



INSTITUTE
OF THE MOTOR
INDUSTRY

IMI QUALIFICATION



Assessment Criteria for

IMI Level 2 Certificate in Customer Service for the Automotive Industry

I.D: 501/1253/3

*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:
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Fanshaws, Brickendon, Hertford SG13 8PQ



CONTACT SHEET

Learner Name:	
Learner Registration No:	
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Employer Contact:	
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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 2 Certificate in Customer Service for the Automotive Industry (VRQ)

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
CSI1	Understand how to Communicate Effectively with Customers in the Automotive Industry (Y/602/1191)	40	2	4
CSD1	Understand how to Deliver Reliable Customer Service Within the Automotive Industry (H/602/1193)	20	2	2
CSD3	Understand how to Use Dealer Management Systems (DMS) Relevant to the Automotive Industry (T/602/1196)	20	2	2
CSHP1	Understand how to Recognise and Deal With Queries, Requests and Problems in the Automotive Industry (F/602/1198)	20	2	2
CSD11	Understand how to Develop Customer Service Relationships in the Automotive Industry (J/602/1199)	30	2	3
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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
<p>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.</p>			

LEARNING OUTCOMES	ASSESSMENT CRITERIA	Evidence Ref No	Date
The Learner will:	The Learner can:		
<p>1. Understand the importance of customer service and the role it plays in operating a successful automotive organisation</p>	<p>1.1. Explain how customer service plays a vital role in operating a successful organisation</p> <p>1.2. Identify main customer types and how to deal with their needs</p> <p>1.3. Describe the difference between poor, reasonable and excellent customer service</p> <p>1.4. Describe the factors that influence customer expectations</p> <p>1.5. Explain the importance of dealing with internal colleagues in a professional manner and the impact this has on effective teamwork</p> <p>1.6. Explain how customer service can provide a competitive advantage for a commercial organisation</p> <p>1.7. Explain the importance for an organisation to balance the needs of its customers against its own limitations</p>		
<p>2. Understand the legislation and external regulation that may impact on customer service</p>	<p>2.1. List the relevant legislation and external regulation that affects the way to deliver customer service</p> <p>2.2. Explain how to balance the requirements of legislation and external regulation with the needs of the organisation when implementing customer service:</p> <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: CSI1	UNIT TITLE: UNDERSTAND HOW TO COMMUNICATE EFFECTIVELY WITH CUSTOMERS IN 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 importance for providing a high standard of personalised customer service to customers in the automotive industry. Learners will need to understand how communication with customers should be appropriate to their needs and should be within the boundaries of an individual’s authority. Means of communication will be through telephone, in writing, electronically or face to face.

LEARNING OUTCOMES	ASSESSMENT CRITERIA	Evidence Ref No.	Date
The Learner will:	The Learner can:		
1. Understand how to communicate effectively with customers	1.1. Explain how to identify the key points being communicated by customers and why it is important to respond appropriately 1.2. Explain the importance of actively listening to what customers are saying, in order to be able to provide suitable solutions 1.3. Explain how to summarise information for customers 1.4. Describe the importance of communicating appropriately with customers: a. electronically b. face to face c. in writing d. telephone 1.5. Explain how to use and read body language to respond to customers wishes and feelings 1.6. Explain how to deal with customers in a respectful, helpful and professional manner at all times 1.7. Explain how questions can be used to check a customer’s understanding 1.8. Explain the importance of maintaining a professional and dignified manner in dealings with customers 1.9. Outline what action should be taken if staff are unable to assist a customer		



<p>2. Understand how to communicate using appropriate customer service language</p>	<p>2.1. State the importance of using appropriate language that the customer will understand</p> <p>2.2. Outline the methods to be used when communicating with customers who have a different language, dialect or accent</p> <p>2.3. Describe the connection between customer expectations and customer satisfaction in delivering an effective customer service</p> <p>2.4. Describe why an organisation's procedures are important in order to provide effective customer service</p> <p>2.5. Describe the types of information customers may request</p> <p>2.6. List typical customer service problems and how they should be dealt with</p>		
<p>3. Understand how to develop effective customer relationships</p>	<p>3.1. Explain the importance of customer retention within the automotive industry</p> <p>3.2. Explain how an individual's behaviour affects how customers will respond</p> <p>3.3. Describe how to defuse potentially stressful situation</p> <p>3.4. Define the types of limitations that may be imposed on an individual and explain how to work within those limitations</p> <p>3.5. Describe how customer expectations may change as the customer deals with an organisation</p> <p>3.6. Outline how to investigate the cost and resource implications of an extension of the service offer to meet or exceed customer expectations</p> <p>3.7. Describe how to investigate the cost implications of bringing in new customers as opposed to retaining existing customers</p> <p>3.8. Explain the importance of following internal referral options when considering variations to an organisation's service offer</p> <p>3.9. Explain how an individual's contribution affects the overall customer service experience</p>		



Learner Name.....

UNIT REF: CSD1	UNIT TITLE: UNDERSTAND HOW TO DELIVER RELIABLE CUSTOMER SERVICE WITHIN THE AUTOMOTIVE INDUSTRY
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Level: 2	Route: Customer Service	Credit Value: 2	GLH: 20
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Rationale: This unit is about understanding how to deliver consistent and reliable service to customers in the automotive industry. As well as knowing how to deal with people, the learner needs to understand the importance of working within the boundaries of an organisation’s service systems to meet or exceed customer expectations. It includes being aware of how communication skills, company procedures and facilities can be used to deliver an effective and enjoyable experience for your customers

LEARNING OUTCOMES	ASSESSMENT CRITERIA	Evidence Ref No.	Date
The Learner will: 1. Understand the importance of providing a consistent service to customers	The Learner can: 1.1. Explain the importance of making realistic customer service promises to customers 1.2. Describe how to balance the needs of customers to those of an organisation 1.3. Explain the importance of keeping promises to customers 1.4. Explain how to inform customers should they be unable to keep any promises 1.5. Explain what action to take if customer needs or expectations had changed and how to adapt the service to meet the new requirements 1.6. Explain the importance of keeping customers informed in a positive and clear manner 1.7. Explain why it is important to keep customers informed if delivery of the service involves passing them onto a colleague		
2. Understand how to make improvements to the customer service experience	2.1. Explain why it is important to confirm that the service provided to customers meets their needs and expectations 2.2. Describe how to evaluate the overall service provided to customers and how they would recommend improvements 2.3. Explain the importance of sharing information with colleagues and service partners in order to improve standards of service delivery		
3. Understand how to deliver a reliable service to customers in the automotive industry	3.1. Explain the importance of keeping up to date with services or products offered within the automotive industry 3.2. Explain the importance of delivering a reliable service to customers in the automotive industry 3.3 Describe the methods for measuring effectiveness in delivering 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: CSHP1	UNIT TITLE: UNDERSTAND HOW TO RECOGNISE AND DEAL WITH QUERIES, REQUESTS AND PROBLEMS IN THE AUTOMOTIVE INDUSTRY
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Level: 2	Route: Customer Service	Credit Value: 2	GLH: 20
<p>Rationale: This unit is about understanding how to deal with queries, requests and complaints promptly and effectively, within the limits of one’s own authority. The scope of this unit is aimed at those working in the Automotive industry. It also covers how to work with colleagues and management in the process of resolving problems.</p>			

LEARNING OUTCOMES	ASSESSMENT CRITERIA	Evidence Ref No.	Date
The Learner will:	The Learner can:		
1. Understand how to respond to customer queries and requests	1.1 Explain how to respond to queries and requests raised by customers 1.2. Describe the key points of an effective negotiation and when to use them 1.3. Explain the importance of knowing when to forward complex queries and requests to colleagues or managers 1.4. Explain how best to deal with systems or process failures 1.5. State how to deal with issues such as lack of time or resources		
2. Understand how to respond to customer problems	2.1. List the common causes of complaint and how best to prevent them occurring 2.2. List the techniques for resolving customer problems 2.3. Explain the importance of taking ownership of a problem 2.4. Explain the most effective ways to resolve customer problems 2.5. State what is meant by cross-functional problem solving		



Learner Name.....

UNIT REF: CSDI1	UNIT TITLE: UNDERSTAND HOW TO DEVELOP CUSTOMER SERVICE RELATIONSHIPS IN THE AUTOMOTIVE INDUSTRY
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Level: 2	Route: Customer Service	Credit Value: 3	GLH: 30
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Rationale: This unit is about understanding how to build long-term relationships and fostering loyalty with customers in the Automotive industry. It also includes why it is important to build trust, so that customers are confident in an organisation's ability to meet their needs consistently.

LEARNING OUTCOMES	ASSESSMENT CRITERIA	Evidence Ref No.	Date
The Learner will: 1 Understand how to build customer confidence	The Learner can: 1.1. Explain how professionalism and assertive behavior can contribute to an effective customer service experience 1.2. Explain the importance of allocating time to deal with customers 1.3. Explain why it is important to reassure customers that everything possible is being done to keep the service promises made by an organisation		
2 Understand the importance of developing customer relationships	2.1. Explain the importance of agreeing expectations with customers 2.2. Explain the importance of customer retention 2.3. Explain the cost implications of bringing in new customers as opposed to retaining existing ones 2.4. Explain how customer expectations may change as the customer deals with an organisation and the impact this has on the customer relationship 2.5. Explain when it may become necessary to provide additional help and information to customers in response to customer questions and comments about an organisation's services or products 2.6. Explain the importance of sharing customer feedback with others and when it may become necessary to pass feedback to those in authority		
3 Understand how to meet and exceed customers' expectations	3.1. Explain how to recognise a conflict of interest between customer expectations and the service offered by an organisation 3.2. Explain why it is important to work effectively with others to resolve any difficulties in meeting customer expectations 3.3. Explain the importance of identifying opportunities for exceeding customer expectations by offering additional services or products		