



**INSTITUTE  
OF THE MOTOR  
INDUSTRY**

**IMI QUALIFICATION**



# **Assessment Criteria for**

## **IMI AUTOMOTIVE MANAGEMENT QUALIFICATIONS (VRQs)**

### **IMI Level 3 Award in Automotive Management**

**OFQUAL I.D: 600/0263/3**

### **IMI Level 4 Certificate in Automotive Management**

**OFQUAL I.D: 600/0298/0**

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## 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



## QUALIFICATION STRUCTURES (RULES OF COMBINATION)

### IMI Level 3 Award in Automotive Management

I.D: 600/0263/3

Learners must achieve 9 credits from the mandatory Level 3 units

### IMI Level 4 Certificate in Automotive Management

I.D: 600/0298/0

Learners must achieve a minimum of 26 credits.

This must include 9 credits from mandatory L3 units and 3 credits from the mandatory L4 units.

A minimum of 14 credits must be achieved from the optional L4 units

#### Mandatory Level 3 units

| Unit Ref: | Unit Title & I.D. number  | GLH | Unit Level | Credit Value |
|-----------|---|-----|------------|--------------|
| CIAM1     | Personal effectiveness in automotive management (Y/502/7935)                | 12  | 3          | 3            |
| CIAM2     | Organising and monitoring resources in the automotive industry (D/502/7936) | 19  | 3          | 3            |
| CIAM3     | Fundamental management principles in the automotive industry (H/502/7937)   | 19  | 3          | 3            |
|           |   |     |            | 9            |

#### Mandatory Level 4 units

| Unit Ref: | Unit Title & I.D. number  | GLH | Unit Level | Credit Value |
|-----------|---|-----|------------|--------------|
| CIAM4     | Customer service and quality in automotive retail operations (K/502/7938) | 19  | 4          | 3            |
|           |   |     |            |              |



## Optional Level 4 units

| Unit Ref: | Unit Title & I.D. number  | GLH | Unit Level | Credit Value |
|-----------|---|-----|------------|--------------|
| CIAM5     | Managing automotive department operations compliance (M/502/7937)           | 19  | 4          | 3            |
| CIAM6     | Working with people in automotive industry disciplines (H/502/79400)        | 19  | 4          | 3            |
| CIAM7     | Recruitment, selection and reward in automotive operations (K/502/7941)     | 19  | 4          | 3            |
| CIAM8     | Appraisal and development of automotive industry people (M/502/7942)        | 19  | 4          | 3            |
| CIAM9     | Planning and Budgeting the automotive department (T/502/7943)               | 28  | 4          | 4            |
| CIAM10    | Local marketing for automotive products and services (A/502/7944)           | 19  | 4          | 3            |
| CIAM11    | Managing Vehicle accident repair operation (F/502/7945)                     | 19  | 4          | 3            |
| CIAM12    | Managing automotive parts operations (J/502/7946)                           | 20  | 4          | 4            |
| CIAM13    | Information communication technology for automotive operations (L/502/7947) | 19  | 4          | 3            |
| CIAM14    | Managing Automotive Service and workshop organisations (R/502/7948)         | 28  | 4          | 4            |
| CIAM15    | Managing F and I operations in the motor industry (Y/502/7949)              | 19  | 4          | 3            |
| CIAM16    | Managing new vehicle sales operations (Y/502/7952)                          | 28  | 4          | 4            |
| CIAM17    | Managing used vehicle sales operations (R/502/7934)                         | 28  | 4          | 4            |
| CIAM18    | Managing vehicle fleet sales operations (L/502/7950)                        | 27  | 4          | 4            |
|           |   |     |            |              |



## **ASSESSMENT CRITERIA**

**IMI Level 3 Award in Automotive Management  
I.D: 600/0263/3**

**IMI Level 4 Certificate in Automotive Management  
I.D: 600/0298/0**



|                        |  |
|------------------------|--|
| <b>UNIT REF: CIAM1</b> | <b>UNIT TITLE: PERSONAL EFFECTIVENESS IN AUTOMOTIVE MANAGEMENT</b> |
|------------------------|--|

|                 |                         |                        |                |
|-----------------|-------------------------|------------------------|----------------|
| <b>Level: 3</b> | <b>Route: Knowledge</b> | <b>Credit Value: 3</b> | <b>GLH: 12</b> |
|-----------------|-------------------------|------------------------|----------------|

**Mapping:** This unit is mapped to MSC A1: Manage your own resources and MSC A2: Manage your own resources and professional development

**Rationale:** This unit is concerned with identifying and developing the competencies and personal attributes that are required for effective management in the automotive sector

| <b>LEARNING OUTCOMES</b>  | <b>ASSESSMENT CRITERIA</b>  |
|---|---|
| <b>The Learner will:</b>  | <b>The Learner can:</b>   |
| 1. Be able to satisfy the fundamental requirements of the management job role           | 1.1 Identify where to locate the relevant national occupational standards and qualifications<br>1.2 Interpret how NOS can be used in their job role<br>1.3 Describe personal attributes to be an effective manager<br>1.4 Apply personal attributes effectively in the job role   |
| 2. Know how to identify skills, understanding and knowledge gaps for their own job role | 2.1 Compare their skills and knowledge against NOS<br>2.2 Compare their personal attributes to those required to be an effective manager  |
| 3. Be able to set achievable, realistic objectives                                      | 3.1 Explain the need to set objectives and plans to achieve personal development goals<br>3.2 Apply the 'SMART' process for setting objectives<br>3.3 Discuss and agree with their senior management the requirements of the job role, personal work objectives and how progress against objectives will be measured.<br>3.4 Recognise when objectives have been achieved |
| 4. Be able to prepare a personal development plan                                       | 4.1 Prepare and agree with their senior manager a personal development plan to address skill gaps<br>4.2 Establish and evaluate personal planning on an ongoing basis   |
| 5. Be able to implement a personal development plan                                     | 5.1. Implement the development plan to agreed timescales in order to achieve the agreed outcomes<br>5.2. Explain how better knowledge, skills and practises have improved business  |

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

- 1.a The competence requirements for managers in the vehicle sector including:
  - i. the current national standards for management and leadership related to the automotive industry
  - ii. the bodies responsible for devising the national standards for management (MSC, SSC)
  - iii. the role of the Awarding Body (IMI) in the development of qualifications and their assessment
  - iv. the units of competence that relate to 'Managing Self and Personal Development' and the outcomes of 'Performance' and 'Behaviours' shown in the management standards
  - v. how management standards can be used to identify a student's own learning and development needs.
- 2.a Personal attributes of management in vehicle sectors and how they can be effectively applied including:
  - i. personal attributes for effective management in the vehicle sector \*
  - ii. the importance of being able to apply personal attributes that deliver and develop effective and harmonious working relationships in their current role or the role to which they aspire.
- 2.b To produce an audit of their current skills, knowledge and performance including:
  - i. an evaluation of the requirements, objectives, responsibilities and authority of their current job description and compare them to those required of an effective manager (as identified in NOS)
  - ii. in consultation with their manager or supervisor, relating to the aspects in (1a) and (2a) above, carry out an assessment of their current skills, knowledge and performance and appraise their own work, comparing it to the management attributes in (2a) above and recognise areas for future development

**Note 2.b.ii:** This should be achieved using a grading or numerically based system at the start and end of the programme to measure improvements resulting from training and development.
- 3.a Skills or knowledge gaps and methods for development and improvement including:
  - i. how to evaluate their own current skills and knowledge and identify and address skill and knowledge gaps
- 3.b Personal development plans, goals and targets including:
  - i. being able to set 'SMART' objectives to give focus to achieving improvements in skills, knowledge and personal performance and attaining personal targets and goals
  - ii. how to produce a personal development plan to include actions and methods to achieve the SMART objectives, rectify gaps and produce improvements in work performance.
  - iii. timescale, training and development needs.
  - iv. discuss and agree with their senior management the personal development plan and its objectives, actions and timescales for completion
  - v. agree with their senior management a frequency of review for the measurement of progress and achievement
- 4.a Evaluation of progress towards development needs:
  - i. how to evaluate the progress made towards achievement of personal goals and targets.
  - ii. how to evaluate benefits gained and applied from planned training and development
  - iii. be able to review and assess progress against personal objectives and share feedback with their senior management, relevant peers and colleagues
  - iv. how to periodically re-evaluate personal goals, targets and development needs
  - v. how to modify their personal development plan accordingly to reflect changes in circumstance and achievements
- 4.b Personal organisation and management including:
  - i. aspects affecting personal organisation and management \*
  - ii. how personal organisation and management can impact on efficiency, effectiveness and the achievement of personal and business targets.
  - iii. processes, techniques and the use of aids for efficient time management and work organisation
- 4.c Evaluation of improvements
  - i. how to evaluate improvements in knowledge, understanding and work performance during this programme of study.
  - ii. aspects for future development or training.
  - iii. aspects which have resulted in improvements in knowledge and performance
  - iv. how to measure 'added value' resulting from development and training.



**Content: contd**

\* NOTES:

- 2.a.i in terms of character, authority and professional application of management skills, positive attitude, commitment, reliability, flexibility, self-motivation, initiative, focus, leadership etc.
- 4.b.i time management, planning and scheduling of work and tasks, identifying deadlines and goals, prioritising work to achieve targets, etc.





|                        |   |
|------------------------|---|
| <b>UNIT REF: CIAM2</b> | <b>UNIT TITLE: ORGANISING AND MONITORING RESOURCES IN THE AUTOMOTIVE INDUSTRY</b> |
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|--|-------------------------|------------------------|----------------|
| <b>Level: 3</b>  | <b>Route: Knowledge</b> | <b>Credit Value: 3</b> | <b>GLH: 19</b> |
| <b>Mapping:</b> This unit is mapped to MSC B8 MSC D5 Allocate and check work in your team, MSC D6: Allocate and monitor the progress and quality of work in your area of responsibility, MSC E6 Ensure health and safety requirements are met in your area of responsibility, MSC E7 Ensure an effective organisational approach to health and safety, MSC E8: Manage physical resources, MSC F6 Monitor and solve customer service problems |                         |                        |                |
| <b>Rationale:</b> This unit addresses the organisation and monitoring of resources in all departments of the automotive sector.  |                         |                        |                |

| <b>LEARNING OUTCOMES</b>   | <b>ASSESSMENT CRITERIA</b>  |
|--|---|
| <b>The Learner will:</b>   | <b>The Learner can:</b>   |
| 1. Be able to plan the use of resources in their area of responsibility within automotive operations                   | 1.1. Identify the various types of resources available to a manager in the automotive sector<br><br>1.2. Identify resource requirements for their area of responsibility<br><br>1.3. Develop a plan to effectively utilise resources in their area of responsibility<br><br>1.4. Explain how to monitor the resources available within their area of responsibility |
| 2. Be able to identify resources that are working efficiently and those that are less efficient.                       | 2.1 Explain the benefits of high quality and good performance in automotive operations<br><br>2.2 Explain the effects of not resolving low quality and poor performance<br><br>2.3 Measure and assess output and quality against required standards   |
| 3. Be able to resolve issues of poor performance and quality within automotive operations                              | 3.1 Identify ways to improve poor quality of work and low levels of output<br><br>3.2 Apply appropriate solutions to rectify poor performances of labour and resources  |
| 4. Know how to handle matters of quality and customer satisfaction customer complaints in automotive retail operations | 4.1 Apply methods to control quality of products and service output<br><br>4.2 Apply methods to control standards of operation in their area of responsibility<br><br>4.3 Explain customer satisfaction and how it affects the long term prospects of a vehicle sales and service operation<br><br>4.4 Explain a range of methods used to measure customer service  |
| 5. Be able to apply the principles of health and safety regulations in the work place                                  | 5.1 Explain the different aspects of work that are addressed by health and safety regulations<br><br>5.2 Apply and manage standards of health and safety in the work place  |

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| <b>Content:</b><br><br><b>The candidate should understand and/or be able to apply:</b><br>1.a Factors affecting the efficient use of resources including: |
|---|

- i. explaining the meaning of resources and describe the types of resources available to a manager in relation to their work role \*
  - ii. the 'quantitative' and 'qualitative' aspects involved in resource management.
  - iii. the key factors affecting the use of human resources\*
  - iv. the range of physical resources available and the factors affecting their use\*
  - v. financial resources available to, or under, the control of the manager
  - vi. how to assess and measure the effectiveness of resources in operation
  - vii. how efficiency and utilisation are measured in the area of responsibility \*
  - viii. set and maintain standards of operation for the area of responsibility
- 1.b Planning of resources including:
- i. the factors involved when planning for new resources \*
  - ii. the importance of consulting with colleagues when acquiring new resources.
  - iii. devise a plan of resources needed to maximise efficiency and profitability in relation to the work-role of the student
  - iv. how to implement and interpret a cost-benefit analysis of the effective use of a resource
- 1.c Monitoring of resources including:
- i. the importance of monitoring the use of resources to ensure efficiency, quality and profitability
  - ii. conducting a risk analysis before using resources
  - iii. the effect on the environment of resources used in the dealership and how to minimise negative effects
  - iv. methods of measuring the efficient use of resources and their benefits in productivity (KPIs) in relation to the work-role of the student
  - v. the effect of inefficient use of resources and the factors that may cause inefficiency
  - vi. actions to remedy inefficient use of resources
- 2.a Effective allocation of work including:
- i. factors that must be considered when allocating work within the work-role of the student \*
  - ii. the responsibility and authority of the manager in allocating work
- 2.b Quality and performance of work including:
- i. the importance of monitoring the quality and performance of work
  - ii. set and maintain standards of quality appropriate to the product or service of the area of responsibility
  - iii. identify issues that affect quality of work
  - iv. methods used for measuring quality and the performance of work
- 2.c Rectifying poor performance and quality including:
- i. the results of poor work quality and performance and the effects of not rectifying poor standards immediately
  - ii. identifying ways in which the quality and performance of work within the work-role of the student can be improved or rectified. \*
  - iii. the role and responsibility of the manager in ensuring high quality and performance of work
- 3.a Monitor customer complaints including:
- i. complaints arising from issues in automotive retail operations \*
  - ii. customer concerns arising from the cause of complaints \*
  - iii. complaints handling procedures and controls
  - iv. procedures to prevent a re-occurrence of a specific complaint

**Content:**

- 4.a The principles of Health and Safety in the workplace including:
- i. principle health and safety regulations as determined by the Health and Safety at Work Act 1974
  - ii. appointing and training a Health and Safety officer to be responsible for health and safety in the department
  - iii. key points for health and safety in each department of the retail automotive operation
  - iv. identifying potential physical hazards that can occur in the workplace \*
  - v. identifying secondary hazards to health that may occur in the work place \*
  - vi. the reporting requirements of RIDDOR (Reporting of Injuries Diseases and Dangerous Occurrences Regulations)
  - vii. standards to be adopted to maintain compliance with CoSHH (Control of Substances Hazardous to Health).
  - viii. maintaining records of incidents and injury

\*

**NOTES:**

- 1.a.i human, physical, financial, time, premises, location, etc
- 1.a.iii headcount, knowledge and skills, multi-skilling, time available to perform tasks, flexibility, adaptability, etc.
- 1.a.iv premises, equipment, tooling & machinery, computers, vehicles, stocks etc
- 1.a.vii labour efficiency, hours sold, value of sales per employee, product sales, etc
- 1.b.i demand, availability of resources, image, efficiency etc
- 2.a.i nature of work to be done; knowledge, skill and efficiency of colleagues; competence in using available resources; training and development needs; time available, importance of the task; deadlines
- 2.b.ii low levels of skill or competence, poor practises or procedures, ineffective or non-available equipment, etc.
- 2.c.ii improve efficiency, profitability, customer retention and satisfaction, improved image, growth of business, expanded range of services and products to satisfy needs, etc.
- 3.a.i work, quality, attitudes, meeting commitments and promises, etc.
- 3.a.ii effects on the customer's plans, identifying causes, identifying responsible parties, uncertainty over liability and accountability, perceived lack of mobility during rectification, etc.
- 4.a.iv high profile markings and hatchings, spillages, cables & hoses, floor coverings, use of power and energy materials and points, etc.
- 4.a.v work station comfort, appropriate equipment, hours of work and rest, use and condition of vehicles, etc.



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|------------------------|---|
| <b>UNIT REF: CIAM3</b> | <b>UNIT TITLE: FUNDAMENTAL MANAGEMENT PRINCIPLES IN THE AUTOMOTIVE INDUSTRY</b> |
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|---|-------------------------|------------------------|----------------|
| <b>Level: 3</b>   | <b>Route: Knowledge</b> | <b>Credit Value: 3</b> | <b>GLH: 19</b> |
| <b>Mapping:</b> This unit is mapped to MSC A2 Manage your own resources and professional development, MSC B6 Provide leadership in your area of responsibility, MSC B11 Promote equality of opportunity, diversity and inclusion in your area of responsibility, MSC C5 Plan change, MSC C6 Implement change, MSC D6 Allocate and monitor the progress and quality of work in your area of responsibility |                         |                        |                |
| <b>Rationale:</b> This unit addresses the fundamental principles of work and operation that are essential to those who manage in the automotive sector  |                         |                        |                |

| <b>LEARNING OUTCOMES</b>   | <b>ASSESSMENT CRITERIA</b>  |
|--|---|
| <b>The Learner will:</b>   | <b>The Learner can:</b>   |
| 1. Know how to motivate themselves and others within automotive operations | 1.1. Identify factors which motivate and encourage<br>1.2. Explain how personal goals can impact, positively or negatively, on motivation at work   |
| 2. Know how to lead teams of colleagues within automotive operations       | 2.1. Identify different types of teams commonly found in vehicle sales/service/repair operations<br>2.2. Explain what is required for a team to work effectively<br>2.3. Explain the roles of individuals within teams<br>2.4. Identify leadership skills and behaviour |
| 3. Be able to communicate effectively with others in the work place        | 3.1 Identify various forms of communication<br>3.2 Apply the most appropriate form of communication in particular circumstances<br>3.3 Explain the benefits of effective communication  |
| 4. Be able to respond positively to change within automotive operations    | 4.1 Determine the causes of change and how it can impact on the business and individuals<br>4.2 Devise and apply processes that provide an effective measurement of change  |

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| <p><b>Content:</b></p> <p><b>The candidate should understand and/or be able to apply:</b></p> <p>1.a Motivational needs and how they influence the satisfaction of a job-holder including:</p> <ul style="list-style-type: none"> <li>i. the meaning of personal goals and values</li> <li>ii. understanding characteristics of individuals and how they respond to different motivational factors</li> <li>iii. differences between motivation and incentive</li> <li>iv. hierarchy of motivational needs</li> <li>v. understand own motivational factors including need, want and desire *</li> <li>vi. expectations of the job and managing progression of competence within the role *</li> <li>vii. social motivational factors and benefits *</li> </ul> |
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**Content:**

- 1.b Impact of personal goals on motivation at work including:
  - i. understanding own career goals and objectives
  - ii. identifying a career path that will satisfy personal goals and work objectives
  - iii. planning personal development to achieve own career goals
  - i. impact of planned and unplanned career paths on motivation at work
  
- 2.a Team leadership of colleagues within vehicle operations including:
  - i. understanding team culture and how it varies between vehicle operations departments
  - ii. understanding team matrices and how they vary with organisational ethos
  - iii. defining and matching roles to characters and types \*
  - iv. different types of teams commonly found in vehicle sales/service/repair premises \*
  - v. how different characters joining a team may vary the team dynamic and performance
  - vi. structuring a team to achieve optimum performance and harmony
  - vii. the purpose of management communication \*
  - viii. delivering praise and maintaining discipline at work
  
- 2.b The fundamentals of leadership including:
  - i. the qualities, characteristics and meaning of good leadership \*
  - ii. how good leaders can influence, motivate and inspire others
  - iii. the benefits and importance of leadership to team working and the organisation
  - iv. different management styles and their concepts \*
  - v. the roles of the team leader \*
  - vi. being able to identify strengths and limitations in own leadership style
  
- 2.c The fundamental processes of managing including:
  - i. planning, organising, controlling and decision-making
  - ii. motivating, communicating, measuring performance, giving feedback
  - iii. the processes for operating and deploying the above strategies of management
  - iv. how management qualities and characteristics influence effective team working
  
- 2.d Requirements for a team to work effectively including:
  - i. the importance of leadership in promoting effective team working
  - ii. the importance of recognising each individual's contribution to effective team working
  - iii. the process of allocating and progressing work to achieve quality standards and deadlines
  - iv. effective team interaction and the benefits of team working\*
  - v. the impact of individual motivators on team working
  - vi. team leadership accountability and delegation of responsibility and authority within the team
  - vii. behaviour which encourages and promotes positive team working \*
  - viii. barriers to effective team working
  
- 3.a Effective communication within vehicle operations
  - i. the principles and benefits of good communication \*
  - ii. the relationship between communication and effective management
  - iii. the importance of communicating company goals and the strategy
  - iv. the importance of frequent communication with the team and individuals \*
  - v. methods of communicating with the team collectively and individually \*
  - vi. the communication of work-related context as well as job content
  - vii. the importance of using appropriate forms of communication to suit circumstances
  - viii. the two-way process of communication and how it can be effectively implemented
  - ix. inviting input from colleagues in the decision making process
  - x. the impact of poor communication on the team and on others who interact with the team
  - xi. develop a communication strategy to encourage and facilitate feedback

**Content:**

- 4.a. Managing the team through change within the organisation, including:
  - i. the need for change and main causes of change \*
  - ii. methods that control and effect response to change
  - iii. identify and justify required changes to procedures, systems, structures and roles
  - iv. planning change and how it will happen
  - v. strategy for communicating the need for change, its progress and effects to all involved
  - vi. identify, assess and manage barriers to change
  - vii. identify and implement training and support for people affected by change
  - viii. implementing, managing and measuring the effect of change
  - ix. opportunities for the business provided by change \*
  - x. impact of change on the individual \*
- 4.b. Managing the effects of change within the organisation, including:
  - i. how change can impact on business performance \*
  - ii. how change can affect business requirements \*
  - iii. assessing the risks and benefits associated with strategies and plans for change
  - iv. developing contingency plan
  - v. assessing the need for new resources
  - vi. developing systems to monitor and assess progress of change

**\* NOTES:**

- 1.a.v working conditions, colleagues, work expectations, competence, equipment, appreciation, praise, career potential etc.
- 1.a.vi management style, attitude, ability, knowledge, training, opportunities etc.
- 1.a.vii car, phone, fuel, pension plan, health plan, bonus, status, recognition, responsibility, empowerment etc.
- 2.a.iii Belbin team roles and behaviours, roles people adopt within a team, team-focused leadership, etc.
- 2.a.iv permanent and short term, functional teams (e.g. the parts staff), cross functional (e.g. a dealership team), management teams, project teams etc.
- 2.a.vii decision making, organising, influencing, consulting, instructing etc.
- 2.b.i visionary, enthusiastic, flair, innovative, confident, respected, good communicator, knowledgeable, dedicated, decisive, empathic, honest, trusted, etc.
- 2.b.iv autocratic, democratic, consultative, dominant, passive, aggressive etc.
- 2.b.v mentor, facilitator, monitor, co-ordinator, director, producer, broker, innovator, etc.
- 2.d.iv positive performance, good working relationships, improved morale, greater efficiency and productivity etc.
- 2.d.vii loyalty, helpfulness, openness, respect, empathy, accessibility, direction etc.
- 2.d.ix criticising colleagues, failure to keep promises, failure to meet deadlines, failure to recognise the needs of others, poor communication etc.
- 3.a.i team morale, performance of colleagues, customer satisfaction and retention, business performance etc.
- 3.a.iv maintain motivation and morale, involve colleagues in decision making, disseminate information, inform colleagues of actions or decisions, request feedback, encourage participation and involvement, report progress made towards achieving company goals, etc
- 3.a.v formal and informal, verbal, individual and group dialogue, group presentations, telephone, written letters, memorandum, email, reports, news letters, notice board etc
- 4.a.i technical, legal, economic, political, social, demographic, business practices, structural, financial etc
- 4.a.ii SWOT analysis, setting objectives, planning, measuring, continuous improvement etc.
- 4.a.ix improving business performance, gaining new business, restructuring to meet new requirements, changing attitudes and culture etc
- 4.a.x affect on personal confidence, financial implications, skill gaps created, training needs, contingency etc.
- 4.b.i increase or loss of competitiveness, new image and awareness, new opportunities etc.
- 4.b.ii new equipment and tooling, new skills required, new business practices, additional resource, additional expense, increased workload, new customer demands and expectations etc.



|                        |   |
|------------------------|---|
| <b>UNIT REF: CIAM4</b> | <b>UNIT TITLE: CUSTOMER SERVICE AND QUALITY IN AUTOMOTIVE RETAIL OPERATIONS</b> |
|------------------------|---|

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|--|-------------------------|------------------------|----------------|
| <b>Level: 4</b>  | <b>Route: Knowledge</b> | <b>Credit Value: 3</b> | <b>GLH: 19</b> |
| <b>Mapping:</b> This unit is mapped to MSC D6 Allocate and monitor the progress and quality of work in their area of responsibility, MSC F5 Resolve customer service problems, MSC 6 Monitor and solve customer service problems, MSC F7 Support customer service improvements, MSC F11 Manage the achievement of customer satisfaction, MSC F14 Prepare to carry out a quality audit, MSC F15 Carry out a quality audit |                         |                        |                |
| <b>Rationale:</b> This unit addresses the core functions of work quality and customer service in the automotive sector   |                         |                        |                |

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

**Content:**

**The candidate should understand and/or be able to apply:**

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

**Content: contd**

- 3.b. Actions required to improve customer service including:
  - i. the causes of poor performance and low standards of behaviour and operation
  - ii. how performance standards are calculated
  - iii. the actions necessary to improve the quality of customer service
  - iv. the importance of continuously measuring and monitoring customer service and care activities
- 4.a. Reasons for customer complaints occurring including:
  - i. varying levels of individual customer expectations
  - ii. causes of customer complaints
  - iii. ways in which customers express their dissatisfaction \*
  - iv. the importance of monitoring customer complaints



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

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

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

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

\* NOTES:

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



|                        |   |
|------------------------|---|
| <b>UNIT REF: CIAM5</b> | <b>UNIT TITLE: MANAGING AUTOMOTIVE DEPARTMENT OPERATIONS COMPLIANCE</b> |
|------------------------|---|

|   |                         |                        |                |
|---|-------------------------|------------------------|----------------|
| <b>Level: 4</b>   | <b>Route: Knowledge</b> | <b>Credit Value: 3</b> | <b>GLH: 19</b> |
| <b>Mapping:</b> This unit is mapped to MSC B8 Ensure compliance with legal, regulatory, ethical and social requirements   |                         |                        |                |
| <b>Rationale:</b> This unit provides managers within the automotive industry with knowledge of the legislation designed to protect the consumer, trader, employer, employee and the public in general |                         |                        |                |

| LEARNING OUTCOMES   | ASSESSMENT CRITERIA   |
|---|---|
| <b>The Learner will:</b>  | <b>The Learner can:</b>   |
| 1. Understand employment legislation relating to automotive operations                                      | 1.1. Explain the legislation relating to the recruitment, selection and employment of staff in automotive operations<br><br>1.2. Explain the potential impact on the business of not adhering to employment legislation<br><br>1.3. Identify the steps to be taken to ensure compliance with employment legislation   |
| 2. Understand consumer legislation relating to automotive operations  | 2.1. Explain the legislation concerned with the sale of goods and services for an automotive operation<br><br>2.2. Explain the potential impact on the business of not adhering to consumer legislation<br><br>2.3. Identify the steps to be taken to ensure compliance with consumer legislation   |
| 3. Understand legal issues and responsibilities relating to the sale of automotive finance and insurances   | 3.1. Explain the key legislative aspects relating to the sale of finance and insurance products within an automotive operation<br><br>3.2. Explain the potential impact on the business of not adhering to finance and insurance legislation<br><br>3.3. Identify the steps to be taken to ensure compliance with finance and insurance legislation   |
| 4. Understand the regulations and responsibilities relating to Value Added Tax within automotive operations | 4.1. Explain the legislation concerned with the sale of goods and services subject to Value Added Tax<br><br>4.2. Explain the responsibilities of the company to accurately report sales and purchases to HMRC<br><br>4.3. Explain the potential impact on the company of not adhering to the requirements relating to Value Added Tax legislation<br><br>4.4. Identify the steps to be taken to ensure compliance with Value Added Tax legislation |
| 5. Understand the Data Protection Act, its associated services and its impact on automotive operations      | 5.1 Explain the legislation concerned with access to personal data stored manually or electronically within an automotive operation<br><br>5.2 Explain the potential impact on the business, employees and customers of not adhering to the Data Protection Act<br><br>5.3 Identify the steps to be taken to ensure compliance with the Data Protection Act   |

**Content:**

**The candidate should understand and/or be able to apply:**

- 1.a Issues and responsibilities of complying with employment legislation within vehicle operations including:
  - i. the meaning of the term contract and the implications this brings to the term employment
  - ii. primary terms included in the formation of a contract of employment \*
  - iii. primary principles and issues of employment legislation \*
  - iv. implications for the business regarding its responsibility to apply employment legislation \*
  - v. guidance, protection and confidence the legislation is designed to give employers and employees
  - vi. the mandatory requirements for monitoring compliance with employment legislation as applied within vehicle operations.
  - vii. specific business methods and processes for monitoring compliance with employment legislation\*.
  
- 2.a Standards which influence customer service and quality including:
  - i. the primary statutes that determine the rules for the sale, supply and delivery of products and services in the motor industry \*
  - ii. legislation that affects customer service and quality\*
  - iii. the role of organisations that represent 'customer interests' \*
  - iv. examples of 'best practice' in the motor industry for providing good customer service.
  
- 2.b Issues of legislation and responsibilities concerning consumer rights within vehicle operations including:
  - i. the importance of awareness and compliance with common laws and statutes
  - ii. fundamental requirements for compliance with contract and tort.
  - iii. core principles and requirements of consumer protection legislation \*
  - iv. the protection and confidence legislation offers vendors and consumers
  - v. standards for compliance with consumer legislation within vehicle operations.
  - vi. methods and processes for monitoring compliance with consumer legislation in business.
  
- 3.a Requirements and responsibilities relating to the management of sales of vehicle finance and insurances including:
  - i. the role of the Financial Conduct Authority, its empowerment, objectives and principles for business
  - ii. the need for, and purpose of, legislation in the finance industry
  - iii. primary legislative requirements that impact the area of retail vehicle operations \*
  - iv. essential documentation required to ensure compliance
  - v. issue and distribution of documentation, to whom and when, as a matter of compliance
  - vi. the implications for the business if compliant practices are not followed.

**Content:**

- 3.b Requirements and responsibilities relating to the sales presentation of vehicle finance and insurances including:
  - i. the importance of good knowledge of the workings of finance and insurance-based products
  - ii. finance sales executives competence to qualify and understand customer needs accurately
  - iii. how knowledge is used to match identified needs to the most suitable products and services appropriate to the customer's needs.
  - iv. requirements and processes for storage and audit of documentation to ensure compliance at all times.
  - v. how documentation is used to enhance sales and give the customer the opportunity and the confidence to make informed decisions.
  - vi. how the sales persons' presentation and advice must give the customer the confidence to make informed and correct decisions.
  - vii. the Insurance Conduct of Business (ICOBs) requirements and standards for delivery of documents, terms and conditions
  
- 4.a Legislation that affect vehicle finance and insurance sales operations including:
  - i. terms of the Consumer Credit Act (1974) and the rules it applies to the terms, conditions and liabilities of all parties involved in the finance contract \*
  - ii. the standards set by the Money Laundering Regulations 2003 & 2007
  - iii. actions to be taken to ensure that all financial transactions entered into by the business are compliant with Money Laundering Regulations 2003 & 2007.
  
- 5.a The Data Protection Act including:
  - i. core terms and requirements of the Data Protection Act 1998
  - ii. standards the business must undertake in order to record and store customer personal data \*
  - iii. the implications for the business in complying with the Data Protection Act \*
  - iv. protection and confidence the legislation is designed to give consumers, employees, third parties and the business
  - v. requirements for maintaining records in compliance with the Data Protection Act.
  - vi. requirements for monitoring and documenting compliance with the terms of the Data Protection Act within vehicle operations.
  
- 6.a Regulations and responsibilities relating to Value Added Tax within vehicle operations including:
  - i. the importance of understanding and complying with HMRC Value Added Tax regulations
  - ii. the structure of Value Added Tax, the various levels of tax and tax codes and the categories to which they apply in the sales of goods and services
  - iii. requirements of vehicle sales and service operations to record in detail and report all sale and purchase transactions to HMRC
  - iv. implications and potential penalties (to the company and its accountable management) of failing to record in detail and report on time all sale and purchase transactions to HRMC VAT office.
  - v. systems and procedures to ensure compliance the Value Added Tax regulations and legislation

**Content:**

\* NOTES:

- 1.a.ii Duration of contract, terms for severance, terms for dismissal from contract, conditions of employment – method and type of remuneration, frequency of review of employment conditions and remuneration, working hours, terms of employment during sickness, employer’s and employee’s liabilities, etc.
- 1.a.iii equality, diversity, national minimum wage, pay, working hours, time off and holidays, grievance procedures, discipline procedures, employment contracts and conditions, maternity and paternity terms, manager liabilities with reference to the welfare of staff, etc
- 1.a.iv working conditions and facilities, commitment to provide payment, maintenance of staff knowledge and competence to do the job, responsibilities and limitations, records and documentation, welfare and well being, etc
- 1.a.vii provision of facilities for work, appraisal, training, review, duty of care etc,
- 2.a.i the Sale Of Goods Act 1979, the Trade Descriptions Act 1968, the Distance Selling Regulations 2000, the Implied Contract Terms, Misrepresentation Act 1967, Unfair Contract Terms Act 1977, Consumer Protection Act 1987, Sale and Supply of Goods and Services Act 1992, etc
- 2.a.ii consumer protection legislation, data protection, equal opportunities, credit and finance regulations, consumer rights, codes of practice and business ethics that relate to the provision of customer service, etc.
- 2.a.iii Competition and Markets Authority and Trading Standards, consumer publications such as Which magazine, television and radio ‘watch dog’ programmes, independent consumer bodies such as CCTA, etc.
- 2.a.iv knowledgeable staff, levels of empowerment, responsibilities and limitations, documentation, etc.
- 2.b.iii honesty, fairness in all aspects of description and transaction, disclosure of all known facts and issues, Fitness for Purpose, Satisfactory Quality, expert competence, accountability, etc
- 3.a.iii Insurance Conduct of Business (ICOBs), complaints procedures, Terms & Conditions, supervision, client money handling, staff competence, maintenance of records, offer of finance and insurance products and services, etc.
- 4.a.i regulated agreement, non-regulated agreement, cancellable and non-cancellable agreements, ‘cooling off period’, thirds and halves rules, factors that contribute to an ‘unenforceable’ agreement, advertising standards, finance quotations, etc.
- 5.a.ii gaining customer permission to retain and use information, ‘secure’ storage of customer data, limitations of use of customer data, restrictions governing the sale of customer data, the right to use data provided by a third party, etc
- 5.a.iii trained and knowledgeable staff, responsibilities and limitations, documentation, secure keeping, restricted access, rules for the sharing of information, etc



|                        |   |
|------------------------|---|
| <b>UNIT REF: CIAM6</b> | <b>UNIT TITLE: WORKING WITH PEOPLE IN AUTOMOTIVE INDUSTRY DISCIPLINES</b> |
|------------------------|---|

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

| <b>LEARNING OUTCOMES</b>  | <b>ASSESSMENT CRITERIA</b>   |
|---|--|
| <b>The Learner will:</b>  | <b>The Learner can:</b>  |
| 1. Be able to develop positive working relationships with colleagues within automotive operations | 1.1. Discuss a range of aspects that affect the working relationships with colleagues<br><br>1.2. Explain the processes and behaviours that promote good working relationships<br><br>1.3. Plan team meetings and individual meetings to communicate issues and business matters   |
| 2. Be able to maintain positive disciplines and motivation in staff and colleagues                | 2.1. Explain the importance of keeping colleagues informed about the standards of conduct and performance expected of them<br><br>2.2. Explain character variances between individuals and how this affects working relationships<br><br>2.3. Apply the principles of motivational strategy when working with subordinates, peers and seniors. |
| 3. Be able to manage instances of conflict and misconduct in subordinates                         | 3.1. Explain the differences between conflict, misconduct, gross misconduct and unsatisfactory performance<br><br>3.2. Handle instances of conflict, misconduct, gross misconduct and unsatisfactory performance   |
| 4. Be able to utilise individual and team strengths in automotive operations                      | 4.1. Identify expertise, knowledge, skills and attitudes within individuals and teams<br><br>4.2. Explain how different skills sets are suited to differing roles within the team<br><br>4.3 Identify skill gaps and provide training solutions  |
| 5. Be able to identify development needs from work performance in automotive operations           | 5.1 Gather and check information required to identify problems with work performance<br><br>5.2 Evaluate current procedures for managing people and their performance in their area of responsibility and identify areas of weakness in the system   |

**Content:**

**The candidate should understand and/or be able to apply:**

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

**Content:**

## \* NOTES:

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





|                        |   |
|------------------------|---|
| <b>UNIT REF: CIAM7</b> | <b>UNIT TITLE: RECRUITMENT, SELECTION AND REWARD IN AUTOMOTIVE OPERATIONS</b> |
|------------------------|---|

|   |                         |                        |                |
|---|-------------------------|------------------------|----------------|
| <b>Level: 4</b>   | <b>Route: Knowledge</b> | <b>Credit Value: 3</b> | <b>GLH: 19</b> |
| <b>Mapping:</b> This unit is mapped to MSC B8 Ensure compliance with legal, regulatory, ethical and social requirements, MSC B1.1 Promote equality of opportunity, diversity and inclusion in your area of responsibility, MSC D3 Recruit, select and keep colleagues, MSC D4 Plan the work force |                         |                        |                |
| <b>Rationale:</b> This unit provides managers and supervisors with the knowledge and understanding to conduct effective recruitment of staff and develop appropriate reward packages within automotive operations.  |                         |                        |                |

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

**Content:**

**The candidate should understand and/or be able to apply:**

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

**Content:**

- 4.a Formal interviewing techniques including:
  - i. the importance of a planned and consistent style of interview through out the job recruitment process
  - ii. how to put the applicant at ease
  - iii. the importance of determining the applicant's understanding of the job role and its responsibilities
  - iv. the importance of evaluating factual information provided by applicants \*
  - v. questioning techniques and the importance of using open questions
  - vi. fair and equal questioning strategy for all candidates
  - vii. how to set and receive a candidate presentation
  - viii. the importance of getting applicants to talk and the need for interviewers to listen
  - ix. how to get applicants to expand or clarify aspects they have discussed
  - x. techniques for determining attitudes, values, interest and commitment
  - xi. the importance and use of selection criteria in determining the successful applicant
  - xii. the importance of retaining recruitment and selection documentation
  
- 5.a Candidate selection process including:
  - i. reviewing candidate portfolios and selecting key qualities
  - ii. short listing job applicants matched to the selection criteria
  - iii. eliminating bias, personal preference and discrimination in the selection process
  - iv. making a justifiable, documented decision of candidate selection
  - v. procedures for informing the successful and unsuccessful applicants
  
- 6.a Current employment law and its effect on the recruitment and selection process including:
  - i. Legislation affecting recruitment and employment including the Employment Relations Act 1999
  - ii. Laws relating to Diversity and Discrimination
  - iii. Trade Union and Labour Relations (consolidation) Act1992
  - iv. Data Protection Act 1998/2000
  - v. Asylum and Immigration Act
  - vi. minimum wage and hours of work
  - iv. company policy and procedures for the recruitment and selection of staff
  - vii. the manager's responsibility and liability when recruiting staff
  
- 7.a Processes involved in assessing and preparing appropriate reward packages for staff including:
  - i. methods used to assess the needs, abilities and preferences of staff for reward and recognition
  - ii. staff rewards including salary/wage structures and bonus, incentive schemes and benefits
  - iii. alternative salary and incentive structures such as performance-related pay and group bonus schemes
  - iv. the appropriate application of benefits in kind as additional reward or remuneration
  - v. the effect benefits-in-kind may have on a staff members' income tax liabilities
  - vi. alternative incentives that apply benefits without additional taxation implications \*

**Content:**

\* NOTES:

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



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

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

**Content:**

**The candidate should understand and/or be able to apply:**

- 1.a. The difference between review and appraisal including:
  - i. objectives of review and of appraisal
  - ii. benefits of a review and an appraisal to both the employer and the employee
  - iii. frequency with which reviews and appraisals should be delivered
  - iv. topics and issues that a review and an appraisal should address
- 1.b. Methods of assessing skill levels, training and development needs of staff including:
  - i. conducting a training needs analysis
  - ii. tools, methods and practises used in assessing performance and identifying skills gaps
  - iii. tools, methods and practises used in assessing current knowledge, skills and personal qualities
  - iv. tools, methods and practises used to identify learning and development potential
  - v. identify the need for an individual's development.\*
  - vi. identify the need for team development.\*
  - vii. ways of determining an employee's potential for development in preparation for a more senior role \*
  - viii. benefits of a scheduled, structured performance and appraisal plan
- 2.a. Issues relating to staff turnover including:
  - i. causes of staff turnover \*
  - ii. ways in which staff can be retained within the job or organisation
  - iii. resolving issues that cause staff turnover
  - iv. use of exit interviews for establishing the cause of staff leaving the organisation's employment
  - v. use of information from exit interviews in reducing staff turnover
- 3.a. Procedures relating to the preparation of staff appraisals and performance reviews including:
  - i. the importance of conducting regular formal staff appraisals and reviews
  - ii. legal protocols to be observed in the preparation, delivery and follow-through of appraisals and reviews
  - iii. preparing an environment appropriate to an appraisal meeting.
  - iv. tools and methods used in planning of staff appraisals and performance reviews \*
  - v. briefing and preparing employees for their review or appraisal
  - vi. techniques of delivering staff appraisals and performance reviews
  - vii. methods used to document the findings and outcomes of staff appraisals and performance reviews
- 4.a. Commitments, obligations and actions that arise from a staff appraisal including:
  - i. proposing, agreeing and planning any courses of action arising from the appraisal or performance review
  - ii. agree targets for improvement based on areas of under performance
  - iii. agree objectives for development based on new technology or changing profiles of work.
  - iv. agree objectives for personal development based on career potential
  - v. explain the expected standards of performance of any courses of action arising from the appraisal or performance review



**Content:**

4.b. Delegation and control of tasks including:

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

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

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

**NOTES:**

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



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

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



**Content:**

**The candidate should understand and/or be able to apply:**

1. a. Financial terminology used in automotive operations including:
  - i. the importance of financial controls in daily operations
  - ii. revenue, sales, turnover, cash flow, working capital
  - iii. cost centres and profit centres
  - iv. gross profit, direct profit, operating profit and net profit
  - v. retained profit/retained loss
  - vi. costs and expenses and their sub-variants \*
  - vii. fixed assets (tangible and intangible) and current assets \*
  - viii. types of liability \*
  - ix. methods of asset and stock depreciation \*
  
- 2.a. The purpose of the main financial reports and documents including:
  - i. trading account
  - ii. management account
  - iii. profit and loss
  - iv. departmental budget
  - v. breakeven chart
  - vi. formats of the reports and documents identified in (i–v) above
- 2.b. How to prepare a budget including:
  - i. the importance of budgets in departmental operations
  - ii. different types of budget that can be prepared
  - iii. process of producing a departmental budget
  - iv. where to find data and information from which to construct and justify a departmental budget
  - v. internal factors affecting a department's budget planning \*
  - vi. external factors affecting a department's budget planning \*
  - vii. who to consult with and why when preparing a budget
  - viii. how to prepare a departmental budget
  - ix. assess the risks to the business plan and departmental performance incurred by the budget plan
  
- 3.a. Use a budget to achieve departmental objectives including:
  - i. layout of and information contained in a departmental budget
  - ii. where to find and how to use management information
  - iii. cross-referencing budget and management report information
  - iv. terms associated with budgets and budget planning \*
  - v. control and measure progress towards target achievement
  - vi. measuring variances and trends
  - vii. identifying causes of over and underperformance from budget and management information
- 3.b. Use a budget to control short term performances including:
  - i. confirm departmental incentives and targets
  - ii. to sub divide the budget into short and medium term objectives
  - iii. measure individual performance areas
  - iv. identify under performance and the need for rectification
  - v. identify over performance and the need for control
  - vi. identify causes of under or over performance against budget goals

**Content:**

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

**\* NOTES:**

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



|                         |   |
|-------------------------|---|
| <b>UNIT REF: CIAM10</b> | <b>UNIT TITLE: LOCAL MARKETING FOR AUTOMOTIVE PRODUCTS AND SERVICES</b> |
|-------------------------|---|

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

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

**Content:**

**The candidate should understand and/or be able to apply:**

- 1.a. The fundamental principles of local marketing of motor products and services including:
  - i. aspects relating to marketing of automotive products and services\*
  - ii. processes for determining customer needs and expectations
  - iii. processes for assessing and determining customer satisfaction
  - iv. evaluate, appreciate and utilise competitive advantage in marketing strategy\*
  - v. evaluate and appreciate how own products and services meet and exceed customer needs
  - vi. how products and services can be extended to meet and satisfy identified customer needs and expectations \*
  
- 2.a. Market sectors and segments including:
  - i. the composition of vehicle market sectors and subsectors
  - ii. the importance of market segmentation in the marketing of automotive products and services
  - iii. determining the primary marketing area
  - iv. identify relevant market segments and target markets within those segments \*
  - v. assessing the needs wants and desires of the target markets
  - vi. assess the potential and value of each of the segments
- 2.b. Products and service positioning including:
  - i. compare and contrast current products and services against existing and potential customer requirements
  - ii. create a list of Unique Selling Points and compare them fairly to competitors' products
  - iii. modifying services offered to meet the requirements of the target market
  - iv. extending or adjusting available products to satisfy the requirements of the target market
  
- 3.a. Planning and preparation of short-term local marketing plans including:
  - i. planning a local marketing campaign of automotive products and services
  - ii. analyse effectiveness of using own or outsourcing resources
  - iii. parties to be involved with the planning and organising of the marketing campaign \*
  - iv. identifying and setting appropriate and achievable market objectives
  - v. methods available for communicating with and promoting to the market \*
  - vi. selecting the marketing methods most appropriate to target market segments
  - vii. planning market strategy to support the organisation's business objectives
  - viii. communicating the marketing campaign plan within the organisation
  - ix. processes involved in planning and documenting a short-term local marketing plan \*
  - x. preparation of a detailed costing for a local marketing plan
  - xi. calculations for establishing the break-even point in a plan
  - xii. processes for defining and projecting the profit factors of a local marketing plan
  - xiii. methods to measure the plan in operation and set frequency of measurement
  - xiv. executing the plan into action

**Content:**

3.b. Communicating the marketing message to the target market including:

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

4.a. Measurement of the effect of an automotive product campaign including:

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

**NOTES:**

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



|                         |  |
|-------------------------|--|
| <b>UNIT REF: CIAM11</b> | <b>UNIT TITLE: MANAGING VEHICLE ACCIDENT REPAIR OPERATIONS</b> |
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|-----------------|-------------------------|------------------------|----------------|
| <b>Level: 4</b> | <b>Route: Knowledge</b> | <b>Credit Value: 3</b> | <b>GLH: 19</b> |
|-----------------|-------------------------|------------------------|----------------|

**Mapping:** This unit is mapped to MSC D6 Allocate and monitor the progress and quality of work in your area of responsibility, MSC E1 Manage a budget, MSC F6 Monitor and solve customer service problems, MSC F8 Work with others to improve customer service

**Rationale:** This unit addresses the effective management and organisation of vehicle accident repair operations

| <b>LEARNING OUTCOMES</b>  | <b>ASSESSMENT CRITERIA</b>  |
|---|---|
| <b>The Learner will:</b>  | <b>The Learner can:</b>   |
| 1. Understand the principles of efficient vehicle accident repair workshop operations         | 1.1. Explain the costs incurred in a vehicle accident repair workshop operation<br>1.2. Explain the aspects of the vehicle accident repair operations that affect customer satisfaction<br>1.3. Explain the aspects of the vehicle accident repair operation premises which affect customer satisfaction<br>1.4. Explain the aspects of vehicle accident repair staff that affect customer satisfaction   |
| 2. Be able to use performance information in a vehicle accident repair workshop               | 2.1. Explain a range of methods used to monitor and report the performance of vehicle accident repair operations<br>2.2. Explain the key performance indicators and benchmarks used in vehicle accident repair operations   |
| 3. Be able to deliver the process of notification of claim or loss                            | 3.1. Explain the process for dealing with claim or loss notifications   |
| 4. Know how to structure the estimate and the workshop job card for a vehicle accident repair | 4.1. Explain the difference between a repair estimate and the workshop job card<br>4.2. Explain the importance of reviewing the estimate with the vehicle present<br>4.3. Produce an estimate for repair from a prepared scenario<br>4.4. Present an estimate for a repair ensuring customer appreciation of the values, qualities and need for the work to be carried out<br>4.5. Evaluate the estimate and produce a workshop job card for the vehicle repair |

**Content:**

**The candidate should understand and/or be able to apply:**

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

**\* NOTES**

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



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

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



**Content:**

**The candidate should understand and/or be able to apply:**

**1.a. Principles of stock management including:**

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

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

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

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

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

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

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

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

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

**Content:**

## NOTES:

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



|                         |  |
|-------------------------|--|
| <b>UNIT REF: CIAM13</b> | <b>UNIT TITLE: INFORMATION COMPUTER TECHNOLOGY FOR AUTOMOTIVE OPERATIONS</b> |
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|                 |                         |                        |                |
|-----------------|-------------------------|------------------------|----------------|
| <b>Level: 4</b> | <b>Route: Knowledge</b> | <b>Credit Value: 3</b> | <b>GLH: 19</b> |
|-----------------|-------------------------|------------------------|----------------|

**Mapping:** This unit is mapped to MSC A2 Manage your own resources and professional development, MSC E4 Promote the use of technology in your organisation, MSC E11 Communicate information and knowledge

**Rationale:** This unit addresses the knowledge required to ensure automotive managers are competent in the use of common computer-based applications and popular business related software

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

**Content:**

**The candidate should understand and/or be able to apply:**

**1.a. Internet and its communication functions including:**

- i. the function of the internet and how it can benefit the retail motor industry
- ii. utilising functions of the internet in departmental control and activity
- iii. benefits and limitations of the communication functions of the internet in the automotive industry

**1.b. Computer operations and functions including:**

- i. unique functions of the terms administrator, user, client, server, network LAN, WAN, intranet, extranet, ICT, e-Commerce, World Wide Web and the internet.
- ii. network systems and the advantages of using them \*

**1.c. Computer threats and security including:**

- i. the threat of unsolicited and undesirable software infiltrating a computer system
- ii. information security and the benefits of being proactive in dealing with security risks \*
- iii. 'computer viruses' how they can infect the system
- iv. definitions of spy-ware and ad-ware and their threat to a computer system
- v. computer online security and anti-virus measures \*
- vi. the purpose and necessity of managing a firewall

**2.a. E-mail and internet access in vehicle operations including:**

- i. the importance and value of electronic communication in business
- ii. setting up and managing an email security policy \*
- iii. managing e-mail effectively \*
- iv. controls and protocols for restricting personal use and individual access to the internet
- v. communicating company policy to staff on the use of email and the internet

**3.a. Computer applications commonly used in a vehicle operation including:**

- i. using trusted software packages to support vehicle operations
- ii. use of computer applications to manage DMS
- iii. the importance of computer applications in managing departmental data
- iv. sorting and filing data and the benefits of creating folders and sub folders \*
- v. creating a structure of folders and subfolders beneficial to the appropriate retail motor department
- vi. word processing \*
- vii. spreadsheets \*
- viii. presentation software (PowerPoint etc.) \*

**4.a. Database management including:**

- i. types of database \*
- ii. compilation of reports from data stored within the database
- iii. advantages of using historical data when communicating with customers and formulating marketing plans
- iv. managing database contact lists
- v. creating a selective database using data filters and sorting relevant customer information\*
- vi. cleansing and updating the database regularly to maintain accuracy of information
- vii. using a database to monitor departmental activity

**Content:**

NOTES:

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



|                         |  |
|-------------------------|--|
| <b>UNIT REF: CIAM14</b> | <b>UNIT TITLE: MANAGING AUTOMOTIVE SERVICE AND WORKSHOP ORGANISATION</b> |
|-------------------------|--|

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

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

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

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

**Content:**

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

**NOTES:**

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





|                         |   |
|-------------------------|---|
| <b>UNIT REF: CIAM15</b> | <b>UNIT TITLE: MANAGING FINANCE AND INSURANCE OPERATIONS IN THE AUTOMOTIVE INDUSTRY</b> |
|-------------------------|---|

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|--|-------------------------|------------------------|----------------|
| <b>Level: 4</b>  | <b>Route: Knowledge</b> | <b>Credit Value: 3</b> | <b>GLH: 19</b> |
| <p><b>Mapping:</b> This unit is mapped to MSC B6 Provide leadership in your area of responsibility, MSC C2 Encourage innovation in your area of responsibility, MSC D1 Develop productive working relationships with colleagues, MSC D6 Allocate and monitor the progress and quality of work in your area of responsibility, MSC D7 Provide learning opportunities for colleagues</p> |                         |                        |                |
| <p><b>Rationale:</b> This unit addresses knowledge required to be able to offer finance and associated insurance services in the automotive sector in accordance with FSA regulations and the Consumer Credit Act</p>  |                         |                        |                |

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

**Content:**

**The candidate should understand and/or be able to apply:**

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

**Content:**

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

**Content:****\* NOTES:**

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



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|-------------------------|--|
| <b>UNIT REF: CIAM16</b> | <b>UNIT TITLE: MANAGING NEW VEHICLE SALES OPERATIONS</b> |
|-------------------------|--|

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

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

**Content:**

**The candidate should understand and be able to apply:**

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

**Content:**

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

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

**\* NOTES:**

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



|                         |   |
|-------------------------|---|
| <b>UNIT REF: CIAM17</b> | <b>UNIT TITLE: MANAGING USED VEHICLE SALES OPERATIONS</b> |
|-------------------------|---|

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

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



**Content:**

**The candidate should understand and be able to apply:**

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

**Content:**

4.a Market opportunity for used vehicles in the primary marketing area including:

- i. determining the primary market area.
- ii. identify the size of the market by analysing vehicle ageing parc data
- iii. determine relevant factors to form a strategy for selling to the market area\*
- iv. process to determine what types of products satisfy the popular market in your area \*
- v. identifying existing and potential competitors
- vi. action a local market awareness plan to promote used vehicle sales department products and services

5.a Used vehicle sales team target and reward management including:

- i. methods used to determine the number of staff required to sell the planned volume of used cars
- ii. structuring a sales commission and bonus matrix.
- iii. aspects of the sales process to target and reward
- iv. how to prepare and plan unit and profit-based sales targets matrices
- v. proposing and agreeing targets with the used vehicle sales team.
- vi. the importance of communicating department objectives to the sales team and other department managers
- vii. measuring and reviewing individual performances against targets.
- viii. how to manage a poor performing sales executive

5.b Used vehicle sales team performance management including:

- i. the importance of the company's CRM systems and making full use of the facility
- ii. selecting and introducing a sales process for the used vehicle sales team
- iii. assessing the effective use of the sales process.
- iv. monitor staff competence and identifying skill gaps
- v. methods of motivating the used vehicle sales team to achieve targets.
- vi. controlling. measuring and reviewing individual and team performance against target.
- vii. prepare and action personal training plans to improve individual sales performances

6.a Organising and presenting used vehicle stock to maximise sales potential including:

- i. the importance of planning showroom display
- ii. the importance of regular attention to used vehicles on display \*
- iii. developing a used car display policy \*
- iv. compliance with current consumer legislation \*

7.a Preparation of a demonstrator policy including:

- i. the importance of preparing and adopting a used vehicle demonstration policy \*
- ii. prepare a used vehicle demonstration policy
- iii. compliance with Inland Revenue regulations for the use of demonstrators

**Content:**

**NOTES:**

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



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|-------------------------|--|
| <b>UNIT REF: CIAM18</b> | <b>UNIT TITLE: MANAGING VEHICLE FLEET SALES OPERATIONS</b> |
|-------------------------|--|

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

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

**Content:**

**The candidate should understand and be able to apply:**

- 1.a. Various types of management, sales and financial information used in a fleet sales operation including:
  - i. information used in analysing corporate sales opportunities and fleet sales department performance \*
  - ii. locating management, market, sales and financial information
  - iii. sources of independently compiled fleet vehicle sales and registration information \*
  - iv. compiling management information from daily fleet sales systems and processes
  - v. preparing corporate vehicle sales reports from available information \*
  - vi. reports of sales performance by secondary profit centres \*
  - vii. customer satisfaction and quality of service monitors and assessments
  - viii. benchmarking information for the measurement of current performances \*
  
- 2.a Legal requirements and compliance within a vehicle fleet sales operation including:
  - i. preparing a business proposal, compliant with FCA and CCA regulations, to meet the requirements of a corporate client
  - ii. prepare a proposal reflecting current taxation and tax allowances information \*
  - iii. commitment to contract and the penalties that apply if contract terms were breached when supplying new or used vehicles to corporate clients
  - iv. terms and liabilities that apply when agreeing a service and maintenance contract with a corporate client
  - v. Data Protection Act 1998 / 2000 requirements for obtaining and retaining business customer information.
  
- 3.a. Prepare a full range of dealership services to offer the corporate client including:
  - i. the importance of including in the business portfolio a full range of dealer services tailored to corporate and business sector needs and expectations.
  - ii. prepare a portfolio of dealership products and services to provide corporate clients with a complete vehicle supply, maintenance, repair and customer care package
  - iii. meeting regularly with departmental manager colleagues to discuss corporate client and market requirements
  - iv. agreeing with other departmental managers business efficiency action plans to satisfy the corporate market demands
  - v. introducing dealership after-market specialists to corporate clients during negotiations to win corporate contracts
  
- 4.a Forecasting sales volumes, stock requirements and the running costs of a vehicle fleet sales operation including:
  - i. agree the standards of operation required to compete in the corporate sales market.
  - ii. manufacturer's definition of segmentation of the fleet market
  - iii. manufacturer policies and procedures for handling each segment of the corporate market.
  - iv. identifying the opportunity that exists in a dealership catchment area.
  - v. corporate vehicle market segmentation and the differences between the segments \*
  - vi. forecast fleet sales vehicle volumes, stock requirements and stock draw-down for delivery
  - vii. structuring a marketing plan for the corporate sales department
  - viii. structuring a financial plan for the corporate sales department
  - ix. process of negotiating with the manufacturer to ensure supply of the proposed volumes.
  - x. the importance of liaising and building a relationship with the manufacturer's fleet operation
  
- 4.b Planning fleet sales department resources including:
  - i. determine the number of sales people required to handle negotiations and client contracts \*
  - ii. plan the administrative structure required to support the sales operation.
  - iii. the importance of agreeing staffing levels and sales strategies with the manufacturer.
  - iv. assess the capacity required to administer the fleet department and its vehicle through-put.
  - v. operate separate fleet and retail sales operations.
  - vi. benefits of the DMS system handling fleet sales independent of retail sales.
  - vii. planning the corporate demonstrator fleet and sourcing the appropriate vehicles
  - viii. risks associated with offering credit terms to corporate customers and the potential to create debtors
  - ix. the importance of working with the after sales team to manage corporate after sales requirements
  - x. Terms and Conditions of contract and how they are enforced with corporate clients.

**Content:**

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

**NOTES**

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