



**INSTITUTE
OF THE MOTOR
INDUSTRY**

IMI QUALIFICATION



Assessment Criteria for

IMI Level 3 Certificate in Customer Service for the Automotive Industry

I.D: 501/1254/5

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

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 Certificate in Customer Service for the Automotive Industry

To achieve this qualification you must complete all the mandatory units.

Group A: Mandatory Units

Unit Ref:	Unit Title & I.D. Number	GLH	Unit Level	Credit Value
CSF1	Demonstrate a Clear Understanding of Customer Service Within the Automotive Industry (R/602/1187)	40	2	4
CSI2	Understand how to Organise the Promotion of Services or Products to Customers in the Automotive Industry (F/602/1203)	30	3	3
CSD2	Understand Customer Service to Improve Service Delivery Within the Automotive Industry (L/602/1205)	40	3	4
CSD3	Understand how to Use Dealer Management Systems (DMS) Relevant to the Automotive Industry (T/602/1196)	20	2	2
CSD4	Understand how to Plan, Organise and Control Customer Service Operations in the Automotive Industry (T/602/2008)	40	3	4
CSHP2	Understand how to Monitor and Resolve Customer Service Problems in the Automotive Industry (H/602/1209)	30	3	3
CSDI2	Understand how to Promote Continuous Improvement in Customer Service Within the Automotive Industry (Y602/1210)	40	3	4
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Learner Name.....

UNIT REF: CSF1	UNIT TITLE: DEMONSTRATE A CLEAR UNDERSTANDING OF CUSTOMER SERVICE WITHIN THE AUTOMOTIVE INDUSTRY
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Level: 2	Route: Customer Service	Credit Value: 4	GLH: 40
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Rationale: This unit is about understanding the general standards of practice required to meet customer expectations and needs within the Automotive industry. It covers both internal and external customers and addresses the issue of recognising and understanding the importance of working within the limits of authority, the rules of an organisation and the law.

LEARNING OUTCOMES	ASSESSMENT CRITERIA	Evidence Ref No.	Date
The Learner will:	The Learner can:		
1. Understand the importance of customer service and the role it plays in operating a successful Automotive organisation	1.1. Explain how customer service plays a vital role in operating a successful organisation 1.2. Identify main customer types and how to deal with their needs 1.3. Describe the difference between poor, reasonable and excellent customer service 1.4. Describe the factors that influence customer expectations 1.5. Explain the importance of dealing with internal colleagues in a professional manner and the impact this has on effective teamwork 1.6. Explain how customer service can provide a competitive advantage for a commercial organisation 1.7. Explain the importance for an organisation to balance the needs of its customers against its own limitations		
2. Understand the legislation and external regulation that may impact on customer service	2.1. List the relevant legislation and external regulation that affects the way to deliver customer service 2.2. Explain how to balance the requirements of legislation and external regulation with the needs of the organisation when implementing customer service: <ul style="list-style-type: none"> a. consumer protection b. data protection c. equality, diversity and inclusion d. health, safety and security e. environmental 		



<p>3. Understand how to present a positive and professional image of themselves to customers</p>	<p>3.1. Describe how personal standards including appearance and behaviour affects customers perception of customer service</p> <p>3.2. State how to recognise customer needs and how to respond appropriately to those needs</p> <p>3.3. Explain how to recognise when a customer is angry or confused and how to deal with such customers</p> <p>3.4. Explain why it is important to respond within suitable timelines in responding to customer requests for information and questions</p>		
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Learner Name.....

UNIT REF: CSI2	UNIT TITLE: UNDERSTAND HOW TO ORGANISE THE PROMOTION OF PRODUCTS OR SERVICES TO CUSTOMERS IN THE AUTOMOTIVE INDUSTRY
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Level: 3	Route: Customer Service	Credit Value: 3	GLH: 30
Rationale: This unit is about understanding how to provide helpful advice and guidance that achieves a balance between customer and organisational needs. It also involves understanding the reasons for promoting the benefits of products and services.			

LEARNING OUTCOMES	ASSESSMENT CRITERIA	Evidence Ref No.	Date
The Learner will:	The Learner can:		
1. Understand how to organise and promote products or services in the automotive industry	1.1. Explain the importance of promoting the use of products or services to customers 1.2. State the main factors that influence customers to use an organisation's products or services 1.3. Describe how to provide appropriate and balanced information to customers about products or services		
2. Understand how to offer products or services to customers in the automotive industry	2.1. Explain how to offer products or services to customers which are of use and have been requested 2.2. Explain how to promote products or services which will suit customers 2.3. Explain the importance of helping customers to access products or services, which are supplied outside of an organisation		
3. Understand how to support and promote the use of additional products or services	3.1. Describe how customers can be encouraged to ask about additional products or services 3.2. Describe how to implement procedures to ensure that customers interested in additional products or services are dealt with promptly and efficiently 3.3. Explain how to share information with others regarding the best approach to take when offering additional products or services to customers		
4. Understand how to monitor the promotion of additional products or services	4.1. Explain why it is important to monitor the methods used in promoting additional products or services to customers in the automotive industry 4.2. Explain how to share information with others on the effectiveness of promoting additional products or services 4.3. Explain why it is important to act upon the findings, should there be a need to change how additional products or services are offered in the future		



Learner Name.....

UNIT REF: CSD2	UNIT TITLE: UNDERSTAND CUSTOMER SERVICE TO IMPROVE SERVICE DELIVERY WITHIN THE AUTOMOTIVE INDUSTRY
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Level: 3	Route: Customer Service	Credit Value: 4	GLH: 40
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Rationale: This unit is about understanding the general standards of practice required to meet customer expectations and needs in the automotive industry. It covers both external and internal customers, and the factors that limit or constrain service delivery. It covers the contribution individuals can make and the internal and external factors that have a bearing on how to improve service delivery.

LEARNING OUTCOMES	ASSESSMENT CRITERIA	Evidence Ref No.	Date
The Learner will:	The Learner can:		
1. Understand customer expectations and the factors that influence them	1.1. Describe a typical automotive organisation and the types of customer it serves 1.2. Explain the key influences on a customer's choice of organisation 1.3. Explain how customer needs and expectations can be met in terms of: a. convenience b. trust c. value for money 1.4. Outline the responsibilities and contribution a typical customer service role can make to the customer service experience 1.5. Define an internal customer chain 1.6. Outline how a customer may differentiate between services offered by competitor organisations		
2. Understand the service standards that apply and their role in customer service delivery	2.1. Summarise the service standards that apply in the automotive industry 2.2. Explain the personal standards required when representing an organisation		
3. Understand the importance of using feedback in measuring customer satisfaction	3.1. Explain how an organisations could measure customer satisfaction 3.2. Explain the importance of using customer feedback to improve service delivery 3.3. Critically compare how feedback could be collected by the following means: a. formal b. informal c. solicited d. unsolicited 3.4. Explain the importance of why an organisation should benchmark its service to that offered by other automotive organisations		
4. Understand the internal factors that affect the quality of	4.1. Describe the equipment and facilities required in order to deliver quality		



customer service	customer service 4.2. Explain the importance of marketing messages and the role they play in the quality of customer service 4.3. Define the terms profitability, productivity and cost efficiency 4.4. Define the term supportive supervision and give examples of when this may be required 4.5. Explain the importance of working within cost and budgetary constraints when delivering quality customer service		
5. Understand the external factors that influence the quality of customer service	5.1. Explain the types of manufacturer support available to an automotive organisation 5.2. Analyse socio-economic trends which may impact upon the quality of customer service		



Learner Name.....

UNIT REF: CSD3	UNIT TITLE: UNDERSTAND HOW TO USE DEALER MANAGEMENT SYSTEMS (DMS) RELEVANT TO THE AUTOMOTIVE INDUSTRY
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Level: 3	Route: Customer Service	Credit Value: 2	GLH: 20
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Rationale: This unit is about understanding how to deliver customer service using various Dealer Management Systems (DMS) in the automotive industry. Whilst not an exhaustive list, typical examples of DMS include Autoline, Autoview, Dragon 2000, Gemini, Kalamazoo and Kerridge. The learner needs to understand how to navigate systems promptly and directly following recommended routes and functionality. In addition, learners need to know how to produce or facilitate the production of standard and bespoke management reports

LEARNING OUTCOMES	ASSESSMENT CRITERIA	Evidence Ref No	Date
The Learner will:	The Learner can:		
1. Understand how to deal with customers using DMS relevant to the automotive industry.	1.1. Describe the key operating features of automotive DMS 1.2. Describe access and sign on routines 1.3. Explain the architecture and geography of the DMS 1.4. Outline the different screen or menu routes that can be followed to meet customer requirements 1.5. Explain how to locate sources of support for the DMS including manuals, help screens and help lines 1.6. Explain how to use search or other enquiry facilities when dealing with customers 1.7. State the importance of avoiding jargon and system terminology in communication with customers 1.8. Explain how to deal with error messages 1.9. Explain how to locate referral points and sources of information in order to meet customer needs 1.10 Explain how to communicate with customers in a language and using appropriate terms relating to DMS		



<p>2. Understand how to deliver customer service using DMS relevant to the automotive industry.</p>	<p>2.1. Explain how to use search or other specialist functions within the software to respond to customer requests</p> <p>2.2. Describe how to navigate the customer service site to ensure they can access those areas appropriate to the customers' needs</p> <p>2.3. Explain the importance of being familiar with the key points of the automotive software manual</p> <p>2.4. Describe the required condition of a work area in order to deliver customer service using DMS</p> <p>2.5. Describe how to enter and amend new records</p> <p>2.6. Describe the procedure for producing standard and bespoke management reports</p> <p>2.7. Describe the errors that could occur when using DMS and the ways to resolve them</p>		
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Learner Name.....

UNIT REF: CSD4	UNIT TITLE: UNDERSTAND HOW TO PLAN, ORGANISE AND CONTROL CUSTOMER SERVICE OPERATIONS IN THE AUTOMOTIVE INDUSTRY
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Level: 3	Route: Customer Service	Credit Value: 4	GLH: 40
<p>Rationale: This unit is about understanding how to plan, organise and control the customer service operations in the automotive industry. It is envisaged that at this level, the learner will understand the importance of delivering effective customer service and know how to suggest improvements to customer service operations. This requires the learner to understand the importance of careful planning and organisation, followed by the close monitoring and control of customer service operations.</p>			

LEARNING OUTCOMES	ASSESSMENT CRITERIA	Evidence Ref No.	Date
The Learner will:	The Learner can:		
1. Understand how to plan customer service operations	1.1. Describe the importance of analysing customer expectations and outline how the service offer could be designed to meet those expectations 1.2. Explain how to develop specific plans that will ensure the effective delivery of customer service operations 1.3. Describe how to plan for contingencies, assess their risks and develop effective plans to deal with them 1.4. Explain the importance of monitoring and evaluating customer service operations		
2. Understand how to supervise customer service operations	2.1. Explain how to negotiate the availability of people and other resources required to implement customer service delivery plans 2.2. Explain why there is a need to develop specific, measurable and realistic targets for those involved in delivering customer service 2.3. Explain the importance of utilising resources effectively 2.4. Explain the importance of delivering effective briefings to staff on objectives and targets 2.5. Explain how to collect and analyse feedback from customers and staff on customer service operations 2.6. Explain how feedback would evaluate the effectiveness of how outcomes and processes have been achieved 2.7. Describe how to modify plans for customer service operations in the light of the feedback from the evaluation		



<p>3. Understand how to make improvements to customer service operations</p>	<p>3.1. Describe how to collect information on the current nature of the operations</p> <p>3.2. Explain the importance of evaluating possible solutions against customer expectations and organisational needs</p> <p>3.3. Outline how to select and implement a solution which will cause the minimum amount of disruption to customers</p> <p>3.4. Explain why it is important to monitor the implementation and success of the proposed solution</p>		
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Learner Name.....

UNIT REF: CSHP2	UNIT TITLE: UNDERSTAND HOW TO MONITOR AND RESOLVE CUSTOMER SERVICE PROBLEMS IN THE MOTOR INDUSTRY
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Level: 3	Route: Customer Service	Credit Value: 3	GLH: 30
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Rationale: This unit is about understanding how to respond to customer queries and resolving problems specific to those working in the Automotive industry. It focuses on the importance of a prompt response and the need to work closely with colleagues to resolve problems and avoid their reoccurrence. It requires the learner to understand when to use their initiative to determine the cause of problems and to investigate ways to resolve commonly occurring problems.

LEARNING OUTCOMES	ASSESSMENT CRITERIA	Evidence Ref No.	Date
The Learner will:	The Learner can:		
1. Understand how to resolve immediate customer service problems	1.1. Explain how they would solve service problems which are within areas of authority 1.2. Describe how to work with others to resolve customer service problems 1.3. Describe how to check with customers in terms of them being satisfied with the actions being taken 1.4. Describe how to resolve problems with service systems and procedures that might affect customers before they become aware of them 1.5. Explain why it is important to use their own initiative to resolve customer service problems and know when to seek the advice of others to resolve specific problems		
2. Understand how repeated customer service problems can affect the organisation	2.1. Explain the importance of investigating the reasons for commonly occurring problems and how best to deal with them 2.2. Explain how to work with others to select the best option for resolving repeating customer service problem 2.3. Explain how to balance customer service expectations with the needs of the organisation		



<p>3. Understand when to take action to avoid the repetition of customer service problems and suggest options for resolving them</p>	<p>3.1. Explain the importance of following organisational procedures and systems when dealing with customer service problems</p> <p>3.2. Describe how to propose solutions to prevent the reoccurrence of repeated customer service problems</p> <p>3.3. Explain why it is important to obtain the approval of managers/colleagues to change organisational guidelines to prevent problems being repeated</p> <p>3.4. Explain how to implement an agreed upon solution</p>		
<p>4. Understand how to monitor and resolve customer service problems</p>	<p>4.1. Describe how to monitor the outcome of the implemented solution</p> <p>4.2. Explain how the successful resolution of customer service problems contributes to customer loyalty with the external customer and improved working relationships</p> <p>4.3. Explain the importance of negotiating with and reassuring customers while their problems are being resolved</p> <p>4.4. Outline the importance of evaluating the approach taken to resolve customer service problems</p>		



Learner Name.....

UNIT REF: CSDI2	UNIT TITLE: UNDERSTAND HOW TO PROMOTE CONTINUOUS IMPROVEMENT IN CUSTOMER SERVICE WITHIN THE AUTOMOTIVE INDUSTRY
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Level: 3	Route: Customer Service	Credit Value: 4	GLH: 40
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Rationale: This unit is about understanding the importance of encouraging continuous improvement in service provision within the Automotive industry by adopting best practice and addressing issues that detract from service excellence. It focuses on the development of workable solutions and the learners' personal knowledge and skills.

LEARNING OUTCOMES	ASSESSMENT CRITERIA	Evidence Ref No.	Date
The Learner will:	The Learner can:		
1. Understand how to plan improvements in customer service based on customer feedback	1.1. Describe how to gather feedback from customers that will help to identify opportunities for customer service improvement 1.2. Explain why it is important to analyse and interpret feedback to identify opportunities for customer service improvements and propose changes 1.3. Explain how to discuss with others the potential effects of proposed changes on customers 1.4. Identify how and when to negotiate changes in customer service systems and improvements		
2. Understand how to implement changes in customer service	2.1. Explain how to organise and implement authorised changes 2.2. Explain the importance of informing those within and outside an organisation of the changes being made and the reasons for them 2.3. State the importance of monitoring early reactions to change		
3. Understand how to review changes to promote continuous improvement in the Automotive industry	3.1. Explain the importance of promoting continuous improvement to customer service in the automotive industry 3.2. Explain how to analyse and interpret feedback and how to share the findings on the effects of change with others 3.3. Explain how to present findings to those with sufficient authority to implement the changes		
4. Understand how to prepare and present a business case highlighting the need for change	4.1. Outline how to prepare an effective business case highlighting the need for change 4.2. Explain how to present an effective business case highlighting the need for change		