



INSTITUTE  
OF THE MOTOR  
INDUSTRY

IMI QUALIFICATION



# Assessment Criteria for

## IMI Level 3 Diploma in Vehicle Sales Principles

I.D: 600/0176/8

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*To be used in conjunction with Candidate Assessment Summary and  
Assessments*

*For assessor use only: Assessor Verifier Guidance*

## 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



### CONTACT SHEET

Learner Name:	
Learner Registration No:	
Learner Address:	
Learner Tel No:	
Learner Email:	
Employer Contact:	
Employer Name & Address:	
Employer Tel No:	

Please complete as appropriate:	
Witness Name:	Witness Name:
Witness Job Title:	Witness Job Title:
Witness Signature:	Witness Signature:
Witness Name:	Witness Name:
Witness Job Title:	Witness Job Title:
Witness Signature:	Witness Signature:
Assessor Name:	Assessor Name:
Assessor Signature:	Assessor Signature:
Assessor Name:	
Assessor Signature:	
Internal Verifier Name:	Internal Verifier Name:
Internal Verifier Signature:	Internal Verifier Signature:



## IMI Level 3 Diploma in Vehicle Sales Principles

This qualification consists of 3 Mandatory Units, 20 Mandatory Specialist Units and 2 Optional Units.

All units are either Knowledge (K) or Skills (S) Units. In most cases the K and S units are combined to form a topic 'set'

In order to pass the qualification, learners must achieve a total of 78 credits from the following groups:

**Group A:** 11 Credits from the Mandatory Units.

**Group B:** 64 Credits from the Mandatory Specialist Units

**Group C:** A minimum of 3 credits from the Optional Units

A minimum of 40 credits must be achieved at Level 3 or above

Please note that every knowledge unit has an online test and the test number is the same as the 'set ref'.

### Group A: Mandatory Units

Set Ref:	Unit Ref, Unit Title & I.D. Number	GLH	Unit Level	Credit Value
G0102	G0102K – Knowledge of Health, Safety and Good Housekeeping in the Automotive Environment (D/601/6171)	30	2	3
G3	G3K – Knowledge of Support for Job Roles in the Automotive Environment (T/601/6175)	20	3	3
G6	G6K - Knowledge of How to Make Learning Possible Through Demonstrations and Instructions (T/601/6242)	45	3	5



**GROUP B: Mandatory Specialist Units**

Set Ref:	Unit Ref, Unit Title & I.D. Number	GLH	Unit Level	Credit Value
VS01	VS01K - Knowledge of Brand, Product and Market Awareness in the Vehicle Sales and Supply Business (Y/502/6462)	35	3	6
VS03	VS03K - Knowledge of Complying With The Legal Requirements And Regulations Of Vehicle Sales (M/502/6466)	15	2	3
VS04	VS04K - Knowledge of Self Management And Administration In A Vehicle Sales Environment (F/502/6469)	25	3	4
VS05	VS05K - Knowledge of Handling Vehicle Sales Telephone Enquiries (R/502/6475)	20	2	3
	VS05S - Skills in Handling Vehicle Sales Telephone Enquiries (J/502/6523)	12	2	2
VS06	VS06K - Knowledge of Constructing And Understanding Sales Packages (L/502/6474)	25	3	4
	VS06S - Skills in Constructing Motor Vehicle Sales Packages (R/502/6525)	25	3	3
VS07	VS07K - Knowledge of Automotive Retail Negotiation And Sales Techniques (Y/502/6476)	25	2	5
	VS07S - Skills in Automotive Retail Negotiation And Sales Techniques (L/502/6524)	15	2	2
VS08	VS08K - Knowledge of Delivering A Vehicle Sales Static Presentation (D/502/6477)	15	2	3
	VS08S - Skills in Delivering A Vehicle Sales Static Presentation (Y/502/6526)	15	2	2
VS09	VS09K - Knowledge of Conducting Vehicle Demonstration Drives (H/502/6481)	20	2	3
VS11	VS11K - Knowledge of Appraising Vehicles For Part Exchange (K/502/6482)	20	3	3
	VS11S - Skills in Appraising Vehicles For Part Exchange (H/502/6528)	12	3	2
VS12	VS12K - Knowledge of Valuing Vehicles For Part Exchange (R/502/6489)	40	3	4
	VS12S - Skills in Valuing Vehicles For Part Exchange (D/502/6530)	15	3	3
VS13	VS13K - Knowledge of Managing Customer Relationships In A Vehicle Sales Environment (R/502/6492)	20	2	3
VS14	VS14K - Knowledge of Handover Of The Vehicle To The Customer (D/502/6494)	25	2	4
VS15	VS15K - Knowledge of Meeting And Greeting Vehicle Sales Customers (J/502/6490)	20	2	3
	VS15S - Skills in Meeting And Greeting Vehicle Sales Customers (H/502/6531)	15	2	2



**GROUP C: Optional Units**

Set Ref:	Unit Ref, Unit Title & I.D. Number	GLH	Unit Level	Credit Value
VS02	VS02K - Knowledge of Negotiating Fleet And Business Buyer Needs (D/502/6463)	17	3	3
VS10	VS10K - Knowledge of Promoting Finance And Insurance For Vehicle Sales (H/502/6478)	30	3	5

**Table for Online Tests**

Unit No.	Unit Title	Test No.	Score Required
G0102	Knowledge of Health, Safety and Good Housekeeping in the Automotive Environment	G0102	18/30
G3	Knowledge of Support for Job Roles in the Automotive Environment	G3	18/30
G6	Knowledge of How to Make Learning Possible Through Demonstrations and Instructions	G6	18/30
VS01	Knowledge of Brand, Product and Market Awareness in the Vehicle Sales and Supply Business	VS01	14/20
VS02	Knowledge of Negotiating Fleet And Business Buyer Needs	VS02	14/20
VS03	Knowledge of Complying With The Legal Requirements And Regulations Of Vehicle Sales	VS01	14/20
VS04	Knowledge of Complying With The Legal Requirements And Regulations Of Vehicle Sales	VS04	14/20
VS05	Knowledge of Handling Vehicle Sales Telephone Enquiries	VS05	14/20
VS06	Knowledge of Constructing And Understanding Sales Packages	VS06	14/20
VS07	Knowledge of Automotive Retail Negotiation And Sales Techniques	VS05	14/20
VS08	Knowledge of Delivering A Vehicle Sales Static Presentation	VS08	14/20
VS09	Knowledge of Conducting Vehicle Demonstration Drives	VS08	14/20
VS10	Knowledge of Promoting Finance And Insurance For Vehicle Sales	VS10	14/20
VS11	Knowledge of Appraising Vehicles For Part Exchange	VS11	14/20
VS12	Knowledge of Valuing Vehicles For Part Exchange	VS11	14/20
VS13	Knowledge of Managing Customer Relationships In A Vehicle Sales Environment	VS13	14/20
VS14	Knowledge of Handover Of The Vehicle To The Customer	VS14	14/20
VS15	Knowledge of Meeting And Greeting Vehicle Sales Customers	VS14	14/20



<b>UNIT REF: G0102K</b>	<b>UNIT TITLE: KNOWLEDGE OF HEALTH, SAFETY AND GOOD HOUSEKEEPING IN THE AUTOMOTIVE ENVIRONMENT</b>
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Level: 2	Route: Knowledge	Credit Value: 3	GLH: 30
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**Mapping:** This unit is mapped to the IMI NOS G1 and G2

**Rationale:** This unit enables the learner to develop an understanding of routine maintenance and cleaning of the automotive environment and using resources economically and health and safety legislation and duties of everyone in the motor vehicle environment. It will provide an appreciation of significant risks in the automotive environment and how to identify and deal with them. Once completed the learner will be able to identify hazards and evaluate and reduce risk.

LEARNING OUTCOMES	ASSESSMENT CRITERIA
The Learner will:	The Learner can:
1. Understand the correct personal and vehicle protective equipment to be used within the automotive environment	1.1. Explain the importance of wearing the types of PPE required for a range automotive repair activities  1.2. Identify vehicle protective equipment for a range of activities  1.3. Describe vehicle and personal safety considerations when working at the roadside
2. Understand effective housekeeping practices in the automotive environment	2.1. Describe why the automotive environment should be properly cleaned and maintained.  2.2. Describe requirements and systems which may be put in place to ensure a clean automotive environment.  2.3. Describe how to minimise waste when using utilities and consumables  2.4. State the procedures and precautions necessary when cleaning and maintaining an automotive environment.  2.5. Describe the selection and use of cleaning equipment when dealing with general cleaning, spillages and leaks in the automotive environment.  2.6. Describe procedures for correct disposal of waste materials from an automotive environment  2.7. Describe procedures for starting and ending the working day which ensure effective housekeeping practices are followed
3. Understand key health and safety requirements relevant to the automotive environment	3.1. List the main legislation relating to automotive environment health and safety.  3.2. Describe the general legal duties of employers and employees required by current health and safety legislation  3.3. Describe key, current health and safety requirements relating to the automotive environment.  3.4. Describe why workplace policies and procedures relating to health and safety are important



<p>4. Understand about hazards and potential risks relevant to the automotive environment</p>	<p>4.1. Identify key hazards and risks in an automotive environment</p> <p>4.2. Describe policies and procedures for reporting hazards, risks, health and safety matters in the automotive environment.</p> <p>4.3. State precautions and procedures which need to be taken when working with associated automotive materials, tools and equipment.</p> <p>4.4. Identify fire extinguishers in common use and which types of fire they should be used on</p> <p>4.5. Identify key warning signs and their characteristics that are found in the vehicle repair environment.</p> <p>4.6. State the meaning of common product warning labels used in an automotive environment.</p>
<p>5. Understand personal responsibilities</p>	<p>5.1. Explain the importance of personal conduct in maintaining the health and safety of the individual and others</p> <p>5.2. Explain the importance of personal presentation in maintaining health safety and welfare</p>



**Content:**

**Economic use of resources**

- a Consumable materials e.g. grease, oils, split pins, locking and fastening devices etc.
- b Requirement to maintain work area effectively
- c Cleaning tools and equipment to maximise workplace efficiency.
- d Requirement to carry out the housekeeping activities safely and in a way that minimises inconvenience to customers and staff.
- e Risks involved when using solvents and detergents.
- f Advantages of good housekeeping.

**Spillages, leaks and waste materials**

- a Relevance of safe systems of work to the storage and disposal of waste materials.
- b Requirement to store and dispose of waste, used materials and debris correctly.
- c Safe disposal of special / hazardous waste materials.
- d Advantages of recycling waste materials.
- e Dealing with spillages and leaks

**Basic legislative requirements**

- a Provision and Use of Work Equipment Regulations 1992.
- b Power Presses Regulations 1992.
- c Pressure Systems and Transportable Gas Containers Regulations 1989.
- d Electricity at Work Regulations 1989.
- e Noise at Work Regulations 1989.
- f Manual Handling Operations Regulations 1992.
- g Health and Safety (Display Screen Equipment) Regulations 1992.
- h Abrasive Wheel Regulations.
- i Safe Working Loads.
- j Working at Height Regulations (2005)

**Routine maintenance of the workplace**

- a Trainee's personal responsibilities and limits of their authority with regard to work equipment.
- b Risk assessment of the workplace activities and work equipment.
- c Workplace person responsible for training and maintenance of workplace equipment.
- d When and why safety equipment must be used.
- e Location of safety equipment.
- f Particular hazards associated with their work area and equipment.
- g Prohibited areas.
- h Plant and machinery that trainees must not use or operate.
- i Why and how faults on unsafe equipment should be reported.
- j Storing tools, equipment and products safely and appropriately.
- k Using the correct PPE.
- l Following manufacturer's recommendations.
- m Location of routine maintenance information e.g. electrical safety check log.

**Legislation relevant to Health and Safety**

- a HASAWA
- b COSHH
- c EPA
- d Manual Handling Operations Regulations 1992
- e PPE Regulations 1992

**Content: Contd**

**General regulations to include an awareness of:**

- a Health and Safety (Display Screen Equipment) Regulations 1992
- b Health and Safety (First Aid) Regulations 1981
- c Health and Safety (Safety Signs and Signals) Regulations 1996
- d Health and Safety (Consultation with Employees) Regulations 1996
- e Employers Liability (Compulsory Insurance) Act 1969 and Regulations 1998
- f Confined Spaces Regulations 1997
- g Noise at Work Regulations 1989
- h Electricity at Work Regulations 1989
- i Electricity (Safety) Regulations 1994
- j Fire Precautions Act 1971
- k Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 1985
- l Pressure Systems Safety Regulations 2000
- m Waste Management 1991
- n Dangerous Substances and Explosive Atmospheres Regulations (DSEAR) 2002
- o Control of Asbestos at Work Regulations 2002

**Legislative duties:**

- a The purpose of a Health and Safety Policy.
- b The relevance of the Health and Safety Executive.
- c The relevance of an initial induction to Health and Safety requirements at your workplace.
- d General employee responsibilities under the HASAWA and the consequences of non-compliance.
- e General employer responsibilities under the HASAWA and the consequences of non-compliance.
- f The limits of authority with regard to Health and Safety within a personal job role.
- g Workplace procedure to be followed to report Health and Safety matters.

**Precautions to be taken when working with vehicles, workshop materials, tools and equipment including electrical safety, pneumatics and hydraulics**

- a Accessing and interpreting safety information
- b Seeking advice when needed
- c Seeking assistance when required
- d Reporting of unsafe equipment
- e Storing tools, equipment and products safely and appropriately
- f Using the correct PPE
- g Following manufacturers recommendations
- h Following application procedures e.g. hazardous substances
- i The correct selection and use of extraction equipment



**Content:**

**PPE to include:**

- a. Typical maintenance procedures for PPE equipment to include:
  - i. typical maintenance log
  - ii. cleaning procedures
  - iii. filter maintenance
  - iv. variation in glove types
  - v. air quality checks
- b. Choice and fitting procedures for masks and air breathing equipment.
- c. Typical workplace processes which would require the use of PPE to include:
  - i. welding
  - ii. sanding and grinding
  - iii. filling
  - iv. panel removal and replacement
  - v. drilling
  - vi. cutting
  - vii. chiselling
  - viii. removal of broken glass
  - ix. removal of rubber seals from fire damaged vehicles
  - x. removal of hypodermic needles
  - xi. servicing activities
  - xii. roadside recovery
- d. Unserviceable PPE.
- e. PPE required for a range automotive repair activities. To include appropriate protection of:
  - i. eyes
  - ii. ears
  - iii. head
  - iv. skin
  - v. feet
  - vi. hands
  - vii. lungs

**Fire and extinguishers**

- a. Classification of fire types
- b. Using a fire extinguisher effectively.
- c. Types of Extinguishers
  - i. foam
  - ii. dry powder
  - iii. CO2
  - iv. water
  - v. fire blanket

**Action to be taken in the event of a fire to include:**

- a. The procedure as:
  - i. raise the alarm
  - ii. fight fire only if appropriate
  - iii. evacuate building
  - iv. call for assistance

**Product warning labels to include:**

- a. Reasons for placing warning labels on containers.
- b. Warning labels in common use, to include:
  - i. toxic
  - ii. corrosive
  - iii. poisonous
  - iv. harmful
  - v. irritant
  - vi. flammable
  - vii. explosive

**Content: contd**

**Warning signs and notices**

- a. Colours used for warning signs:
  - i. red
  - ii. blue
  - iii. green
- b. Shapes and meaning of warning signs:
  - i. round
  - ii. triangular
  - iii. square
- c. The meaning of prohibitive warning signs in common use.
- d. The meaning of mandatory warning signs in common use.
- e. The meaning of warning notices in common use.
- f. General design of safe place warning signs.

**Hazards and risks to include:**

- a. The difference between a risk and a hazard.
- b. Potential risks resulting from:
  - i. the use and maintenance of machinery or equipment
  - ii. the use of materials or substances
  - iii. accidental breakages and spillages
  - iv. unsafe behaviour
  - v. working practices that do not conform to laid down policies
  - vi. environmental factors
  - vii. personal presentation
  - viii. unauthorised personal, customers, contractors etc entering your work premises
  - ix. working by the roadside
  - x. vehicle recovery

**The employee's responsibilities in identifying and reporting risks within their working environment.**

- a. The method of reporting risks that are outside your limits of authority.
- b. Potential causes of:
  - i. fire
  - ii. explosion
  - iii. noise
  - iv. harmful fumes
  - v. slips
  - vi. trips
  - vii. falling objects
  - viii. accidents whilst dealing with broken down vehicles

**Personal responsibilities**

- a. The purpose of workplace policies and procedures on:
  - i. the use of safe working methods and equipment
  - ii. the safe use of hazardous substances
  - iii. smoking, eating, drinking and drugs
  - iv. emergency procedures
  - v. personal appearance
- b. The importance of personal appearance in the control of health and safety.



**Content: contd**

**Action to be taken in the event of colleagues suffering accidents**

- a. The typical sequence of events following the discovery of an accident such as:
  - i. make the area safe
  - ii. remove hazards if appropriate i.e. switch off power
  - iii. administer minor first aid
  - iv. take appropriate action to re-assure the injured party
  - v. raise the alarm
  - vi. get help
  - vii. report on the accident
  
- b. Typical examples of first aid which can be administered by persons at the scene of an accident:
  - i. check for consciousness
  - ii. stem bleeding
  - iii. keep the injured person's airways free
  - iv. place in the recovery position if injured person is unconscious
  - v. issue plasters for minor cuts
  - vi. action to prevent shock i.e. keep the injured party warm
  - vii. administer water for minor burns or chemical injuries
  - viii. wash eyes with water to remove dust or ingress of chemicals (battery acid)
  - ix. need to seek professional help for serious injuries
  
- c. Examples of bad practice which may result in further injury such as:
  - i. moving the injured party
  - ii. removing foreign objects from wounds or eyes
  - iii. inducing vomiting
  - iv. straightening deformed limbs



<b>UNIT REF: G3K</b>	<b>UNIT TITLE: KNOWLEDGE OF SUPPORT FOR JOB ROLES IN THE AUTOMOTIVE WORK ENVIRONMENT</b>
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Level: 3	Route: Knowledge	Credit Value: 3	GLH: 20
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**Mapping:** This unit is mapped to the IMI NOS G3

**Rationale:** This unit enables the learner to develop an understanding of how to keep good working relationships with all colleagues in the automotive work environment by using effective communication and support skills.

LEARNING OUTCOMES	ASSESSMENT CRITERIA
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Understand key organisational structures, functions and roles within the automotive work environment	1.1. Identify the purpose of different sections of a typical automotive work environment 1.2. Explain organisational structures and lines of communication within the automotive work environment 1.3. Explain levels of responsibility within specific job roles in automotive workplace. To include: a trainee b skilled employee c supervisor d manager
2. Understand the importance of obtaining, interpreting and using information in order to support their job role within the automotive work environment	2.1. Explain the importance of different sources of information in an automotive work environment. 2.2. Explain how to find, interpret and use relevant sources of information 2.3. Describe the main legal requirements relating to the vehicle, including road safety requirements 2.4. Explain the importance of working to recognised procedures and processes 2.5. Explain when replacement units and components must meet the manufacturers' original equipment specification. 2.6. Explain the purpose of how to use identification codes
3. Understand the importance of different types of communication within the automotive work environment	3.1. Explain where different methods of communication would be used within the automotive environment 3.2. Explain the factors which can determine your choice of communication. 3.3. Explain how the communication of information can change with the target audience to include uninformed and informed people



4. Understand communication requirements when working in the automotive work environment	4.1. Explain how to report using written and verbal communication. 4.2. Explain the importance of documenting information relating to work carried out in the automotive environment 4.3. Explain the importance of working to agreed timescales
5. Understand how to develop good working relationships with colleagues and customers in the automotive workplace	5.1. Describe how to develop positive working relationships with colleagues and customers 5.2. Explain the importance of developing positive working relationships 5.3. Explain the importance of accepting other peoples' views and opinions. 5.4. Explain the importance of making and honouring realistic commitments to colleagues and customers.

**Content:**

**The structure of a typical vehicle repair business**

- a. How these areas relate to each other within the business:
  - i. body shop
  - ii. vehicle repair workshop
  - iii. paint shop
  - iv. valeting
  - v. vehicle parts store
  - vi. main office
  - vii. vehicle sales
  - viii. reception
- b. Sources of information:
  - i. other staff
  - ii. manuals
  - iii. parts lists
  - iv. computer software and the internet
  - v. manufacturer
  - vi. diagnostic equipment

**Communication requirements when carrying out vehicle repairs**

- a Locating and using correct documentation and information for:
- b Recording vehicle maintenance and repairs
- c Vehicle specifications
- d Component specifications
- e Oil and fluid specifications
- f Equipment and tools
- g Identification codes

**Procedures for:**

- a Referral of problems
- b Reporting delays
- c Additional work identified during repair or maintenance
- d Keeping others informed of progress



**Content: contd**

**Methods of communication**

- a Verbal
- b Signs and notices
- c Memos
- d Telephone
- e Electronic mail
- f Vehicle job card
- g Notice boards
- h SMS text messaging
- i Letters

**Organisational & customer requirements:**

- a Importance of time scales to customer and organisation
- b Relationship between time and costs
- c Meaning of profit

**Choice of communication**

- a Distance
- b Location
- c Job responsibility

**Importance of maintaining positive working relationships:**

- a Morale
- b Productivity
- c Company image
- d Customer relationships
- e Colleagues





<b>UNIT REF: G6K</b>	<b>UNIT TITLE: KNOWLEDGE OF HOW TO MAKE LEARNING POSSIBLE THROUGH DEMONSTRATIONS AND INSTRUCTION</b>
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Level: 3	Route: Knowledge	Credit Value: 5	GLH: 45
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**Mapping:** This unit is mapped to the IMI NOS G6

**Rationale:** This unit enables the learner to develop an understanding of how to carry out demonstrations and instruction which will help the learner to learn. It includes demonstrating equipment, showing skills, giving instruction, deciding when to use demonstration or instruction, potential of technology based learning, checking on learners' progress and giving feedback

LEARNING OUTCOMES	ASSESSMENT CRITERIA
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Understand the nature and role of demonstrations and instruction	1.1. Classify the separate areas of demonstrations which encourage learning 1.2. Identify which types of learning are best achieved and supported through demonstrations 1.3. Explain how to identify and use different learning opportunities 1.4. Explain how to structure demonstrations and instruction sessions 1.5. Explain how to choose from a range of demonstration techniques
2. Understand the principles and concepts of demonstration and instruction	2.1. Describe how to put learners at ease and encourage them to take part 2.2. Justify the choice between demonstration and instruction as a learning method 2.3. Explain how to identify individual learning needs 2.4. Clarify which factors are likely to prevent learning and how to overcome them 2.5. Explain how to check learners' understanding and progress 2.6. Explain how to choose and prepare appropriate materials 2.7. Explain the separate areas of instructional techniques which encourage learning 2.8. Describe which types of learning are best achieved and supported through instruction
3. Understand the external factors influencing human resource development	3.1. Explain how to make sure everybody acts in line with health, safety and environmental protection, legislation and best practice. 3.2. Analyse developments in technology based learning and new ways of delivery

**Content:**

**Separate areas of demonstration which encourage learning. To include:**

- a. Demonstration is particularly applicable to learning manual skills.
- b. Learning to do something usually involves:
  - i. purpose the aim or objective
  - ii. procedure the most effective way of completing the task
  - iii. practice all skills require practice to improve
- c. Practical tasks are more quickly learnt through demonstration.
- d. Emphasis is required to body movements when demonstrating.
- e. The demonstrator should encourage learners to ask questions.
- f. Emphasis should be placed upon key points whilst demonstrating.
- g. Any demonstration should ensure that all safety aspects are covered.

**Types of learning which are best achieved and supported through demonstrations. To include:**

- a. Types of learning:
  - i. Psychomotor measurement of manual skill performance
  - ii. cognitive learning involving thought processes
  - iii. affective demonstration of feelings, emotions or attitudes
- b. Demonstration involves learning to do something (Psychomotor Domain).
- c. Combination of instruction and practical demonstrations are very effective means of learning practical skills.

**How to structure demonstration and instruction sessions. To include:**

- a. Before the demonstration and/or instruction ensure that the following good practice is recognised:
  - i. identify key points
  - ii. relate theoretical underpinning knowledge to key points
  - iii. rehearse to ensure that all equipment is working
  - iv. ensure all students can see even small equipment and processes
  - v. time the demonstration
  - vi. consider how to make students participate
  - vii. consider how to emphasise safe working practices
- b. During the demonstration and/or instruction good practice is to:
  - i. give a clear introduction
  - ii. identify any tools/equipment
  - iii. determine the current audience level of knowledge
  - iv. complete the demonstration correctly (do not show how not to do it)
  - v. stress key points and show links between them
  - vi. monitor safety aspects
  - vii. check learner understanding
- c. After the demonstration(if possible):
  - i. enable the audience to practice the techniques
  - ii. provide feedback on their performance

**How to identify individual learning needs**

- a. Diagnose the learning needs of your audience to include:
  - i. what competencies they already have
  - ii. what experience they have of the subject area
  - iii. what competencies they need to achieve
  - iv. what demonstration techniques are best suited to their needs
  - v. how you will assess their needs have been met

**What factors are likely to prevent learning. To include:**

- i. language barriers
- ii. physical barriers
- iii. specialist knowledge
- iv. pace of learning
- v. method of delivery
- vi. environmental factors
- vii. teaching styles
- viii. dyslexia

**Content: Contd**

**How to check learners understanding and progress**

- a. Questionnaires.
- b. Verbal questioning.
- c. Observation.
- d. Assessment.
- e. Role play.
- f. Projects/assignments.
- g. Multi-choice questions.
- h. Simulation.
- i. Tests.

**How to organise information and prepare materials**

- a. Identify the course aim.
- b. Identify the subject aim.
- c. Identify the lesson aim.
- d. Complete a lesson plan - plan the teaching.
- e. Identify a series of 'cues' to be used during the lesson.
- f. Logically organise the information.
- g. Use suitable resources and equipment to maximise learning opportunities.
- h. Assess the learners progress and understanding.

**Instructional techniques**

- a. Types of instructional techniques to include:
  - i. lectures
  - ii. handouts
  - iii. team teaching
  - iv. peer teaching
  - v. discussion – individual, group and peer
  - vi. question and answer
  - vii. multimedia
  - viii. seminars
  - ix. case studies
  - x. project/assignments

**Environmental factors that effect learning**

- a. Environmental factors that should be considered before demonstration/instruction to include:
  - i. loud noises
  - ii. bright colours
  - iii. bright lights
  - iv. strong smells
  - v. atmosphere
  - vi. temperature
  - vii. classroom seating
  - viii. classroom layout
  - ix. bright lights

**Health and safety factors that effect learning**

- a. Health and safety factors that should be considered before demonstration/instruction to include:
  - i. assessment of risk and hazards
  - ii. condition of electrical/electronic equipment
  - iii. position of cables and wires
  - iv. safety of equipment used in demonstration/instruction
  - v. condition of classroom equipment/furniture/structure
  - vi. suitable protective clothing/equipment

**Content: Contd****Analysis of demonstration/instruction**

- a. Analysis of demonstration/instruction to include:
  - i. feedback from students
  - ii. feedback from colleagues
  - iii. organisational quality assessment
  - iv. feedback from external organisations
  - v. awarding body requirements

**Developments in learning. To include:**

- i. multimedia based materials
- ii. web based materials
- iii. interactive materials

**How to choose and prepare appropriate materials. To include:**

- a. Putting information in order
- b. Deciding whether the language used is appropriate
- c. Type of material i.e. paper and technology based etc.



<b>UNIT REF: VS01K</b>	<b>UNIT TITLE: KNOWLEDGE OF BRAND, PRODUCT AND MARKET AWARENESS IN THE VEHICLE SALES AND SUPPLY BUSINESS</b>
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Level: 3	Route: Knowledge	Credit Value: 6	GLH: 35
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**Mapping:** This unit is mapped to the IMI NOS VS01

**Rationale:** This unit will help the learner develop the knowledge and understanding they need to monitor the achievement of personal sales, contribution and profit against targets, demonstrating how to communicate brand and product values in customer handling and market awareness throughout the sales process

LEARNING OUTCOMES	ASSESSMENT CRITERIA
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Understand the role of dealerships in the retail vehicle industry	1.1. Describe the size and trends of dealerships within the UK automotive industry  1.2 Explain new vehicle production cycles and the delivery process  1.3. Describe the manufacturer supply chain for new vehicles  1.4 Explain the relationship between dealership, a typical dealer group and the vehicle manufacturers  1.5 Describe the structure and ownership of a dealer network  1.6. Describe the structure and inter-departmental relationships of a typical dealership
2. Understand the factors that influence profitability in the retail vehicle industry	2.1. Compare different sources of stock and their profitability  2.2 Explain the difference between wholesale and retail pricing  2.3 Explain the principles of cash flow within a retail vehicle business
3. Understand own contribution to the profitability of the dealership	3.1 Explain margins and bonus structures  3.2 Describe own personal targets and personal impact on dealership profitability
4. Understand the influence of brands in the retail vehicle industry	4.1 Explain what a brand is  4.2 Explain what brand values mean to customers  4.3 Explain how brand names influence customer expectations



5. Understand the factors that influence customer behaviour	5.1 Summarise the economic factors that can influence potential buyers 5.2 Explain the impact of stock source on customer choice, lead time and the financial offer
6. Understand the sales process	6.1 Define what is meant by a sale 6.2 Explain a range of customer buying motives 6.3 Describe own organisation's sales processes 6.4 Explain how to sell value over price

**Content to Include:**

- a. The structure and roles of the major organisations to include:
  - i. the vehicle manufacturers
  - ii. new vehicle production cycles and delivery process
  - iii. new vehicle supply chains and distribution hubs
  - iv. the structure and ownership of a dealer network
  - v. large dealer groups
  - vi. franchise and non franchise dealerships
  - vii. specialist dealers
- b. The relationship between the dealership, a typical dealer group and the vehicle manufacturers to include:
  - i. franchise agreements
  - ii. dealer standards
  - iii. regional / zone management
- c. The structure and roles of supporting organisations to include:
  - i. trade associations
  - ii. professional bodies
  - iii. trading standards
  - iv. government departments (e.g. transport, industry, education etc.)
- d. The trends within the UK automotive industry to include:
  - i. current industry codes of practice
  - ii. impact of technology
  - iii. continuous development in vehicle safety
  - iv. legislation relating to the sale of vehicles
  - v. customer buying habits and trends
  - vi. image of the industry
- e. The size of dealerships to include:
  - i. geographical, designed to meet territorial targets and customer needs
  - ii. products, types of vehicles and sales volume
  - iii. key accounts, single point for sales and after sales

**The structure and inter-departmental relationships of a typical dealership**

- a. The types of operation or departments within the dealership to include:
  - i. sales
  - ii. service
  - iii. parts
  - iv. body shop
  - v. after sales
  - vi. warranty
  - vii. accounts

**Content to Include:**

**The function of each type and their relationship to other departments**

- a. The different job roles and responsibilities of each to include:
  - i. owners/directors
  - ii. managers
  - iii. sales controllers / executives
  - iv. technicians
  - v. other personnel

**Different sources of stock and their profitability to include:**

- a. New vehicles:
  - i. manufacturer led pricing
  - ii. wholesale
  - iii. retail
  - iv. bonus
- b. Used vehicles:
  - i. dealer led pricing
  - ii. retail
  - iii. trade
- c. Low volume – high margin
- d. High volume – low margin
- e. Cost of Sales to include:
  - i. demonstrators
  - ii. mileage
  - iii. fuel
  - iv. advertising
  - v. promotions
  - vi. new vehicle preparation
  - vii. used vehicle preparation
  - viii. commission

**The principles of cash flow within a retail vehicle business**

- a. The correlation between vehicle sales targets and financial targets
- b. The basic principles of accounts to include:
  - i. the cash flow forecast
  - ii. the cash book
  - iii. the sales ledger
  - iv. the purchase ledger
  - v. credit control systems
  - vi. margins

**Factors influencing retained profit**

- a. Own financial operating parameters to include:
  - i. vehicle type
  - ii. finance
  - iii. insurance
  - iv. warranty

**Limits of authority**

- a. Approval process when limits of authority are exceeded
- b. Bonus structures to include:
  - i. manufacturers incentives
  - ii. finance company incentives
  - iii. insurance company incentives
  - iv. dealer incentives (individual and team)

**Content to Include:**

**Own personal targets**

- a. Job description to include:
  - i. planning personal objectives
  - ii. organising work schedules
  - iii. implementing
  - iv. monitoring
  - v. evaluating
  - vi. setting new objectives
- b. Using SMART objectives to include:
  - i. specific (e.g. sales targets)
  - ii. measurable (e.g. sales figures)
  - iii. attainable (e.g. based on levels of experience)
  - iv. realistic (e.g. in line with current trends)
  - v. time (e.g. based on organisation's timescales)
- c. Alignment of own and dealership targets
- d. Brands to include:
  - i. definition
  - ii. examples
- e. Brand values to include:
  - i. safety
  - ii. reliability
  - iii. comfort
  - iv. performance
  - v. efficiency
- f. Typical brand names and influence on customer expectations
- g. The economic factors that can influence potential buyers to include:
  - i. pricing
  - ii. terms of payment
  - iii. promotions
  - iv. seasonal commitments
- h. The impact of stock source on customer choice, lead time and the financial offer
  - i. stock record systems
  - ii. ordering process
  - iii. delivery lead times
  - iv. preparation
  - v. documentation

**The nature and ethics of selling**

- a. Negative images and stereotypes of selling to include:
  - i. hard selling
  - ii. miss-selling
  - iii. bribery
- b. Positive images of selling
- c. The sales cycle in the context of own organisation to include:
- d. Pre-sale:
  - i. prospecting
  - ii. targeting customers
  - iii. making appointments
  - iv. diary planning
  - v. researching individual customers
  - vi. personal preparation
  - vii. setting objectives for the sales call





**Content to Include:**

e. Sale:

- i. breaking the ice and building rapport
- ii. identifying needs through questioning
- iii. presenting a sales proposal
- iv. handling objections
- v. negotiating agreement
- vi. closing

f. Post-sale to include:

- i. processing the order
- ii. delivery / hand over
- iii. customer follow-up
- iv. after sales service
- v. gaining referrals and recommendations
- vi. identifying repeat selling opportunities
- vii. self analysis and seeking feedback

g. A range of customer buying motives to include:

- i. status
- ii. promotions
- iii. passenger capacity
- iv. luggage capacity
- v. performance
- vi. mileage
- vii. comfort
- viii. efficiency
- ix. terrain

h. How to sell value over price to include:

- i. the difference between features and benefits
- ii. typical features of own products
- iii. typical benefits of own products



<b>UNIT REF: VS03K</b>	<b>UNIT TITLE: KNOWLEDGE OF COMPLYING WITH THE LEGAL REQUIREMENTS AND REGULATIONS OF VEHICLE SALES</b>
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Level: 2	Route: Knowledge	Credit Value: 3	GLH: 15
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**Mapping:** This unit is mapped to the IMI NOS VS03

**Rationale:** This unit will help the learner develop the knowledge and understanding they need to satisfy the legal requirements in the vehicle sales environment. The latter to be achieved whilst adopting best practice and include data protection, trading law relevant to the sales process etc

LEARNING OUTCOMES	ASSESSMENT CRITERIA
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Understand the regulation and legislation relevant to vehicle sales	1.1. Summarise the current relevant regulation, legislation, data protection and trading law relating to vehicle sales.  1.2 Explain how and when to use trade plates  1.3 Explain the consequences of misuse and loss of trade plates.  1.4 Identify potential sources of information on regulation, legislation, data protection and trading law relevant to your role.
2. Understand own and organisational responsibilities in relation to regulation and legislation relevant to vehicle sales	2.1. Explain the impact that current regulation, legislation, data protection and trading law has on own role.  2.2 Justify the need to maintain own knowledge and understanding of regulation, legislation, data protection and trading law relevant to own role.  2.3 Explain own legal and moral responsibility in relation to vehicle sales.  2.4 Explain the legal and moral responsibility of the organisation in relation to vehicle sales.

<p><b>Content to Include:</b></p> <p><b>The current relevant regulation, legislation, data protection and trading law relating to vehicle sales</b></p> <p>a. Basic principles applicable to vehicle sales</p> <ul style="list-style-type: none"> <li>i. the financial services and markets act</li> <li>ii. enterprise act</li> <li>iii. fair trading act</li> <li>iv. consumer protection act</li> <li>v. data protection act</li> <li>vi. supply of goods and services act</li> <li>vii. contract law</li> <li>viii. health and safety legislation</li> <li>ix. vehicle excise and registration act</li> <li>x. road traffic act</li> <li>xi. industry codes of conduct</li> <li>xii. any other current industry legislation</li> </ul>
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**Content to Include:**

- b. How and when to use trade plates to include:
  - i. property rights and ownership
  - ii. categories of business eligible to use
  - iii. DVLA guidance and conditions of use
  - iv. holder's responsibilities for safeguarding and use
- c. The consequences of misuse and loss of trade plates to include:
  - i. penalties for
  - ii. fraudulently altering or using trade plates
  - iii. fraudulently lending them, or
  - iv. allowing them to be used by any other person
  - v. procedure for reporting theft, loss, destruction
- d. Potential sources of information on regulation, legislation, data protection and trading law relevant to your role to include:
  - i. terms and conditions of employment
  - ii. job description
  - iii. company standards and policies
  - iv. sales documentation and literature
  - v. franchise agreements
  - vi. motor industry trade associations
  - vii. intranet
  - viii. internet
  - ix. local authority bye-laws
- e. The impact that current regulation, legislation, data protection and trading law has on own role to include:
  - i. statutory duties and legal obligations relating to vehicle sales
  - ii. duty to interpret and accurately communicate information to customers
- f. The need to maintain own knowledge and understanding of regulation, legislation, data protection and trading law relevant to own role:
  - i. remaining compliant and embracing change
  - ii. continuous personal development
  - iii. occupational competence
  - iv. professional image
- g. Own legal and moral responsibility in relation to vehicle sales
- h. Significance of observing organisational and ethical rules
  - i. when providing information to customers
- i. Characteristics and qualities of the professional salesperson:
  - i. knowledgeable
  - ii. honest
  - iii. helpful
  - iv. reliable
  - v. motivated
- j. The legal and moral responsibility of the organisation in relation to vehicle sales to include:
  - i. trading standards and ethics
  - ii. corporate social responsibility



<b>UNIT REF: VS04K</b>	<b>UNIT TITLE: KNOWLEDGE OF SELF MANAGEMENT AND ADMINISTRATION IN A VEHICLE SALES ENVIRONMENT</b>
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<b>Level: 3</b>	<b>Route: Knowledge</b>	<b>Credit Value: 4</b>	<b>GLH: 25</b>
<b>Mapping: This unit is mapped to the IMI NOS VS04</b>			
<b>Rationale:</b> This unit will help the learner develop the knowledge and understanding they need for time management, meeting sales targets, achieving objectives and using information technology to facilitate own role			

<b>LEARNING OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Understand the importance of self-management and administration in a vehicle sales environment	1.1. Explain the importance of effective self management and accurate administration in a vehicle sales environment.  1.2 Explain the importance of time keeping in a vehicle sales environment.  1.3 Explain the importance of keeping promises on time in a vehicle sales environment.  1.4 Describe the likely cost to the organisation if promises are not kept.
2. Understand how to manage own work and administration in a vehicle sales environment	2.1. Describe how to prioritise time for specific tasks.  2.2 Describe how to use a browser and search engine.  2.3 Describe how to use relevant operating systems required to effectively carry out own role.  2.4 Explain how to apply self management and administration skills within a team environment and across the business.  2.5 Describe how to use dealership logs and diary systems to record activity and schedule follow up.

**Content to Include:**

**The importance of effective self management and accurate administration in a vehicle sales environment to include:**

- a. Personal effectiveness and CPD:
  - i. role and purpose of objectives and targets
  - ii. organisation's objectives and significance for own development
  - iii. the importance of taking responsibility for own personal development
  - iv. evaluating personal development opportunities to improve own performance
  - v. use of job description
  - vi. obtaining feedback on performance from line managers and colleagues
  - vii. simple training needs analysis- e.g. using outcomes of swot analyses to plan personal development
  - viii. identification of preferred learning styles
- b. The significance of maintaining accurate administration systems in the organisation:
  - i. sales documentation
  - ii. customer records and databases
  - iii. legal requirements
  - iv. financial – audits and tax
  - v. quality – audits and customer service
- c. Storage, indexing and information retrieval systems to include:
  - i. manual and electronic
- d. Confidentiality / security of records to include:
  - i. levels of access, backup, virus protection, legal aspects
- e. Data Protection Act
- f. The importance of time keeping in a vehicle sales environment to include:
  - i. terms and conditions of employment
  - ii. working according to organisation's objectives, policies, procedures, and priorities
- g. The importance of keeping promises on time in a vehicle sales environment to include:
  - i. the supply of goods and services act
  - ii. implied terms and contracts for services
- h. When supplying services, the need for:
  - i. reasonable care and skill
  - ii. completion in a reasonable time
  - iii. completion at a reasonable charge
- i. The likely cost to the organisation if promises are not kept to include:
  - i. tangible and intangible costs of negative customer experiences
- j. How to prioritise time for specific tasks to include:
  - i. planning techniques appropriate to job activity e.g. tasks, schedules, timetables, rotas
  - ii. setting and using smart objectives to manage own work
  - iii. strategies to establish priorities e.g. urgent / important matrix and making most effective use of time
  - iv. use of milestones to monitor progress
  - v. importance of monitoring and revising plans in line with progress
  - vi. recognising limiting factors that could hinder the achievement of objectives
- k. How to use a browser and search engine to include:
  - i. basic operation of internet and intranet
  - ii. organisational policy and limitations

**How to use relevant operating systems required to effectively carry out own role**

- a. Operation, effective and economical use of organisational resources to include:
  - i. information systems
  - ii. dealer management systems
  - iii. computer systems
  - iv. internet
  - v. intranet
  - vi. communication systems
  - vii. authorisations and limitations



**Content to Include:**

- b. How to apply self management and administration skills within a team environment and across the business to include:
  - i. organisational structure, aims and objectives
  - ii. individual roles and responsibilities
  - iii. maintaining effective working relationships
  - iv. own contribution to achieving organisational and team objectives
  - v. recognising achievements
  - vi. supporting performance improvement
- c. How to use dealership logs and diary systems to record activity and schedule follow up
- d. Purpose and nature of diary systems and logs
- e. Organisational policy for maintaining accurate logs and diary systems to include:
  - i. pre sales planning
  - ii. recording activities
  - iii. follow up



<b>UNIT REF: VS05K</b>	<b>UNIT TITLE: KNOWLEDGE OF HANDLING VEHICLE SALES TELEPHONE ENQUIRIES</b>
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<b>Level: 2</b>	<b>Route: Knowledge</b>	<b>Credit Value: 3</b>	<b>GLH: 20</b>
<b>Mapping: This unit is mapped to the IMI NOS VS05</b>			
<b>Rationale: This unit will help the learner develop the knowledge and understanding they need for handling and logging telephone enquires and the identification of caller's needs</b>			

<b>LEARNING OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
<p><b>The Learner will:</b></p> <p>1. Understand how to handle vehicle sales telephone enquiries</p>	<p><b>The Learner can:</b></p> <p>1.1. Describe the generic sales process</p> <p>1.2 Explain the validity of each component of the generic sales process to vehicle sales telephone enquiries.</p> <p>1.3 Explain the objective of the inbound telephone sales call.</p> <p>1.4 Summarise the relevant data to collect on the telephone.</p> <p>1.5 Describe the enquiry logging and booking system used in the organisation.</p> <p>1.6 Explain the concept of percentage contact loss in telephone communication.</p>

<p><b>Content to Include:</b></p> <p><b>The generic sales process</b></p> <p>a. Blending the sales cycle with inbound and outbound telephone conversations to include:</p> <p>b. Pre-sale preparation</p> <ul style="list-style-type: none"> <li>i. product knowledge</li> <li>ii. current campaigns</li> <li>iii. potential scripts</li> <li>iv. typical objections and strategies for handling</li> <li>v. environment e.g. conducive to concentration and active listening and interruption free</li> </ul> <p>c. Sale:</p> <ul style="list-style-type: none"> <li>i. breaking the ice and building rapport</li> </ul> <p>d. Recognising personal style:</p> <ul style="list-style-type: none"> <li>i. visual</li> <li>ii. auditory</li> <li>iii. kinaesthetic</li> <li>iv. identifying needs through questioning</li> </ul>
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**Content to Include:**

- e. Establishing customer aims and objectives:
  - i. personal / business use
  - ii. vehicle requirements
  - iii. budgets and means
  - iv. part exchange
  - v. matching products to satisfy needs
  - vi. presenting a sales proposal
  - vii. handling objections
  - viii. negotiating agreement
  - ix. closing
- f. Post-sale:
  - i. processing the order
  - ii. customer follow-up
  - iii. after sales service
  - iv. gaining referrals and recommendations
  - v. identifying repeat selling opportunities
  - vi. self analysis and seeking feedback
- g. The validity of each component of the generic sales process to vehicle sales telephone enquiries to include:
  - i. the advantages and disadvantages of telephone selling
- h. The objective of the inbound telephone sales call to include:
  - i. factors that inspire inbound and outbound vehicle sales enquiries
  - ii. organisational aims and objectives
  - iii. personal targets
  - i. inbound sales enquiries:
    - i. advertising campaigns
    - ii. internet
    - iii. intranet
    - iv. manufacturers' referrals
    - v. customer referrals
- j. Outbound sales enquiries:
  - i. maintaining rapport
  - ii. raise awareness of promotions
  - iii. identify current needs
  - iv. seek appointments
  - v. identify referrals
  - vi. market intelligence
  - vii. build customer data base

**The relevant data to collect on the telephone.**

- a. Organisational requirements and records (Basic data) to include:
  - i. date / time
  - ii. sales person
  - iii. customer name
  - iv. telephone number
  - v. nature of call
  - vi. comments
  - vii. follow up

**The enquiry logging and booking system used in the organisation**

- a. Purpose and nature of diary systems and logs
- b. Organisational policy for maintaining accurate logs and diary systems to include:
  - i. pre sales planning
  - ii. recording activities
  - iii. follow up
- c. The concept of percentage contact loss in telephone communication to include:
  - i. procedures for monitoring and evaluating performance





<b>UNIT REF: VS05S</b>	<b>UNIT TITLE: SKILLS IN HANDLING VEHICLE SALES TELEPHONE ENQUIRIES</b>
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<b>Level: 2</b>	<b>Route: Skills</b>	<b>Credit Value: 2</b>	<b>GLH: 12</b>
<b>Mapping: This unit is mapped to the IMI NOS VS05</b>			
<b>Rationale:</b> This unit will help the learner develop the skills they need for handling and logging telephone enquires and identifying caller's needs			

<b>LEARNING OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Be able to handle vehicle sales telephone enquiries	1.1 Make the response personal to the caller. 1.2 Provide relevant product knowledge and advice to the caller. 1.3 Handle caller objections effectively. 1.4 Use telephone communication methods to secure transition to the next stage of the sales process. 1.5 Close telephone conversations in a way that meets own and caller's objectives. 1.6. Accurately summarise telephone conversations.

**EVIDENCE REQUIREMENTS**

You must produce evidence of handling and logging telephone enquiries and the identification of caller's needs <b>on at least 3</b> separate occasions. The evidence must include details of the following:  Identification of caller needs  Product knowledge and advice provided to the caller  Effective handling of objections  Summarising the conversation  Methods used to secure transition to the next stage of the sales cycle  Effective closure of the conversation  Information collected and the call log entry	<b>EVIDENCE REFERENCE NO.</b>		
	Your assessor must observe you handling and logging telephone enquiries and the identification of caller's needs <b>on at least 2</b> separate occasions	<b>ASSESSOR OBSERVATION EVIDENCE REF. NO.</b>	

<b>ASSESSOR SIGNATURE:</b>	<b>PIN NO:</b>	<b>DATE:</b>
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UNIT REF: VS06K

**UNIT TITLE: KNOWLEDGE OF CONSTRUCTING AND UNDERSTANDING SALES PACKAGES**

Level: 3

Route: Knowledge

Credit Value: 4

GLH: 25

**Mapping:** This unit is mapped to the IMI NOS VS06**Rationale:** This unit will help the learner develop the knowledge and understanding they need for constructing and understanding sales packages based on information from manufacturer, dealership and government, whilst complying with audit requirements

LEARNING OUTCOMES	ASSESSMENT CRITERIA
<p><b>The Learner will:</b></p> <p>1. Understand how to construct sales packages</p>	<p><b>The Learner can:</b></p> <p>1.1. Summarise the features, advantages and benefits of offers available from the manufacturer, the dealership and government.</p> <p>1.2 Explain the options and combinations contained within available sales packages.</p> <p>1.3. Explain the importance of keeping information up to date in order to offer the best possible business opportunity to the customers and to the organisation.</p> <p>1.4 Explain the operating philosophy of own organisation, identifying sales packages and additional promotions that fit into its context.</p> <p>1.5 Describe audit requirements resulting from government and industry regulations.</p>

**Content to Include:****The features, advantages and benefits of offers available from the manufacturer, the dealership and Government.**

- a. Product range:
- i. vehicles
  - ii. specifications
  - iii. accessories
  - iv. finance
  - v. insurance
  - vi. warranty
  - vii. gap schemes
  - viii. product features and benefits

**The options and combinations contained within available sales packages to include:**

- b. Current product promotions:
- i. manufacturer
  - ii. finance
  - iii. insurance
  - iv. dealership

**Content to Include:**

**Individual product margins and operating parameters**

- a. Package permutations and their alignment with:
  - i. organisational aims and objectives
  - ii. authorisation processes and limits of authority
  - iii. individual and organisational product targets
  - iv. profitability
  - v. pricing tactics, sales, discounts, promotions
  - vi. sales standards and ethics

**The importance of keeping information up to date in order to offer the best possible business opportunity to the customers and to the organisation**

- a. Significance of using accurate current information during sales negotiations to include:
  - i. informed customers
  - ii. non informed customers
- b. Operation and function of a Dealer Management System (DMS) to include:
  - i. accessing and managing information
  - ii. sales administration
  - iii. proposals and quotations
  - iv. sales orders
  - v. electronic order management
  - vi. sales information systems
  - vii. developing the customer data base

**The operating philosophy of own organisation, identifying sales packages and additional promotions that fit into its context**

- a. Organisational aims and objectives
- b. Sales strategies and the organisations market to include:
  - i. geographic
  - ii. demographic
- c. Role of the salesperson in relation to promotional mix:
  - i. advertising
  - ii. sales promotion
  - iii. direct marketing
  - iv. public relations
  - v. personal selling
  - vi. sponsorship
  - vii. events
  - viii. the internet
  - ix. sales literature, brochures
- d. Role of the sales person in carrying out research:
  - i. market sensing
  - ii. market intelligence
  - iii. eyes and ears of the organisation
  - iv. building a network of contacts
  - v. recommending opportunities to enhance sales
- e. Audit requirements resulting from government and industry regulations to include:
  - i. documentation e.g. electronic and hard copy
- f. Secure storage and retention requirements:
  - i. FSA requirements
  - ii. accounting records
  - iii. contracts
  - iv. data protection



<b>UNIT REF:VS06S</b>	<b>UNIT TITLE: SKILLS IN CONSTRUCTING MOTOR VEHICLE SALES PACKAGES</b>
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<b>Level: 3</b>	<b>Route: Skills</b>	<b>Credit Value: 3</b>	<b>GLH: 25</b>
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**Mapping:** This unit is mapped to the IMI NOS VS06

**Rationale:** This unit will help the learner develop the skills they need for constructing and understanding sales packages based on information from manufacturer, dealership and government, whilst complying with audit requirements.

<b>LEARNING OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Be able to construct motor vehicle sales packages	1.1 Use appropriate sources of information for the sales package. 1.2 Communicate the deal offer to the customer. 1.3 Adhere to work place procedures and guidelines when constructing the sales package. 1.4 Comply with prescribed audit requirements. 1.5 Show how updated information has been used to offer the best possible opportunity to different customers 1.6 Show the decision structure of the business for the introduction of sales packages and promotions.



**EVIDENCE REQUIREMENTS**

<p>You must produce evidence of constructing and understanding sales packages and complying with audit requirements <b>on at least 3</b> separate occasions. The evidence must include details of the following:</p>	<p><b>EVIDENCE REFERENCE NO.</b></p>		
<p>Sources of information and factors influencing package structure</p>			
<p>Audit compliance requirements</p>			
<p>Elements of the sales cycle applied when presenting the deal offer to the customer</p>			
<p>Restructuring and alignment with current promotions and different customers</p>			
<p>The decision structure of the business that introduces the sales packages and promotions</p>			
<p>Your assessor must observe you constructing and understanding sales packages and complying with audit requirements <b>on at least 2</b> separate occasions.</p>	<p><b>ASSESSOR OBSERVATION EVIDENCE REF. NO.</b></p>		

<p><b>ASSESSOR SIGNATURE:</b></p>	<p><b>PIN NO:</b></p>	<p><b>DATE:</b></p>
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<b>UNIT REF: VS07K</b>	<b>UNIT TITLE: KNOWLEDGE OF AUTOMOTIVE RETAIL NEGOTIATION AND SALES TECHNIQUES</b>
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<b>Level: 2</b>	<b>Route: Knowledge</b>	<b>Credit Value: 5</b>	<b>GLH: 25</b>
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**Mapping:** This unit is mapped to the IMI NOS VS07

**Rationale:** This unit will help the learner develop the knowledge and understanding they need to develop the customer service and negotiation skills required to sell a vehicle. It covers qualification, objection handling, negotiation and closing skills.

<b>LEARNING OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Understand how to present vehicle sales solutions to the customer	1.1 Explain how to identify customer expectations and the factors that influence them. 1.2 Describe the main components of a deal offer. 1.3 Explain how to find and offer solutions productively. 1.4. Explain the difference between price and value.
2. Understand how to provide customer service during the vehicle sales process	2.1 Describe the internal factors that affect the quality of customer service delivery. 2.2 Explain how success in customer service is achievable irrespective of the presence of a specific financial reward.
3. Understand how to communicate with the customer in a vehicle sales environment	3.1 Summarise communication styles as appropriate to different customer categories 3.2 Explain how the intelligent use of open and closed questions can help to qualify the customer's needs and requirements 3.3 Explain why it is important to use accurate and correct terminology when dealing with customers 3.4 Demonstrate a range of accurate and correct terminology to use when dealing with customers 3.5 Explain the principle of active listening which involves reinforcing what the customer is saying and by asking relevant questions
4. Understand how to deal with customer objections in a vehicle sales environment	4.1 Explain how to clarify customer objections 4.2 Describe how to apply objection handling techniques
5. Know how to close a sale in a vehicle sales environment	5.1 Explain how to conclude negotiations in order to close a sale

**Content to Include:**

**How to identify customer expectations and the factors that influence them to include:**

- a. Basic influences on customers' buying behavior:
  - i. distinguishing between needs, wants and expectations
- b. The elements of the 4P marketing mix to include:
  - i. product for e.g. features and benefits
  - ii. place for e.g. territory
  - iii. price for e.g. high, low, competitive.
  - iv. promotion for e.g. advertising, sales promotion, direct marketing, publicity/public relations (including sponsorship)
- c. The buying process:
  - i. the aida model (1.awareness/attention, 2. interest, 3.desire, 4.action)
- d. The main components of a deal offer to include:
  - i. part exchange price offer
  - ii. new (newer) vehicle
  - iii. specifications
  - iv. accessories
  - v. finance
  - vi. insurance
  - vii. warranty

**How to find and offer solutions productively to include:**

- a. Pre-sale preparation:
  - i. information resources e.g. brochures, promotional material, price guides
  - ii. operation and function of a dealer management system (dms)
- b. The difference between price and value:
  - i. product pricing methods
  - ii. definition of the product market value
  - iii. influences on the negotiation process

**The internal factors that affect the quality of customer service delivery**

- a. Barriers to implementing customer care, to include:
  - i. authority
  - ii. budget
  - iii. people
  - iv. time
  - v. management
- b. How barriers to customer care can be overcome

**How success in customer service is achievable irrespective of the presence of a specific financial reward**

- a. The customer experience, both physical and emotional
- b. Importance of customer service standards, to include:
  - i. courtesy
  - ii. respect
  - iii. fairness
  - iv. clarity
  - v. accessibility
  - vi. timeliness
  - vii. responsiveness
- c. Maintaining rapport
- d. Gaining referrals and recommendations
- e. Identifying repeat sales opportunities
- f. Communication styles as appropriate to different customer categories
- g. Individual preferred styles:
  - i. visual
  - ii. auditory
  - iii. kinaesthetic

**Content to Include:**

- h. Body language:
  - i. meeting and greeting gestures
  - ii. building rapport
  - iii. eye contact
  - iv. facial expressions
  - v. personal space
- i. Characteristics of selling in different contexts:
  - i. retail customers – new car buyer
  - ii. retail customers – used car buyer
  - iii. retail customers – existing / repeat business
  - iv. business customers e.g. informed buyers, the decision making unit (dmu), business tax implications, presenting at board level
  - v. trade customers
  - vi. telephone customers
  - vii. selling services (such as after sales) – intangible products
- j. How the intelligent use of open and closed questions can help to qualify the customer’s needs and requirements:
  - i. the difference between open and closed questions
  - ii. building rapport
  - iii. identifying needs through questioning
- k. Establishing customer aims and objectives:
  - i. personal / business use
  - ii. vehicle requirements
  - iii. budgets and means
  - iv. part exchange
- l. Matching products to satisfy needs
- m. Presenting a sales proposal

**Why it is important to use accurate and correct terminology when dealing with customers**

- a. The importance of ethics in selling to include:
  - i. the positive qualities for ethical selling e.g. truth, honesty, professionalism
  - ii. negative practices e.g. hard sales techniques, discrediting competitors, unprofessional behaviour
- b. A range of accurate and correct terminology to use when dealing with customers:
  - i. examples of industry jargon and more appropriate terminology to use

**The principle of active listening which involves reinforcing what the customer is saying and by asking relevant questions**

- a. Active listening skills:
  - i. effective listening
  - ii. concentrating
  - iii. blocking internal dialogue
  - iv. body language to demonstrate listening
  - v. reflecting and questioning e.g. confirming / clarifying understanding

**How to clarify customer objections**

- a. Basic objection handling:
  - i. acknowledge
  - ii. listen
  - iii. don’t interrupt
- b. Typical objections:
  - i. pricing
  - ii. product
  - iii. part exchange offers e.g. valid: agree and counter, invalid: negate and clarify

**How to conclude negotiations in order to close a sale**

- a. Basic closing:
  - i. buying signals
  - ii. summarise and ask for order





<b>UNIT REF: VS07S</b>	<b>UNIT TITLE: SKILLS IN AUTOMOTIVE RETAIL NEGOTIATION AND SALES TECHNIQUES</b>
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<b>Level: 2</b>	<b>Route: Skills</b>	<b>Credit Value: 2</b>	<b>GLH: 15</b>
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**Mapping:** This unit is mapped to the IMI NOS VS07

**Rationale:** This unit will help the learner develop the skills they need to develop the customer service and negotiation skills required to sell a vehicle. It covers qualification, objection handling, negotiation and closing skills

LEARNING OUTCOMES	ASSESSMENT CRITERIA
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Be able to establish an effective relationship with the vehicle customer	1.1 Prepare to meet customers. 1.2 Empathise with the customer. 1.3 Show understanding for the customer's issues 1.4 Use positive language when speaking to the customer. 1.5 Use effective rapport building skills with the customer. 1.6 Handle a range of objections.
2. Be able to negotiate a vehicle sale with the customer	2.1 Summarise the customer's needs and requirements 2.2 Relate customer needs to an appropriate offer of goods or services. 2.3 Use open ended questions when exploring customer responses to an offer. 2.4 Formulate a proposal that reflects value for your organisation and the customer. 2.5. Present the proposal to the customer in a way which meets their needs and the needs of your organisation 2.6 Negotiate successfully to close the sale.



**EVIDENCE REQUIREMENTS**

<p>You must produce evidence of using customer service and negotiation skills to sell a vehicle <b>on at least 3</b> separate occasions. The evidence must include details of the following:</p>	<p><b>EVIDENCE REFERENCE NO.</b></p>		
Customer service standards applied			
Meeting and greeting			
Building rapport			
Qualification using active listening, open and closed questioning			
Product features and benefits described			
Objection handling			
Negotiation			
The proposal - representing value for the organisation and customer			
Asking for the business			
Closing the sale			
<p>Your assessor must observe you using customer service and negotiation skills to sell a vehicle <b>on at least 2</b> separate occasions</p>	<p><b>ASSESSOR OBSERVATION EVIDENCE REF. NO.</b></p>		

<p><b>ASSESSOR SIGNATURE:</b></p>	<p><b>PIN NO:</b></p>	<p><b>DATE:</b></p>
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<b>UNIT REF: VS08K</b>	<b>UNIT TITLE: KNOWLEDGE OF DELIVERING A VEHICLE SALES STATIC PRESENTATION</b>
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<b>Level: 2</b>	<b>Route: Knowledge</b>	<b>Credit Value: 3</b>	<b>GLH: 20</b>
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**Mapping:** This unit is mapped to the IMI NOS VS08

**Rationale:** This unit will help the learner develop the knowledge and understanding they need to deliver effective sales presentations to maximise sales potential. It includes giving bespoke presentations to the customer and providing opportunities for questions to be asked.

<b>LEARNING OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
<p><b>The Learner will:</b></p> <p>1. Understand how to deliver a vehicle sales static presentation</p>	<p><b>The Learner can:</b></p> <p>1.1 Describe the features and benefits of own product portfolio.</p> <p>1.2 Explain how to conduct a 360 degree vehicle walk around.</p> <p>1.3 Explain how to use information derived from customer interaction to structure the presentation.</p> <p>1.4. Explain how to identify key sale indicators.</p> <p>1.5 Explain how to apply key sales indicators as relevant features and benefits during the presentation.</p> <p>1.6 Describe how to source and update own knowledge relating to benefits and features of products and services.</p> <p>1.7 Describe the importance of relaying information accurately to the customer.</p>

<p><b>Content to Include:</b></p> <p><b>The features and benefits of own product portfolio to include:</b></p> <p>a. Product range:</p> <ul style="list-style-type: none"> <li>i. vehicles</li> <li>ii. specifications</li> <li>iii. accessories</li> <li>iv. finance</li> <li>v. insurance</li> <li>vi. warranty</li> </ul> <p>b. Product features and benefits</p> <p>c. How to conduct a 360 degree vehicle walk around</p> <p><b>Sales cycle integration to include:</b></p> <p>a. Pre-sale:</p> <ul style="list-style-type: none"> <li>i. display area e.g. franchise requirements, dealer standards</li> <li>ii. vehicle e.g. ease of access</li> <li>iii. personal preparation</li> <li>iv. planning delivery sequence</li> </ul>
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**Content to Include:**

**How to use information derived from customer interaction to structure the presentation to include:**

**Sales cycle integration**

- a. Sale:
  - i. breaking the ice and building rapport
  - ii. recognising personal style e.g. visual, auditory, kinaesthetic
  - iii. identifying needs through questioning
  - iv. establishing customer aims and objectives e.g. personal / business use, vehicle requirements, budgets and means, part exchange
- b. Matching products to satisfy needs:
  - i. presenting a sales proposal
  - ii. handling objections
  - iii. negotiating agreement
  - iv. closing
- c. Post-sale:
  - i. processing the order
  - ii. self analysis and seeking feedback
- d. How to identify key sale indicators, to include:
  - i. observation
  - ii. active listening
  - iii. sensing
  - iv. questioning
  - v. verbal and non verbal communications

**How to apply key sales indicators as relevant features and benefits during the presentation, to include:**

**Buying signals**

- a. Typical indicators, to include:
  - i. comfort
  - ii. safety
  - iii. efficiency
  - iv. performance
  - v. security
  - vi. economy
- b. Reflecting
- c. Affirming

**How to source and update own knowledge relating to benefits and features of products and services.**

- a. Information systems including:
  - i. dealer promotions
  - ii. franchise support
  - iii. brochures
  - iv. leaflets
  - v. internet
  - vi. intranet

**The importance of relaying information accurately to the customer.**

- a. The qualities of the salesperson:
  - i. knowledgeable
  - ii. honest
  - iii. helpful
  - iv. reliable
  - v. motivated



<b>UNIT REF: VS08S</b>	<b>UNIT TITLE: SKILLS IN DELIVERING A VEHICLE SALES STATIC PRESENTATION</b>
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<b>Level: 2</b>	<b>Route: Skills</b>	<b>Credit Value: 2</b>	<b>GLH: 15</b>
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**Mapping:** This unit is mapped to the IMI NOS VS08

**Rationale:** This unit will help the learner develop the skills they need to deliver effective sales presentations to maximise sales potential. It includes giving bespoke presentations to the customer and providing opportunities for questions to be asked.

LEARNING OUTCOMES	ASSESSMENT CRITERIA
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Be able to deliver a vehicle sales static presentation	1.1 Provide information about the product features and benefits.  1.2 Structure presentations relevant to information gathered in interaction with the customer.  1.3 Present the correct products or services.  1.4 Use information systems where appropriate.
2. Be able to build a relationship with customers when delivering a vehicle sales static presentation	2.1 Actively listen to customers needs and requirements.  2.2 Respond appropriately to customers' needs and requirements.  2.3 Generate rapport with the customer.
3. Be able to gain customer agreement to a product or service during a vehicle sales static presentation	3.1 Gain customer agreement for vehicle or service at the preliminary stage of the sale



**EVIDENCE REQUIREMENTS**

<p>You must produce evidence of delivering effective sales presentations to maximise sales potential <b>on at least 3</b> separate occasions. The evidence must include details of the following:</p>	<b>EVIDENCE REFERENCE NO.</b>		
<p>The product features and benefits identified to support the presentation</p>			
<p>The potential objections identified and strategies planned for overcoming these</p>			
<p>Building rapport</p>			
<p>Qualification using active listening, open and closed questioning</p>			
<p>Information systems accessed where appropriate</p>			
<p>Products matched and presented representing value for the organisation and customer</p>			
<p>Negotiating agreement</p>			
<p>Trial closures</p>			
<p>Your assessor must observe you delivering effective sales presentations to maximise sales potential <b>on at least 2</b> separate occasions</p>	<b>ASSESSOR OBSERVATION EVIDENCE REF. NO.</b>		

<p><b>ASSESSOR SIGNATURE:</b></p>	<p><b>PIN NO:</b></p>	<p><b>DATE:</b></p>
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<b>UNIT REF: VS09K</b>	<b>UNIT TITLE: KNOWLEDGE OF CONDUCTING VEHICLE DEMONSTRATION DRIVES</b>
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Level: 2	Route: Knowledge	Credit Value: 3	GLH: 20
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**Mapping:** This unit is mapped to the IMI NOS VS09

**Rationale:** This unit will help the learner develop the knowledge and understanding they need to plan and carry out demonstration drives with customers. Particular attention is paid to the safety and security of the individual and the vehicle.

LEARNING OUTCOMES	ASSESSMENT CRITERIA
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Understand the purpose and value of a test drive	1.1 Explain the objective of the demonstration drive. 1.2 Summarise the importance of a structured presentation for the demonstration drive. 1.3 Define the characteristics of a test drive.
2. Understand how to prepare for a test drive	2.1 Describe the dealer demonstration vehicle standards. 2.2 Describe the process for booking demonstration drives. 2.3 Describe the demonstration preparation process.
3. Understand the legal and regulatory requirements that apply to test drives	3.1 Summarise the legal requirements that apply to test drives. 3.2 Explain duty of care in relation to demonstration drives as defined by the employer. 3.3 Identify how and when to use trade plates 3.4 Explain the consequences of misuse and loss of trade plates.

**Content to Include:**

- a. The objective of the demonstration drive:
  - i. purpose of the demonstration drive
  - ii. key benefits for the customer
- b. The importance of a structured presentation for the demonstration drive:
  - i. structure of an effective presentation
  - ii. sales cycle integration
  - iii. vehicle features and benefits
- c. The characteristics of a test drive:
  - i. route planning principles
  - ii. effective customer driving experiences
  - iii. vehicle handling characteristics
- d. The dealer demonstration vehicle standards:
  - i. vehicle condition
  - ii. roadworthy
  - iii. fuelled
  - iv. parked to facilitate e.g. static demonstration, drive off



**Content to Include:**

**The process for booking demonstration drives**

- a. Appropriate vehicle:
  - i. available
  - ii. presentable
  - iii. roadworthy
  - iv. trade plates available
  - v. planned routes accessibility
- b. The demonstration preparation process:
  - i. vehicle functional checks
  - ii. vehicle fuelled
  - iii. customer data and documentation checks
  - iv. temporary absence covered
  - v. anticipated return time notified
  - vi. planned routes confirmed accessible
- c. The legal requirements that apply to test drives:
  - i. driving licence
  - ii. insurance
  - iii. trade plates
  - iv. fitness to drive
- d. Duty of care in relation to demonstration drives as defined by the employer:
  - i. health and safety risk assessment
  - ii. security risk assessment

**Trade plates**

- a. Dealership policy:
  - i. use
  - ii. storage
  - iii. security





<b>UNIT REF: VS11K</b>	<b>UNIT TITLE: KNOWLEDGE OF APPRAISING VEHICLES FOR PART EXCHANGE</b>
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<b>Level: 3</b>	<b>Route: Knowledge</b>	<b>Credit Value: 3</b>	<b>GLH: 20</b>
<b>Mapping: This unit is mapped to the IMI NOS VS11</b>			
<b>Rationale: This unit is about appraising the condition of vehicles and verifying vehicle identity, ownership and history to confirm that there are no vehicle ownership problems</b>			

<b>LEARNING OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Understand the purpose of used vehicle appraisal for part exchange	1.1 Define the difference between the used vehicle appraisal and the valuation after. 1.2 Describe the objective of the used vehicle appraisal
2. Understand how to appraise vehicles for part exchange	2.1 Describe the process of used vehicle appraisal 2.2 Identify the resources used in the appraisal 2.3 Explain how to verify vehicle identity, ownership and history. 2.4 Describe customer's expectations of the appraisal process 2.5 Explain the importance of customer involvement in the appraisal process.

<p><b>Content to Include:</b></p> <p>a. The difference between the used vehicle appraisal and the valuation after:</p> <ul style="list-style-type: none"> <li>i. purpose of the appraisal</li> <li>ii. reasons for the evaluation</li> </ul> <p>The objective of the used vehicle appraisal:</p> <ul style="list-style-type: none"> <li>i. ownership</li> <li>ii. history</li> <li>iii. informing the valuation process</li> <li>iv. check list for final hand over</li> </ul> <p><b>The process of used vehicle appraisal</b></p> <p><b>Inspect and record to include:</b></p> <p>a. Vehicle condition:</p> <ul style="list-style-type: none"> <li>i. exterior</li> <li>ii. interior</li> </ul> <p>b. Vehicle details:</p> <ul style="list-style-type: none"> <li>i. make, model, colour, trim etc.</li> <li>ii. vehicle identification number (VIN)</li> <li>iii. mileage</li> <li>iv. MOT certificate</li> <li>v. service history</li> <li>vi. road fund licence (expiry date)</li> <li>vii. fitted accessories</li> </ul>
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**Content to Include:**

- a. How to verify vehicle identity, ownership and history:
  - i. registration certificate (v5)
  - ii. first registration date
  - iii. specification, additions or changes
  - iv. ownership
  - v. number of owners
- b. Hire purchase investigation (HPI):
  - i. vehicle mileage declaration (vmd)
  - ii. vehicle mileage check (VMC)
- c. The customer's expectations of the appraisal process:
  - i. open sources of information influencing customers expectations
- d. The importance of customer involvement in the appraisal process:
  - i. validation of appraisal records
  - ii. opportunities to build rapport
  - iii. verbal affirmations of ownership and use



<b>UNIT REF: VS11S</b>	<b>UNIT TITLE: SKILLS IN APPRAISING VEHICLES FOR PART EXCHANGE</b>
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<b>Level: 3</b>	<b>Route: Skills</b>	<b>Credit Value: 2</b>	<b>GLH: 12</b>
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**Mapping:** This unit is mapped to the IMI NOS VS11

**Rationale:** This unit will help the learner develop the skills they need to appraise the condition of vehicles and verify vehicle identity, ownership and history to confirm that there are no vehicle ownership problems and to enable a valuation to be placed on them

<b>LEARNING OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Be able to appraise vehicles for part exchange	1.1 Conduct accurate static and dynamic vehicle appraisals. 1.2 Document accurate static and dynamic vehicle appraisals. 1.3 Present the appraisal to the manager for approval.
2. Be able to present vehicle appraisals for part exchange with the customer	2.1 Present the approved valuation to the customer in a way that maintains an effective working relationship. 2.2 Handle customer feedback effectively 2.3 Manage customer expectations. 2.4 Interact effectively with a customer during a part exchange appraisal. 2.5 Highlight positive values of competitors' products.



**EVIDENCE REQUIREMENTS**

<p>You must produce evidence of appraising the condition of vehicles and verifying identity, ownership and history to enable a valuation <b>on at least 3</b> separate occasions. The evidence must include details of the following:</p>	<p><b>EVIDENCE REFERENCE NO.</b></p>		
<p>Conducting and documenting accurate and dynamic vehicle appraisals</p>			
<p>Verifying vehicle identity</p>			
<p>Confirming ownership and history</p>			
<p>Interacting effectively with the customer during the appraisal</p>			
<p>Managing customer expectations</p>			
<p>Presenting the appraisal to the manager</p>			
<p>Presenting the price offer to the customer</p>			
<p>Your assessor must observe you appraising the condition of vehicles, verifying identity, ownership and history to enable a valuation and presenting a price offer <b>on at least 2</b> separate occasions</p>	<p><b>ASSESSOR OBSERVATION EVIDENCE REF. NO.</b></p>		

<p><b>ASSESSOR SIGNATURE:</b></p>	<p><b>PIN NO:</b></p>	<p><b>DATE:</b></p>
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<b>UNIT REF: VS12K</b>	<b>UNIT TITLE: KNOWLEDGE OF VALUING VEHICLES FOR PART EXCHANGE</b>
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<b>Level: 3</b>	<b>Route: Knowledge</b>	<b>Credit Value: 4</b>	<b>GLH: 40</b>
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**Mapping:** This unit is mapped to the IMI NOS VS12

**Rationale:** This unit will help the learner develop the knowledge and understanding they need to review the information presented by the appraisal and make judgments regarding; recondition costs, current demand and value of the part exchange, and the impact on retained profit from the related sales

<b>LEARNING OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Understand the purpose of used vehicle valuation for part exchange	1.1 Explain the value of the used vehicle in the sales process. 1.2 Describe the objective of the used vehicle valuation.
2. Understand how to value vehicles for part exchange	2.1 Describe the process of used vehicle valuation. 2.2 Identify the resources used in the valuation of used vehicles 2.3 Describe the factors that influence the vehicle value, both nationally and locally. 2.4 Explain how to highlight positive values of competitors' products.

<p><b>Content to Include:</b></p> <p><b>The value of the used vehicle in the sales process</b></p> <p>a. Benefits of the used vehicle purchase in the context of:</p> <ul style="list-style-type: none"> <li>i. new (newer) vehicle sales</li> <li>ii. used vehicle stock</li> <li>iii. margins</li> </ul> <p><b>Negative aspects of the used vehicle purchase in the context of:</b></p> <p>a. Retail sale:</p> <ul style="list-style-type: none"> <li>i. preparation costs</li> <li>ii. latent defects</li> </ul> <p>b. Trade sale:</p> <ul style="list-style-type: none"> <li>i. margins</li> <li>ii. time</li> <li>iii. storage</li> </ul> <p>c. The objective of the used vehicle valuation, to include:</p> <ul style="list-style-type: none"> <li>i. importance of accurate valuations and impact on dealership profitability</li> <li>ii. valuations as an aid to successful sales negotiations</li> <li>iii. information sources influencing customer expectations</li> </ul>
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**Content to Include:**

**The process of used vehicle valuation, to include:**

- a. financial operating parameters - variables aligned with new (newer) vehicle type and related margins:
  - i. reviewing evidence generated by the appraisal
  - ii. calculating refurbishment costs
  - iii. establishing ownership
  - iv. HPI checks
  - v. finance settlement calculations
  - vi. VAT calculations
- b. The resources used in the valuation of used vehicles, to include:
  - i. appraisal documentation
  - ii. electronic images
  - iii. dealer approved price guides
  - iv. franchise
  - v. cap
  - vi. glass's
  - vii. workshop estimates
  - viii. bodyshop estimates
  - ix. parts and accessories estimates
- a. The factors that influence the vehicle value, both nationally and locally, to include:
  - i. vehicle type and market trends
  - ii. vehicle history e.g. mileage, condition, warranty
  - iii. potential buyers and sales income from retail, trade, other
- b. How to highlight positive values of competitors' products, to include:
  - i. monitoring competitor activity and sales strategies
  - ii. SWOT analysis



<b>UNIT REF: VS12S</b>	<b>UNIT TITLE: SKILLS IN VALUING VEHICLES FOR PART EXCHANGE</b>
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<b>Level: 3</b>	<b>Route: Skills</b>	<b>Credit Value: 3</b>	<b>GLH: 15</b>
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**Mapping:** This unit is mapped to the IMI NOS VS12

**Rationale:** This unit will help the learner develop the skills they need to review the information presented by the appraisal and make judgments regarding; recondition costs, current demand and value of the part exchange, and the impact on retained profit from the related sales

<b>LEARNING OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Be able to value vehicles for part exchange	1.1 Access and interpret the latest dealer approved: <ul style="list-style-type: none"> <li>a. price</li> <li>b. guides</li> </ul> 1.2. Accurately estimate part exchange recondition costs 1.3. Calculate profit margins from related sales 1.4. Effectively present the valuation 1.5. Highlight positive values of competitors products

**EVIDENCE REQUIREMENTS**

You must produce evidence of valuing vehicles for part exchange on <b>at least 3</b> occasions. The evidence must include details of the following:	<b>EVIDENCE REFERENCE NO.</b>		
Information sources used to estimate current market value			
Appraisal information that influenced the valuation			
Reconditioning estimates			
Factors that influenced the balance between profitability and sales volume			
Customer’s response to the price offer			
Your assessor must observe you valuing vehicles for part exchange on <b>at least 2</b> occasions	<b>ASSESSOR OBSERVATION EVIDENCE REF. NO.</b>		

<b>ASSESSOR SIGNATURE:</b>	<b>PIN NO:</b>	<b>DATE:</b>
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<b>UNIT REF: VS13K</b>	<b>UNIT TITLE: KNOWLEDGE OF MANAGING CUSTOMER RELATIONSHIPS IN A VEHICLE SALES ENVIRONMENT</b>
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Level: 2	Route: Knowledge	Credit Value: 3	GLH: 20
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**Mapping:** This unit is mapped to the IMI NOS VS13

**Rationale:** This unit will help the learner develop the knowledge and understanding they need to use effective customer relationship management to create opportunities for referral and repeat business, to achieve short or long term success.

<b>LEARNING OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Understand how to manage customer relationships in a vehicle sales environment	1.1 Explain the potential long term value of the customer in relation to profit and unit goals for both the salesperson and the organisation.  1.2 Describe the methodology for customer relationship management including: <ul style="list-style-type: none"> <li>a. follow up</li> <li>b. problem solving</li> <li>c. referral business.</li> </ul> 1.3 Explain the relationship between structured customer relationship management and long-term success, in conjunction with the necessity for short-term goal setting.  1.4 Define the importance of effective communication with the customer at all times.





**Content to Include:**

**The potential long term value of the customer in relation to profit and unit goals for both the salesperson and the organisation**

- a. Organisational aims and objectives:
  - i. personal targets e.g. units and financial

**Franchise agreements and customer service standards**

- a. The methodology for customer relationship management including:
  - i. follow up
  - ii. problem solving
  - iii. referral business.
- b. The significance of maintaining accurate customer records:
  - i. including customer data base, contact logs and diaries
  - ii. customer care policies
  - iii. customer service feedback, e.g. monitoring and review systems
- c. Factors that lead to potential complaints and prevention measures
- d. Simple ways to recognise and investigate problems
- e. Internal and external support process for solving problems
- d. The relationship between structured customer relationship management and long-term success, in conjunction with the necessity for short-term goal setting:
  - i. the sales cycle blended with providing a positive customer service experience (from initial pre sale contact through to post sale activities)

**The importance of effective communication with the customer at all times**

**Pareto's principle**

- a. The significance of customer loyalty and opportunities that arise with regards to:
  - i. customer retention
  - ii. repeat business
  - iii. referrals
  - iv. networking
  - v. market intelligence
  - vi. business growth



<b>UNIT REF: VS14K</b>	<b>UNIT TITLE: KNOWLEDGE OF HANDOVER OF THE VEHICLE TO THE CUSTOMER</b>
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Level: 2	Route: Knowledge	Credit Value: 4	GLH: 25
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**Mapping:** This unit is mapped to the IMI NOS VS14

**Rationale:** This unit will help the learner develop the knowledge and understanding they need to make a successful handover of a vehicle to a customer, ensuring the effective communication with the customer from placing the order to the handover event

LEARNING OUTCOMES	ASSESSMENT CRITERIA
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Understand the impact and importance of handover in the sales process	1.1 Explain the importance of the handover to the overall sales process. 1.2 Identify at what point in the sales process the handover begins. 1.3 Explain the potential effect on the customer of the handover experience. 1.4 Describe the effect of handover on customer satisfaction index score.
2. Understand the opportunities provided by the handover process	2.1 Explain how to recognise the opportunity for repeat and referral business from the handover experience.
3. Know the documentation and timescales involved in a successful handover	3.1 Identify the required documentation and timescales involved in a successful handover event.



**Content to Include:**

- a. The importance of the handover to the overall sales process.
- b. Customer expectations from placing the order to the handover event
- c. Business impact of successful handovers
- d. The point in the sales process the handover begins

**Sales cycle in the context of preparation and handover**

- a. Sale:
  - i. breaking the ice and building rapport
  - ii. identifying needs through questioning
  - iii. presenting a sales proposal
  - iv. handling objections
  - v. negotiating agreement
  - vi. closing
- b. Post-sale:
  - i. processing the order
  - ii. communicating and building rapport
  - iii. delivery / hand over
  - iv. customer follow-up
  - v. after sales service
  - vi. gaining referrals and recommendations
  - vii. identifying repeat selling opportunities
  - viii. self analysis and seeking feedback

**Vehicle preparation to agreed specifications e.g. new vehicles, used vehicles**

- a. People involved, lead times and activities:
  - i. order
  - ii. delivery
  - iii. condition checks
  - iv. preparation e.g. workshop, bodyshop, valet, fuel, registration
- b. The potential effect on the customer of the handover experience
- c. Customer expectations during the handover event
- d. The effect of handover on customer satisfaction index score
- e. Index score systems
- f. Business impact of successful handovers
- g. The opportunity for repeat and referral business from the handover experience

**Sales cycle in the context of after sales**

- a. Communicating and maintaining rapport

**The required documentation and timescales involved in a successful handover event**

- a. Part exchange vehicle:
  - i. re-check process e.g. current condition and specifications
  - ii. documentation requirements
- b. New vehicle :
  - i. documentation requirements
  - ii. briefing and familiarisation process



<b>UNIT REF: VS15K</b>	<b>UNIT TITLE: KNOWLEDGE OF MEETING AND GREETING VEHICLE SALES CUSTOMERS</b>
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Level: 2	Route: Knowledge	Credit Value: 3	GLH: 20
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**Mapping:** This unit is mapped to the IMI NOS VS15

**Rationale:** This unit will help the learner develop the knowledge and understanding they need to use effective communication methods to offer a re-assuring, knowledgeable and confident platform for interaction and provide a positive first impression

LEARNING OUTCOMES	ASSESSMENT CRITERIA
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Understand the customer communication process	1.1 Explain how and why it is important to use effective communication methods with customers.  1.2 Explain the importance of verbal and non-verbal communication skills when dealing with customers.  1.3 Describe the different types of communication methods that can be used when dealing with customers.
2. Understand the importance of initial contact with the customer	2.1 Explain the value of a structured approach to making a first impression.  2.2 Describe the limited window of opportunity that is represented by a new customer enquiry.

**Content to Include:**

**How and why it is important to use effective communication methods with customers**

a. Purpose and nature of communications in the context of vehicle sales:

- i. opportunities to gain new business
- ii. customer retention
- iii. customer referrals
- iv. repeat business
- v. customer service index

**The importance of verbal and non-verbal communication skills when dealing with customers**

a. Benefits of an open minded and non judgmental approach to interacting with others:

- i. understanding personal style
- ii. understanding others' styles and how these may differ
- iii. adapting own style and interacting effectively to meet customer needs
- iv. the importance of recognising diversity in relation to age, disability, national origin, religion, sexual orientation, values, ethnic culture, education, lifestyle, beliefs, physical appearance, social class and economic status
- v. aspects of face-to-face communication, including appearance, impact, body language.
- vi. active listening and questioning skills
- vii. the stages in communication e.g. sender, encoding, transmission, decoding, receiver
- viii. possible barriers to communication and methods to overcome them



**Content to Include:**

**The different types of communication methods that can be used when dealing with customers**

- a. Range of communication methods and their use during the sales cycle, to include:
  - i. face-to-face discussion
  - ii. advertising
  - iii. mail shot
  - iv. letters
  - v. internet
  - vi. intranet
  - vii. email
  - viii. telephone
  - ix. voicemail
  - x. text

**Advantages and disadvantages of each method**

**Organisational policies regarding each method**

**The value of a structured approach to making a first impression**

- a. Blending the sales cycle with the communication process:
  - i. building rapport
  - ii. active listening
  - iii. questioning and qualifying
  - iv. anticipating and overcoming objections
  - v. exploring options
  - vi. seeking agreement
  - vii. taking action

**The limited window of opportunity that is represented by a new customer enquiry**

- a. Organisational aims and objectives, personal targets:
  - i. planning and scheduling activities around primary aims and objectives
  - ii. urgent / Important matrix
- b. Responding appropriately to meet customer needs



<b>UNIT REF:</b> VS15S	<b>UNIT TITLE:</b> SKILLS IN MEETING AND GREETING VEHICLE SALES CUSTOMERS
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<b>Level:</b>	<b>Route:</b> Skills	<b>Credit Value:</b>	<b>GLH:</b>
<b>Mapping:</b> This unit is mapped to the IMI NOS VS15			
<b>Rationale:</b> This unit will help the learner develop the skills they need to use effective communication methods to offer a re-assuring, knowledgeable and confident platform for interaction and provide a positive first impression			

<b>LEARNING OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Be able to qualify the selling opportunity	1.1 Maximise the opportunity by using appropriate communication methods.  1.2 Use a structured and professional approach to gathering critical information in transition to the qualification phase.  1.3 Gain early agreement from the prospective customer as a sound foundation to proceed.
2. Be able to engage the customer in the selling process	2.1 Identify key buying criteria as soon as possible.  2.2 Apply key buying criteria.  2.3 Offer a reassuring, knowledgeable and confident platform for interaction.  2.4 Use proven approach to early objection handling.  2.5 Eliminate all distraction where possible and provide undivided attention to the customer.  2.6 Appear interested in the customer throughout the contact.



**EVIDENCE REQUIREMENTS**

<p>You must produce evidence of using effective communication methods to offer a re-assuring, knowledgeable and confident platform for interaction and provide a positive first impression to the customer <b>on at least 3</b> separate occasions. The evidence must include details of the following:</p>	<p><b>EVIDENCE REFERENCE NO.</b></p>		
<p>Recognising customer's personal style and building rapport</p>			
<p>Attentively maintaining interest</p>			
<p>Active listening</p>			
<p>Questioning and qualifying</p>			
<p>Anticipating and overcoming objections</p>			
<p>Exploring options</p>			
<p>Presenting offers representing value for the organisation and customer</p>			
<p>Negotiating and seeking agreement</p>			
<p>Advancing the sales cycle during the interactions while creating a positive impression</p>			
<p>Your assessor must observe using effective communication methods to offer a re-assuring, knowledgeable and confident platform for interaction and providing a positive first impression to the customer <b>on at least 2</b> separate occasions</p>	<p><b>ASSESSOR OBSERVATION EVIDENCE REF. NO.</b></p>		

<p><b>ASSESSOR SIGNATURE:</b></p>	<p><b>PIN NO:</b></p>	<p><b>DATE:</b></p>
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<b>UNIT REF: VS02K</b>	<b>UNIT TITLE: KNOWLEDGE OF NEGOTIATING FLEET AND BUSINESS BUYER NEEDS</b>
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Level: 3	Route: Knowledge	Credit Value: 3	GLH: 17
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**Mapping:** This unit is mapped to the IMI NOS VS02

**Rationale:** This unit will help the learner develop the knowledge and understanding they need to understand the methods of acquisition available to a 'business buyer' within the automotive sector and meeting the business customer's need.

LEARNING OUTCOMES	ASSESSMENT CRITERIA
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Understand the importance and value of the business market for vehicle sales	1.1. Explain the longer term value and potential of a business buyer to the organisation.  1.2 Explain the importance of the business market to the organisation and within the motor industry as a whole.  1.3 Describe the group and brand expectation of profit and volume in the business market
2. Understand how to meet business vehicle buyers' needs	2.1. Explain why a business driver needs a longer test drive than a retail buyer  2.2 Summarise the tax implications for a business buyer  2.3 Explain the importance of providing accurate and appropriate advice in relation to the tax implications of vehicle purchase  2.4 Summarise the unique selling points of the brand and dealer group to the business community  2.5 Describe the funding options available to the business buyer
3. Understand how to adapt the sales process to individual business buyers	3.1 Explain the reasoning and methodology applicable to the sales process bespoke to a business client.



**Content to Include:**

- a. The longer term value and potential of a business buyer to the organisation to include:
  - i. significance of contract wins
  - ii. organisation and brand endorsements
  - iii. referrals
  - iv. repeat business
  - v. after sales and service absorption
- b. The importance of the business market to the organisation and within the motor industry as a whole to include:
  - i. market penetration
  - ii. volume and statistics
- c. The group and brand expectation of profit and volume in the business market to include:
  - i. market profile
  - ii. brand image
  - iii. targets
  - iv. manufacturers bonus
- d. Why a business driver needs a longer test drive than a retail buyer
- e. Identifying business aims and objectives
- f. Typical company structures to include:
  - i. small, medium, large
  - ii. -the decision making unit (dmu)
  - iii. gatekeeper
  - iv. influencer
  - v. decider
  - vi. user
  - vii. buyer

**Summarise the tax implications for a business buyer**

- a. Basic Company Accounting Systems in the context of vehicles to include:
  - i. assets and depreciation
  - ii. operating costs
  - iii. residual values
  - iv. corporation tax
  - v. vat registration
  - vi. vat payments and returns
  - vii. fuel emissions and tax bands

**The importance of providing accurate and appropriate advice in relation to the tax implications of vehicle purchase to include:**

- a. The qualities of the salesperson:
  - i. knowledgeable
  - ii. honest
  - iii. helpful
  - iv. reliable
  - v. motivated
- b. The unique selling points of the brand and dealer group to the business community to include:
  - i. brand features and benefits
  - ii. dealership networks and after sales services
- c. The funding options available to the business buyer to include:
- d. Product range



**Content to Include:**

e. Leasing:

- i. contract hire
- ii. purchase
- iii. company cars
- iv. car allowance schemes
- v. finance
- vi. insurance
- vii. warranty

f. Product features and benefits:

- i. mileage
- ii. mileage penalties
- iii. after sales
- iv. disposal
- v. FSA regulations

**The reasoning and methodology applicable to the sales process bespoke to a business client.**

a. The sales cycle in the context of business to business selling to include:

b. Pre-sale:

- i. prospecting
- ii. targeting customers
- iii. making appointments
- iv. diary planning
- v. researching individual customers
- vi. personal preparation
- vii. setting objectives for the sales call

c. Sale:

- i. breaking the ice and building rapport
- ii. identifying needs through questioning
- iii. presenting a sales proposal
- iv. handling objections
- v. negotiating agreement
- vi. closing

d. Post-sale:

- i. processing the order
- ii. delivery / hand over
- iii. customer follow-up
- iv. after sales service
- v. gaining referrals and recommendations
- vi. identifying repeat selling opportunities
- vii. self analysis and seeking feedback

e. Competitor activity in the context of fleet and business sales

- i. SWOT analysis



<b>UNIT REF: VS10K</b>	<b>UNIT TITLE: KNOWLEDGE OF PROMOTING FINANCE AND INSURANCE FOR VEHICLE SALES</b>
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Level: 3	Route: Knowledge	Credit Value: 5	GLH: 30
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**Mapping:** This unit is mapped to the IMI NOS VS10

**Rationale:** This unit will help the learner develop the knowledge and understanding they need to secure the necessary finance and insurance in order to enable them to purchase vehicles. It includes identifying the customer’s finance and insurance needs before presenting possible options

LEARNING OUTCOMES	ASSESSMENT CRITERIA
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Understand how to promote finance and insurance for vehicle sales	1.1 Compare the different finance and insurance products available.  1.2 Define the criteria used to apply the features and benefits to each individual customer need.  1.3 Explain the principles and requirements of treating a customer fairly.  1.4 Describe when and where to refer a customer for more specialised information and guidance.
2. Understand relevant legislation, regulation, codes of practice and guidelines relating to finance and insurance for vehicle sales	2.1 Summarise the current relevant legislation, regulation, codes of practice and guidelines relating to finance and insurance for vehicle sales.

**Content to Include:**

**The different finance and insurance products available**

- a. Credit facilities:
  - i. cost plus interest
  - ii. hire purchase
  - iii. credit sale
- b. Personal contract plans
- c. Manufacturers’ terms
- d. Leasing
- e. Contract hire (with option to buy)
- f. GAP schemes
- g. Other options:
  - i. warranties (mandatory and extended)
  - ii. insurance for parts and labour.

a. The criteria used to apply the features and benefits to each individual customer need, to include:

- i. the financial services authority (FSA) regulations
- ii. accreditation requirements
- iii. proposals
- iv. quotations

b. The principles and requirements of treating a customer fairly, to include:

- i. FSA standards
- ii. trading standards
- iii. codes of practice
- iv. personal standards



**Content to Include:**

- c. The qualities of the salesperson:
  - i. knowledgeable
  - ii. honest
  - iii. helpful
  - iv. reliable
  - v. motivated

**When and where to refer a customer for more specialised information and guidance**

**The role of the business or finance manager**

- a. The current relevant legislation, regulation, codes of practice and guidelines relating to finance and insurance for vehicle sales:
  - i. financial services act
  - ii. consumer protection act
  - iii. terms and conditions of an order