



INSTITUTE  
OF THE MOTOR  
INDUSTRY

IMI QUALIFICATION



# Assessment Record for

## IMI Level 3 Diploma in Vehicle Fitting Supervisory Competence

I.D: 600/0253/0

---

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

*For assessor use only: Teaching Programmes and 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.

© 2015 IMI

All rights reserved. No part of this publication may be reproduced, stored in retrieval system, or transmitted, in any form or by any means, electronic, mechanical, photocopying, recording or otherwise, without the prior written permission of IMI

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:	

<b>Please complete as appropriate:</b>	
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 Fitting Supervisory Competence

This qualification consists of 4 Mandatory Units, 7 Mandatory Specialist Units and 4 Optional Units.

All units are either Competency (C), Skills (S) or Knowledge (K) Units. The C, K or S units are combined to form a topic 'set'

In order to pass the qualification, learners must achieve a minimum of 57 credits from the following groups:

**Group A:** 17 credits from the Mandatory Units.

**Group B:** 30 credits from the Mandatory Specialist Units

**Group C:** 10 credits from the Optional Units

A minimum of 45 credits must be achieved at Level 3 or above

TQT= 570

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
G6	G6C - Competency in Making Learning Possible Through Demonstrations and Instructions (Y/601/6380)	40	3	5
	G6K - Knowledge of How to Make Learning Possible Through Demonstrations and Instructions (T/601/6242)	45	3	5
VP14	VP14C - Competency in Monitoring And Solving Customer Service Problems Within A Vehicle Parts Environment (R/502/6069)	25	3	3
	VP14K - Knowledge of Monitoring And Solving Customer Service Problems Within A Vehicle Parts (Y/502/6087)	30	3	4

**Group B: Mandatory Specialist Units**

Set Ref:	Unit Ref, Unit Title & I.D. Number	GLH	Unit Level	Credit Value
<b>E.12</b>	E.12 - Plan, monitor and adjust staffing levels and schedules in a retail environment (H/500/5193)	63	3	11
<b>VP04</b>	VP04C - Competency in Receiving and Storing Motor Vehicle Parts (K/502/6059)	20	2	3
	VP04K - Knowledge of Receiving and Storing Motor Vehicle Parts (M/502/6077)	24	2	3
<b>VP08</b>	VP08C - Competency in Processing Payment Transactions Within A Vehicle Parts Environment (M/502/6063)	15	2	3
	VP08K - Knowledge of Processing Payment Transactions Within A Vehicle Parts Environment (T/502/6081)	25	2	3
<b>VP16</b>	VP16C - Competency in Selling Motor Vehicle Parts to Customers (L/502/6071)	20	3	3
	VP16K - Knowledge of Selling Motor Vehicle Parts to Customers (H/502/6089)	30	3	4

**GROUP C: Optional Units**

Set Ref:	Unit Ref, Unit Title & I.D. Number	GLH	Unit Level	Credit Value
<b>G8</b>	G8C - Competency in Identifying and Agreeing Motor Vehicle Customer Service Needs (K/601/6383)	40	3	5
	G8K - Knowledge of How to Identify and Agree Motor Vehicle Customer Service Needs (R/601/6247)	45	3	5
<b>G14</b>	G14C - Competency in Monitoring Procedures to Control Risks to Health and Safety in the Automotive Sector (F/502/6486)	40	3	5
	G14K - Knowledge in Monitoring Procedures to Control Risk to Health and Safety (T/502/6484)	40	3	5



Learner Name: .....

<b>UNIT REF: G6C</b>	<b>UNIT TITLE: COMPETENCY IN MAKING LEARNING POSSIBLE THROUGH DEMONSTRATIONS AND INSTRUCTION</b>
----------------------	--

Level: 3	Route: Competence	Credit Value: 5	GLH: 40
----------	-------------------	-----------------	---------

**Mapping:** This unit is mapped to the IMI NOS unit G6

**Rationale:** This unit will help the learner to develop competency in order 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	Ref No	Date
The Learner will:	The Learner can:		
1. Be able to demonstrate skills and methods to learners	1.1. Perform demonstrations based on an analysis of the skills needed and the order in which they must be learned  1.2. Perform demonstrations that are accurate and realistic  1.3. Perform structured demonstrations so that the learner can get the most out of it  1.4. Perform demonstrations whilst encouraging learners to ask questions and get explanation at appropriate stages in the demonstration  1.5. Provide positive feedback to learners whilst they are being given the opportunity to practise the skills that have been demonstrated  1.6. Perform additional demonstrations of skills being taught to reinforce learning  1.7. Perform demonstrations in a safe environment which also allows learners to see clearly  1.8. Respond to the needs of the learners during demonstrations  1.9. Reduce distractions and disruptions as much as possible		
2. Be able to instruct learners	2.1. Implement instruction which is matched to the needs of learners  2.2. Use identified learning outcomes which can be achieved through instruction  2.3. Perform instruction, ensuring that the manner, level and speed of the instruction encourages learners to take part  2.4. Perform instruction whilst regularly checking that the learners understand and adapt instruction as appropriate  2.5. Give learners positive feedback on the learning experience and the outcomes achieved  2.6. Carry out a review with the learners to identify anything that prevented learning and adapt instruction as appropriate		



## EVIDENCE REQUIREMENTS

1. <b>You must</b> provide at least <b>1 record</b> of an activity which has been demonstrated.	
2. <b>You must</b> provide records of at least <b>2 observations</b> , <b>1</b> of which <b>must be</b> by your assessor, which cover at least <b>1 demonstration</b> and <b>1 instruction or a combination of both</b> .	
3. It is expected that the <b>records</b> must include evidence to show how you:	
<ul style="list-style-type: none"> <li>decided on the sequence of the demonstration</li> </ul>	<ul style="list-style-type: none"> <li>identified which learning outcomes were achieved</li> </ul>
<ul style="list-style-type: none"> <li>ensured that the demonstration was accurate and realistic</li> </ul>	<ul style="list-style-type: none"> <li>ensured a safe environment for the demonstration and allowed all learners to see the demonstration clearly</li> </ul>
4. In preparing the record you should consider:	
<ul style="list-style-type: none"> <li>which types of learning are best achieved and supported through demonstrations</li> </ul>	<ul style="list-style-type: none"> <li>how to choose and prepare appropriate materials, including technology based materials.</li> </ul>
<ul style="list-style-type: none"> <li>how to choose between instruction and demonstration as learning methods</li> </ul>	<ul style="list-style-type: none"> <li>which types of learning are best achieved through instruction</li> </ul>
<ul style="list-style-type: none"> <li>how to identify individual learning needs</li> </ul>	<ul style="list-style-type: none"> <li>how to make sure everybody acts in line with health, safety and environmental protection legislation and best practice</li> </ul>
<ul style="list-style-type: none"> <li>which factors are likely to prevent learning and how to overcome them</li> </ul>	<ul style="list-style-type: none"> <li>how to analyse developments in learning and new ways of delivery, including technology based learning</li> </ul>
5. It is also expected that evidence from your observations <b>will show</b> how you:	
<ul style="list-style-type: none"> <li>structured the demonstration so that the learner got the most out of it</li> </ul>	<ul style="list-style-type: none"> <li>reduced distractions and disruptions as much as possible</li> </ul>
<ul style="list-style-type: none"> <li>encouraged learners to ask questions and get explanations at appropriate stages in the demonstration</li> </ul>	<ul style="list-style-type: none"> <li>matched instruction to the needs of learners</li> </ul>
<ul style="list-style-type: none"> <li>gave learners the opportunities to practice the skill being demonstrated</li> </ul>	<ul style="list-style-type: none"> <li>ensured that the manner, level and speed of the instruction encourages learners to take part</li> </ul>
<ul style="list-style-type: none"> <li>gave learners positive feedback</li> </ul>	<ul style="list-style-type: none"> <li>regularly check that learners understand and adapt instruction as appropriate</li> </ul>
<ul style="list-style-type: none"> <li>reinforced learning by repeating demonstration</li> </ul>	<ul style="list-style-type: none"> <li>gave learners positive feedback on the learning experience and the outcome achieved</li> </ul>
<ul style="list-style-type: none"> <li>responded to the needs of learners during the demonstration</li> </ul>	<ul style="list-style-type: none"> <li>identified anything that prevented learning and reviewed this with the learner</li> </ul>

<b>ASSESSOR SIGNATURE:</b>	<b>PIN NO:</b>	<b>DATE:</b>
----------------------------	----------------	--------------



<b>UNIT REF: G6K</b>	<b>UNIT TITLE: KNOWLEDGE OF HOW TO MAKE LEARNING POSSIBLE THROUGH DEMONSTRATIONS AND INSTRUCTION</b>
----------------------	--

Level: 3	Route: Knowledge	Credit Value: 5	GLH: 45
----------	------------------	-----------------	---------

**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.



Learner Name: .....

<b>UNIT REF: VP14C</b>	<b>UNIT TITLE: COMPETENCY IN MONITORING AND SOLVING CUSTOMER SERVICE PROBLEMS WITHIN A VEHICLE PARTS ENVIRONMENT</b>
------------------------	--

Level: 3	Route: Competence	Credit Value: 3	GLH: 25
----------	-------------------	-----------------	---------

**Mapping:** This unit is mapped to the IMI NOS VP14

**Rationale:** This unit requires the learner to demonstrate competence in solving immediate customer service problems effectively and about changing systems to avoid repeated customer service problems within vehicle parts operations

LEARNING OUTCOMES	ASSESSMENT CRITERIA	Ref No	Date
The Learner will:	The Learner can:		
1. Be able to solve immediate customer service problems	1.1 Respond positively to customers' problems according to organisational guidelines. 1.2 Solve customer problems when it is within own area of authority. 1.3 Work with others when necessary to solve customer's problems 1.4 Keep customers informed of the action being taken. 1.5 Confirm with customers that they are satisfied with the action taken. 1.6 Solve problems within service systems and procedures which might affect customers before they come aware of them. 1.7 Inform the relevant person and colleagues of the steps taken to solve specific problems.		
2. Be able to identify repeat customer service problems and options to solve them	2.1 Work individually or with colleagues to identify repeated customer service problems. 2.2 Identify the options for dealing with repeated problems and consider the advantages and disadvantages of each option. 2.3 Work with others to determine an agreed way forward for solving repeated problems. 2.4 Select the best option for customers and the organisation.		
3. Be able to take action to avoid repeat customer service problems	3.1 Negotiate with the relevant person changes to customer service systems and procedures that will reduce the chance of problems being repeated. 3.2 Implement the solution agreed with relevant colleagues. 3.3 Keep customers informed in a positive and clear manner of steps being taken to solve any service problems. 3.4 Monitor the solutions that have been implemented and make any suitable changes to ensure that no further problems occur. 3.5 Action changes to customer service systems and procedures brought in by the organisation.		



## EVIDENCE REQUIREMENTS

1. <b>You must</b> produce evidence of solving immediate customer service problems on <b>at least 2 separate</b> occasions	Evidence Ref:	
2. <b>You must</b> produce evidence of identifying repeated customer service problems and options for solving them on <b>at least 1 occasion</b>	Evidence Ref:	
3. <b>You must</b> produce evidence of taking action to avoid the repetition of customer service problems on <b>at least 1 occasion</b>	Evidence Ref:	
4. <b>You must</b> be observed monitoring and solving customer service problems on <b>at least 2 separate</b> occasions	Observation Ref:	
Evidence from simulated activities is <b>not</b> acceptable for this unit		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
---------------------	---------	-------



<b>UNIT REF: VP14K</b>	<b>UNIT TITLE: KNOWLEDGE OF MONITORING AND SOLVING CUSTOMER SERVICE PROBLEMS WITHIN A VEHICLE PARTS ENVIRONMENT</b>
------------------------	---

Level: 3	Route: Knowledge	Credit Value: 4	GLH: 30
----------	------------------	-----------------	---------

**Mapping:** This unit is mapped to the IMI NOS VP14

**Rationale:** This unit will help the learner develop the knowledge and understanding they need for solving immediate customer service problems effectively and about changing systems to avoid repeated customer service problems within vehicle parts operations

LEARNING OUTCOMES	ASSESSMENT CRITERIA
<p><b>The Learner will:</b></p> <p>1. Understand the legal requirements, regulations and codes of practice relevant to vehicle parts customer service</p>	<p><b>The Learner can:</b></p> <p>1.1. Summarise the relevant legal and regulatory requirements that affect the way products and services can be delivered to customers, including:</p> <ul style="list-style-type: none"> <li>a. health and safety</li> <li>b. data protection</li> <li>c. equal opportunities</li> <li>d. disability discrimination</li> </ul> <p>1.2 Summarise the relevant industry, organisational and professional codes of practice and ethical standards that affect the way the products or services can be delivered to customers</p> <p>1.3 Explain what the customers' rights are and how these rights affect customer service when the customer has a problem or returned parts for credit</p>
<p>2. Understand the organisational context for working with vehicle parts customers</p>	<p>2.1. Describe any contractual agreements that customers may have with the organisation with regards to payment for parts</p> <p>2.2 Identify the products or services offered by the organisation relevant to own customer service role.</p> <p>2.3 Explain the limits of own authority and when it is important to seek agreement with or permission from other people in the organisation when dealing with customers service issues/complaints</p> <p>2.4 Identify who to refer to for guidance when customer needs cannot be adequately met</p> <p>2.5 Describe any organisational targets relevant to own job, own role in meeting them and the implications for the organisation if those targets are not met.</p> <p>2.6 Explain how the successful resolution of customer service problems contributes to customer loyalty with the external customer and improved working relationships with the internal customer.</p>
<p>3. Understand how to solve customer service problems</p>	<p>3.1 Describe how to communicate in a clear, polite, confident way and why this is important.</p> <p>3.2 Explain how to negotiate with and reassure customers whilst their problems are being solved.</p> <p>3.3 Explain organisational procedures and systems for dealing with customer service problems.</p>

**Content:**
**Legal requirements, regulations and codes of practice relevant to vehicle parts customer service**

- a. Legal and regulatory requirements that affect the way products and services can be delivered to customers, including:
  - i. health and safety
  - ii. data protection
  - iii. equal opportunities
  - iv. disability discrimination
- b. Industry, organisational and professional codes of practice and ethical standards that affect the way the products or services can be delivered to customers:
- c. customers' rights are and how these rights affect customer service when the customer has a problem or returned parts for credit:
  - i. contract law
  - ii. product liability
  - iii. the sale of goods act
  - iv. the trade description act
  - v. satisfactory quality
  - vi. fitness for purpose
  - vii. distance selling regulations

**Organisational context for working with vehicle parts customers**

- a. Contractual agreements that customers may have with the organisation with regards to payment for parts:
  - i. account terms
  - ii. returns policy
  - iii. special order policy
- b. Identify the products or services offered by the organisation relevant to own customer service role:
  - i. parts
  - ii. accessories
  - iii. merchandise
  - iv. customer service
  - v. parts warranty
  - vi. exchange
  - vii. expert advice
- c. The limits of own authority and when it is important to seek agreement with or permission from other people in the organisation when dealing with customers service issues/complaints:
  - i. supervisor
  - ii. manager
  - iii. company policy
- d. Identify who to refer to for guidance when customer needs cannot be adequately met:
  - i. colleague
  - ii. supervisor
  - iii. manager
  - iv. company policy

**Content:**

- e. Organisational targets relevant to own job, own role in meeting them and the implications for the organisation if those targets are not met:
  - i. first time fix (correct part/pick)
  - ii. customer service (retention/Advocacy)
- f. How the successful resolution of customer service problems contributes to customer loyalty with the external customer and improved working relationships with the internal customer:
  - i. customer retention and advocacy
  - ii. improved working relationships
  - iii. improved trust

**How to solve customer service problem**

- a. How to communicate in a clear, polite, confident way and why this is important.
  - i. professionalism
  - ii. adherence at all times
- b. How to negotiate with and reassure customers whilst their problems are being solved.
  - i. empathy
  - ii. customers are kept informed
  - iii. professionalism
- c. Organisational procedures and systems for dealing with customer service problems.
  - i. specific company complaints procedure



Learner Name: .....

<b>UNIT REF: E.12</b>	<b>UNIT TITLE: PLAN, MONITOR AND ADJUST STAFFING LEVELS AND SCHEDULES IN A RETAIL ENVIRONMENT</b>
-----------------------	---

<b>Level: 3</b>	<b>Route: Knowledge</b>	<b>Credit Value: 11</b>	<b>GLH: 63</b>
<b>Rationale:</b> This unit is about how to plan, monitor and adjust staffing levels and schedules in a retail environment			

LEARNING OUTCOMES	ASSESSMENT CRITERIA	Ref No	Date
<b>The Learner will:</b>	<b>The Learner can:</b>		
1. Know how to plan staffing levels and prepare work schedules for a retail team	1.1. Show that they know why staffing plans are needed 1.2. Show that they know the relevant laws, company policy and contract terms and conditions which affect the hours that staff must work 1.3. Show that they know and understand the relationship between staffing plans and work targets 1.4. Show that they know how to work out staffing requirements 1.5. Show that they know how to produce and present staffing plans in a form suitable for the needs of the relevant people 1.6. Show that they know how to schedule work so that operational needs are met and operational limits are taken account of		
2. Know how to monitor staffing levels and schedules against the work targets of a retail team	2.1. Show that they know how staffing levels and the way in which staff are used can affect the work that can be done 2.2. Show that they know how to collect and evaluate information on staffing 2.3. Show that they know how to adjust staffing levels and schedules 2.4. Show that they know the factors, other than staffing, that may affect progress towards work targets, and the effect these are likely to have 2.5. Show that they know how to justify assessments of effectiveness 2.6. Show that they know how their manner and behaviour when presenting the results of assessments is likely to influence staff's response to them		



<p>3. Plan staffing levels and prepare work schedules for a retail team</p>	<p>3.1. Produce staffing plans and schedules that cover all operational needs and take account of operational limits</p> <p>3.2. Produce staffing plans and schedules that include accurate numbers and realistic levels of skill, work allocation, places where people will work, and start and finish times</p> <p>3.3. Schedule hours of work that keep to relevant laws, company policy and contracts of employment</p> <p>3.4. Produce plans that are easy for the relevant people to understand and use</p> <p>3.5. Include realistic emergency plans to cope with abnormal situations</p>		
<p>4. Monitor staffing levels and schedules against the work targets of a retail team</p>	<p>4.1. Collect and organise enough information about the staff available and the work those staff are doing</p> <p>4.2. Assess realistically whether there are enough staff for targets to be achieved</p> <p>4.3. Find out what progress is being made towards achieving work targets</p> <p>4.4. Use the information about staffing and progress towards targets to make realistic and justifiable assessments of how effective staff are</p> <p>4.5. Adjust staffing levels and schedules so that targets can be met</p> <p>4.6. Clearly and promptly recommend changes in staffing to their manager</p> <p>4.7. Promptly pass on the results of assessments to the people who need those results</p> <p>4.8. Use the results of assessments to encourage staff to reach targets</p>		

**EVIDENCE REQUIREMENTS**

<p>1. <b>You must</b> produce evidence of producing a detailed staffing plan on at least 2 separate occasions</p>	<p><b>Evidence Ref:</b></p>	
<p>2. <b>You must</b> produce evidence of adjusting staffing plans when:</p>	<p><b>Evidence Ref:</b></p>	
<p>Unexpected absence occurs</p>		
<p>Planned absence occurs</p>		
<p>3. <b>You must</b> be observed by your assessor producing or amending a staffing plan</p>	<p><b>Observation Ref:</b></p>	
<p>Evidence from simulated activities is <b>not</b> acceptable for this unit</p>		

<p><b>ASSESSOR SIGNATURE:</b></p>	<p><b>PIN NO:</b></p>	<p><b>DATE:</b></p>
-----------------------------------	-----------------------	---------------------



Learner Name: .....

<b>UNIT REF: VP04C</b>	<b>UNIT TITLE: COMPETENCY IN RECEIVING AND STORING MOTOR VEHICLE PARTS</b>
------------------------	--

<b>Level: 2</b>	<b>Route: Competence</b>	<b>Credit Value: 3</b>	<b>GLH: 20</b>
<b>Mapping:</b> This unit is mapped to the IMI NOS VP04			
<b>Rationale:</b> This unit requires the learner to demonstrate competence in receiving and storing motor vehicle parts to meet customer requirements			

LEARNING OUTCOMES	ASSESSMENT CRITERIA	Ref No	Date
<b>The Learner will:</b>	<b>The Learner can:</b>		
1. Be able to prepare to receive and store motor vehicle parts	1.1 Wear suitable personal protective equipment when receiving and storing parts.  1.2 Ensure the goods inwards area is clear before the arrival of expected deliveries  1.3 Ensure there is sufficient storage space before the arrival of expected deliveries.		
2. Be able to receive motor vehicle parts	2.1 Ensure deliveries are unloaded safely and securely, observing all manual handling requirements.  2.2 Ensure the parts received are: <ul style="list-style-type: none"> <li>a. checked against requirements / stock orders</li> <li>b. match part number, description and quantity</li> <li>c. fit for resale.</li> </ul> 2.3 Ensure that delivery documentation is complete, accurate and processed promptly.  2.4 Check delivery records to ensure organisational requirements have been met by individual suppliers.		
3. Be able to store motor vehicle parts after receiving them	3.1 Place parts into storage correctly and within required timescales, taking account of relevant stock rotation requirements.  3.2 Ensure that parts can be accessed easily.  3.3 Organise storage facilities to take account of: <ul style="list-style-type: none"> <li>a. known operational needs</li> <li>b. safety requirements</li> <li>c. the need to preserve the condition of parts</li> <li>d. legal requirements</li> </ul> 3.4 Maintain a routine for checking the movement of stock to ensure that health and safety and other organisational requirements are being met.		
4. Be able to maintain records relating to receiving and storing motor vehicle parts	4.1 Keep complete, accurate and up-to-date stock records that can be accessed by everyone who needs them.  4.2 Update stock records accurately upon receipt of stock orders.  4.3 Report any discrepancies or problems identified during receipt and storage of stock orders to the relevant person(s) promptly.		

**EVIDENCE REQUIREMENTS**

1. <b>You must</b> produce evidence of receiving and storing vehicle parts on <b>at least 3 separate</b> occasions	<b>Evidence Ref:</b>	
2. <b>You must</b> produce evidence of dealing with discrepancies on <b>at least 2 separate</b> occasions including:  damaged stock  incorrect stock	<b>Evidence Ref:</b>	
3. <b>You must</b> be observed receiving and storing vehicle parts on <b>at least 2 separate</b> occasions	<b>Observation Ref:</b>	
Evidence from simulated activities is <b>not</b> acceptable for this unit		

<b>ASSESSOR SIGNATURE:</b>	<b>PIN NO:</b>	<b>DATE:</b>
----------------------------	----------------	--------------



<b>UNIT REF: VP04K</b>	<b>UNIT TITLE: KNOWLEDGE OF RECEIVING AND STORING MOTOR VEHICLE PARTS</b>
------------------------	---

Level: 2	Route: Knowledge	Credit Value: 3	GLH: 24
<b>Mapping:</b> This unit is mapped to the IMI NOS VP04			
<b>Rationale:</b> This unit will help the learner develop the knowledge and understanding they need to receive and store motor vehicle parts			

LEARNING OUTCOMES	ASSESSMENT CRITERIA
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Understand the legal requirements and regulations that cover receiving and storing motor vehicle parts	1.1 Summarise current legislation, including health and safety requirements, relating to receiving and storing motor vehicle parts, including the use of personal protective equipment.  1.2 Describe an organisation's legal rights as a customer.
2. Understand organisational systems relevant to receiving and storing motor vehicle parts	2.1 Describe organisational systems and procedures for: <ol style="list-style-type: none"> <li>a. receiving and accepting parts</li> <li>b. storing and moving parts stock, including maintaining the quality of stock susceptible to damage and/or deterioration</li> <li>c. dealing with discrepancies and late deliveries</li> <li>d. record keeping, documentation and parts stock control</li> <li>e. health, safety and security requirements when receiving and moving parts</li> <li>f. checking stock condition and the storage of stock.</li> </ol> 2.2 Describe organisational systems and procedures for: <ol style="list-style-type: none"> <li>a. relevant parts identification</li> <li>b. parts storage, rotation and management</li> <li>c. handling damaged parts</li> <li>d. documentation completion and keeping records</li> <li>e. the receiving into stock of new parts on to organisational systems.</li> </ol>
3. Understand the importance of receiving and storing vehicle parts correctly	3.1 Explain why it is important to check incoming parts stock against requirements, after unloading and receiving parts.  3.2 Describe the business and customer satisfaction related factors governing why: <ol style="list-style-type: none"> <li>a. deliveries should be checked promptly</li> <li>b. shortfalls should be rectified promptly</li> <li>c. purchasing records should be maintained accurately.</li> </ol> 3.3 Describe what action to take when there are problems with deliveries.



4. Know how to store motor vehicle parts after receiving them	4.1 Describe how to issue parts locations to new parts that have been added to the “standard” stock list. 4.2 Describe how to put new locations for new part numbers on to organisational systems. 4.3 Describe how to handle and move parts safely, including: a. the requirements for and importance of, wearing personal protective equipment b. manual handling techniques and weights that can be moved without assistance c. how to check and use relevant mechanical handling equipment. 4.4 Explain the implications of failing to put stock away correctly.
---	--

**Content:****Legal requirements and regulations that cover receiving and storing motor vehicle parts**

- a. Current legislation, including health and safety requirements, relating to receiving and storing motor vehicle parts, including the use of personal protective equipment:
  - i. personal protective equipment
  - ii. manual handling regulations
  - iii. the control of substances hazardous to health regulations
  - iv. the health & safety at work act
  - v. explosives act
- b. An organisation’s legal rights as a customer
  - i. current legislation

**Organisational systems relevant to receiving and storing motor vehicle parts**

- a. Organisational systems and procedures for:
  - i. receiving and accepting parts
  - ii. storing and moving parts stock, including maintaining the quality of stock susceptible to damage and/or deterioration
  - iii. dealing with discrepancies and late deliveries
  - iv. record keeping, documentation and parts stock control
  - v. health, safety and security requirements when receiving and moving parts
  - vi. checking stock condition and the storage of stock.
- b. Organisational systems and procedures for:
  - i. relevant parts identification
  - ii. parts storage, rotation and management (FIFO, LIFO)
  - iii. handling damaged parts
  - iv. documentation completion and keeping records
  - v. the receiving into stock of new parts on to organisational systems.

**Content:**
**Importance of receiving and storing vehicle parts correctly**

- a. Importance of checking incoming parts stock against requirements, after unloading and receiving parts.
  - i. customer service
  - ii. invoicing / credits (supplier)
  - iii. liability
- b. The business and customer satisfaction related factors governing why:
  - i. deliveries should be checked promptly
  - ii. shortfalls should be rectified promptly
  - iii. purchasing records should be maintained accurately
- c. Action to take when there are problems with deliveries.
  - i. contacting suppliers
  - ii. informing customers (internal & external)

**How to store motor vehicle parts after receiving them**

- a. How to issue parts locations to new parts that have been added to the “standard” stock list.
  - i. organisational procedure
- b. How to put new locations for new part numbers on to organisational systems.
  - i. organisational procedure
- c. How to handle and move parts safely, including:
  - i. the requirements for and importance of, wearing personal protective equipment
  - ii. manual handling techniques and weights that can be moved without assistance
  - iii. how to check and use relevant mechanical handling equipment
- d. The implications of failing to put stock away correctly
  - i. damaged parts
  - ii. risks to health & safety
  - iii. lost / missing stock.



Learner Name: .....

<b>UNIT REF: VP08C</b>	<b>UNIT TITLE: COMPETENCY IN PROCESSING PAYMENT TRANSACTIONS WITHIN A VEHICLE PARTS ENVIRONMENT</b>
------------------------	---

<b>Level: 2</b>	<b>Route: Competence</b>	<b>Credit Value: 3</b>	<b>GLH: 15</b>
-----------------	--------------------------	------------------------	----------------

**Mapping:** This unit is mapped to the IMI NOS VP08

**Rationale:** : This unit requires the learner to demonstrate competence in calculating the cost of parts and processing both cash and other forms of payment, including credit and debit card payments, account payments and credit transfers.

LEARNING OUTCOMES	ASSESSMENT CRITERIA	Ref No	Date
<b>The Learner will:</b>	<b>The Learner can:</b>		
1. Be able to calculate prices for motor vehicle parts	1.1 Identify the price of items.  1.2 Resolve any problems in pricing parts promptly by using the available sources of information.  1.3 Calculate the total price of the transaction correctly.  1.4 Inform customers of the amount due clearly and accurately.		
2. Be able to process payments for motor vehicle parts	2.1 Confirm the cash amount given by the customer and the change given to them, if relevant.  2.2 Verify the identity of account holders following organisational procedures prior to debiting their account.  2.3 Gain authorisation for accepting non-cash payments and processing account debits when the value of the order exceeds the limit that can be personally authorised.  2.4 Inform the customer in a suitable manner when authorisation for payment cannot be obtained for non-cash transactions.  2.5 Complete and process all documentation required clearly and accurately.  2.6 Store payments securely and protect them from theft.		
3. Be able to provide an appropriate level of customer service when processing payments	3.1 Ensure customers are treated courteously at all times.  3.2 Balance the need to give attention to individual customers whilst ensuring that others are not left without attention.		



**EVIDENCE REQUIREMENTS**

1. <b>You must</b> produce evidence of processing payments (cash and non-cash) on <b>at least 3* separate</b> occasions	<b>Evidence Ref:</b>		
2. <b>You must</b> produce evidence of using each of the following types of documentation	<b>Evidence Ref:</b>		
receipts and records			
credit and charge card slips			
credit account slips			
3. <b>You must</b> be observed processing payments on <b>at least 2* separate</b> occasions	<b>Observation Ref:</b>		
Evidence from simulated activities is <b>not</b> acceptable for this unit			
*However, you must prove to your assessor that you have the necessary knowledge and understanding to be able to perform competently in respect of all techniques and processes.			

<b>ASSESSOR SIGNATURE:</b>	<b>PIN NO:</b>	<b>DATE:</b>
----------------------------	----------------	--------------



<b>UNIT REF: VP08K</b>	<b>UNIT TITLE: KNOWLEDGE OF PROCESSING PAYMENT TRANSACTIONS WITHIN A VEHICLE PARTS ENVIRONMENT</b>
------------------------	--

Level: 2	Route: Knowledge	Credit Value: 3	GLH: 25
----------	------------------	-----------------	---------

**Mapping:** This unit is mapped to the IMI NOS VP08K

**Rationale:** This unit will help the learner develop the knowledge needed to calculate the cost of parts and process both cash and other forms of payment, including credit and debit card payments, account payments and credit transfers.

LEARNING OUTCOMES	ASSESSMENT CRITERIA
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Know legal and regulatory requirements relating to the processing of payment transactions	1.1 Describe current relevant legislation, regulations, codes of practice and guidelines relating to processing payment transactions.
2. Understand organisational requirements relating to the processing of payment transactions	2.1 Describe organisational systems and procedures for: <ul style="list-style-type: none"> <li>a. authorising non-cash and credit account transactions</li> <li>b. verifying account holders</li> <li>c. calculating and taking payments</li> <li>d. booking purchases to customer accounts</li> <li>e. dealing with suspected fraud.</li> </ul>
3. Understand how to deal with customers when processing payments	3.1 Explain the value and importance of customer service to effective trading operations. 3.2 Describe how to balance giving the correct amount of attention to individual customers whilst maintaining a responsibility towards other customers in busy trading periods. 3.3 Describe how to deal with customers when authorisation cannot be obtained for their non-cash payments. 3.4 Describe how to deal with customers offering suspect tender or non-cash payments.
4. Know how to calculate prices for motor vehicle parts	4.1 Describe how to identify and check prices in a parts operation. 4.2 Describe how to get information and advice to deal with pricing problems. 4.3 Describe how to identify current discounts and special offers (e.g. campaigns and promotions). 4.4 Explain the features of any current parts campaigns and promotions.



5. Know how to process payments for motor vehicle parts	5.1 Describe common methods of calculating payments, including the use of point of sale equipment and manual calculations.  5.2 Describe the types of payment that are acceptable.  5.3 Explain the limits of own authority for processing payments.  5.4. Describe how to identify counterfeit payments.  5.5 Describe how to check for stolen credit cards, charge cards or debit cards.  5.6 Explain the types of transaction errors that can occur and the consequences of failure to report errors.
6. Know how to maintain the security of payments	6.1 Describe how to keep cash and other payments safe and secure.  6.2 Explain relevant security issues surrounding payment transactions.

**Content:****Legal and regulatory requirements relating to the processing of payment transactions**

- a. Current legislation, regulations, codes of practice and guidelines relating to processing payment transactions.
  - i. sales of goods act
  - ii. data protection act
  - iii. distance selling regulations
  - iv. chip & pin

**Organisational requirements relating to the processing of payment transactions**

- a. Organisational systems and procedures for:
  - i. authorising non-cash and credit account transactions
  - ii. verifying account holders
  - iii. calculating and taking payments
  - iv. booking purchases to customer accounts
  - v. dealing with suspected fraud.

**Understand how to deal with customers when processing payments**

- a. The value and importance of customer service to effective trading operations.
  - i. trust
  - ii. professionalism
  - iii. return trade
- b. Balancing giving the correct amount of attention to individual customers whilst maintaining a responsibility towards other customers in busy trading periods.
  - i. polite / professional
  - ii. keeping customer informed
- c. How to deal with customers when authorisation cannot be obtained for their non-cash payments.
  - i. obtain another form of payment (professionally)
- d. How to deal with customers offering suspect tender or non-cash payments.
  - i. refer to line manager
  - ii. follow company policy

**Content:**
**How to calculate prices for motor vehicle parts**

- a. How to identify and check prices in a parts operation.
  - i. company / supplier procedures
  - ii. manual calculations
  - iii. computer / electronic calculations
- b. How to get information and advice to deal with pricing problems.
  - i. supervisor
  - ii. manager
  - iii. company policy
- c. How to identify current discounts and special offers (e.g. campaigns and promotions).
  - i. company / supplier policies
- d. Features of any current parts campaigns and promotions.
  - i. marketing awareness
  - ii. company policy

**How to process payments for motor vehicle parts**

- a. Describe common methods of calculating payments
  - i. point of sale equipment
  - ii. manual calculations.
- b. Describe the types of payment that are acceptable.
  - i. cash
  - ii. credit / debit card
  - iii. account
  - iv. cheque
- c. Explain the limits of own authority for processing payments.
  - i. company policy
  - ii. referral to line manager
- d. Describe how to identify counterfeit payments.
  - i. counterfeit money checks (i.e. uv light, holograms etc.)
  - ii. false cards / incorrect information
- e. Describe how to check for stolen credit cards, charge cards or debit cards.
  - i. check other forms of i.d.
  - ii. company policy
- f. Explain the types of transaction errors that can occur and the consequences of failure to report errors.
  - i. incorrect change
  - ii. incorrect amount accepted
  - iii. incorrect data entry to point of sale equipment
  - iv. non-authorisation

**How to maintain the security of payments**

- a. Describe how to keep cash and other payments safe and secure.
  - i. securing payments after they are taken
  - ii. regular security risk assessments
- b. Explain relevant security issues surrounding payment transactions.
  - i. fraud
  - ii. theft
  - iii. violence



Learner Name: .....

<b>UNIT REF: VP16C</b>	<b>UNIT TITLE: COMPETENCY IN SELLING MOTOR VEHICLE PARTS TO CUSTOMERS</b>
------------------------	---

<b>Level: 3</b>	<b>Route: Competence</b>	<b>Credit Value: 3</b>	<b>GLH: 20</b>
<b>Mapping:</b> This unit is mapped to the IMI NOS VP16			
<b>Rationale:</b> This unit requires the learner to demonstrate competence in providing information to vehicle parts customers in order to sell them products that are suitable for their needs			

LEARNING OUTCOMES	ASSESSMENT CRITERIA	Ref No	Date
<b>The Learner will:</b>	<b>The Learner can:</b>		
1. Be able to provide the customer with a choice of motor vehicle parts to meet their needs	1.1 Select the appropriate parts number/s that the customer is looking for from the information they provide.  1.2 Give clear explanations and suggestions about alternatives if the customer's requirements cannot be met or appear unrealistic.  1.3 Check whether the parts most likely to meet the customer's requirements are available.  1.4 Give accurate advice on other courses of action when the customer's preferred part is not available.		
2. Be able to help customers choose motor vehicle parts that meet their needs	2.1 Explain the features and benefits of parts and how they meet the customer's requirements.  2.2 Spend enough time with customers whilst making sure that the parts operation or other customers are not ignored.  2.3 Provide customers with enough time to ask questions seek clarification and make buying decisions.  2.4 Handle objections and queries in a way that promotes sales and keeps the customer's confidence.  2.5 Promote sales and goodwill through being courteous to customers and interacting with them effectively		
3. Be able to complete the sale of motor vehicle parts	3.1 Take opportunities for selling associated or additional parts.  3.2 Acknowledge the customer's buying decisions.  3.3 Explain any after sales service and customer rights that apply.  3.4 Process payments promptly		



**EVIDENCE REQUIREMENTS**

1. <b>You must</b> produce evidence of selling <b>at least 2 different</b> types of associated or additional parts which:	<b>Evidence Ref:</b>	
Extend the life of the main purchase		
Link to the function of the main purchase		
2. <b>You must</b> be observed identifying customer requirements on <b>at least 2 separate</b> occasions covering both:	<b>Observation Ref:</b>	
Alternative parts to meet their needs		
Alternative source of parts		
3. <b>You must</b> be observed providing information about the features and benefits of products on <b>at least 2 separate:</b>	<b>Observation Ref:</b>	
4. <b>You must</b> be observed confirming the customers preferences and buying decisions on <b>at least 2 separate:</b>	<b>Observation Ref:</b>	
Evidence from simulated activities is <b>not</b> acceptable for this unit		

<b>ASSESSOR SIGNATURE:</b>	<b>PIN NO:</b>	<b>DATE:</b>
----------------------------	----------------	--------------



<b>UNIT REF: VP16K</b>	<b>UNIT TITLE: KNOWLEDGE OF SELLING MOTOR VEHICLE PARTS TO CUSTOMERS</b>
------------------------	--

<b>Level: 3</b>	<b>Route: Knowledge</b>	<b>Credit Value: 4</b>	<b>GLH: 30</b>
<b>Mapping: This unit is mapped to the IMI NOS VP16</b>			
<b>Rationale: This unit will help the learner develop the knowledge and understanding they need to provide information to vehicle parts operations customers in order to sell products that are suitable for their needs</b>			

<b>LEARNING OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Understand the legal requirements, regulations and codes of practice relevant to selling motor vehicle parts	1.1. Summarise the legal rights and obligations of retailers and customers, including the Sale of Goods Act.
2. Know how to identify different options for motor vehicle parts that might meet customer needs	2.1. Describe available product information that is relevant to providing a customer with options.  2.2 Explain how to identify the different options that are available to meet customer needs  2.3 Describe how to access information about the options that are available to meet customer needs.
3. Understand how to give motor vehicle parts customers information on the features and benefits of different parts	3.1 Explain how to identify the features of parts, including the use of reference materials.  3.2 Explain the difference between the features of a part and the benefits of a part.  3.3 Describe methods for comparing and contrasting the features, advantages and benefits of parts to help customers make decisions about which parts to buy.
4. Understand how to assist motor vehicle parts customers to make a buying choice	4.1 Explain how to use questioning techniques to clarify and confirm customer's buying needs.  4.2 Describe how to talk to different types of customers and help them to understand the information you provide.  4.3 Explain how to recognise buying signals from customers.  4.4 Explain how to handle customer objections and queries effectively.
5. Understand the importance of building customer confidence and loyalty during the selling process	5.1 Explain the importance of customer confidence and loyalty to the organisation  5.2 Explain own personal contribution to building customer confidence and loyalty when selling parts.
6. Understand how to complete a sale with motor vehicle parts customers	6.1 Describe techniques for closing the sale.  6.2 Describe acceptable methods of payment.  6.3 Describe the payment process including customer credit checks.

**Content:**
**Legal requirements, regulations and codes of practice relevant to selling motor vehicle parts**

- a. Legal rights and obligations of retailers and customers, including the Sale of Goods Act:
  - i. sale of goods act
  - ii. trade descriptions act

**How to identify different options for motor vehicle parts that might meet customer needs**

- a. Available product information that is relevant to providing a customer with options:
  - i. reference material (paper and electronic based)
  - ii. verbally
  - iii. company policy
- b. How to identify the different options that are available to meet customer needs:
  - i. company policy
  - ii. supplier specific
- c. How to access information about the options that are available to meet customer needs:
  - i. company policy
  - ii. supplier specific

**How to give motor vehicle parts customers information on the features and benefits of different parts**

- a. How to identify the features of parts, including the use of reference materials:
  - i. reference material
  - ii. research and product knowledge
- b. The difference between the features of a part and the benefits of a part:
  - i. features tell
  - ii. benefits sell
- c. Comparing and contrasting the features, advantages and benefits of parts to help customers make decisions about which parts to buy:
  - i. features
  - ii. benefits

**How to assist motor vehicle parts customers to make a buying choice**

- a. How to use questioning techniques to clarify and confirm customer's buying needs:
  - i. open questions
  - ii. closed questions
  - iii. probing questions
- b. How to talk to different types of customers and help them to understand the information you provide:
  - i. retail customers
  - ii. trade customers
  - iii. internal customers
  - iv. company policy

**Content:**

- c. How to recognise buying signals from customers:
  - i. body language
  - ii. tone of voice
- d. How to handle customer objections and queries effectively:
  - i. refer to line manager
  - ii. company policy

**Importance of building customer confidence and loyalty during the selling process**

- a. Importance of customer confidence and loyalty to the organisation:
  - i. customer retention
  - ii. impact upon targets and profit
- b. Own personal contribution to building customer confidence and loyalty when selling parts:
  - i. professionalism at all times

**How to complete a sale with motor vehicle parts customers**

- a. Techniques for closing the sale:
  - i. assertiveness
  - ii. offers
  - iii. persuasiveness
  - iv. suggesting terms
  - v. company policy
- b. Acceptable methods of payment:
  - i. cash
  - ii. credit / debit card
  - iii. cheque
  - iv. account
  - v. company policy
- c. The payment process including customer credit checks:
  - i. company policy



Learner Name: .....

<b>UNIT REF: G8C</b>	<b>UNIT TITLE: COMPETENCY IN IDENTIFYING AND AGREEING MOTOR VEHICLE CUSTOMER SERVICE NEEDS</b>
----------------------	--

Level: 3	Route: Competence	Credit Value: 5	GLH: 40
----------	-------------------	-----------------	---------

**Mapping:** This unit is mapped to the IMI NOS G8

**Rationale:** This unit helps the learner to develop competency in order to: gain information from customers on their perceived needs; give advice and information and agree a course of action; contract for the agreed work and complete all necessary records and instructions.

LEARNING OUTCOMES	ASSESSMENT CRITERIA	Ref No	Date
The Learner will:	The Learner can:		
1. Be able to obtain relevant information from the customer	1.1. Obtain and interpret sufficient, relevant information, from the customer to make an assessment of their needs.  1.2. Clarify customer and vehicle needs by referring to vehicle data and operating procedures		
2. Be able to provide relevant information to the customer	2.1. Provide customers with accurate, current and relevant advice and information, in a form that the customer will understand.  2.2. Demonstrate techniques which encourage customers to ask questions and seek clarification during conversation		
3. Be able to agree work undertaken with the customer	3.1. Summarise and record work agreed with the customer, before accepting the vehicle.  3.2. Implement confirmation of the agreement by ensuring customer understanding		
4. Be able to ensure recording systems are implemented correctly	4.1. Use recording systems which are accurate and complete, in the required format and signed by the customer where necessary  4.2. Perform the next stage in the process by passing on completed records to the correct person promptly.  4.3. Demonstrate correct procedures for customer approval where the contracted agreement is likely to be exceeded.		

### EVIDENCE REQUIREMENTS

1. <b>You must</b> produce evidence, including records, to show that you have dealt with <b>3 different customers</b> .	<b>Evidence Ref</b>		
2. <b>You must</b> be observed by your assessor in your normal workplace dealing with <b>at least 1 customer</b>	<b>Observation Ref:</b>		

ASSESSOR SIGNATURE:	PIN NO:	DATE:
---------------------	---------	-------



<b>UNIT REF: G8K</b>	<b>UNIT TITLE: KNOWLEDGE OF HOW TO IDENTIFY AND AGREE MOTOR VEHICLE CUSTOMER SERVICE NEEDS</b>
----------------------	--

Level: 3	Route: Knowledge	Credit Value: 5	GLH: 45
----------	------------------	-----------------	---------

**Mapping:** This unit is mapped to the IMI NOS G8

**Rationale:** This unit enables the learner to develop an understanding of how to gain: information from customers on their perceived needs; give advice and information and agree a course of action; contract for the agreed work and complete all necessary records and instructions.

LEARNING OUTCOMES	ASSESSMENT CRITERIA
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Understand legislative and organisational requirements and procedures	1.1. Describe the fundamental legal requirements of current consumer legislation and the consequences of their own actions in respect of this legislation  1.2. Describe the content and limitations of company and product warranties for the vehicles dealt with by their company  1.3. Explain the limits of their own authority for accepting vehicles  1.4. Explain the importance of keeping customers informed of progress  1.5. Describe their workplace requirements for the completion of records  1.6. Explain how to complete and process all the necessary documentation
2. Understand how to communicate and care for customers	2.1. Explain how to communicate effectively with customers  2.2. Describe how to adapt your language when explaining technical matters to non-technical customers  2.3. Explain how to use effective questioning techniques  2.4. Describe how to care for customers and achieve customer satisfaction
3. Understand company products and services	3.1. Describe the range of options available to resolve vehicle problems  3.2. Describe the range and type of services offered by their company  3.3. Explain the effect of resource availability upon the receipt of customer vehicles and the completion work  3.4. Explain how to access costing and work completion time information

**Content:**
**Organisational requirements**

- a. Explain the organisation's terms and conditions applicable to the acceptance of customer vehicles.
- b. Explain the content and limitations of vehicle and component warranties for the vehicles dealt with by your organisation.
- c. Detail what, if any, limits there are to the authority for accepting vehicles.
- d. Detail why it is important to keep customers advised of progress and how this is achieved within the organisation.
- e. Detail the organisation's procedures for the completion and processing of documentation and records, including payment methods and obtaining customer signatures as applicable.

**Principles of customer communication and care.**

- a. First Impressions.
- b. Listening skills – 80:20 ratio.
- c. Eye contact and smiling.
- d. Showing interest and concern.
- e. Questioning techniques and customer qualification.
- f. Giving clear non-technical explanations.
- g. Confirming understanding (statement/question technique, reflective summary).
- h. Written communication – purpose, content, presentation and style.
- i. Providing a high quality service – fulfilling (ideally exceeding) customer expectations within agreed time frames.
- j. Obtaining customer feedback and corrective actions when dissatisfaction expressed.
- k. Dealing with complaints.

**Company products and services**

- a. Service standards
  - i. national
  - ii. manufacturer
  - iii. organisational
- b. The range and type of services offered by the organisation.
  - i. diagnostic.
  - ii. servicing.
  - iii. repair.
  - iv. warranty.
  - v. MOT testing.
  - vi. fitment of accessories/enhancements.
  - vii. internal.
- c. The courses of action available to resolve customer problems.
  - i. the extent and nature of the work to be undertaken.
  - ii. the terms and conditions of acceptance.
  - iii. the cost.
  - iv. the timescale.
  - v. required payment methods.
- d. Effect of resource availability upon the receipt of customer vehicles and the completion of work.
  - i. levels and availability of equipment.
  - ii. levels and availability of technicians.
  - iii. workshop loading systems.
- e. How to access costing and work completion time information.
  - i. manuals.
  - ii. computer based.

**Vehicle Information Systems, Servicing and Repair Requirements**

- a. Accessing technical data including diagnostics.
- b. Servicing to manufacturer requirements/standards.
- c. Repair/operating procedures.
- d. MOT standards/requirements.
- e. Quality controls – interim and final.
- f. Requirements for cleanliness of vehicle on return to customer.
- g. Handover procedures.



**Content: contd**

**Consumer legislation: To include:**

- a. Consumer protection
- b. Sale of goods
- c. Data protection
- d. Product liability
- e. Health and safety
- f. Discrimination



Learner Name: .....

<b>UNIT REF: G14C</b>	<b>UNIT TITLE: COMPETENCY IN MONITORING PROCEDURES TO CONTROL RISKS TO HEALTH AND SAFETY IN THE AUTOMOTIVE SECTOR</b>
-----------------------	---

Level: 3	Route: Competence	Credit Value: 5	GLH: 40
----------	-------------------	-----------------	---------

**Mapping:** This unit is mapped to the IMI NOS G14

**Rationale:** This unit provides the learner with competency to effectively plan and fairly allocate the work required within their area. It also includes the monitoring of progress and quality of work to ensure that the required level or standard of performance is being met.

LEARNING OUTCOMES	ASSESSMENT CRITERIA	Ref No	Date
The Learner will:	The Learner can:		
1. Be able to check that health and safety procedures are followed	1.1 Ensure that all the information available regarding health and safety is up-to-date  1.2 Check that other people possess the most up-to-date information, instructions and training regarding health and safety on a regular basis  1.3 Monitor procedures according to workplace requirements at agreed intervals  1.4 Utilise information obtain from feedback relating to workplace procedures  1.5 Respond promptly to any breaches of health and safety procedures  1.6 Keep records relating to health and safety matters in the correct format on a regular basis  1.7 Suggest recommendations for changes to workplace procedures to a responsible person		
2. Be able to ensure that risks are controlled safely and effectively	2.1. Ensure that accurate records are kept regarding workplace risks identified  2.2. Adhere to workplace procedures regarding the reporting of hazards and high risks  2.3. Ensure that appropriate precautions to control risks are agreed  2.4. Check on a regular basis that other persons are aware of any risks and the appropriate action to take to reduce the risks  2.5. Review on a regular basis that the precautions to reduce risks are minimised  2.6. Report promptly and accurately any conflicts which exist between workplace and statutory requirements  2.7. Ensure that all reports contain accurate details about the cause of hazards		



**EVIDENCE REQUIREMENTS**

<p>1. <b>You must</b> produce evidence of dealing with health and safety issues to include:</p>	<p><b>Evidence Ref</b></p>
<p>continuous monitoring of workplace activities at correct intervals</p>	
<p>using feedback obtained to make relevant changes in relation to health and safety</p>	
<p>responding promptly to any breaches to health and safety</p>	
<p>continuous monitoring of workplace activities at correct intervals</p>	
<p>using feedback obtained to make relevant changes in relation to health and safety</p>	
<p>responding promptly to any breaches to health and safety</p>	
<p>2. <b>You must</b> produce evidence of dealing with risks in the workplace to include:</p>	<p><b>Evidence Ref</b></p>
<p>accurate record keeping</p>	
<p>obtaining agreement of changes required to reduce the risk</p>	
<p>adhering to workplace policies and procedures</p>	
<p>reporting of any conflicts that may exist between workplace policies and statutory requirements</p>	
<p>regular monitoring of precautions to ensure they are effective in reducing the risk</p>	
<p>2. <b>You must</b> be observed by your assessor in your normal workplace dealing with a health and safety issue:</p>	<p><b>Observation Ref:</b></p>

<p><b>ASSESSOR SIGNATURE:</b></p>	<p><b>PIN NO:</b></p>	<p><b>DATE:</b></p>
-----------------------------------	-----------------------	---------------------



<b>UNIT REF: G14K</b>	<b>UNIT TITLE: KNOWLEDGE IN MONITORING PROCEDURES TO CONTROL RISK TO HEALTH AND SAFETY</b>
-----------------------	--

<b>Level: 3</b>	<b>Route: Knowledge</b>	<b>Credit Value: 5</b>	<b>GLH: 40</b>
<b>Mapping: This unit is mapped to the IMI NOS G14</b>			
<b>Rationale:</b> This unit provides the learner with the knowledge to make sure that statutory and workplace procedures for controlling risks to health and safety are being carried out.			

<b>LEARNING OUTCOMES</b>	<b>ASSESSMENT CRITERIA</b>
<b>The Learner will:</b>	<b>The Learner can:</b>
1. Understand health and safety legislation and workplace policies	1.1 Explain the employers' and employees, legal duties for health and safety within the workplace  1.2 Identify their own responsibilities for health and safety as defined by legislation covering their job role
2. Understand risks to health and safety	2.1. Identify the difference between a risk and a hazard  2.2. Identify what hazards may exist in their workplace  2.3. Identify particular risks that may exist for their specific job role  2.4. Explain what precautions can be taken to reduce these risks  2.5. Explain the importance of being alert to the presence of hazards
3. Understand the importance of monitoring and controlling health and safety	3.1. Explain their workplace health and safety policies and procedures  3.2. Explain how to keep health and safety records  3.3. Identify effective communication methods  3.4. Identify effective methods for monitoring activities with respect to health and safety  3.5. Explain the importance of promptly dealing with significant risks in the workplace
4. Understand the scope of their role regarding health and safety	4.1. Identify the work areas and the people they are responsible for  4.2. Identify the scope of their job and capabilities regarding health and safety matter

**Content to Include:**
**Health and safety policies within the work place**

- a. Employer's responsibility:
  - i. make the workplace safe and free from risks to health
  - ii. assess risks and take action
  - iii. devise a health and safety policy
  - iv. co-operate on health and safety matters
  - v. provide information, training and supervision
  - vi. provide welfare and first aid facilities
  - vii. provide PPE free of charge
  - viii. set up emergency procedures
  - ix. take precautions against dangers and provide safety signs
  - x. avoid risk of injuries from manual handling operations
  - xi. report injuries, diseases and dangerous occurrences to the appropriate authorities
- b. Employee's responsibility:
  - i. take reasonable care
  - ii. co-operate with employers to meet the statutory requirements
  - iii. not interfere or misuse anything provided for health and safety in the workplace
  - iv. use all equipment correctly and in accordance with the instructions
  - v. follow instructions and guidelines
  - vi. participate in health and safety training
  - vii. adhere to agreed safe practices
  - viii. report any hazards and risks
  - ix. communicate any health and safety issues
  - x. use the correct PPE where required

**Monitoring and controlling health and safety**

- a. Identifying hazards in the workplace. The list may include:
  - i. trolley jacks
  - ii. recovery equipment
  - iii. other road users
  - iv. oils and chemicals
  - v. tools
  - vi. fuel
  - vii. extension leads
  - viii. air lines
- b. Precautions to reduce the risk may include:
  - i. regular servicing of equipment
  - ii. keeping tools clean and tidy
  - iii. clean up any spillages
  - iv. use appropriate PPE
  - v. put unused extension leads and air lines away
  - vi. be vigilant when working on a carriageway
- c. Methods of monitoring activities with respect to health and safety. Methods may include:
  - i. observe working activities
  - ii. review accident records
  - iii. additional training

**Effective communication techniques with respect to health and safety. The list should include:**

- i. adequate induction when new to the business
- ii. training
- iii. warning signs
- iv. PPE signs
- v. safe condition signs
- vi. lead by example



**ASSESSOR COMMENTS AND FEEDBACK**

Assessor's should comment and give feedback each time they observe a learner or meet with a learner to review evidence. Therefore each time an observation or review of evidence takes place the assessor should enter the date and the evidence number, and make appropriate comments and feedback.  
Please see the guide below for the type of comments that can be included.

<b>The following provides guidance as to the type of comments that can be included below.</b>		
<ol style="list-style-type: none"><li>1. A description of the various activities being carried out by the learner for each unit.</li><li>2. How the learner has met the Learning Outcomes for each unit.</li><li>3. Questions that you have asked, particularly to cover Evidence Requirements, not demonstrated through performance.</li><li>4. Questions you have asked to ascertain Essential Knowledge.</li><li>5. Issues arising from assessment.</li><li>6. Identification of good or poor performance.</li><li>7. Any action required to further develop the learners knowledge and skills.</li><li>8. Constructive feedback to the learner.</li></ol>		
<b>Date</b>	<b>Evidence Ref No.</b>	<b>Assessor Comments:</b> Please ensure your comments are concise.



ASSESSOR COMMENTS AND FEEDBACK

CONTINUATION SHEET

Date	Evidence Ref No.	Assessor Comments: Please ensure your comments are concise.