------------|----------------|
| Level: 4 | Route: Knowledge | Credit Value: 4 | GLH: 20 |
| Mapping: This unit is mapped to MSC B1 Develop and implement operational plans for your area of responsibility, MSC B4 Put strategic business plans in to action, MSC E15 Procure supplies, MSC F3 Manage business processes, MSC F7 Support customer service improvements | | | |
| Rationale: This unit addresses the knowledge required to organise and manage a successful automotive accessory and replacement parts operation | | | |

| LEARNING OUTCOMES | ASSESSMENT CRITERIA |
|---|---|
| The Learner will: | The Learner can: |
| 1. Know how to manage automotive parts and accessory stock within an automotive operation | 1.1. Explain the principles of parts stock management 1.2. Apply a range of methods used for managing stock in a automotive parts operation |
| 2. Understand automotive parts customer groups and the significance of each group | 2.1. Explain the meaning of internal and external customers 2.2. Classify the types of customers who use a automotive parts operation 2.3. Describe the impact each customer type has on a automotive parts operation |
| 3. Be able to operate an automotive replacement parts and accessory sales and supply department | 3.1. Explain the aspects relating to stocking and supplying of automotive parts that influence customer satisfaction 3.2. Apply processes used to ensure a match between supply and demand 3.3. Plan parts stock to satisfy demand 3.4. Plan parts stock to achieve stock turn objectives 3.5. Acquire stock from appropriate suppliers 3.6. Explain the aspects relating to the automotive parts operation sales staff and premises that affect customer satisfaction |
| 4. Be able to control automotive parts sales, stock turn and profit retention | 4.1. Explain the key performance indicators and benchmarks related to automotive parts operations 4.2. Explain the financial aspects used to monitor and report on the effective performance of a automotive parts operation |

Content:
The learner should understand and/or be able to apply:
1.a. Principles of stock management including:

- i. the importance of stock management and control in the automotive industry
- ii. fundamentals of stock management and stock control in automotive parts operations
- iii. goals and objectives of automotive parts stock management
- iv. minimum quantity stock management
- v. parts stock turn management
- vi. first time pick of parts including the relationships to profit and customer satisfaction
- vii. planning stock mix and item stock quantities
- viii. planning stock mix to exploit the market opportunity
- ix. balanced economic stock orders, VOR ordering, emergency orders and 'just in time' delivery
- x. controlling emergency orders and automotive off road orders
- xi. identifying overage stock and managing and stock obsolescence
- xii. principles underpinning computerised stock control systems
- xiii. methods for reducing stock damage and related costs *
- xiv. parts packaging to increase sales and customer satisfaction

2.a Customer who use a automotive parts operation including:

- i. definition of internal customer types *
- ii. definition of types of external customers *
- iii. definition of types of captive customers *
- iv. definition of types of retail customers *
- v. definition of types of trade customers *

3.a Management of an automotive parts stock and sales operation including:

- i. classifying automotive parts by market type *
- ii. principles of supply and demand and the need to match demand with supply
- iii. causes of dormant, redundant and obsolete stock and methods of minimising such stock
- iv. methods for obtaining stock *
- v. the advantages of obtaining stock by regular stock order *
- vi. processes for carrying out a stock inventory check
- vii. reasons for carrying out a stock inventory check *

3.b Managing customer satisfaction in automotive parts sales including:

- i. the importance of customer service, care and satisfaction in automotive parts operations
- ii. the importance of providing excellent customer service and maintaining good relationships with customers
- iii. delivering customer satisfaction, customer care and retaining customers
- iv. aspects relating to the supply of parts that affect customer satisfaction *
- v. aspects of the parts department premises the effect customer satisfaction *
- vi. factors relating to parts sales staff that affect customer satisfaction *

4.a Measuring automotive parts sales and profit factors including:

- i. financial terms relating to a parts operation.*
- ii. basic layout and construction of a Trading Account and a Profit & Loss Account
- iii. KPIs associated with an automotive parts operations *
- iv. how to calculate the KPIs in (iii) using typical data from an automotive parts operations
- v. the possible causes for underachievement of selected KPIs
- vi. the causes of low gross profit in a parts operations *
- vii. the causes of low direct and net profits in a parts operation *

Content:

NOTES:

- 1.a.xiii stock rotation, first in first out, maximum/minimum stock quantities, just in time deliveries etc
- 2.a.i service department, vehicle sales department, vehicle repair department, dealerships or businesses within the same group etc.
- 2.a.ii retail customers, private buyers, local business customers, fleet customers, contract hire companies, non-franchise local repair businesses, dealers representing the same manufacturer but outside the group etc.
- 2.a.iii other dealership departments, warranty customers, contract customers etc.
- 2.a.iv private buyers, local business customers, fleet customers, contract hire companies, etc.
- 2.a.v non-franchise local repair businesses, dealers representing the same manufacturer but outside the group, franchised dealers representing other manufacturers etc.
- 3.a.i competitive, captive, fast moving, slow moving, dormant, redundant, spurious etc.
- 3.a.iv regular stock orders, vehicle off road, emergency orders etc.
- 3.a.v Maximising gross profit potential, supply forecasting, minimum stock quantity control etc.
- 3.a.vii to obtain stock valuation, identify stock losses, identify stock damage, identify redundant, over-age and obsolete stock etc.
- 3.b.iv parts pricing, quality of part, part availability, promptness of delivery, reliability, standard of service, confidence inspired by staff etc.
- 3.b.v image, facilities, parking, cleanliness, displays and presentation etc
- 3.b.vi positive attitude empathy with the customer's need, interest, giving attention, competence, knowledge, politeness etc.
- 4.a.i Gross profit, direct profit, return on capital employed, stock depreciation, cost of stock
- 4.a.iii stock turn ratio, % first time pick, % lost sales, % gross profit, sales per vehicle parc unit, debtors days parts sales per labour hour, etc
- 4.a.vi excessive use of VOR and emergency orders, inappropriate discounting to customers, stock damage, stock losses, over stocking, redundant stock, obsolete stock, etc.
- 4.a.vii all the aspects identified in (vi) above + excessive expenditure on associated practices, services and resources, poor control over indirect costs and overheads etc.



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| UNIT REF: CIAM13 | UNIT TITLE: INFORMATION COMPUTER TECHNOLOGY FOR AUTOMOTIVE OPERATIONS |
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| Level: 4 | Route: Knowledge | Credit Value: 3 | GLH: 19 |
| Mapping: This unit is mapped to MSC A2 Manage your own resources and professional development, MSC E4 Promote the use of technology in your organisation, MSC E11 Communicate information and knowledge | | | |
| Rationale: This unit addresses the knowledge required to ensure automotive managers are competent in the use of common computer-based applications and popular business related software | | | |

| LEARNING OUTCOMES | ASSESSMENT CRITERIA |
|---|--|
| The Learner will: | The Learner can: |
| 1. Know how to use the internet and its communication functions related to automotive operations | 1.1. Explain how the internet can be used to support vehicle operations 1.2. Distinguish between internet and intranet 1.3. Explain the importance of imposing controls on internet usage 1.4. Use internet and email facilities for communication purposes and information-gathering |
| 2. Be able to use word processing, spreadsheet and presentation applications in the workplace | 2.1. Use standard word processor functions including formatting text and paragraphs, adding tables and pictures, adding headers and footers 2.2. Use standard spreadsheet functions to include; formatting cells, columns and rows and the use of formulae to carry out automatic calculations 2.3. Use standard presentation functions to include; using slide templates, formatting text, inserting pictures and importing data from other applications and converting data into a chart, graph or table |
| 3. Understand the functions of a database and its benefits as a communication and marketing tool within an automotive operation | 3.1. Explain the function of a database and how information is retrieved in the form of reports 3.2. Describe the advantages of a database when communicating with existing or potential customers 3.3. Explain the advantages of a database when used to support marketing activity |
| 4. Understand how a database can be used as a contact and sales analysis tool within an automotive operation | 4.1. Use a database to store and manage contact lists 4.2. Cleanse a database on a regular basis 4.3. Use a database to monitor and report on sales activity within their area of responsibility |

Content:

The learner should understand and/or be able to apply:

- 1.a. Internet and its communication functions including:
 - i. the function of the internet and how it can benefit the retail motor industry
 - ii. utilising functions of the internet in departmental control and activity
 - iii. benefits and limitations of the communication functions of the internet in the automotive industry
- 1.b. Computer operations and functions including:
 - i. unique functions of the terms administrator, user, client, server, network LAN, WAN, intranet, extranet, ICT, e-Commerce, World Wide Web and the internet.
 - ii. network systems and the advantages of using them *
- 1.c. Computer threats and security including:
 - i. the threat of unsolicited and undesirable software infiltrating a computer system
 - ii. information security and the benefits of being proactive in dealing with security risks *
 - iii. 'computer viruses' how they can infect the system
 - iv. definitions of spy-ware and ad-ware and their threat to a computer system
 - v. computer online security and anti-virus measures *
 - vi. the purpose and necessity of managing a firewall
- 2.a. E-mail and internet access in vehicle operations including:
 - i. the importance and value of electronic communication in business
 - ii. setting up and managing an email security policy *
 - iii. managing e-mail effectively *
 - iv. controls and protocols for restricting personal use and individual access to the internet
 - v. communicating company policy to staff on the use of email and the internet
- 3.a. Computer applications commonly used in a vehicle operation including:
 - i. using trusted software packages to support vehicle operations
 - ii. use of computer applications to manage DMS
 - iii. the importance of computer applications in managing departmental data
 - iv. sorting and filing data and the benefits of creating folders and sub folders *
 - v. creating a structure of folders and subfolders beneficial to the appropriate retail motor department
 - vi. word processing *
 - vii. spreadsheets *
 - viii. presentation software (PowerPoint etc.) *
- 4.a. Database management including:
 - i. types of database *
 - ii. compilation of reports from data stored within the database
 - iii. advantages of using historical data when communicating with customers and formulating marketing plans
 - iv. managing database contact lists
 - v. creating a selective database using data filters and sorting relevant customer information*
 - vi. cleansing and updating the database regularly to maintain accuracy of information
 - vii. using a database to monitor departmental activity



Content:

NOTES:

- 1.b.ii file sharing, printer sharing, group project work, remote back-up, central storage etc.
- 1.c.ii adopting an internet policy with respect to handling sensitive data, the importance of backing up data and regularly saving important data. restricted access, passwords and controls, etc.
- 1.c.v anti-virus software, spy-ware, regularly updating relevant software, using automatic updates, renewing virus protection subscription, not opening unrecognised e-mail/attachments, maintaining pop-up blockers, firewall, encryption, digital IDs & signatures etc.
- 2.a.ii e-mail account access, email content, transmitting or handling of sensitive information or data, restrictions on private use, password protocols etc.
- 2.a.iii junk email, spam, filters, creating folders, attachments, address book, prioritising (flagged) messages, read receipts, sender blocking, message rules, encrypting data etc
- 3.a.iv locating and filing and sorting customer and product information, information storage, archived information, services or customers, and to contain and identify files of specific topics, issues and images
- 3.a.vi creating and saving documents, creating page layouts, inserting and creating headers and footers, formatting paragraphs and text, adding and setting up tables, inserting pictures from clip art prepared files and own input (photography), inserting a text files, merging documents, creating a letter etc.
- 3.a.vii creating and saving spreadsheets, formatting cells, columns and rows, merging cells, configure basic formulae to carry out automatic calculations within cells, rows and columns, using pivot tables and inserting comments and hyperlinks etc.
- 3.a.viii creating and saving presentations, creating and using slide templates, inserting and formatting text boxes, inserting and resizing pictures, inserting imported data from other applications in the form of charts, graphs or tables, using presentation animation etc.
- 4.a.i flat model, hierarchical model, network model, relational model, dimensional model, objectional model
- 4.a.v selection by customer area, type of vehicle/model owned, date of last visit etc.



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| UNIT REF: CIAM14 | UNIT TITLE: MANAGING AUTOMOTIVE SERVICE AND WORKSHOP ORGANISATION |
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| Level: 4 | Route: Knowledge | Credit Value: 4 | GLH: 28 |
| <p>Mapping: This unit is mapped to MSC B1 Develop and implement operational plans for your area of responsibility, MSC B4 Put strategic business plans in to action, MSC D6 Allocate and monitor the progress and quality of work in your area of responsibility, MSC E1 Manage a budget , MSC F3 Manage business processes, MSC F6 Monitor and solve customer service problems, MSC F7 Support customer service improvements , MSC F8 Work with others to improve customer service</p> | | | |
| <p>Rationale: This unit addresses skills and knowledge required to operate and control a vehicle service workshop department.</p> | | | |

| LEARNING OUTCOMES | ASSESSMENT CRITERIA |
|---|---|
| The Learner will: | The Learner can: |
| 1. Understand the principles of efficient automotive workshop operations | 1.1. Explain the infrastructure and operational functions of an automotive workshop. 1.2. Explain the costs incurred in an automotive workshop 1.3. Plan workshop operations 1.4. Load jobs and tasks on to the workshop to achieve efficient productivity |
| 2. Be able to use automotive workshop performance information | 2.1. Control the profit, cost and productive centres of the automotive operation 2.2. Plan and organise the workload 2.3. Measure and control the performance of service and workshop operations 2.4. Explain the key performance indicators and benchmarks used in service and workshop operations 2.5. Explain the financial aspects used to monitor and report on the effective performance of an automotive service operation |
| 3. Understand automotive service customer groups and the significance of each group | 3.1. Explain the meaning of internal and external customers 3.2. Classify the types of customers who use an automotive service operation and summarise the impact each type has on the operation |
| 4. Be able to control quality of work, customer satisfaction and retention | 4.1. Explain the aspects of the service operations that affect customer satisfaction 4.2. Organise and operate a quality control function in the service workshop 4.3. Explain the aspects of the service operation premises which affect customer satisfaction 4.4. Explain the aspects of the service operation staff which affect customer satisfaction |

Content:
The learner should understand and/or be able to apply:

- 1.a Principles of efficient vehicle workshop operations including:
 - i. the layout and functionality of vehicle service workshop
 - ii. infrastructure of resources required to run an efficient workshop operation *
 - iii. costs incurred in order to be able to offer workshop services to the public
 - iv. typical expenses incurred as a result of operating a vehicle workshop operation
 - v. financial terms associated with service and workshop operations *
 - vi. structure and layout of a profit and loss account for a service and workshop operation
- 1.b How to plan and organise an efficient workshop operation including:
 - i. the importance of preparing a workshop operating plan
 - ii. planning procedures to achieve high levels of productivity and profitability
 - iii. benefits of practices such as parts pre-picking and vehicle positioning to workshop efficiency
 - iv. planning cohesive practices for the workshop and service administration *
 - v. loading the workshop to maximise capacity
 - vi. loading the workshop within the limitations of resources available *
- 2.a Principles of efficient and cost effective productivity in the vehicle workshop including:
 - i. service department profit and cost centres
 - ii. productivity and efficiency of workshop output
 - iii. gross profit and direct profit factors related to the service department
 - iv. how to control and maintain levels of gross profit and direct profit
 - v. labour utilisation and productive efficiency
 - vi. controlling work in progress
 - vii. the measurement of income and profit factors from workshop productivity *
 - viii. profit drains that can result from service workshop operations *
- 2.b Methods used to monitor the performance of workshop operations including:
 - i. key performance Indicators that report the effective working of the service workshop *
 - ii. the data and formulas used to calculate service workshop KPIs
 - iii. sources of information that report workshop performance *
 - iv. how to use KPIs to direct and improve workshop performance
 - v. how to benchmark workshop performance using composite reports
- 3.a Service customer groups and the importance of each group including:
 - i. the importance of both internal and external customers
 - ii. internal and external customer types relating to a service and workshop operation *
 - iii. the contribution each customer group makes to the achievement of the department goals

Content:

- 4.a Aspects of the service operation which influence customer satisfaction including:
- i. the meaning of customer service, care and satisfaction
 - ii. how to provide excellent customer service
 - iii. measuring customer satisfaction, customer retention and profitability
 - iv. aspects relating to service operations that affect customer satisfaction *
 - v. aspects of the service and workshop premises and facilities that impact on customer satisfaction *
- 4.b Aspects of the service department staff that influence customer satisfaction including:
- i. the importance of training and controlling customer-facing staff skills and behaviour and *
 - ii. providing leadership to colleagues and demonstrating a customer-focused approach
 - iii. company values and policies for delivering customer service and achieving customer satisfaction in service and workshop operations.

NOTES:

- 1.a.ii workshop bays, equipment, tooling, access to parts, vehicle parking, technicians, apprentices, administrative staff, customer facing staff, systems, procedures controls etc.
- 1.a.v gross profit, direct profit, operating profit, return on capital employed
- 1.b.iv universally beneficial systems and procedures, workshop to front desk relations, knowledge and skill demonstrated by job holders, understanding the work done by other team members, corporate representation by staff etc.
- 1.b.vi hours available, average efficiencies, skill levels, knowledge levels, equipment and tooling availability, parts availability, etc.
- 2.a.vii turnover, sold hours, sold hours opportunity, gross profit, direct profit, parts sold per labour hour, work in progress etc.
- 2.a.viii idle time, non productive time, work-in-progress, low levels of skill, workshop loading procedure, credit control, use of job clocking system, parts picking etc.
- 2.b.i % labour efficiency, % labour utilisation, % first-time fix, hours sold per technician, revenue per technician, debtors days, % gross profit % direct profit, % operating profit, direct/indirect staff ratio, etc
- 3.a.ii Internal customers: other dealership departments etc. External customers: retail customers, trade customer, fleet customers, contract hire customers etc. Captive customers: warranty customers, contract customers, other dealership departments etc.
- 4.a.iv pre-booking for repair, availability and flexibility of workshop hours, range of services provided, reception facilities & organisation, customer waiting facilities, availability of courtesy vehicles, collection and delivery service, menu pricing, promptness of service, communication with customer, quality & reliability of repair, presentation of vehicle, flexibility for payment, staffing aspects, workshop premises etc
- 4.a.v image, facilities, signage, waiting areas, information, parking, comfort & cleanliness, presentation, decoration, corporate identity etc
- 4.b.i courtesy, interpersonal skills, tact, identifying customer requirements, recognising individual needs of customers, identifying and resolving problems, showing interest, giving attention, communication, ability to explain technical issues, etc.



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| UNIT REF: CIAM15 | UNIT TITLE: MANAGING FINANCE AND INSURANCE OPERATIONS IN THE AUTOMOTIVE INDUSTRY |
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| Level: 4 | Route: Knowledge | Credit Value: 3 | GLH: 19 |
| Mapping: This unit is mapped to MSC B6 Provide leadership in your area of responsibility, MSC C2 Encourage innovation in your area of responsibility, MSC D1 Develop productive working relationships with colleagues, MSC D6 Allocate and monitor the progress and quality of work in your area of responsibility, MSC D7 Provide learning opportunities for colleagues | | | |
| Rationale: This unit addresses knowledge required to be able to offer finance and associated insurance services in the automotive sector in accordance with FSA regulations and the Consumer Credit Act | | | |

| LEARNING OUTCOMES | ASSESSMENT CRITERIA |
|--|--|
| The Learner will: | The Learner can: |
| 1. Understand the types of finance available to automotive retail and corporate customers | 1.1. Discuss a range of methods of vehicle funding and acquisition and how they can be used to facilitate vehicle sales 1.2. Explain the structure of each method of funding or acquisition and describe the tax liability implications |
| 2. Know how to match finance and insurance products to customer needs and requirements | 2.1. Explain the process of how to gain a detailed understanding of the customers' needs and lifestyles 2.2. Analyse identified needs to ensure the right product is offered 2.3. Explain how the different features of various financial products can match specific customer needs and desires |
| 3. Be able to include finance and insurance products in the vehicle sales process to ensure compliance | 3.1. Evaluate the current sales process and the point where vehicle funding, acquisition and insurance is introduced. 3.2. Assess current performance with funding, acquisition and insurance sales and identify shortfalls in the process 3.3. Introduce a structure for the presentation of vehicle funding, acquisition and insurances that is compliant with current regulations. 3.4. Plan objectives for the sales of finance and insurance products. 3.5. Operate controls to maintain on target performance to achieve objectives and ensure compliance with current regulations for the sales of finance and insurance products |
| 4. Understand the legal issues and responsibilities relating to the sales of vehicle finance and insurance | 4.1. Explain the key legislative aspects that affect vehicle finance and insurance operations 4.2. Evaluate current finance and insurance processes against legislative requirements and make recommendations for change to ensure compliance 4.3. Explain the methods of training and coaching required for staff to understand compliance with legislation. |

Content:
The learner should understand and/or be able to apply:

- 1.a. Methods of acquiring or funding private and commercial vehicles including:
 - i. the importance of offering finance and insurance solutions to every customer
 - ii. funding and acquisition products available *
 - iii. insurance products and the facilities each offers the customer *
 - iv. additional products and services the customer can buy and include in the finance package *
- 1.b. Ways in which different vehicle funding and acquisition methods can facilitate vehicle sales including:
 - i. how a salespersons' complete knowledge of vehicle funding and acquisition can help the customer make a buying decision that is beneficial to their situation
 - ii. how a complete knowledge of vehicle funding and acquisition can help plan and facilitate vehicle sales
- 2.a. The structure and features of each finance product including:
 - i. the ownership versus 'use only' balance sheet *
 - ii. the components of each of the popular methods of funding and acquisition *
 - iii. features and benefits of each method of vehicle funding and acquisition
 - iv. structure & prepare a quotation compliant with Financial Conduct Authority and Consumer Credit Act regulations for each method of funding or acquisition.
- 2.b. Implications, effects and benefits of Company Taxation and Value Added Tax in vehicle finance and acquisition including:
 - i. Corporation Tax legislation affecting the taxation status of passenger cars and commercial vehicles operated by companies and businesses
 - ii. Value Added Tax and how it is applied to vehicle acquisitions
 - iii. how Value Added Tax can influence a company or business vehicle acquisition decision
- 3.a. Methods of understanding and analysing customer needs and expectations including:
 - i. the importance of a developing and delivering a structured, disciplined process for analysing customer needs and expectations
 - ii. the information to be gained in order to understand and confirm the customer's needs and expectations.
 - iii. Financial Conduct Authority and Data Protection Act requirements for obtaining and retaining customer information.
 - iv. implications of not thoroughly understanding customer requirements including the possible long term effects and liabilities.
- 3.b. A knowledge of attitude and lifestyle influences that could affect the customer's vehicle acquisition decision including:
 - i. factors that affect different customer types and the way they can express widely varying needs, wants, desires and expectations when discussing issues of finance.
 - ii. motivational factors that may affect the customer's favoured method of funding or acquisition *
 - iii. personal factors that could affect the customer's funding decision *
 - iv. how the knowledge of methods of funding and acquisition displayed by the sales person can affect the customer's confidence and their decision to accept the product offered.

Content:

- 4.a The matching of features of the various funding products to known customer needs including:
- i. the importance of specialist product knowledge in vehicle finance and acquisition.
 - ii. actions to be taken to ensure that product knowledge is current and accurate.
 - iii. methods of ensuring that the sales team always have a clear understanding of the features and advantages of the funding products offered.
 - iv. employing controls to ensure that appropriate funding or acquisition product benefits are clearly and accurately related to every customer.
- 5.a Involvement of finance products in the sales process including:
- i. the importance of introducing finance at the appropriate time and its effect on the outcome of the sale.
 - ii. methods used to introduce and discuss vehicle finance *
 - iii. assess the methods of discussing funding and acquisition used by each member of the team
 - iv. reviewing the findings and preparing an action strategy to develop Finance & Insurance sales
 - v. set realistic and achievable goals and targets for finance and insurance sales *
 - vi. prepare an action plan with the team to develop confidence and ability to discuss finance and insurance with every customer at the appropriate time in the sales process.
 - vii. include in the action plan recommendations for changes to process and approach that will benefit the customer and the sales operation
- 6.a Primary legislation that affects vehicle finance and insurance sales operations including:
- i. the position of the Financial Conduct Authority as the regulator for the sale of finance and insurance
 - ii. Financial Conduct Authority statutory objectives and principles for businesses trading in finance and insurance
 - iii. insurance mediation regulations and the responsibilities for ensuring compliance of dealer staff.
 - iv. terms of the Consumer Credit Act (1974) and the rules it applies to the terms, conditions and liabilities of all parties involved in the finance contract *
 - v. Data Protection Act 1998 / 2000 and the standards the business must adopt be able to note and store customer personal data *
 - vi. the standards set by the Money Laundering Regulations 2003 & 2007
 - vii. actions to be taken to ensure that all financial transactions entered into by the business are compliant with Money Laundering Regulations 2003 & 2007.
- 6.b Operating processes and procedures in compliance finance authority standards including:
- i. review current business processes against legislative requirements *
 - ii. review current skills and knowledge of the team against legislative requirements
 - iii. how to organise a compliant procedure for the handling of customer complaints
 - iv. how to implement a compliant procedure for the safe keeping of customer records
 - v. how to plan a process of regular reviews to ensure total compliance.
 - vi. methods of measurement to monitor and report compliant standards in operation.
- 6.c Develop the team in all aspects of finance and insurance sales process including:
- i. conduct a training needs analysis for sales of vehicle finance products and standards compliance
 - ii. explain how current training addresses the requirements of the legislation and regulations.
 - iii. Financial Conduct Authority requirements and the levels of responsibility and knowledge each grade of operative in the structure needs to hold in order to be compliant with the regulations
 - iv. assess the attitudes and approach of the business and its employees towards compliance with the legislation and regulations
 - v. determine how the assessment of training, attitude and approach and knowledge of the regulations could be used as a foundation on which to devise a compliance training plan.
 - vi. prepare, implement and follow-up a training plan to ensure that members of staff are knowledgeable and skilled in handling all matters relating to the sale of finance and insurance products and services



Content:

* NOTES:

- 1.a.ii hire purchase, contract purchase, personal contract plans, operating lease, contract hire, full maintaining contracts etc.
- 1.a.iii guaranteed asset protection, credit protection, uninsured loss recovery, early termination insurance, extended warranty, mechanical breakdown insurance etc.
- 1.a.iv maintenance packages, accessories, options, paint and upholstery protectors, MOT plans etc.
- 2.a.i ownership, use of vehicle only, use of vehicle with ownership liabilities, ownership with guaranteed buy-back, use of vehicle with ownership options etc.
- 2.a.ii cost of finance, deposit, amount financed, administration fees, repayment terms, initial rental, monthly rentals, etc.
- 3.b.ii experience with a particular source of funding, relationship with bank or specific finance house, doesn't want term commitment without release, friend or relative's experience with particular funding method. Etc.
- 3.b.iii occupation, family and dependants, hobbies, interests, consistency of level of income, etc.
- 5.a.ii early in the process, at a late stage in the process, finance handled by the sales executive, finance referred to an F&I expert etc.
- 5.a.v finance penetration% of vehicle sales, target retained profit from finance, average finance income per unit retailed etc.
- 6.a.iv regulated agreement, non-regulated agreement, cancellable and non-cancellable agreements, 'cooling off period', thirds and halves rules, factors that contribute to an 'unenforceable' agreement, advertising standards, finance quotations, etc.
- 6.a.v gaining customer permission to retain and use information, 'secure' storage of customer data, limitations of use of customer data, restrictions governing the sale of customer data, the right to use data provided by a third party, etc
- 6.b.i Financial Conduct Authority regulations, Consumer Credit Act, Data Protection Act, Insurance Conduct of Business (ICOBs), etc.
- 6.c.vi training in the standards as determined by Insurance Conduct of Business standards (ICOBs), training for all levels – senior, middle and front line management, operational and administrative staff, competence testing, etc.



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| UNIT REF: CIAM16 | UNIT TITLE: MANAGING NEW VEHICLE SALES OPERATIONS |
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| Level: 4 | Route: Knowledge | Credit Value: 4 | GLH: 28 |
| Mapping: This unit is mapped to MSC B1 Develop and implement operational plans for your area of responsibility, MSC B4 Put strategic business plans in to action, MSC B6 Provide leadership in your area of responsibility, MSC C5 Plan Change, MSC D6 Allocate and monitor the progress and quality of work in your area of responsibility, MSC D7 Provide learning opportunities, MSC E1 Manage a budget, MSC F8 Work with others to improve customer service, MSC F3 Manage business processes, MSC F7 Support customer service improvements | | | |
| Rationale: This unit addresses the knowledge required to effectively manage a new vehicle sales operation | | | |

| LEARNING OUTCOMES | ASSESSMENT CRITERIA |
|--|--|
| The Learner will: 1. Be able to use management, sales and financial information in a new vehicle sales operation | The Learner can: 1.1. Identify the various types of management, sales and financial information used in a new vehicle sales operation 1.2. Demonstrate the use of management, sales and financial information in ensuring achievement of targets and goals |
| 2. Be able to organise vehicle stock and resources to achieve new vehicle sales objectives | 2.1. Plan new vehicle stock requirements 2.2. Explain the process for ordering new vehicle stock 2.3. Plan the roles and staffing required to operate the new vehicle sales operation and achieve its objectives. 2.4. Assess staff skill needs and provide training solutions. 2.5. Use DMS controls to monitor stock, value, volume and ageing |
| 3. Be able to set objectives for new vehicle sales and profit | 3.1. Explain the process for identifying the market opportunity for new vehicles in the marketing area 3.2. Prepare a new vehicle sales plan to gain market share in the catchment area 3.3. Calculate and justify new vehicle sales objectives and targets 3.4. Implement sales controls to measure daily vehicle sales activities 3.5. Explain the process for monitoring and reporting sales performance of individuals and the sales team as a whole |
| 4. Be able to create awareness of the sales facility and vehicles for sale in the catchment area | 4.1. Describe the catchment are and the types of customer it contains 4.2. Explain the terms and the importance of complying with trading standards requirements for all new vehicles offered for sale. 4.3. Prepare and action a local market awareness plan for the products and services of the new vehicle sale department |

Content:
The learner should understand and be able to apply:

- 1.a. Management, sales and financial information used in a new vehicle sales operation including:
 - i. types of information that can be used in analysing sales department performance *
 - ii. sourcing management, sales and financial information
 - iii. management information derived from daily work processes
 - iv. vehicle sales reports and ratios prepared from showroom information *
 - v. reports of sales performance from department secondary profit centres *
 - vi. customer satisfaction and retention analysis
 - vii. benchmarking information for the measurement of current performances *
- 1.b Control new vehicle sales operations from management information including:
 - i. review current performance against benchmarks and standards
 - ii. identify strengths and weaknesses in performance from benchmark comparisons
 - iii. identify sales trends from management information
 - iv. analyse sales performances and trends against the market
 - v. implement change in department operations to address negative performances and trends
 - vi. prepare and implement controls to measure the effects of change
- 2.a Legislation and compliance in a new vehicle sales operation (excluding those contained in Unit 5) including:
 - i. block exemption regulations
 - ii. new vehicle pricing order
 - iii. vehicle economy labelling
 - iv. health and safety requirements relating to motor vehicle sales and presentation *
 - v. procedures for checking and recording customer's legal status and compliance
- 3.a Stock control and the processing of new vehicle sold orders including:
 - i. the importance of using DMS correctly
 - ii. monitoring the progress of new vehicle sold order delivery
 - iii. using DMS reports to monitor stock values, volume and ageing stock.
 - iv. processes for determining new vehicle stock volumes and mix requirements
 - v. determine staff resources required to sell the volume of cars planned.
 - vi. stock management and managing stock-turn
 - vii. develop action plans to market and clear ageing stock.
- 4.a Market opportunity for new vehicles in the catchment area including:
 - i. determining the primary market area.
 - ii. review past performances and market information to identify market trends and establish resource needs
 - iii. product factors to review when setting new vehicle sales objectives *
 - iv. sources of information required for planning sales strategy *
 - v. vehicle registration data required to identify sales potential within the market area.
 - vi. locate and use local knowledge to identify market opportunity *
 - vii. assessing potential for the dealer within the primary marketing area
 - viii. identify the strengths and weaknesses of competitor brands and dealers within the catchment area.
 - ix. prepare a local market awareness plan to promote sales department products and services

Content:

- 6.a Organising and presenting new vehicle stock to maximise sales potential including:
- i. the importance of planning the showroom display *
 - ii. the importance of regular attention to vehicles on display inside and outside the sales showroom *
 - iii. displaying vehicles to their best advantage to attract custom

- 7.a Prepare a demonstrator policy including:
- i. the importance of preparing and adopting a demonstrator policy *
 - ii. prepare a demonstrator policy
 - iii. selecting relevant demonstration vehicles based on market knowledge
 - iv. the importance of regulating the private use of demonstrators *
 - v. compliance with inland revenue legislation for the use of demonstrators *

*** NOTES:**

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|---------|--|
| 1.a.i | enquiry rate, sales process records, unit sales, financial information, vehicle market information, ancillary product and service sales, vehicle registrations, sales person performance, etc. |
| 1.a.iv | unit sales analysis, lost sales analysis, sales conversion ratio, turnover and profit analysis, stock movement and stock turn analysis, sales and profit performance by sales person, etc. |
| 1.a.v | sales of options, accessories, finance, insurances, warranties, maintenance contracts etc. |
| 1.a.vii | previous year's results, composite information, brand performance in the market, department budget, etc. |
| 2.a.iv | adequate access to vehicles, vehicle movement in the presence of customers and visitors, condition of display area, condition of vehicles, etc. |
| 4.a.ii | review sales history, lost sales analysis, market trends identified in the marketing plan and manufacturer expectations and forecasts, etc. |
| 4.a.iii | brand vehicle models, variants, specifications, capacity, colours, fuel type, engine size, taxation sector (RFL), competitor equivalents and their popularity in the local market etc. |
| 4.a.iv | socio-economic, demographic and competitive factors, geographic location, awareness of brand and dealership, etc |
| 4.a.vi | local newspapers, journals, Chambers of Commerce, business directories, Local Council Growth and Development Strategy, housing developments, industrial developments, planned transport links, etc. |
| 6.a.i | range of models to represent main sectors, examples of variant levels of finish and equipment, range of contrasting colours, use of accessories on display vehicles, etc. |
| 6.a.ii | vehicles cleaned daily, vehicles always 100% complete, vehicles prepared under bonnet and wheel arches as well bodywork etc |
| 7.a.i | controlling models and specifications, vehicle age and mileage limits, terms of usage, driver age limitations, maintenance of demonstrator, priority use, etc |
| 7.a.iv | limitation of use, limitation of drivers, personal belongings in car, fuel usage, priority of use, use of same vehicle each day, required minimum condition of car, etc. |
| 7.a.v | vehicle use is correctly recorded, demonstrator log maintained for every journey, vehicle and driver recorded for benefit in kind tax, car is correctly recorded for taxable deduction as an essential business asset, etc |



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| UNIT REF: CIAM17 | UNIT TITLE: MANAGING USED VEHICLE SALES OPERATIONS |
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| Level: 4 | Route: Knowledge | Credit Value: 4 | GLH: 28 |
| Mapping: This unit is mapped to MSC B1 Develop and implement operational plans for your area of responsibility, MSC B4 Put strategic business plans in to action, MSC B6 Provide leadership in your area of responsibility, MSC C5 Plan Change, MSC D6 Allocate and monitor the progress and quality of work in your area of responsibility, MSC D7 Provide learning opportunities, MSC F8 Work with others to improve customer service, MSC F3 Manage business processes, MSC F7 Support customer service improvements | | | |
| Rationale: This unit addresses the knowledge required to effectively manage a used vehicle sales operation | | | |

| LEARNING OUTCOMES | ASSESSMENT CRITERIA |
|---|---|
| The Learner will: | The Learner can: |
| 1. Be able to use management, sales and financial information in a used vehicle sales operation | 1.1. Identify the various types of management, sales and financial information employed in a used vehicle sales operation 1.2. Demonstrate the use of management, sales and financial information in ensuring achievement of targets and goals |
| 2. Be able to plan, manage and control used vehicle stock and stock values | 2.1. Plan used vehicle stock requirements 2.2. Explain a process for acquiring used vehicles for retail stock 2.3. Apply methods of valuing used vehicles 2.4. Plan the roles and staffing required to operate the used vehicle sales operation and achieve its objectives. 2.5. Assess staff skill needs and provide training solutions. 2.6. Use DMS controls to monitor stock, values, volume and ageing |
| 3. Be able to set objectives for used vehicle sales and profit | 3.1. Explain the process for identifying the market opportunity for used vehicles in the marketing area 3.2. Prepare a new vehicle sales plan to gain market share in the catchment area 3.3. Calculate and justify used vehicle sales targets 3.4. Implement sales controls to measure daily used vehicle sales activities 3.5. Explain the process for monitoring and reporting sales performance of individuals and the used vehicle sales department team |
| 4. Be able to organise, offer and present used vehicle stock to maximise sales potential | 4.1. Explain the importance of maintaining an excellent used vehicle display 4.2. Explain the terms of and the importance of complying with trading standards requirements for all used vehicles offered for sale. 4.3. Prepare and action a local market awareness plan for the products and services of the used vehicle sale department |

Content:
The learner should understand and be able to apply:

- 1.a. Management, sales and financial information employed in a used vehicle sales operation including:
 - i. information used in analysing used vehicle sales department performance *
 - ii. know where used vehicle management, sales and financial information can be located
 - iii. how used vehicle sales reports can be prepared from daily sales process information *
 - iv. reports of sales performance from department secondary profit centres *
 - v. customer satisfaction and retention analysis
 - vi. benchmarking information for the measurement of current performances *
- 1.b Control used vehicle sales operations from management information including:
 - i. review current performance against benchmarks
 - ii. identify strengths and weaknesses in performance from benchmark comparisons
 - iii. identify sales trends from management information
 - iv. plan to maximise positive sales performances and trends.
 - v. implement changes in operations to reverse negative performances and trends
 - vi. prepare and implement controls to measure the effects of change
- 2.a Legislation and compliance in a new vehicle sales operation (excluding those contained in Unit 5) including:
 - i. block Exemption Regulations
 - ii. used Vehicle Pricing Order
 - iii. Vehicle Economy Labelling
 - iv. Health and Safety requirements relating to used vehicle sales and presentation *
 - v. vehicle safety checking of used vehicles offered for sale
 - vi. procedures for checking and recording customer's legal status and compliance.
- 3.a Acquire, manage and control used vehicle stock and their values including:
 - i. importance of a used car purchasing policy
 - ii. the structure of a used car purchasing policy *
 - iii. the importance and benefits of a used vehicle stock control policy
 - iv. the structure of a used vehicle stock control policy (including stock liquidation) *
 - v. use DMS systems and reports to record and monitor used vehicle stock *
 - vi. use of sales data to identify fast moving products and market opportunities
 - vii. how to develop market knowledge from competitor and local activity
 - viii. the importance of ensuring used stock is prepared and displayed within a pre-set time frame*
 - ix. checking legitimacy of vehicles when purchasing used stock *
 - x. the importance of developing relationships with sources of used vehicle supply and disposal
 - xi. sources of supply of used vehicle stock *
 - xii. acquiring used vehicle stock from manufacturers, rental and leasing operations.
 - xiii. how to prepare a vehicle pricing policy to achieve profit and sales turnover
- 3.b Control and dispose of trade sale used vehicle stock including:
 - i. the importance of developing relationships with auction companies for both acquisition and disposal
 - ii. correct procedures for disposing of used vehicles to the trade
 - iii. the importance of a stock turn and liquidation policy
 - iv. selecting the used vehicle trade outlets most beneficial for the company
 - v. use DMS systems and reports to record and monitor trade vehicle stock *

Content:

- 4.a Market opportunity for used vehicles in the primary marketing area including:
- i. determining the primary market area.
 - ii. identify the size of the market by analysing vehicle ageing parc data
 - iii. determine relevant factors to form a strategy for selling to the market area*
 - iv. process to determine what types of products satisfy the popular market in your area *
 - v. identifying existing and potential competitors
 - vi. action a local market awareness plan to promote used vehicle sales department products and services
- 5.a Used vehicle sales team target and reward management including:
- i. methods used to determine the number of staff required to sell the planned volume of used cars
 - ii. structuring a sales commission and bonus matrix.
 - iii. aspects of the sales process to target and reward
 - iv. how to prepare and plan unit and profit-based sales targets matrices
 - v. proposing and agreeing targets with the used vehicle sales team.
 - vi. the importance of communicating department objectives to the sales team and other department managers
 - vii. measuring and reviewing individual performances against targets.
 - viii. how to manage a poor performing sales executive
- 5.b Used vehicle sales team performance management including:
- i. the importance of the company's CRM systems and making full use of the facility
 - ii. selecting and introducing a sales process for the used vehicle sales team
 - iii. assessing the effective use of the sales process.
 - iv. monitor staff competence and identifying skill gaps
 - v. methods of motivating the used vehicle sales team to achieve targets.
 - vi. controlling. measuring and reviewing individual and team performance against target.
 - vii. prepare and action personal training plans to improve individual sales performances
- 6.a Organising and presenting used vehicle stock to maximise sales potential including:
- i. the importance of planning showroom display
 - ii. the importance of regular attention to used vehicles on display *
 - iii. developing a used car display policy *
 - iv. compliance with current consumer legislation *
- 7.a Preparation of a demonstrator policy including:
- i. the importance of preparing and adopting a used vehicle demonstration policy *
 - ii. prepare a used vehicle demonstration policy
 - iii. compliance with Inland Revenue regulations for the use of demonstrators

Content:

NOTES:

- 1.a.i enquiry rate, sales process records, unit sales, financial information, vehicle trade information, ancillary product and service sales, sales person performance, etc.
- 1.a.iii unit sales analysis, lost sales analysis, sales conversion ratio, turnover and profit analysis, stock movement and stock turn analysis, sales and profit performance by sales person, etc.
- 1.a.iv sales of accessories, finance, insurances, warranties, maintenance plans etc.
- 1.a.vi previous year's results, composite information, department budget, etc.
- 2.a.iv adequate access to vehicles, vehicle movement in the presence of customers and visitors, condition of display area, cleanliness of vehicles, unrepaired bodywork damage, etc.
- 3.a.ii maximum age of retail vehicle, maximum mileage, number of owners, available service history, brand selective, area of registration, specification selective, body style preference, selective methods of disposal of trade sale vehicles, time limit for disposal of trade vehicles, etc.
- 3.a.iv stand-in value calculation, stock liquidation terms, stock write-down, limitation of expenditure before sale, etc.
- 3.a.v stock age, automatic stock write-down, stock sorting to maintain profile, grouping stock by age, vehicle type, body style, brand, etc.
- 3.a.viii stock approaching liquidation age, write-down value for liquidation, stand-in value including reconditioning etc.
- 3.a.ix H.P.I. seller references, previous owner, brand record, legitimacy of documentation, etc.
- 3.a.xi trade auctions, other brand dealers, other dealers within group or franchise, ex-contract leasing vehicles, Motability, etc
- 3.b.v total vehicle stock and individual vehicle values, volume of stock, average age of stock and age of individual vehicles, identifying vehicles approaching overage status, etc.
- 4.a.iii socio- economic, demographic and competitive factors, drive time, geographic location, awareness of brand and sales site, etc
- 4.a.iv brand manufacturer approved stock, selecting competitive brands, specialist brands, maximum size of vehicle, selecting body styles, quality vehicles, vehicle retail price limit, etc.
- 6.a.ii vehicles cleaned daily, vehicles always 100% complete, vehicles prepared under bonnet and wheel arches as well bodywork etc
- 6.a.iii model mix, pricing, vehicle status sheets, vehicle reconditioning, mechanical preparation, etc
- 6.a.iv vehicle pricing is correctly displayed, offers of finance are correct for the vehicle on which it is displayed, information on the status sheet is true and accurate, promises offered can be met, etc
- 7.a.i demonstration route planning, amount of fuel in used cars, required minimum mechanical conditioning of sale cars prior to demonstration, etc.



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| UNIT REF: CIAM18 | UNIT TITLE: MANAGING VEHICLE FLEET SALES OPERATIONS |
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| Level: 4 | Route: Knowledge | Credit Value: 4 | GLH: 27 |
| <p>Mapping: This unit is mapped to MSC B1 Develop and implement operational plans for your area of responsibility, MSC B4 Put strategic business plans in to action, MSC B6 Provide leadership in your area of responsibility, MSC B8 Ensure compliance with legal, regulatory, ethical and social requirements, MSC D6 Allocate and monitor the progress and quality of work in your area of responsibility, MSC D7 Provide learning opportunities for colleagues, MSC F8 Work with others to improve customer service, MSC F7 Support customer service improvements</p> | | | |
| <p>Rationale: This unit addresses the knowledge required to effectively manage a vehicle fleet sales operation</p> | | | |

| LEARNING OUTCOMES | ASSESSMENT CRITERIA |
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| The Learner will: | The Learner can: |
| 1. Be able to use corporate sales-related management information in a vehicle fleet sales operations | 1.1. Identify the various types of management, sales and financial information relevant to a corporate sales operation 1.2. Explain the use of management information in ensuring and the profitability of a corporate sales operation 1.3. Describe how compliance with regulations and legislation is applied and maintained in the fleet sales operation. |
| 2. Understand the benefits of offering the full services of the dealership to satisfy corporate client needs | 2.1. Identify the full range of services a dealership can provide to corporate clients 2.2. Apply benefits of the dealership services to support and satisfy the specific needs of corporate and business clients 2.3. Set and maintain standards of customer service and quality |
| 3. Know how to plan sales volumes, stock requirements and the running costs of the vehicle fleet sales operation | 3.1. Identify the opportunity for fleet vehicle sales in the market area 3.2. Plan and justify vehicle fleet sales volume objectives 3.3. Operate a process for monitoring and reporting the sales performance of individuals and the fleet sales team as a whole 3.4. Plan fleet vehicle stock requirements |
| 4. Be able to set objectives and plan strategy to achieve corporate fleet sales and profit targets | 4.1. Set and control targets for sales and profit in a fleet sales operation 4.2. Plan and apply methods of operation and management control to ensure corporate sales and profit targets are achieved 4.3. Develop a strategic plan identifying how corporate sales and profit targets are to be achieved |

Content:
The learner should understand and be able to apply:

- 1.a. Various types of management, sales and financial information used in a fleet sales operation including:
 - i. information used in analysing corporate sales opportunities and fleet sales department performance *
 - ii. locating management, market, sales and financial information
 - iii. sources of independently compiled fleet vehicle sales and registration information *
 - iv. compiling management information from daily fleet sales systems and processes
 - v. preparing corporate vehicle sales reports from available information *
 - vi. reports of sales performance by secondary profit centres *
 - vii. customer satisfaction and quality of service monitors and assessments
 - viii. benchmarking information for the measurement of current performances *

- 2.a Legal requirements and compliance within a vehicle fleet sales operation including:
 - i. preparing a business proposal, compliant with FCA and CCA regulations, to meet the requirements of a corporate client
 - ii. prepare a proposal reflecting current taxation and tax allowances information *
 - iii. commitment to contract and the penalties that apply if contract terms were breached when supplying new or used vehicles to corporate clients
 - iv. terms and liabilities that apply when agreeing a service and maintenance contract with a corporate client
 - v. Data Protection Act 1998 / 2000 requirements for obtaining and retaining business customer information.

- 3.a. Prepare a full range of dealership services to offer the corporate client including:
 - i. the importance of including in the business portfolio a full range of dealer services tailored to corporate and business sector needs and expectations.
 - ii. prepare a portfolio of dealership products and services to provide corporate clients with a complete vehicle supply, maintenance, repair and customer care package
 - iii. meeting regularly with departmental manager colleagues to discuss corporate client and market requirements
 - iv. agreeing with other departmental managers business efficiency action plans to satisfy the corporate market demands
 - v. introducing dealership after-market specialists to corporate clients during negotiations to win corporate contracts

- 4.a Forecasting sales volumes, stock requirements and the running costs of a vehicle fleet sales operation including:
 - i. agree the standards of operation required to compete in the corporate sales market.
 - ii. manufacturer's definition of segmentation of the fleet market
 - iii. manufacturer policies and procedures for handling each segment of the corporate market.
 - iv. identifying the opportunity that exists in a dealership catchment area.
 - v. corporate vehicle market segmentation and the differences between the segments *
 - vi. forecast fleet sales vehicle volumes, stock requirements and stock draw-down for delivery
 - vii. structuring a marketing plan for the corporate sales department
 - viii. structuring a financial plan for the corporate sales department
 - ix. process of negotiating with the manufacturer to ensure supply of the proposed volumes.
 - x. the importance of liaising and building a relationship with the manufacturer's fleet operation

- 4.b Planning fleet sales department resources including:
 - i. determine the number of sales people required to handle negotiations and client contracts *
 - ii. plan the administrative structure required to support the sales operation.
 - iii. the importance of agreeing staffing levels and sales strategies with the manufacturer.
 - iv. assess the capacity required to administer the fleet department and its vehicle through-put.
 - v. operate separate fleet and retail sales operations.
 - vi. benefits of the DMS system handling fleet sales independent of retail sales.
 - vii. planning the corporate demonstrator fleet and sourcing the appropriate vehicles
 - viii. risks associated with offering credit terms to corporate customers and the potential to create debtors
 - ix. the importance of working with the after sales team to manage corporate after sales requirements
 - x. terms and conditions of contract and how they are enforced with corporate clients.

Content:

- 5.a Methods of understanding and assessing corporate customer needs and expectations including:
- i. the importance of developing and delivering a structured process for assessing corporate and business customer needs and expectations
 - ii. information required to understand and confirm the customer's needs and expectations.
- 6.a Fleet sales team target and reward management including:
- i. fundamentals of a commission matrix.
 - ii. aspects of the fleet sales process to target
 - iii. prepare unit-based and income-based fleet sales target matrices
 - iv. proposing and agreeing targets with the fleet sales team members.
 - v. the importance of communicating the targets to other department managers
 - vi. monitor staff competence and identifying skill gaps.
 - vii. controlling, measuring and reviewing individual and team performances against target
 - viii. managing a poor performing fleet sales executive
- 6.b Fleet sales team performance management including:
- i. awareness of the functions of the company's CRM systems
 - ii. calculating the fleet sales effort required to achieve targets
 - iii. selecting and introducing an effective fleet sales processes
 - iv. methods of motivating the fleet sales team to achieve targets
 - v. monitor staff competence and identifying skill gaps
 - vi. prepare and action personal training plans to improve individual fleet sales performances
 - vii. the importance of reviewing performance against target with the sales team and individual team members

NOTES

- 1.a.i prospect contact rate, enquiry rate, fleet sales meeting records, proposals presented, corporate loan demonstrations, unit sales, captive, fleet and business vehicle market information, fleet and business-user vehicle registrations, local business performance reports, sales person performance, etc.
- 1.a.iii fleet press reports, SMMT market analysis reports, commercial vehicle registration reports, etc.
- 1.a.v corporate vehicle sales analysis, lost sales analysis, sales conversion ratio, turnover and profit analysis, corporate vehicle stock turn analysis, sales and profit performance by fleet sales person, etc.
- 1.a.vi sales of options, accessories, finance, insurances, warranties, maintenance contracts etc.
- 1.a.viii previous year's results, composite information, brand performance in the fleet market, department budget, brand projections of share of the business and fleet markets etc.
- 2.a.ii Corporation Tax, Inland Revenue regulations for writing down allowances, benefit-in-kind taxation relevant to company car and commercial vehicle drivers, payment and possible reclaim of Value Added Tax, etc
- 4.a.v small businesses, medium sector fleets, national fleets, contract hire and leasing companies, fleet management companies, utilities, emergency services, MoD, daily rental, etc.
- 4.b.i number of corporate clients currently held, number of sales forecast for current clients, current situation of negotiations in prospect client buying cycles, frequency of replacement of vehicles by local companies, number of local businesses with which the dealership has no current relationship, etc.



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|-------------------------|--|
| UNIT REF: CIAM19 | UNIT TITLE: MANAGING VEHICLE SHORT-TERM RENTAL OPERATIONS |
|-------------------------|--|

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|---|-------------------------|------------------------|----------------|
| Level: 4 | Route: Knowledge | Credit Value: 4 | GLH: 27 |
| <p>Mapping: This unit is mapped to MSC B1 Develop and implement operational plans for your area of responsibility, MSC B4 Put strategic business plans in to action, MSC B6 Provide leadership in your area of responsibility, MSC D4 Plan the workforce, MSC D6 Allocate and monitor the progress and quality of work in your area of responsibility, MSC D7 Provide learning opportunities, MSC E12 Manage knowledge in your area of responsibility, MSC F3 Manage business processes, MSC F7 Support customer service improvements, MSC F8 Work with others to improve customer service</p> | | | |
| <p>Rationale: This unit addresses the knowledge required to manage a department operating daily and short-term rental of passenger cars and commercial vehicles</p> | | | |

| LEARNING OUTCOMES | ASSESSMENT CRITERIA |
|---|--|
| The Learner will: | The Learner can: |
| 1. Know how to plan the infrastructure for a vehicle rental operation | 1.1. Describe the infrastructure of a vehicle rental operation. 1.2. Explain key aspects of the rental manager’s responsibility for duty of care and health and safety in vehicle rental operations. 1.3. Plan and organise resources for a vehicle rental operation 1.4. Use controls to measure and maintain departmental performance 1.5. Apply controls to ensure that vehicles are correctly utilised and operated |
| 2. Be able to organise the team to perform effectively in vehicle rental operations | 2.1. Define the job roles and responsibilities of the daily rental team 2.2. Assess and organise training and development appropriate to staff training needs 2.3. Measure and review staff productivity and quality of performance. |
| 3. Be able to manage business performance in the vehicle rental operation | 3.1. Apply and operate controls to maintain the quality and utilisation of rental vehicles 3.2. Describe procedures for vehicle acquisition, retirement and disposal. 3.3. Explain methods of managing productivity and profitability to achieve budget objectives 3.4. Apply monitors and maintain desired standards to achieve customer satisfaction. |
| 4. Be able to deliver high levels of customer satisfaction | 4.1. Describe methods for managing internal and external customers 4.2. Define a process to ensure customers are provided with correct specification rental vehicles 4.3. Explain the process for ensuring customers become aware of all terms, conditions and commitments of their rental agreement. 4.4. Describe a correct procedure for vehicle hand-over and hand-back 4.5. Explain the implications of failing to apply the correct procedure for vehicle hand-over and hand-back. |

Content:
The learner should understand and be able to apply:

- 1.a. Planning and establishing the infrastructure for a vehicle short-term rental operation including:
- i. tasks and responsibilities of the vehicle rental manager *
 - ii. aspects of Duty of Care for which the manager and department are responsible
 - iii. aspects of Health and Safety relating to customer welfare in vehicle rental *
 - iv. identify the resources needed to operate the vehicle rental function effectively *
 - v. identify the staffing required to run the vehicle rental operation proficiently *
 - vi. the importance of the contribution of each role to customer satisfaction and the overall success of the business
 - vii. plan and implement routines and procedures to optimise the performance of the vehicle rental service *
 - viii. prepare and use operating controls to measure and guide the department to achieve its objectives.
 - ix. prepare and use operating controls to report and maintain high quality rental vehicle preparation
- 2.a Organisation and performance management of the team including:
- i. identify routine work, tasks and responsibilities to be undertaken in the vehicle rental operation
 - ii. select and justify the roles required to perform the routine work and tasks to the desired results, standards of quality and efficient performance
 - iii. assess the skills required to perform the roles effectively
 - iv. identify training and development needs in staff and organise training solutions.
 - v. design and apply processes for measuring individual and team performances
 - vi. design and apply processes for measuring progress towards achieving departmental objectives
 - vii. benefits of meeting regularly with the team to review and discuss all aspects of department operations
- 3.a. Manage departmental business performance and quality including:
- i. identify, measure and manage critical aspects of departmental performance
 - ii. manage and control departmental gross profit and direct profit
 - iii. select, calculate and apply core key performance indicators for the department
 - iv. implementation of controls to monitor and manage productivity and quality for each key aspects of performance (KPI).
 - v. use a budget plan to benchmark performances and achieve objectives
 - vi. analyse results and determine strategy to manage performance trends
 - vii. prepare routines and schedules to maximise quality and efficiency *
 - viii. mapping seasonal trends and adjusting vehicle supply and budgets to meet demand
 - ix. vehicle rental marketing activities, promotions and incentives in the catchment area
 - x. benefits of regular meetings with departmental manager colleagues to discuss needs and issues of all departments and the promotional offers and services of vehicle rental.

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3.b. Control vehicle suitability including:

- i. plan a model mix of rental vehicles appropriate to the local market demands
- ii. plan and agree a supply and delivery strategy with vehicle and service suppliers
- iii. setting vehicle usage limitations and mileage controls based on maximum profit advantage *
- iv. retiring and disposing of rental vehicles

3.c. Monitor customer satisfaction feedback including:

- i. the importance of customer feedback in vehicle rentals
- ii. use customer satisfaction monitors to gain valuable input *
- iii. analysing customer issues and input from satisfaction monitors
- iv. procedures for managing customer issues.
- v. planning and operating a quality control process for vehicle rental *

4.a Management of customer service and quality in vehicle short term rental including:

- i. customer types and their needs including internal and external customers.
- ii. qualities that determine customer satisfaction in short term vehicle rental *
- iii. preparing a policy to determine the services and qualities a customer can expect
- iv. communication skills and standards required for qualifying customer needs and requirements.
- v. transparency in invoicing and invoice presentation. *
- vi. contract presentation ensuring complete customer understanding of terms and conditions *
- vii. procedure for fraud prevention ensuring correctness of customer documentation and method of payment
- viii. procedures for the hand-over and hand-back of rental vehicles *
- ix. implications of incorrect procedures of hand-over and hand-back for customers and the rental company

NOTES

- 1.a.i vehicle standards, efficiency of operation, customer satisfaction, turnover, profitability, staff quality and training, Health and Safety, etc.
- 1.a.iii condition of vehicle, condition of customer areas, ease of access to vehicles, vehicle handover, appropriate legislation, disabled access etc.
- 1.a.iv preparation & storage facilities, customer handling facilities, systems, procedures, tools and equipment, procedures for acquisition and disposal, etc
- 1.a.v receptionists, drivers, valets, mechanics etc.
- 1.a.vii vehicle processing between rentals, efficiency of administration (invoicing etc.), credit and debtor control, customer services and information, customer experience, etc
- 3.a.vii ref: vehicle turn-round from time-in to time-out, tasks of vehicle maintenance and preparation, standards to which vehicles are to be prepared, management of vehicles to meet customer requirements, preparation of paperwork for opening and closing of the contract, etc.
- 3.b.iii considerations: optimising residual value, vehicle make model variant and model year differentials, emissions groupings, vehicle mileage limits, minimised service maintenance and repair expense, etc.
- 3.c.ii feedback monitors at time of rental and post rental, methods of issuing customer feedback requests, receiving customer issues at hand-over and hand-back, recording customer complaints, etc
- 3.c.v vehicle maintenance and preparation, safety checks and inspections, quality of customer handling, administration, etc
- 4.a.ii cleanliness and condition of vehicle, confidence to drive vehicle, advisor empathy with customer issues, correct vehicle supplied to need, correct paperwork detail, etc.
- 4.a.v costs, fees, taxes and charges clearly illustrated with value and justification factors, etc
- 4.a.vi rental commitments, inclusions and benefits, terms, liabilities, rights and commitments clearly explained and justified, etc.
- 4.a.viii customer introduction to car, explanation of controls, ensure comfort and competence to drive vehicle. examine and record minor damage before and after rental, customer agreement over damage liability or fuel usage etc,