

City & Guilds Level 2 and Level 3 Diploma in Vehicle Sales Competence (4150-22-23)

September 2017 Version 2.1



Qualification at a glance

Subject area	Vehicle maintenance and repair
City & Guilds number	4150
Age group approved	16-18, 19+
Assessment	Short answer questions Centre assessed
Fast track	Not available. Full approval is required in all cases.
Support materials	Centre handbook
Registration and Certification	See online/Walled Garden for last Registration and Certification dates.

Title and level	GLH	TQT	City & Guilds number	Accreditation number
City & Guilds Level 2 Diploma in Vehicle Sales Competence	8	30	4150-22	601/4682/5
City & Guilds Level 3 Diploma in Vehicle Sales Competence	10	10	4150-23	601/4685/0

Version and date	Change detail	Section
2.1 September 2017	Added TQT details	Qualification at a glance and Structure
	Deleted QCF	Throughout



Contents

1	Introduction	5
2	Centre requirements	11
3	Delivering the qualification	15
4	Assessment	17
5	Units	22
Unit 001	Competence in health, safety and good housekeeping in the automotive environment	23
Unit 003	Competency in supporting job roles in the automotive work environment	26
Unit 006	Competence in making learning possible through demonstrations and instruction	29
Unit 051	Knowledge of health, safety and good housekeeping in the automotive environment	32
Unit 053	Knowledge of support for job roles in the automotive work environment	41
Unit 056	Knowledge of how to make learning possible through demonstrations and instruction	46
Unit 116	Competency in appraising vehicles for part exchange	52
Unit 117	Competency in automotive retail negotiation and sales techniques	54
Unit 118	Competency in brand, product and market awareness in the vehicle sales and supply business	56
Unit 119	Competency in complying with the legal requirements and regulations of vehicle sales	58
Unit 120	Competence in conducting vehicle demonstration drives	60
Unit 121	Competency in constructing motor vehicle sales packages	62
Unit 122	Competency in delivering a vehicle sales static presentation	64
Unit 123	Competency in handling vehicle sales telephone enquiries	67
Unit 124	Competency in handover of the vehicle to the customer	69
Unit 125	Competency in managing customer relationships in a vehicle sales environment	72
Unit 126	Competency in meeting and greeting vehicle sales customers	74
Unit 127	Competency in negotiating fleet and business buyer needs	76
Unit 128	Competency in promoting finance and insurance for vehicle sales	78

Unit 129	Competency in self management and administration in a vehicle sales environment	80
Unit 130	Competency in valuing vehicles for part exchange	82
Unit 166	Knowledge of appraising vehicles for part exchange	84
Unit 167	Knowledge of automotive retail negotiation and sales techniques	87
Unit 168	Knowledge of brand, product and market awareness in the vehicle sales and supply business	92
Unit 169	Knowledge of complying with the legal requirements and regulations of vehicle sales	99
Unit 170	Knowledge of conducting vehicle demonstration drives	102
Unit 171	Knowledge of constructing and understanding sales packages	106
Unit 172	Knowledge of delivering a vehicle sales static presentation	109
Unit 173	Knowledge of handling vehicle sales telephone enquiries	112
Unit 174	Knowledge of handover of the vehicle to the customer	115
Unit 175	Knowledge of managing customer relationships in a vehicle sales environment	119
Unit 176	Knowledge of meeting and greeting vehicle sales customers	122
Unit 177	Knowledge of negotiating fleet and business buyer needs	125
Unit 178	Knowledge of promoting finance and insurance for vehicle sales	130
Unit 179	Knowledge of self management and administration in a vehicle sales environment	133
Unit 180	Knowledge of valuing vehicles for part exchange	137
Appendix 1	Relationships to other qualifications	140
Appendix 2	Sources of general information	141



1 Introduction

This document tells you what you need to do to deliver the qualifications:

Area	Description
Who are the qualifications for?	<p>The City & Guilds automotive qualifications are designed to meet the needs of vehicle sales personnel working in dealerships, specialist sales centres and garages.</p> <p>These VCQs are available at levels 1-3</p> <p>Structure and assessment strategy as produced by IMI Automotive Skills, the Sector Skills Council for the automotive industry.</p>
What do the qualifications cover?	<p>These qualifications allow candidates to learn, develop and practise the skills required for employment and/or career progression in the automotive industry.</p> <p>VCQs are work based qualifications and they are aimed at candidates who are already working in the automotive sector. They are assessed in the workplace by the following methods:</p> <ul style="list-style-type: none">• workplace observation• witness testimony• verbal questioning of essential knowledge• short answer questions
Are the qualifications part of a framework or initiative?	<p>This qualification is part of the Vehicle Sales Apprenticeship Framework.</p>
What opportunities for progression are there?	<p>After taking these qualifications candidates will have a qualification that show employers and customers they have the skills of a competent vehicle sales professional and will be able to progress into employment.</p> <p>In addition, candidates who enjoy leading teams of people at work could also move onto a qualification as a Team Leader or Supervisor such as qualifications at Levels 2, 3 and 4 through the Institute of Leadership and Management (ILM).</p>

Structure

To achieve the **Level 2 Diploma in Vehicle Sales Competence (4150-22)**, learners must achieve **86** credits:

- **18** credits must come from the mandatory generic units - 001, 003, 051, 053
- **53** credits from the mandatory specialist units - 118, 119, 120, 122, 123, 124, 125, 126, 168, 169, 170, 172, 173, 174, 175, 176
- **15** credits must come from a minimum of 2 optional groups:
 - Optional Group A – 127 and 177
 - Optional Group B – 121 and 171
 - Optional Group C – 117 and 167
 - Optional Group D – 128 and 178

Unit no.	Unit accreditation number	Unit title	Level	Credit value	GLH
	Mandatory	Generic			
001	A/601/6338	Competency in health, safety and good housekeeping in the automotive environment	2	7	60
003	K/601/6366	Competency in supporting job roles in the automotive work environment	3	5	40
051	D/601/6171	Knowledge of health, safety and good housekeeping in the automotive environment	2	3	30
053	T/601/6175	Knowledge of support for job roles in the automotive work environment	3	3	20
	Mandatory	Specialist			
118	R/502/6461	Competency in brand, product and market awareness in the vehicle sales and supply business	3	4	20
119	A/502/6468	Competency in complying with the legal requirements and regulations of vehicle sales	2	3	15
120	D/502/6480	Competency in conducting vehicle demonstration drives	2	3	15
122	M/502/6483	Competency in delivering a vehicle sales static presentation	2	3	15
123	T/502/6467	Competency in handling vehicle sales telephone enquiries	2	3	15
124	K/502/6479	Competency in handover of the vehicle to the customer	2	3	15
125	L/502/6488	Competency in managing customer relationships in a vehicle sales environment	2	3	15
126	Y/502/6493	Competency in meeting and greeting vehicle sales customers	2	3	15

Unit no.	Unit accreditation number	Unit title	Level	Credit value	GLH
168	Y/502/6462	Knowledge of brand, product and market awareness in the vehicle sales and supply business	3	6	35
169	M/502/6466	Knowledge of complying with the legal requirements and regulations of vehicle sales	2	3	15
170	H/502/6481	Knowledge of conducting vehicle demonstration drives	2	3	20
172	D/502/6477	Knowledge of delivering a vehicle sales static presentation	2	3	20
173	R/502/6475	Knowledge of handling vehicle sales telephone enquiries	2	3	20
174	D/502/6494	Knowledge of handover of the vehicle to the customer	2	4	25
175	R/502/6492	Knowledge of managing customer relationships in a vehicle sales environment	2	3	20
176	J/502/6490	Knowledge of meeting and greeting vehicle sales customers	2	3	20
	Optional	Group A			
127	H/502/6464	Competency in negotiating fleet and business buyer needs	3	3	17
177	D/502/6463	Knowledge of negotiating fleet and business buyer needs	3	3	17
	Optional	Group B			
121	A/502/6471	Competency in constructing motor vehicle sales packages	3	5	25
171	L/502/6474	Knowledge of constructing and understanding sales packages	3	4	25
	Optional	Group C			
117	J/502/6473	Competency in automotive retail negotiation and sales techniques	2	4	20
167	Y/502/6476	Knowledge of automotive retail negotiation and sales techniques	2	5	25
	Optional	Group D			
128	F/502/6472	Competency in promoting finance and insurance for vehicle sales	3	4	20
178	H/502/6478	Knowledge of promoting finance and insurance for vehicle sales	3	5	30

To achieve the **Level 3 Diploma in Vehicle Sales Competence (4150-23)**, learners must achieve **125** credits.

- **28** credits must come from mandatory generic units 001, 003, 006, 051, 053, 056
- **91** credits from the mandatory specialist units 116, 118, 119, 120, 121, 122, 123, 124, 125, 126, 128, 129, 130, 166, 168, 169, 170, 171, 172, 173, 174, 175, 176, 178, 179, 180
- A minimum of **6** credits must come from a minimum of Optional Group A or B:
 - Optional Group A – 127 and 177
 - Optional Group B – 117 and 167.

Unit no.	Unit accreditation no.	Unit title	Level	Credit value	GLH
	Mandatory	Generic			
001	A/601/6338	Competency in health, safety and good housekeeping in the automotive environment	2	7	60
003	K/601/6366	Competency in supporting job roles in the automotive work environment	3	5	40
006	Y/601/6380	Competency in making learning possible through demonstrations and instruction	3	5	40
051	D/601/6171	Knowledge of health, safety and good housekeeping in the automotive environment	2	3	30
053	T/601/6175	Knowledge of support for job roles in the automotive work environment	3	3	20
056	T/601/6242	Knowledge of how to make learning possible through demonstrations and instruction	3	5	45
	Mandatory	Specialist			
116	J/502/6487	Competency in appraising vehicles for part exchange	3	3	15
118	R/502/6461	Competency in brand, product and market awareness in the vehicle sales and supply business	3	4	20
119	A/502/6468	Competency in complying with the legal requirements and regulations of vehicle sales	2	3	15
120	D/502/6480	Competency in conducting vehicle demonstration drives	2	3	15
121	A/502/6471	Competency in constructing motor vehicle sales packages	3	5	25
122	M/502/6483	Competency in delivering a vehicle sales static presentation	2	3	15

Unit no.	Unit accreditation no.	Unit title	Level	Credit value	GLH
123	T/502/6467	Competency in handling vehicle sales telephone enquiries	2	3	15
124	K/502/6479	Competency in handover of the vehicle to the customer	2	3	15
125	L/502/6488	Competency in managing customer relationships in a vehicle sales environment	2	3	15
126	Y/502/6493	Competency in meeting and greeting vehicle sales customers	2	3	15
128	F/502/6472	Competency in promoting finance and insurance for vehicle sales	3	4	20
129	T/502/6470	Competency in self management and administration in a vehicle sales environment	3	3	15
130	L/502/6491	Competency in valuing vehicles for part exchange	3	3	15
166	K/502/6482	Knowledge of appraising vehicles for part exchange	3	3	20
168	Y/502/6462	Knowledge of brand, product and market awareness in the vehicle sales and supply business	3	6	35
169	M/502/6466	Knowledge of complying with the legal requirements and regulations of vehicle sales	2	3	15
170	H/502/6481	Knowledge of conducting vehicle demonstration drives	2	3	20
171	L/502/6474	Knowledge of constructing and understanding sales packages	3	4	25
172	D/502/6477	Knowledge of delivering a vehicle sales static presentation	2	3	20
173	R/502/6475	Knowledge of handling vehicle sales telephone enquiries	2	3	20
174	D/502/6494	Knowledge of handover of the vehicle to the customer	2	4	25
175	R/502/6492	Knowledge of managing customer relationships in a vehicle sales environment	2	3	20
176	J/502/6490	Knowledge of meeting and greeting vehicle sales customers	2	3	20
178	H/502/6478	Knowledge of promoting finance and insurance for vehicle sales	3	5	30

Unit no.	Unit accreditation no.	Unit title	Level	Credit value	GLH
179	F/502/6469	Knowledge of self management and administration in a vehicle sales environment	3	4	25
180	R/502/6489	Knowledge of valuing vehicles for part exchange	3	4	40
	Optional	Group A			
127	H/502/6464	Competency in negotiating fleet and business buyer needs	3	3	17
177	D/502/6463	Knowledge of negotiating fleet and business buyer needs	3	3	17
	Optional	Group B			
117	J/502/6473	Competency in automotive retail negotiation and sales techniques	2	4	20
167	Y/502/6476	Knowledge of automotive retail negotiation and sales techniques	2	5	25

Total Qualification Time

Total Qualification Time (TQT) is the total amount of time, in hours, expected to be spent by a Learner to achieve a qualification. It includes both guided learning hours (which are listed separately) and hours spent in preparation, study and assessment.

Title and level	GLH	TQT
City & Guilds Level 2 Diploma in Vehicle Sales Competence	8	30
City & Guilds Level 3 Diploma in Vehicle Sales Competence	10	10



2 Centre requirements

Approval

In all cases, centres will need to gain both centre and qualification approval. Please refer to the *Centre Manual - Supporting Customer Excellence* for further information.

Centre staff should familiarise themselves with the structure, content and assessment requirements of the qualifications before designing a course programme.

Resource requirements

Physical resources and site agreements

Centres must have access to sufficient equipment in the college, training centre or workplace to ensure candidates have the opportunity to cover all of the practical activities.

Centre staffing

Staff delivering these qualifications must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- be occupationally competent or technically knowledgeable in the areas for which they are delivering training and/or have experience of providing training. This knowledge must be to the same level as the training being delivered
- have recent relevant experience in the specific area they will be assessing
- have credible experience of providing training.

Centre staff may undertake more than one role, eg tutor and assessor or internal quality assurer, but cannot internally quality assure their own assessments.

Assessors and internal quality assurers

All assessors must:

- have sufficient and relevant technical/occupational competence in the unit, at or above the level of the unit being assessed
- have in depth knowledge of the Qualification or credit based unit evidence requirements
- hold or be working towards a relevant assessors' award as specified by the Sector Skills Council. This will include, but not be limited to the assessor qualifications
 - Level 3 Award in Assessing Competence in the Work Environment
 - Level 3 Award in Assessing Vocationally Related Achievement
 - SVQ Unit L&D9D Assess workplace competence using direct methods (SCQF Level 7)
 - SVQ Unit L&D9DI Assess workplace competence using direct and in-direct methods (SCQF Level 8)
 - PDA in Workplace assessment using direct methods (L&D9D) at SCQF Level 7
 - PDA in Workplace assessment using direct and in-direct methods (L&D9DI) at SCQF Level 8
 - Legacy Assessor units A1, A2 and D32/33 units
 - An appropriate equivalent as defined by the IMI, SSC – see *'Using employers' in-house training programmes to assess automotive management & Leadership competence based units and qualifications'*)
- assessors working towards a relevant assessor qualification must achieve their qualification within 12 months. Ordinarily, there is a requirement that assessors working towards the assessor qualification must have their assessment decisions confirmed by a qualified assessor
- demonstrate knowledge and understanding of the competencies that a learner is required to demonstrate for the qualification that they are undertaking
- provide evidence of completing 5 days working/job shadowing in industry within their professional area in a 24 month period. This will be any work based activity conducted within a real working environment and does not apply to assessment activities
- provide evidence of 30 hours of technical/qualification related CPD within a 12 month period. (This is in addition to working / job shadowing)
- be approved by the Awarding Organisation to carry out assessments for the VCQs they are competent in.

All internal quality assurers must:

- have in-depth knowledge of the occupational standards and credit based unit evidence requirements.
- be occupationally aware of the relevant industry sector being quality assured
- hold or be working towards a relevant verifier award as specified by the Institute of the Motor Industry. This will include, but not be limited to the Quality Assurance qualifications:
 - Level 4 Award in the Internal Quality Assurance of Assessment Processes and Practice

- o Level 4 Certificate in Leading the Internal Quality Assurance of Assessment Processes and Practice
- o SVQ Unit L&D11 Internally monitor and maintain the quality of workplace assessment (SCQF Level 8)
- o PDA in Internal verification of workplace assessment at SCQF Level 8
- o A legacy Internal Verifier unit V1 or D34 unit
- o An appropriate equivalent as defined by the SSC.
- o An appropriate equivalent as defined by the IMI, SSC – see '*Using employers' in-house training programmes to assess automotive management & Leadership competence based units and qualifications*')
- verifiers working towards a relevant qualification must achieve their qualification within 12 months. Ordinarily, there is a requirement that IV's working towards the assessor qualification must have their assessment decisions confirmed by a qualified IV
- provide evidence of CPD totalling not less than 30 hours from within their professional area within a 12 month period
- be approved by the Awarding Organisation to carry out internal verification for relevant VCQ(s)
- demonstrate knowledge and understanding of the quality assurance processes required by the centre and the awarding organisation.

Continuing Professional Development (CPD)

Centres must support their staff to ensure that they have current knowledge of the occupational area, that delivery, mentoring, training, assessment and quality assurance is in line with best practice, and that it takes account of any national or legislative developments.

Candidate entry requirements

City & Guilds does not set entry requirements for these qualifications. However, centres must ensure that candidates have the potential and opportunity to gain the qualifications successfully. Note: In order to produce evidence for some of the units, candidates will need to be in possession of a full driving licence, as the vehicle has to be driven for demonstration purposes.

Age restrictions

This qualification is accredited for candidates aged 16 years or older.



3 Delivering the qualification

Initial assessment and induction

An initial assessment of each candidate should be made before the start of their programme to identify:

- if the candidate has any specific training needs
- support and guidance they may need when working towards their qualifications
- any units they have already completed, or credit they have accumulated which is relevant to the qualification
- the appropriate type and level of qualification

We recommend that centres provide an induction programme so the candidate fully understands the requirements of the qualifications, their responsibilities as a candidate, and the responsibilities of the centre. This information can be recorded on a learning contract.

Support materials

City & Guilds will provide the following learning and support resources which will be posted on our website: **www.cityandguilds.com/automotive**

- Evidence tracking sheets.

Recording documents

Candidates and centres may decide to use a paper-based or electronic method of recording evidence.

To support the delivery of vocational qualifications we offer our own ePortfolio, Learning Assistant, an easy to use and secure online tool to support and evidence candidates' progress towards achieving qualifications. Further details are available at:

www.cityandguilds.com/eportfolios.

City & Guilds has developed training and assessment documentation specifically for these qualifications which are available from City & Guilds website. Although new centres are expected to use these forms, centres may devise or customise alternative forms, which must be approved for use by the external quality assurer, before they are used by candidates and assessors at the centre.

Health and safety

The requirement to follow safe working practices is an integral part of all City & Guilds qualifications and assessments, and it is the responsibility of centres to ensure that all relevant health and safety requirements are in place before candidates start practical assessments.

Should a candidate fail to follow health and safety practice and procedures during an assessment, the assessment must be stopped. The candidate should be informed that they have not reached the standard required to successfully pass the assessment and told the reason why. Candidates may retake the assessment at a later date, at the discretion of the centre. In case of any doubt, guidance should be sought from the external quality assurer.

Data protection and confidentiality

Centres offering this qualification may need to provide City & Guilds with personal data for staff and candidates. Guidance on data protection and the obligations of City & Guilds and centres are explained in *Centre Manual - Supporting Customer Excellence*.

Equal opportunities

It is a requirement of centre approval that centres have an equal opportunities policy (see *Centre Manual - Supporting Customer Excellence*). The regulatory authorities require City & Guilds to monitor centres to ensure that equal opportunity policies are being followed.

The City & Guilds equal opportunities policy is set out on the City & Guilds website, in *Centre Manual - Supporting Customer Excellence*, and is also available from the City & Guilds Customer Relations department.

Access to qualifications on the Regulated Qualifications Framework is open to all, irrespective of gender, race, creed, age or special needs. The centre co-ordinator should ensure that no candidate is subject to unfair discrimination on any ground in relation to access to assessment and the fairness of the assessment.

Access to assessment

City & Guilds' guidance and regulations on access to assessment are designed to facilitate access to assessments and qualifications for candidates who are eligible for adjustments to assessment arrangements. Access arrangements are designed to allow attainment to be demonstrated. For further information, please see *Access to assessment and qualifications*, available on the City & Guilds website.

Appeals

Centres must have their own, auditable, appeals procedure that must be explained to candidates during their induction. Appeals must be fully documented by the quality assurance co-ordinator and made available to the external quality assurer or City & Guilds. Further information on appeals is given in *Centre Manual - Supporting Customer Excellence*. There is also information on appeals for centres and learners on the City & Guilds website or available from the Customer Relations department.



4 Assessment

Candidates must complete

- A short answer test for each knowledge unit
- A portfolio of evidence for each competence and skills unit.

Knowledge units

Short answer question papers are provided for the knowledge units. The short-answer questions should be taken under supervised conditions as closed-book tests.

This means that all activities will be completed with the assessor, or other designated supervisor, present. Strict exam regulations do not apply; it is envisaged that most candidates will take the short-answer questions in their normal learning environment with their own tutor present. Alternatively, assessors may prefer to ask the questions orally and record individual candidates' responses.

Time constraints

There are no time constraints applied to the assessment of this qualification. If centres have queries regarding the length of time required to complete a particular task, they should contact their external quality assurer in the first instance who will advise accordingly and feed this information back to City & Guilds where appropriate.

Recognition of Prior Learning (RPL)

Recognition of prior learning means using a learner's previous experience, or qualifications which have already been achieved, to contribute to a new qualification. RPL is allowed and is also sector specific.

Evidence requirements for VCQ

Candidates working towards a VCQ must provide evidence from the workplace that covers a minimum of a 4 month, (16 week), period.

All evidence for VCQs must be assessed by suitably qualified assessors and must adhere to the requirements for the units being assessed.

Evidence other than from direct workplace observation

Workplace assessment/simulation

IMI credit based units are work / competency based and therefore candidates are to be assessed under normal workplace conditions. It is recognised however, that there are situations where the workplace may not be appropriate or that waiting for naturally occurring evidence is impractical. In these situations IMI will allow centres to set up or devise assessment situations.

These assessment situations can only be set up after:

- all possible routes for the collection of naturally occurring evidence have been exhausted
- the exact make up and content of the centre devised assessment has been agreed and approved by the external quality assurer
- the assessor can assure that the simulation will provide evidence that is valid reliable and authentic.

Any simulation must be carried out using actual vehicles; the use of engine rigs or electrical boards is not permitted.

Realistic work environment

Candidates should be assessed within their normal workplace, or in exceptional circumstances as described previously via simulation. The use of approved simulation means therefore that RWE, Realistic Work Environment is not to be used.

Expert witnesses

The use of witness testimony and expert witness testimony are appropriate methods for assessors to collect supplementary evidence on candidates' performance. Witness testimonies can be obtained from people that are occupationally competent and who may be familiar with the national occupational standards, such as the candidate's line manager. The assessor must judge the validity of the witness testimony and these may vary depending on the source. Witness testimonies can only support the assessment process and may remove or reduce the need to collect supplementary evidence, however, the awarding organisation's / body's quality assurance requirements must be met. Additionally the person or persons providing the Witness Testimony evidence must make themselves available to the External quality assurer for confirmation of evidence validity if required.

Remote observation

The use of direct observation from a remote location is permitted as long as the centre seeks and receives the approval from City & Guilds prior to its use.

Level 2 & 3 Diploma in Vehicle Sales Competence

Unit	Level	Unit title	Credit value	Assessment method
001	2	Competency in health, safety and good housekeeping in the automotive environment	7	Portfolio
003	3	Competency in supporting job roles in the automotive work environment	5	Portfolio
006	3	Competency in making learning possible through demonstrations and instruction	5	Portfolio
051	2	Knowledge of health, safety and good housekeeping in the automotive environment	3	Short answer questions
053	3	Knowledge of support for job roles in the automotive work environment	3	Short answer questions
056	3	Knowledge of how to make learning possible through demonstrations and instruction	5	Short answer questions
116	3	Competency in appraising vehicles for part exchange	3	Portfolio
117	2	Competency in automotive retail negotiation and sales techniques	4	Portfolio
118	3	Competency in brand, product and market awareness in the vehicle sales and supply business	4	Portfolio
119	2	Competency in complying with the legal requirements and regulations of vehicle sales	3	Portfolio
120	2	Competency in conducting vehicle demonstration drives	3	Portfolio
121	3	Competency in constructing motor vehicle sales packages	5	Portfolio
122	2	Competency in delivering a vehicle sales static presentation	3	Portfolio
123	2	Competency in handling vehicle sales telephone enquiries	3	Portfolio
124	2	Competency in handover of the vehicle to the customer	3	Portfolio
125	2	Competency in managing customer relationships in a vehicle sales environment	3	Portfolio

Unit	Level	Unit title	Credit value	Assessment method
126	2	Competency in meeting and greeting vehicle sales customers	3	Portfolio
127	3	Competency in negotiating fleet and business buyer needs	3	Portfolio
128	3	Competency in promoting finance and insurance for vehicle sales	4	Portfolio
129	3	Competency in self management and administration in a vehicle sales environment	3	Portfolio
130	3	Competency in valuing vehicles for part exchange	3	Portfolio
166	3	Knowledge of appraising vehicles for part exchange	3	Short answer questions
167	2	Knowledge of automotive retail negotiation and sales techniques	5	Short answer questions
168	3	Knowledge of brand, product and market awareness in the vehicle sales and supply business	6	Short answer questions
169	2	Knowledge of complying with the legal requirements and regulations of vehicle sales	3	Short answer questions
170	2	Knowledge of conducting vehicle demonstration drives	3	Short answer questions
171	3	Knowledge of constructing and understanding sales packages	4	Short answer questions
172	2	Knowledge of delivering a vehicle sales static presentation	3	Short answer questions
173	2	Knowledge of handling vehicle sales telephone enquiries	3	Short answer questions
174	2	Knowledge of handover of the vehicle to the customer	4	Short answer questions
175	2	Knowledge of managing customer relationships in a vehicle sales environment	3	Short answer questions
176	2	Knowledge of meeting and greeting vehicle sales customers	3	Short answer questions
177	3	Knowledge of negotiating fleet and business buyer needs	3	Short answer questions

Unit	Level	Unit title	Credit value	Assessment method
178	3	Knowledge of promoting finance and insurance for vehicle sales	5	Short answer questions
179	3	Knowledge of self management and administration in a vehicle sales environment	4	Short answer questions
180	3	Knowledge of valuing vehicles for part exchange	4	Short answer questions



5 Units

Availability of units

Below is a list of the learning outcomes for all the units.

Structure of units

These units each have the following:

- City & Guilds reference number
- Unit Accreditation Number (UAN)
- title
- level
- credit value
- guided learning hours
- unit aim
- relationship to NOS, other qualifications and frameworks
- endorsement by a sector or other appropriate body
- learning outcomes which are comprised of a number of assessment criteria.

Unit 001

Competence in health, safety and good housekeeping in the automotive environment

UAN:	A/601/6338
Level:	Level 2
Credit value:	7
GLH:	60
Relationship to NOS:	This unit is linked to NOS G1 Contribute to housekeeping in motor vehicle environments.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	<p>This unit will enable the learner to develop competency in order to:</p> <ul style="list-style-type: none">• carry out day to day work area cleaning, clearing away, dealing with spillages and disposal of waste, used materials and debris• identify hazards and risks in the automotive environment and complying with relevant legislation and good practice• work safely at all times within the automotive environment, both as an individual and with others.

Learning outcome	The learner will:
1.	Be able to use correct personal and vehicle protection within the automotive work environment.
Assessment criteria	
The learner can:	
1.1	select and use personal protective equipment throughout activities, to include appropriate protection of: <ul style="list-style-type: none">a. eyesb. earsc. headd. skine. feetf. handsg. lungs
1.2	select and use vehicle protective equipment throughout all activities.

Learning outcome	The learner will:
2.	Be able to carry out effective housekeeping practices in the automotive work environment.
Assessment criteria	
The learner can:	
2.1	select and use cleaning equipment which is of the right type and suitable for the task
2.2	use utilities and appropriate consumables, avoiding waste
2.3	use materials and equipment to carry out cleaning and maintenance duties in allocated work areas, following automotive work environment policies, schedules and manufacturers instructions
2.4	perform housekeeping activities safely and in a way which minimizes inconvenience to customers and staff
2.5	keep the work area clean and free from debris and waste materials
2.6	keep tools and equipment fit for purpose by regular cleaning and keeping tidy
2.7	dispose of used cleaning agents, waste materials and debris to comply with legal and workplace requirements.

Learning outcome	The learner will:
3.	Be able to recognise and deal with dangers in order to work safely within the automotive workplace.
Assessment criteria	
The learner can:	
3.1	name and locate the responsible persons for health and safety in their relevant workplace
3.2	identify and report working practices and hazards which could be harmful to themselves or others
3.3	carry out safe working practices whilst working with equipment, materials and products in the automotive environment
3.4	rectify health and safety risks encountered at work, within the scope and capability of their job role.

Learning outcome	The learner will:
4.	Be able to conduct themselves responsibly.
Assessment criteria	
The learner can:	
4.1	show personal conduct in the workplace which does not endanger the health and safety of themselves or others
4.2	display suitable personal presentation at work which ensures the health and safety of themselves and others at work.

Unit 001 Competence in health, safety and good housekeeping in the automotive environment

Supporting information

Assessment

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Competency Unit Assessment Requirements, both of which can be downloaded from the **IMI website**.

Unit 003

Competency in supporting job roles in the automotive work environment

UAN:	K/601/6366
Level:	Level 3
Credit value:	5
GLH:	40
Relationship to NOS:	This unit is linked to G3 Maintain Working Relationships in the Motor Vehicle Environment.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will help the learner develop competency in order to keep good working relationships with all colleagues and customers in the automotive work environment by using effective communication and support.

Learning outcome	The learner will:
1.	Be able to work effectively within the organisational structure of the automotive work environment.
Assessment criteria	
The learner can:	
1.1	respond promptly and willingly to requests for assistance from customers and colleagues
1.2	refer customers and colleagues to the correct person should requests fall outside their responsibility and capability.

Learning outcome	The learner will:
2.	Be able to obtain and use information in order to support their job role within the automotive work environment.
Assessment criteria	
The learner can:	
2.1	select and use legal and manufacturers information, in an automotive work environment.

Learning outcome	The learner will:
3.	Be able to communicate with and support colleagues and customers effectively within the automotive work environment.
Assessment criteria	
The learner can:	
3.1	use methods of communication with customers and colleagues which meet their needs
3.2	give customers and colleagues accurate information
3.3	make requests for assistance from or to customers and colleagues clearly and courteously
3.4	report any anticipated delays in completion to the relevant persons promptly.

Learning outcome	The learner will:
4.	Be able to develop and keep good working relationships in the automotive work environment.
Assessment criteria	
The learner can:	
4.1	contribute to team work by initiating ideas and co-operating with customers and colleagues
4.2	treat customers and colleagues in a way which shows respect for their views and opinions
4.3	make and keep achievable commitments to customers and colleagues
4.4	inform colleagues promptly of anything likely to affect their own work.

Unit 003 Competency in supporting job roles in the automotive work environment

Supporting information

Assessment

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Competency Unit Assessment Requirements, both of which can be downloaded from the **IMI website**.

Unit 006

Competence in making learning possible through demonstrations and instruction

UAN:	Y/601/6380
Level:	Level 3
Credit value:	5
GLH:	40
Relationship to NOS:	This unit is linked to G6 Enable Learning through Demonstration and Instruction.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will help the learner to develop competency in order to carry out demonstrations and instruction. It includes demonstrating equipment, showing skills, giving instruction, deciding when to use demonstration or instruction, potential of technology based learning, checking on learners' progress and giving feedback.

Learning outcome	The learner will:
1.	Be able to demonstrate skills and methods to learners.
Assessment criteria	
The learner can:	
1.1	perform demonstrations based on an analysis of the skills needed and the order in which they must be learned
1.2	perform demonstrations that are accurate and realistic
1.3	perform structured demonstrations so that the learner can get the most out of it
1.4	perform demonstrations whilst encouraging learners to ask questions and get explanation at appropriate stages in the demonstration
1.5	provide positive feedback to learners whilst they are being given the opportunity to practise the skills that have been demonstrated
1.6	perform additional demonstrations of skills being taught to reinforce learning
1.7	perform demonstrations in a safe environment which also allows learners to see clearly
1.8	respond to the needs of the learners during demonstrations
1.9	reduce distractions and disruptions as much as possible.

Learning outcome	The learner will:
2.	Be able to instruct learners.
Assessment criteria	
<p>The learner can:</p> <ul style="list-style-type: none"> 2.1 implement instruction which is matched to the needs of learners 2.2 use identified learning outcomes which can be achieved through instruction 2.3 perform instruction, ensuring that the manner, level and speed of the instruction encourages learners to take part 2.4 perform instruction whilst regularly checking that the learners understand and adapt instruction as appropriate 2.5 give learners positive feedback on the learning experience and the outcomes achieved 2.6 carry out a review with the learners to identify anything that prevented learning and adapt instruction as appropriate. 	

Unit 006

Competence in making learning possible through demonstrations and instruction

Supporting information

Assessment

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Competency Unit Assessment Requirements, both of which can be downloaded from the **IMI website**.

Unit 051

Knowledge of health, safety and good housekeeping in the automotive environment

UAN:	D/601/6171
Level:	Level 2
Credit value:	3
GLH:	30
Relationship to NOS:	This unit is linked to G1 Contribute to Housekeeping in Motor Vehicle Environments and G2 Reduce Risks to Health and Safety in the Motor Vehicle Environment.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	<p>This unit will give the learner the knowledge they need to carry out routine maintenance and cleaning of the automotive environment and using resources economically.</p> <p>Health and safety legislation and duties of everyone in the motor vehicle environment. It will provide an appreciation of significant risks in the automotive environment and how to identify and deal with them. Once completed the learner will be able to identify hazards and evaluate and reduce risk.</p>

Learning outcome	The learner will:
1. Understand the correct personal and vehicle protective equipment to be used within the automotive environment.	
Assessment criteria	
The learner can:	
1.1	explain the importance of wearing the types of PPE required for a range of automotive repair activities
1.2	identify vehicle protective equipment for a range of repair activities
1.3	describe vehicle and personal safety considerations when working at the roadside.

Learning outcome	The learner will:
2.	Understand effective housekeeping practices in the automotive environment.
Assessment criteria	
The learner can:	
2.1	describe why the automotive environment should be properly cleaned and maintained
2.2	describe requirements and systems which may be put in place to ensure a clean automotive environment
2.3	describe how to minimise waste when using utilities and consumables
2.4	state the procedures and precautions necessary when cleaning and maintaining an automotive environment
2.5	describe the selection and use of cleaning equipment when dealing with general cleaning, spillages and leaks in the automotive environment
2.6	describe procedures for correct disposal of waste materials from an automotive environment
2.7	describe procedures for starting and ending the working day which ensure effective housekeeping practices are followed.

Learning outcome	The learner will:
3.	Understand key health and safety requirements relevant to the automotive environment.
Assessment criteria	
The learner can:	
3.1	list the main legislation relating to automotive environment health and safety
3.2	describe the general legal duties of employers and employees required by current health and safety legislation
3.3	describe key, current health and safety requirements relating to the automotive environment
3.4	describe why workplace policies and procedures relating to health and safety are important.

Learning outcome	The learner will:
4.	Understand about hazards and potential risks relevant to the automotive environment.
Assessment criteria	
The learner can:	
4.1	identify key hazards and risks in an automotive environment
4.2	describe policies and procedures for reporting hazards, risks, health and safety matters in the automotive environment
4.3	state precautions and procedures which need to be taken when working with vehicles, associated materials, tools and equipment
4.4	identify fire extinguishers in common use and which types of fire they should be used on
4.5	identify key warning signs and their characteristics that are found in the vehicle repair environment
4.6	state the meaning of common product warning labels used in an automotive environment.

Learning outcome	The learner will:
	5. Understand personal responsibilities.
Assessment criteria	
The learner can:	
5.1	explain the importance of personal conduct in maintaining the health and safety of the individual and others
5.2	explain the importance of personal presentation in maintaining health safety and welfare.

Unit 051 Knowledge of health, safety and good housekeeping in the automotive environment

Supporting information

Guidance and range

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Knowledge Unit Syllabus, both of which can be downloaded from the **IMI website**.

1. Economic use of resources

- a. Consumable materials eg grease, oils, split pins, locking and fastening devices etc.

2. Requirement to maintain work area effectively

- a. Cleaning tools and equipment to maximise workplace efficiency.
- b. Requirement to carry out the housekeeping activities safely and in a way that minimises inconvenience to customers and staff.
- c. Risks involved when using solvents and detergents.
- d. Advantages of good housekeeping.

3. Spillages, leaks and waste materials

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

4. Basic legislative requirements

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

5. Routine maintenance of the workplace

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

6. Legislation relevant to health and safety

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

7. General regulations to include an awareness of:

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

8. Legislative duties

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

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

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

10. PPE to include:

- a. typical maintenance procedures for ppe equipment to include:
 - i. typical maintenance log
 - ii. cleaning procedures
 - iii. filter maintenance
 - iv. variation in glove types
 - v. air quality checks
- b. choice and fitting procedures for masks and air breathing equipment
- c. typical workplace processes which would require the use of PPE to include:
 - i. welding
 - ii. sanding and grinding
 - iii. filling
 - iv. panel removal and replacement
 - v. drilling
 - vi. cutting
 - vii. chiselling
 - viii. removal of broken glass
 - ix. removal of rubber seals from fire damaged vehicles
 - x. removal of hypodermic needles
 - xi. servicing activities
 - xii. roadside recovery
 - xiii. unserviceable PPE

- d. PPE required for a range automotive repair activities. To include appropriate protection of:
 - i. eyes
 - ii. ears
 - iii. head
 - iv. skin
 - v. feet
 - vi. hands
 - vii. lungs.

11. Fire and extinguishers

- a. Classification of fire types.
- b. Using a fire extinguisher effectively.

12. Types of extinguishers

- a. Foam.
- b. Dry powder.
- c. Co2.
- d. Water.
- e. Fire blanket.

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

The procedure as:

- a. raise the alarm
- b. fight fire only if appropriate
- c. evacuate building
- d. call for assistance.

14. Product warning labels to include:

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

15. Warning signs and notices

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

16. Hazards and risks to include:

- a. the difference between a risk and a hazard
- b. potential risks resulting from:
 - i. the use and maintenance of machinery or equipment
 - ii. the use of materials or substances
 - iii. accidental breakages and spillages
 - iv. unsafe behaviour
 - v. working practices that do not conform to laid down policies
 - vi. environmental factors
 - vii. personal presentation
 - viii. unauthorised personal, customers, contractors etc entering your work premises
 - ix. working by the roadside
 - x. vehicle recovery
- c. the employee's responsibilities in identifying and reporting risks within their working environment.
- d. the method of reporting risks that are outside your limits of authority.
- e. potential causes of:
 - i. fire
 - ii. explosion
 - iii. noise
 - iv. harmful fumes
 - v. slips
 - vi. trips
 - vii. falling objects
 - viii. accidents whilst dealing with broken down vehicles.

17. Personal responsibilities

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

18. Action to be taken in the event of colleagues suffering accidents

- a. The typical sequence of events following the discovery of an accident such as:
 - i. make the area safe
 - ii. remove hazards if appropriate ie switch off power
 - iii. administer minor first aid
 - iv. take appropriate action to re-assure the injured party
 - v. raise the alarm
 - vi. get help
 - vii. report on the accident.

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

Unit 053

Knowledge of support for job roles in the automotive work environment

UAN:	T/601/6175
Level:	Level 3
Credit value:	3
GLH:	20
Relationship to NOS:	This unit is linked to G3 Maintaining Working Relationships in the Motor Vehicle Environment.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit enables the learner to develop an understanding of how to keep good working relationships with all colleagues in the automotive work environment by using effective communication and support skills.

Learning outcome	The learner will:
1.	Understand key organisational structures, functions and roles within the automotive work environment.
Assessment criteria	
The learner can:	
1.1	describe the purpose of the main sections of a typical automotive work environment. To include: <ul style="list-style-type: none">a. receptionb. body shopc. service repair workshopd. valetinge. partsf. salesg. administration
1.2	describe organisational structures and lines of communication within the automotive work environment
1.3	explain levels of responsibility within specific job roles in automotive workplace. To include: <ul style="list-style-type: none">a. traineeb. skilled technicianc. supervisord. manager.

Learning outcome	The learner will:
2.	Know the importance of obtaining, interpreting and using information in order to support their job role within the automotive work environment.
Assessment criteria	
The learner can:	
2.1	identify and explain the importance of different sources of information in an automotive work environment. To Include: <ul style="list-style-type: none"> a. other staff b. manuals c. parts lists d. computer software / internet e. manufacturer f. diagnostic equipment
2.2	explain how to find, interpret and use relevant sources of information. To include: <ul style="list-style-type: none"> a. operating specifications b. test procedures c. repair procedures
2.3	describe legal requirements relating to the vehicle, including road safety requirements
2.4	explain the importance of working to recognised procedures and processes
2.5	explain when replacement units and components must meet the manufacturers' original equipment specification.
2.6	explain the purpose of how to use identification codes.

Learning outcome	The learner will:
3.	Understand the importance of different types of communication within the automotive work environment.
Assessment criteria	
The learner can:	
3.1	explain where the following methods of communication would be used within the automotive environment: <ul style="list-style-type: none"> a. verbal b. signs and notices c. memos d. telephone e. electronic mail f. vehicle job card g. notice boards h. SMS text messaging i. letters
3.2	explain the factors which can determine the lines of communication. To include: <ul style="list-style-type: none"> a. distance b. location c. job responsibility

3.3	explain how the communication of information can change with the target audience. To include: <ol style="list-style-type: none"> a. uninformed people b. informed people.
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Learning outcome	The learner will:
4. Know communication requirements when carrying out vehicle repairs in the automotive work environment.	
Assessment criteria	
The learner can:	
4.1 explain how to report using written and spoken methods of communication. To include: <ol style="list-style-type: none"> a. referral of problems b. reporting delays c. additional work required d. keep others informed of progress 	
4.2 explain the importance of documenting information relating to work carried out in the automotive environment	
4.3 explain the importance of working to agreed timescales. To include: <ol style="list-style-type: none"> a. keeping others informed of progress b. the relationship between time and cost. 	

Learning outcome	The learner will:
5. Know how to develop good working relationships with colleagues and customers in the automotive workplace.	
Assessment criteria	
The learner can:	
5.1 describe how to develop positive working relationships with colleagues and customers	
5.2 explain the importance of developing positive working relationships with regard to: <ol style="list-style-type: none"> a. morale b. productivity c. company image d. customer relationships e. colleagues 	
5.3 explain the importance of accepting other peoples' views and opinions.	
5.4 explain the importance of making and honouring realistic commitments to colleagues and customers.	

Unit 053 Knowledge of support for job roles in the automotive work environment

Supporting information

Guidance and range

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Knowledge Unit Syllabus, both of which can be downloaded from the **IMI website**.

1. The structure of a typical vehicle repair business

- a. How these areas relate to each other within the business:
 - i. body shop
 - ii. vehicle repair workshop
 - iii. paint shop
 - iv. valeting
 - v. vehicle parts store
 - vi. main office
 - vii. vehicle sales
 - viii. reception.

2. Sources of information

- a. Other staff.
- b. Manuals.
- c. Parts lists.
- d. Computer software and the internet.
- e. Manufacturer.
- f. Diagnostic equipment.

3. Levels of responsibility within specific job roles in automotive workplace. To include:

- a. trainee
- b. skilled technician
- c. supervisor
- d. manager.

4. Communication requirements when carrying out vehicle repairs

- a. Locating and using correct documentation and information for:
 - i. recording vehicle maintenance and repairs
 - ii. vehicle specifications
 - iii. component specifications
 - iv. oil and fluid specifications
 - v. equipment and tools
 - vi. identification codes.

- b. Procedures for:
 - i. referral of problems
 - ii. reporting delays
 - iii. additional work identified during repair or maintenance
 - iv. keeping others informed of progress.

5. Methods of communication

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

6. Organisational and customer requirements:

- a. importance of time scales to customer and organisation
- b. relationship between time and costs
- c. meaning of profit.

7. Choice of communication

- a. Distance.
- b. Location.
- c. Job responsibility.

8. Importance of maintaining positive working relationships

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

9. How the communication of information can change with the target audience. To include:

- a. uninformed people
- b. informed people.

Unit 056

Knowledge of how to make learning possible through demonstrations and instruction

UAN:	T/601/6242
Level:	Level 3
Credit value:	5
GLH:	45
Relationship to NOS:	This unit is linked to G6 Enable Learning Through Demonstration and Instruction.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit enables the learner to develop an understanding of how to carry out demonstrations and instruction which will help the learner to learn. It includes demonstrating equipment, showing skills, giving instruction, deciding when to use demonstration or instruction, potential of technology based learning, checking on learners' progress and giving feedback.

Learning outcome	The learner will:
	1. Understand the nature and role of demonstrations and instruction.
Assessment criteria	
The learner can:	
1.1	classify the separate areas of demonstrations which encourage learning
1.2	identify which types of learning are best achieved and supported through demonstrations
1.3	explain how to identify and use different learning opportunities
1.4	explain how to structure demonstrations and instruction sessions
1.5	explain how to choose from a range of demonstration techniques.

Learning outcome	The learner will:
2.	Understand the principles and concepts of demonstration and instruction.
Assessment criteria	
The learner can:	
2.1	describe how to put learners at ease and encourage them to take part
2.2	justify the choice between demonstration and instruction as a learning method
2.3	explain how to identify individual learning needs
2.4	clarify which factors are likely to prevent learning and how to overcome them
2.5	explain how to check learners' understanding and progress
2.6	explain how to choose and prepare appropriate materials
2.7	explain the separate areas of instructional techniques which encourage learning
2.8	describe which types of learning are best achieved and supported through instruction.

Learning outcome	The learner will:
3.	Understand the external factors influencing human resource development.
Assessment criteria	
The learner can:	
3.1	explain how to make sure everybody acts in line with health, safety and environmental protection, legislation and best practice
3.2	analyse developments in technology based learning and new ways of delivery.

Unit 056 Knowledge of how to make learning possible through demonstrations and instruction

Supporting information

Guidance and range

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Knowledge Unit Syllabus, both of which can be downloaded from the **IMI website**.

1. Separate areas of demonstration which encourage learning

To include:

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

2. Types of learning which are best achieved and supported through demonstrations

To include:

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

3. How to structure demonstration and instruction sessions

To include:

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

4. How to identify individual learning needs

Diagnose the learning needs of your audience to include:

- a. what competencies they already have
- b. what experience they have of the subject area
- c. what competencies they need to achieve
- d. what demonstration techniques are best suited to their needs
- e. how you will assess their needs have been met.

5. What factors are likely to prevent learning

To include:

- a. language barriers
- b. physical barriers
- c. specialist knowledge
- d. pace of learning
- e. method of delivery
- f. environmental factors
- g. teaching styles
- h. dyslexia.

6. How to check learners understanding and progress

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

7. How to organise information and prepare materials

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

8. Instructional techniques

Types of instructional techniques to include:

- a. lectures
- b. handouts
- c. team teaching
- d. peer teaching
- e. discussion – individual, group and peer
- f. question and answer
- g. multimedia
- h. seminars
- i. case studies
- j. project/assignments.

9. Environmental factors that effect learning

Environmental factors that should be considered before demonstration/instruction to include:

- a. loud noises
- b. bright colours
- c. bright lights
- d. strong smells
- e. atmosphere
- f. temperature
- g. classroom seating
- h. classroom layout
- i. bright lights.

10. Health and safety factors that effect learning

Health and safety factors that should be considered before demonstration/instruction to include:

- a. assessment of risk and hazards
- b. condition of electrical/electronic equipment
- c. position of cables and wires
- d. safety of equipment used in demonstration/instruction
- e. condition of classroom equipment/furniture/structure
- f. suitable protective clothing/equipment.

11. Analysis of demonstration/instruction

Analysis of demonstration/instruction to include:

- a. feedback from students
- b. feedback from colleagues
- c. organisational quality assessment
- d. feedback from external organisations
- e. awarding body requirements.

12. Developments in learning

To include:

- a. multimedia based materials
- b. web based materials
- c. interactive materials.

13. How to choose and prepare appropriate materials

To include:

- a. putting information in order
- b. deciding whether the language used is appropriate
- c. type of material ie paper and technology based etc.

Unit 116

Competency in appraising vehicles for part exchange

UAN:	J/502/6487
Level:	3
Credit value:	3
GLH:	15
Relationship to NOS:	This unit is linked to IMI NOS VS11.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop competency in appraising the condition of vehicles and verifying vehicle identity, ownership and history to confirm that there are no vehicle ownership problems and to enable a valuation to be placed on them.

Learning outcome	The learner will:
1.	Be able to appraise vehicles for part exchange.
Assessment criteria	
The learner can:	
1.1	conduct accurate static and dynamic vehicle appraisals
1.2	document accurate static and dynamic vehicle appraisals
1.3	present the appraisal to the manager for approval.

Learning outcome	The learner will:
2.	Be able to present vehicle appraisals for part exchange with the customer.
Assessment criteria	
The learner can:	
2.1	present the approved valuation to the customer in a way that maintains an effective working relationship
2.2	handle customer feedback effectively
2.3	manage customer expectations
2.4	interact effectively with a customer during a part exchange appraisal
2.5	highlight positive values of competitors' products.

Unit 116 Competency in appraising vehicles for part exchange

Supporting information

Assessment

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Competency Unit Assessment Requirements, both of which can be downloaded from the **IMI website**.

Unit 117

Competency in automotive retail negotiation and sales techniques

UAN:	J/502/6473
Level:	2
Credit value:	4
GLH:	20
Relationship to NOS:	This unit is linked to the IMI NOS VS07.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop competency in the customer service and negotiation skills required to sell a vehicle. It covers qualification, objection handling, negotiation and closing skills.

Learning outcome	The learner will:
1.	Be able to establish an effective relationship with the vehicle customer.
Assessment criteria	
The learner can:	
1.1 prepare to meet customers	
1.2 empathise with the customer	
1.3 show understanding for the customer's issues	
1.4 use positive language when speaking to the customer	
1.5 use effective rapport building skills with the customer	
1.6 handle a range of objections.	

Learning outcome	The learner will:
2.	Be able to negotiate a vehicle sale with the customer.
Assessment criteria	
The learner can:	
2.1 summarise the customer's needs and requirements	
2.2 relate customer needs to an appropriate offer of goods or services	
2.3 use open ended questions when exploring customer responses to an offer	
2.4 formulate a proposal that reflects value for your organisation and the customer	
2.5 ask for the business	
2.6 negotiate successfully to close the sale.	

Unit 117 Competency in automotive retail negotiation and sales techniques

Supporting information

Assessment

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Competency Unit Assessment Requirements, both of which can be downloaded from the **IMI website**.

Unit 118

Competency in brand, product and market awareness in the vehicle sales and supply business

UAN:	R/502/6461
Level:	3
Credit value:	4
GLH:	20
Relationship to NOS:	This unit is linked to IMI NOS VS01.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop competency in monitoring the achievement of personal sales, contribution and profit against targets, demonstrating how to communicate brand and product values in customer handling and market awareness throughout the sales process.

Learning outcome	The learner will:
	1. Be able to monitor personal sales achievement.
Assessment criteria	
The learner can:	
1.1 monitor achievement of personal sales against targets	
1.2 monitor achievement of contribution, profit, and volume against targets.	

Learning outcome	The learner will:
	2. Be able to make value-centred vehicle sales.
Assessment criteria	
The learner can:	
2.1 communicate brand and product values in customer handling and throughout the sales process	
2.2 sell value over price.	

Learning outcome	The learner will:
	3. Be able to find solutions to improving personal sales performance.
Assessment criteria	
The learner can:	
3.1 interpret performance data and trends with a view to applying appropriate and pragmatic solutions to improve own sales performance.	

Unit 118 **Competency in brand, product
and market awareness in the
vehicle sales and supply
business**

Supporting information

Assessment

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Competency Unit Assessment Requirements, both of which can be downloaded from the **IMI website**.

Unit 119

Competency in complying with the legal requirements and regulations of vehicle sales

UAN:	A/502/6468
Level:	2
Credit value:	3
GLH:	15
Relationship to NOS:	This unit is linked to IMI NOS VS03.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop competency in meeting legal requirements in the vehicle sales environment. The latter to be achieved whilst adopting best practice and include data protection, trading law relevant to the sales process etc.

Learning outcome	The learner will:
1. Be able to apply regulation and legislation appropriate to vehicle sales.	
Assessment criteria	
The learner can:	
1.1	identify the impact of regulation, legislation, data protection and trading law has on own role
1.2	determine the level of knowledge required to maintain understanding of regulation, legislation, data protection and trading law relevant to own role
1.3	access appropriate sources of relevant information on regulation, legislation, data protection and trading law relevant to own role
1.4	communicate relevant regulation, legislation, data protection and trading law using accurate terminology to the customer as appropriate.

Unit 119

Competency in complying with the legal requirements and regulations of vehicle sales

Supporting information

Assessment

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Competency Unit Assessment Requirements, both of which can be downloaded from the **IMI website**.

Unit 120

Competence in conducting vehicle demonstration drives

UAN:	D/502/6480
Level:	2
Credit value:	3
GLH:	15
Relationship to NOS:	This unit is linked to IMI NOS VS09.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop competency in planning and carrying out demonstration drives with customers. Particular attention is paid to the safety and security of the individual and the vehicle.

Learning outcome	The learner will:
	1. Be able to conduct a vehicle test drive.
Assessment criteria	
The learner can:	
1.1 obtain the required customer data and paperwork prior to the drive	
1.2 obtain the required customer data and paperwork prior to the drive	
1.3 present features and benefits during the drive with due care and safety	
1.4 identify risks to self, customer and vehicle	
1.5 evaluate the risks to self, customer and vehicle	
1.6 carry out a trial close when necessary.	

Unit 120 **Competence in conducting vehicle demonstration drives**

Supporting information

Assessment

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Competency Unit Assessment Requirements, both of which can be downloaded from the **IMI website**.

Unit 121

Competency in constructing motor vehicle sales packages

UAN:	A/502/6471
Level:	3
Credit value:	5
GLH:	25
Relationship to NOS:	This unit is linked to IMI NOS VS06.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop competency in constructing and understanding sales packages based on information from manufacturer, dealership and government, whilst complying with audit requirements.

Learning outcome	The learner will:
1.	Be able to construct motor vehicle sales packages.
Assessment criteria	
The learner can:	
1.1	use appropriate sources of information for the sales package
1.2	communicate the deal offer to the customer
1.3	adhere to work place procedures and guidelines when constructing the sales package
1.4	comply with prescribed audit requirements
1.5	show how updated information has been used to offer the best possible opportunity to different customers
1.6	show the decision structure of the business for the introduction of sales packages and promotions.

Unit 121 Competency in constructing motor vehicle sales packages

Supporting information

Assessment

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Competency Unit Assessment Requirements, both of which can be downloaded from the **IMI website**.

Unit 122

Competency in delivering a vehicle sales static presentation

UAN:	M/502/6483
Level:	2
Credit value:	3
GLH:	15
Relationship to NOS:	This unit is linked to IMI NOS VS08.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop competency in delivering effective sales presentations to maximise sales potential. It includes giving bespoke presentations to the customer and providing opportunities for questions to be asked.

Learning outcome	The learner will:
1.	Be able to deliver a vehicle sales static presentation.
Assessment criteria	
The learner can:	
1.1	provide information about the product features and benefits
1.2	structure presentations relevant to information gathered in interaction with the customer
1.3	present the correct products or services
1.4	use information systems where appropriate.

Learning outcome	The learner will:
2.	Be able to build a relationship with customers when delivering a vehicle sales static presentation.
Assessment criteria	
The learner can:	
2.1	actively listen to customers needs and requirements
2.2	respond appropriately to customers' needs and requirements
2.3	generate rapport with the customer.

Learning outcome	The learner will:
	3. Be able to gain customer agreement to a product or service during a vehicle sales static presentation.
Assessment criteria	
The learner can:	
3.1 gain customer agreement for vehicle or service at the preliminary stage of the sale.	

Unit 122 Competency in delivering a vehicle sales static presentation

Supporting information

Assessment

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Competency Unit Assessment Requirements, both of which can be downloaded from the **IMI website**.

Unit 123

Competency in handling vehicle sales telephone enquiries

UAN:	T/502/6467
Level:	2
Credit value:	3
GLH:	15
Relationship to NOS:	This unit is linked to IMI NOS VS05.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop competency in handling and logging telephone enquires and identifying caller's needs.

Learning outcome	The learner will:
1.	Be able to handle vehicle sales telephone enquiries.
Assessment criteria	
The learner can:	
1.1	make the response personal to the caller
1.2	provide relevant product knowledge and advice to the caller
1.3	handle caller objections effectively
1.4	use telephone communication methods to secure transition to the next stage of the sales process
1.5	close telephone conversations in a way that meets own and caller's objectives
1.6	accurately summarise telephone conversations.

Unit 123

Competency in handling vehicle sales telephone enquiries

Supporting information

Assessment

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Competency Unit Assessment Requirements, both of which can be downloaded from the **IMI website**.

Unit 124

Competency in handover of the vehicle to the customer

UAN:	K/502/6479
Level:	2
Credit value:	3
GLH:	15
Relationship to NOS:	This unit is linked to IMI NOS VS14.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop competency in making a successful handover of a vehicle to a customer, ensuring the effective communication with the customer from placing the order to the handover event.

Learning outcome	The learner will:
1.	Be able to liaise with the customer during the handover process.
Assessment criteria	
The learner can:	
1.1	keep the customer informed of progress from when they place their order to the handover event
1.2	agree an appointment and schedule with the customer
1.3	offer a consistent brand experience to the customer throughout the handover process.

Learning outcome	The learner will:
2.	Be able to prepare the handover of a vehicle to the customer.
Assessment criteria	
The learner can:	
2.1	ensure that all colleagues relevant to the event are made aware of their place in the schedule
2.2	ensure that the vehicle is prepared and is the correct specification
2.3	ensure that vehicle has been allocated adequate space for the handover event to run smoothly
2.4	ensure the vehicle is parked safely
2.5	allow sufficient time to apply all aspects of the handover procedure
2.6	ensure the customer is able to adhere to handover schedule.

Learning outcome	The learner will:
3.	Be able to complete the handover of a vehicle to the customer.
Assessment criteria	
<p>The learner can:</p> <ul style="list-style-type: none"> 3.1 reinforce with the customer their decision to buy 3.2 provide the customer with the opportunity to raise queries and address any concerns 3.3 incorporate part-exchange acceptance, to include re-appraisal and collation of all necessary documentation and proofs, as applicable 3.4 maintain control of the process at all times 3.5 re-present the product to include essential knowledge and health and safety 3.6 accommodate customer preferences without undermining the prescribed structure or value of the event. 	

Unit 124 Competency in handover of the vehicle to the customer

Supporting information

Assessment

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Competency Unit Assessment Requirements, both of which can be downloaded from the **IMI website**.

Unit 125

Competency in managing customer relationships in a vehicle sales environment

UAN:	L/502/6488
Level:	2
Credit value:	3
GLH:	15
Relationship to NOS:	This unit is linked to IMI NOS VS13.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop competency in effective customer relationship management to create opportunities for referral and repeat business, to achieve short or long term success.

Learning outcome	The learner will:
1. Be able to manage customer relationships in a vehicle sales environment.	
Assessment criteria	
The learner can:	
1.1	work to maintain a positive relationship with the customer both during and after they have taken delivery of their vehicle or service
1.2	use a positive relationship with the customer in order to create the opportunity for both referral and repeat business
1.3	use a structured approach to customer relationship management in order to: a. maximise the potential for short and long term success b. minimise the risk of costly error and customer disillusionment
1.4	offer a professional and reassuring service throughout the buying experience.

Unit 125 Competency in managing customer relationships in a vehicle sales environment

Supporting information

Assessment

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Competency Unit Assessment Requirements, both of which can be downloaded from the **IMI website**.

Unit 126

Competency in meeting and greeting vehicle sales customers

UAN:	Y/502/6493
Level:	2
Credit value:	3
GLH:	15
Relationship to NOS:	This unit is linked to IMI NOS VS15.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop competency in effective communication methods to offer a re-assuring, knowledgeable and confident platform for interaction and provide a positive first impression.

Learning outcome	The learner will:
1.	Be able to qualify the selling opportunity.
Assessment criteria	
The learner can:	
1.1	maximise the opportunity by using appropriate communication methods
1.2	use a structured and professional approach to gathering critical information in transition to the qualification phase
1.3	gain early agreement from the prospective customer as a sound foundation to proceed.

Learning outcome	The learner will:
2.	Be able to engage the customer in the selling process.
Assessment criteria	
The learner can:	
2.1	identify key buying criteria as soon as possible
2.2	apply key buying criteria
2.3	offer a reassuring, knowledgeable and confident platform for interaction
2.4	use proven approach to early objection handling
2.5	eliminate all distraction where possible and provide undivided attention to the customer
2.6	appear interested in the customer throughout the contact.

Unit 126 Competency in meeting and greeting vehicle sales customers

Supporting information

Assessment

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Competency Unit Assessment Requirements, both of which can be downloaded from the **IMI website**.

Unit 127

Competency in negotiating fleet and business buyer needs

UAN:	H/502/6464
Level:	3
Credit value:	3
GLH:	17
Relationship to NOS:	This unit is linked to IMI NOS VS02.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop competency in negotiating fleet and business buyers' needs for vehicles.

Learning outcome	The learner will:
1.	Be able to negotiate fleet and business buyer needs.
Assessment criteria	
The learner can:	
1.1	make clear the financial options available to the buyer
1.2	help the buyer to understand the advantages/disadvantages of the financial options available
1.3	help the buyer to understand the tax implications of the purchase
1.4	communicate the unique selling points of the brand and dealer group to the business community.

Unit 127 Competency in negotiating fleet and business buyer needs

Supporting information

Assessment

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Competency Unit Assessment Requirements, both of which can be downloaded from the **IMI website**.

Unit 128

Competency in promoting finance and insurance for vehicle sales

UAN:	F/502/6472
Level:	3
Credit value:	4
GLH:	20
Relationship to NOS:	This unit is linked to IMI NOS VS10.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop competency in securing the necessary finance and insurance in order to enable customers to purchase vehicles. Including, identifying the customer's finance and insurance needs before presenting possible options.

Learning outcome	The learner will:
1.	Be able to promote finance and insurance for vehicle sales.
Assessment criteria	
The learner can:	
1.1	identify the customers funding requirements
1.2	demonstrate the different finance offers available through the dealership along with their relative benefits to different customers
1.3	demonstrate the different insurance offers available through the dealership along with their relative benefits to different customers
1.4	promote the features and benefits of finance and insurance offers in conjunction with the product range
1.5	promote commercial advantage through industry and competitor knowledge.

Unit 128 Competency in promoting finance and insurance for vehicle sales

Supporting information

Assessment

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Competency Unit Assessment Requirements, both of which can be downloaded from the **IMI website**.

Unit 129

Competency in self management and administration in a vehicle sales environment

UAN:	T/502/6470
Level:	3
Credit value:	3
GLH:	15
Relationship to NOS:	This unit is linked to IMI NOS VS04.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop competency in time management, meeting sales targets, achieving objectives and using information technology to facilitate own role.

Learning outcome	The learner will:
1.	Be able to manage own work and administration in a vehicle sales environment.
Assessment criteria	
The learner can:	
1.1	follow own organisation's procedures for completing contract and order forms
1.2	demonstrate the correct completion of dealership logs
1.3	access the internet and appropriate intranet applications
1.4	perform basic internet searches
1.5	implement effective time management procedures
1.6	use relevant operating systems required to effectively carry out the role.

Unit 129

Competency in self management and administration in a vehicle sales environment

Supporting information

Assessment

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Competency Unit Assessment Requirements, both of which can be downloaded from the **IMI website**.

Unit 130

Competency in valuing vehicles for part exchange

UAN:	L/502/6491
Level:	3
Credit value:	3
GLH:	15
Relationship to NOS:	This unit is linked to IMI NOS VS12.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop competency in reviewing the information presented by the appraisal and make judgments regarding; recondition costs, current demand and value of the part exchange, and the impact on retained profit from the related sales

Learning outcome	The learner will:
	1. Be able to value vehicles for part exchange.
Assessment criteria	
The learner can:	
1.1 interpret the latest dealer approved price guides correctly	
1.2 estimate part exchange recondition costs accurately	
1.3 calculate profit margins from related sales	
1.4 present the valuation effectively	
1.5 highlight positive values of competitors' products.	

Unit 130 Competency in valuing vehicles for part exchange

Supporting information

Assessment

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Competency Unit Assessment Requirements, both of which can be downloaded from the **IMI website**.

Unit 166

Knowledge of appraising vehicles for part exchange

UAN:	K/502/6482
Level:	3
Credit value:	3
GLH:	20
Relationship to NOS:	This unit is linked to IMI NOS VS11
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop knowledge and understanding they need to appraise the condition of vehicles and verify vehicle identity, ownership and history to confirm that there are no vehicle ownership problems.

Learning outcome	The learner will:
1.	Understand the purpose of used vehicle appraisal for part exchange.
Assessment criteria	
The learner can:	
1.1	define the difference between the used vehicle appraisal and the valuation after
1.2	describe the objective of the used vehicle appraisal.

Learning outcome	The learner will:
2.	Understand how to appraise vehicles for part exchange.
Assessment criteria	
The learner can:	
2.1	describe the process of used vehicle appraisal
2.2	identify the resources used in the appraisal
2.3	explain how to verify vehicle identity, ownership and history
2.4	describe customer's expectations of the appraisal process
2.5	explain the importance of customer involvement in the appraisal process.

Unit 166 Knowledge of appraising vehicles for part exchange

Supporting information

Guidance and range

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Knowledge Unit Syllabus, both of which can be downloaded from the **IMI website**.

- 1. The difference between the used vehicle appraisal and the valuation after:**
 - a. purpose of the appraisal
 - b. reasons for the evaluation.

- 2. The objective of the used vehicle appraisal:**
 - a. ownership
 - b. history
 - c. informing the valuation process
 - d. check list for final hand over.

- 3. The process of used vehicle appraisal**

- 4. Inspect and record to include:**
 - a. vehicle condition:
 - i. exterior
 - ii. interior
 - b. vehicle details:
 - i. make, model, colour, trim etc
 - ii. Vehicle Identification Number (VIN)
 - iii. mileage
 - iv. MOT certificate
 - v. service history
 - vi. road fund licence (expiry date)
 - vii. fitted accessories
 - c. functional tests.

- 5. How to identify key sale indicators, to include:**
 - a. observation
 - b. active listening
 - c. sensing
 - d. questioning
 - e. verbal and non verbal communications.

- 6. How to verify vehicle identity, ownership and history**
 - a. Registration Certificate (V5)
 - b. First registration date.
 - c. Specification, additions or changes.
 - d. Ownership.
 - e. Number of owners.

- 7. Hire Purchase Investigation (HPI)**
 - a. Vehicle Mileage Declaration (VMD).
 - b. Vehicle Mileage Check (VMC).

- 8. The customer's expectations of the appraisal process**
 - a. Open sources of information influencing customer's expectations.

- 9. The importance of customer involvement in the appraisal process**
 - a. Validation of appraisal records.
 - b. Opportunities to build rapport.
 - c. Verbal affirmations of ownership and use.

Unit 167

Knowledge of automotive retail negotiation and sales techniques

UAN:	Y/502/6476
Level:	2
Credit value:	5
GLH:	25
Relationship to NOS:	This unit is linked to IMI NOS VS07.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop knowledge and understanding they need to develop the customer service and negotiation skills required to sell a vehicle. It covers qualification, objection handling, negotiation and closing skills.

Learning outcome	The learner will:
1.	Understand how to present vehicle sales solutions to the customer.
Assessment criteria	
The learner can:	
1.1	explain how to identify customer expectations and the factors that influence them
1.2	describe the main components of a deal offer
1.3	explain how to find and offer solutions productively
1.4	explain the difference between price and value.

Learning outcome	The learner will:
2.	Understand how to provide customer service during the vehicle sales process.
Assessment criteria	
The learner can:	
2.1	describe the internal factors that affect the quality of customer service delivery
2.2	explain how success in customer service is achievable irrespective of the presence of a specific financial reward.

Learning outcome	The learner will:
	3. Understand how to communicate with the customer in a vehicle sales environment.
Assessment criteria	
The learner can:	
3.1 summarise communication styles as appropriate to different customer categories	
3.2 explain how the intelligent use of open and closed questions can help to qualify the customer's needs and requirements	
3.3 explain why it is important to use accurate and correct terminology when dealing with customers	
3.4 demonstrate a range of accurate and correct terminology to use when dealing with customers	
3.5 explain the principle of active listening which involves reinforcing what the customer is saying and by asking relevant questions.	

Learning outcome	The learner will:
	4. Understand how to deal with customer objections in a vehicle sales environment.
Assessment criteria	
The learner can:	
4.1 explain how to clarify customer objections	
4.2 describe how to apply objection handling techniques.	

Learning outcome	The learner will:
	5. Know how to close a sale in a vehicle sales environment.
Assessment criteria	
The learner can:	
5.1 explain how to conclude negotiations in order to close a sale.	

Unit 167 Knowledge of automotive retail negotiation and sales techniques

Supporting information

Guidance and range

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Knowledge Unit Syllabus, both of which can be downloaded from the **IMI website**.

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

- a. basic influences on customers' buying behavior:
 - i. distinguishing between needs, wants and expectations
- b. the elements of the 4P marketing mix to include:
 - i. Product for eg features and benefits
 - ii. Place for eg territory
 - iii. Price for eg high, low, competitive
 - iv. Promotion for eg advertising, sales promotion, direct marketing, publicity/public relations (including sponsorship)
- c. the buying process:
 - i. The AIDA model (1. Awareness/attention, 2. Interest, 3. Desire, 4. Action).

2. The main components of a deal offer to include:

- a. part exchange price offer
- b. new (newer) vehicle
- c. specifications
- d. accessories
- e. finance
- f. insurance
- g. warranty.

3. How to find and offer solutions productively to include:

- a. pre-sale preparation:
 - i. information resources eg brochures, promotional material, price guides
 - ii. operation and function of a Dealer Management System (DMS).

4. The difference between price and value:

- a. product pricing methods
- b. definition of the product market value
- c. influences on the negotiation process.

- 5. The internal factors that affect the quality of customer service delivery**
 - a. Barriers to implementing customer care, to include:
 - i. authority
 - ii. budget
 - iii. people
 - iv. time
 - v. management.
 - b. How barriers to customer care can be overcome.
- 6. How success in customer service is achievable irrespective of the presence of a specific financial reward**
- 7. The customer experience, both physical and emotional**
- 8. Importance of customer service standards, to include:**
 - a. courtesy
 - b. respect
 - c. fairness
 - d. clarity
 - e. accessibility
 - f. timeliness
 - g. responsiveness.
- 9. Maintaining rapport**
- 10. Gaining referrals and recommendations**
- 11. Identifying repeat sales opportunities**
- 12. Communication styles as appropriate to different customer categories**
 - a. Individual preferred styles:
 - i. visual
 - ii. auditory
 - iii. kinaesthetic.
 - b. Body language:
 - i. meeting and greeting gestures
 - ii. building rapport
 - iii. eye contact
 - iv. facial expressions
 - v. personal space.
 - c. Characteristics of selling in different contexts:
 - i. retail customers – new car buyer
 - ii. retail customers – used car buyer
 - iii. retail customers – existing / repeat business
 - iv. business customers eg informed buyers, the Decision Making Unit (DMU), business tax implications, presenting at board level
 - v. trade customers
 - vi. telephone customers
 - vii. selling services (such as after sales) – intangible products.

- 13. How the intelligent use of open and closed questions can help to qualify the customer's needs and requirements:**
 - a. the difference between open and closed questions
 - b. building rapport
 - c. identifying needs through questioning.
- 14. Establishing customer aims and objectives:**
 - a. personal / business use
 - b. vehicle requirements
 - c. budgets and means
 - d. part exchange.
- 15. Matching products to satisfy needs**
- 16. Presenting a sales proposal**
- 17. Why it is important to use accurate and correct terminology when dealing with customers**
- 18. The importance of ethics in selling to include:**
 - a. the positive qualities for ethical selling eg truth, honesty, professionalism
 - b. negative practices eg hard sales techniques, discrediting competitors, unprofessional behaviour.
- 19. A range of accurate and correct terminology to use when dealing with customers**
 - a. Examples of industry jargon and more appropriate terminology to use.
- 20. The principle of active listening which involves reinforcing what the customer is saying and by asking relevant questions**
 - a. Active listening skills:
 - i. effective listening
 - ii. concentrating
 - iii. blocking internal dialogue
 - iv. body language to demonstrate listening
 - v. reflecting and questioning eg confirming / clarifying understanding.
- 21. How to clarify customer objections**
 - a. Basic objection handling:
 - i. acknowledge
 - ii. listen
 - iii. don't interrupt.
 - b. Typical objections:
 - i. pricing
 - ii. product
 - iii. part exchange offers eg valid - agree and counter, invalid - negate and clarify.
- 22. How to conclude negotiations in order to close a sale**
 - a. Basic closing:
 - i. buying signals
 - ii. summarise and ask for order.

Unit 168

Knowledge of brand, product and market awareness in the vehicle sales and supply business

UAN:	Y/502/6462
Level:	3
Credit value:	6
GLH:	35
Relationship to NOS:	This unit is linked to IMI NOS VS01.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop knowledge and understanding they need to monitor the achievement of personal sales, contribution and profit against targets, demonstrating how to communicate brand and product values in customer handling and market awareness throughout the sales process.

Learning outcome	The learner will:
1.	Understand the role of dealerships in the retail vehicle industry.
Assessment criteria	
The learner can:	
1.1	describe the size and trends within the UK automotive industry
1.2	explain new vehicle production cycles and the delivery process
1.3	describe the manufacturer supply chain for new vehicles
1.4	explain the relationship between a typical dealer group and the vehicle manufacturers
1.5	describe the structure and ownership of a dealer network
1.6	describe the structure and inter-departmental relationships of a typical dealership.

Learning outcome	The learner will:
2.	Understand the factors that influence profitability in the retail vehicle industry.
Assessment criteria	
The learner can:	
2.1	compare different sources of stock and their profitability
2.2	explain the difference between wholesale and retail pricing
2.3	explain the principles of cash flow within a retail vehicle business.

Learning outcome	The learner will:
	3. Understand own contribution to the profitability of the dealership.
Assessment criteria	
The learner can:	
3.1 explain margins and bonus structures	
3.2 describe own personal targets and personal impact on dealership profitability.	

Learning outcome	The learner will:
	4. Understand the influence of brands in the retail vehicle industry.
Assessment criteria	
The learner can:	
4.1 explain what a brand is	
4.2 explain what brand values mean to customers	
4.3 explain how brand names influence customer expectations.	

Learning outcome	The learner will:
	5. Understand the factors that influence customer behaviour.
Assessment criteria	
The learner can:	
5.1 summarise the economic factors that can influence potential buyers	
5.2 explain the impact of stock source on customer choice, lead time and the financial offer.	

Learning outcome	The learner will:
	6. Understand the sales process.
Assessment criteria	
The learner can:	
6.1 define what is meant by a sale	
6.2 explain a range of customer buying motives	
6.3 describe own organisation's sales processes	
6.4 explain how to sell value over price.	

Unit 168 Knowledge of brand, product and market awareness in the vehicle sales and supply business

Supporting information

Guidance and range

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Knowledge Unit Syllabus, both of which can be downloaded from the **IMI website**.

- 1. The structure and roles of the major organisations to include:**
 - a. the vehicle manufacturers
 - b. new vehicle production cycles and delivery process
 - c. new vehicle supply chains and distribution hubs
 - d. the structure and ownership of a dealer network
 - e. large dealer groups
 - f. franchise and non franchise dealerships
 - g. specialist dealers.

- 2. The relationship between the dealership, a typical dealer group and the vehicle manufacturers to include:**
 - a. franchise agreements
 - b. dealer standards
 - c. regional / zone management.

- 3. The structure and roles of supporting organisations to include:**
 - a. trade associations
 - b. professional bodies
 - c. trading standards
 - d. government departments (eg transport, industry, education etc).

- 4. The trends within the UK automotive industry to include:**
 - a. current industry codes of practice
 - b. impact of technology
 - c. continuous development in vehicle safety
 - d. legislation relating to the sale of vehicles
 - e. customer buying habits and trends
 - f. image of the industry.

- 5. The size of dealerships to include:**
 - a. geographical, designed to meet territorial targets and customer needs
 - b. products, types of vehicles and sales volume
 - c. key accounts, single point for sales and after sales.

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

- 7. The types of operation or departments within the dealership to include:**
 - a. sales
 - b. service
 - c. parts
 - d. body shop
 - e. after sales
 - f. warranty
 - g. accounts.

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

- 9. The different job roles and responsibilities of each to include:**
 - a. owners/directors
 - b. managers
 - c. sales controllers / executives
 - d. technicians
 - e. other personnel.

- 10. Different sources of stock and their profitability to include:**
 - a. new vehicles:
 - i. manufacturer led pricing
 - ii. wholesale
 - iii. retail
 - iv. bonus
 - b. used vehicles:
 - i. dealer led pricing
 - ii. retail
 - iii. trade.

- 11. Low volume – high margin**

- 12. High volume – low margin**

- 13. Cost of sales to include:**
 - a. demonstrators
 - b. mileage
 - c. fuel
 - d. advertising
 - e. promotions
 - f. new vehicle preparation
 - g. used vehicle preparation
 - h. commission.

- 14. The principles of cash flow within a retail vehicle business**

- 15. The correlation between vehicle sales targets and financial targets**

- 16. The basic principles of accounts to include:**
 - a. the cash flow forecast
 - b. the cash book
 - c. the sales ledger
 - d. the purchase ledger
 - e. credit control systems
 - f. margins.

- 17. Factors influencing retained profit**

- 18. Own financial operating parameters to include:**
 - a. vehicle type
 - b. finance
 - c. insurance
 - d. warranty.

- 19. Limits of authority**

- 20. Approval process when limits of authority are exceeded**

- 21. Bonus structures to include:**
 - a. manufacturers incentives
 - b. finance company incentives
 - c. insurance company incentives
 - d. dealer incentives (individual and team).

- 22. Own personal targets**

- 23. Job description to include:**
 - a. planning personal objectives
 - b. organising work schedules
 - c. implementing
 - d. monitoring
 - e. evaluating
 - f. setting new objectives.

- 24. Using SMART objectives to include:**
- a. specific (eg sales targets)
 - b. measurable (eg sales figures)
 - c. attainable (eg based on levels of experience)
 - d. realistic (eg in line with current trends)
 - e. time (eg based on organisation's timescales).
- 25. Alignment of own and dealership targets**
- 26. Brands to include:**
- a. definition
 - b. examples.
- 27. Brand values to include:**
- a. safety
 - b. reliability
 - c. comfort
 - d. performance
 - e. efficiency.
- 28. Typical brand names and influence on customer expectations**
- 29. The economic factors that can influence potential buyers to include:**
- a. pricing
 - b. terms of payment
 - c. promotions
 - d. seasonal commitments.
- 30. The impact of stock source on customer choice, lead time and the financial offer**
- a. Stock record systems.
 - b. Ordering process.
 - c. Delivery lead times.
 - d. Preparation.
 - e. Documentation.
- 31. The nature and ethics of selling**
- 32. Negative images and stereotypes of selling to include:**
- a. hard selling
 - b. miss-selling
 - c. bribery.
- 33. Positive images of selling**

34. The sales cycle in the context of own organisation to include:

- a. pre-sale:
 - i. prospecting
 - ii. targeting customers
 - iii. making appointments
 - iv. diary planning
 - v. researching individual customers
 - vi. personal preparation
 - vii. setting objectives for the sales call
- b. sale:
 - i. breaking the ice and building rapport
 - ii. identifying needs through questioning
 - iii. presenting a sales proposal
 - iv. handling objections
 - v. negotiating agreement
 - vi. closing
- c. post-sale to include:
 - i. processing the order
 - ii. delivery / hand over
 - iii. customer follow-up
 - iv. after sales service
 - v. gaining referrals and recommendations
 - vi. identifying repeat selling opportunities
 - vii. self analysis and seeking feedback.

35. A range of customer buying motives to include:

- a. status
- b. promotions
- c. passenger capacity
- d. luggage capacity
- e. performance
- f. mileage
- g. comfort
- h. efficiency
- i. terrain.

36. How to sell value over price to include:

- a. the difference between features and benefits
- b. typical features of own products
- c. typical benefits of own products.

Unit 169

Knowledge of complying with the legal requirements and regulations of vehicle sales

UAN:	M/502/6466
Level:	2
Credit value:	3
GLH:	15
Relationship to NOS:	This unit is linked to IMI NOS VS03.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop knowledge and understanding they need to satisfy the legal requirements in the vehicle sales environment. The latter to be achieved whilst adopting best practice and include data protection, trading law relevant to the sales process etc.

Learning outcome	The learner will:
1.	Understand the regulation and legislation relevant to vehicle sales.
Assessment criteria	
The learner can:	
1.1	summarise the current relevant regulation, legislation, data protection and trading law relating to vehicle sales
1.2	explain how and when to use trade plates
1.3	explain the consequences of misuse and loss of trade plates
1.4	identify potential sources of information on regulation, legislation, data protection and trading law relevant to your role.

Learning outcome	The learner will:
2.	Understand own and organisational responsibilities in relation to regulation and legislation relevant to vehicle sales.
Assessment criteria	
The learner can:	
2.1	explain the impact that current regulation, legislation, data protection and trading law has on own role
2.2	justify the need to maintain own knowledge and understanding of regulation, legislation, data protection and trading law relevant to own role
2.3	explain own legal and moral responsibility in relation to vehicle sales
2.4	explain the legal and moral responsibility of the organisation in relation to vehicle sales.

Unit 169

Knowledge of complying with the legal requirements and regulations of vehicle sales

Supporting information

Guidance and range

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Knowledge Unit Syllabus, both of which can be downloaded from the **IMI website**.

1. The current relevant regulation, legislation, data protection and trading law relating to vehicle sales to include:

- a. basic principles applicable to vehicle sales:
 - i. The Financial Services and Markets Act
 - ii. Enterprise Act
 - iii. Fair Trading Act
 - iv. Consumer Protection Act
 - v. Data Protection Act
 - vi. Supply of Goods and Services Act
 - vii. contract law
 - viii. health and safety legislation
 - ix. Vehicle Excise and Registration Act
 - x. Road Traffic Act
 - xi. industry codes of conduct
 - xii. any other current industry legislation.

2. How and when to use trade plates to include:

- a. property rights and ownership
- b. categories of business eligible to use
- c. DVLA guidance and conditions of use
- d. holder's responsibilities for safeguarding and use.

3. The consequences of misuse and loss of trade plates to include:

- a. penalties for:
 - i. fraudulently altering or using trade plates
 - ii. fraudulently lending them, or
 - iii. allowing them to be used by any other person
 - iv. procedure for reporting theft, loss, destruction

- 4. Potential sources of information on regulation, legislation, data protection and trading law relevant to your role to include:**
 - a. terms and conditions of employment
 - b. job description
 - c. company standards and policies
 - d. sales documentation and literature
 - e. franchise agreements
 - f. motor industry trade associations
 - g. intranet
 - h. internet
 - i. local authority bye-laws.

- 5. The impact that current regulation, legislation, data protection and trading law has on own role to include:**
 - a. statutory duties and legal obligations relating to vehicle sales
 - b. duty to interpret and accurately communicate information to customers.

- 6. The need to maintain own knowledge and understanding of regulation, legislation, data protection and trading law relevant to own role:**
 - a. Remaining compliant and embracing change:
 - i. continuous personal development
 - ii. occupational competence
 - iii. professional image.

- 7. Own legal and moral responsibility in relation to vehicle sales**
 - a. Significance of observing organisational and ethical rules:
 - i. when providing information to customers.
 - b. Characteristics and qualities of the professional salesperson:
 - i. knowledgeable
 - ii. honest
 - iii. helpful
 - iv. reliable
 - v. motivated.

- 8. The legal and moral responsibility of the organisation in relation to vehicle sales to include:**
 - a. trading standards and ethics
 - b. corporate social responsibility.

Unit 170

Knowledge of conducting vehicle demonstration drives

UAN:	H/502/6481
Level:	2
Credit value:	3
GLH:	20
Relationship to NOS:	This unit is linked to IMI NOS VS09.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop knowledge and understanding they need to plan and carry out demonstration drives with customers. Particular attention is paid to the safety and security of the individual and the vehicle.

Learning outcome	The learner will:
1.	Understand the purpose and value of a test drive.
Assessment criteria	
The learner can:	
1.1	explain the objective of the demonstration drive
1.2	summarise the importance of a structured presentation for the demonstration drive
1.3	define the characteristics of a test drive.

Learning outcome	The learner will:
2.	Understand how to prepare for a test drive.
Assessment criteria	
The learner can:	
2.1	describe the dealer demonstration vehicle standards
2.2	describe the process for booking demonstration drives
2.3	describe the demonstration preparation process.

Learning outcome	The learner will:
3.	Understand the legal and regulatory requirements that apply to test drives.
Assessment criteria	
The learner can:	
3.1	summarise the legal requirements that apply to test drives
3.2	explain duty of care in relation to demonstration drives as defined by the employer
3.3	identify how and when to use trade plates
3.4	explain the consequences of misuse and loss of trade plates.

Unit 170 Knowledge of conducting vehicle demonstration drives

Supporting information

Guidance and range

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Knowledge Unit Syllabus, both of which can be downloaded from the **IMI website**.

- 1. The objective of the demonstration drive**
 - a. Purpose of the demonstration drive.
 - b. Key benefits for the customer.

- 2. The importance of a structured presentation for the demonstration drive**
 - a. Structure of an effective presentation.
 - b. Sales cycle integration.
 - c. Vehicle features and benefits.

- 3. The characteristics of a test drive**
 - a. Route planning principles.
 - b. Effective customer driving experiences.
 - c. Vehicle handling characteristics.

- 4. The dealer demonstration vehicle standards**
 - a. Vehicle condition.
 - b. Roadworthy.
 - c. Fuelled.
 - d. Parked to facilitate eg static demonstration, drive off.

- 5. The process for booking demonstration drives**
 - a. Appropriate vehicle:
 - i. available
 - ii. presentable
 - iii. roadworthy
 - iv. trade plates available
 - v. planned routes accessibility.

- 6. The demonstration preparation process**
 - a. Vehicle functional checks.
 - b. Vehicle fuelled.
 - c. Customer data and documentation checks.
 - d. Temporary absence covered.
 - e. Anticipated return time notified.
 - f. Planned routes confirmed accessible.

7. The legal requirements that apply to test drives

- a. Driving licence.
- b. Insurance.
- c. Trade plates.
- d. Fitness to drive.

8. Duty of care in relation to demonstration drives as defined by the employer

- a. Health and safety risk assessment.
- b. Security risk assessment.

9. Trade plates

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

Unit 171

Knowledge of constructing and understanding sales packages

UAN:	L/502/6474
Level:	3
Credit value:	4
GLH:	25
Relationship to NOS:	This unit is linked to IMI NOS VS06.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop knowledge and understanding they need for constructing and understanding sales packages based on information from manufacturer, dealership and government, whilst complying with audit requirements.

Learning outcome	The learner will:
1.	Understand how to construct sales packages.
Assessment criteria	
The learner can:	
1.1	summarise the features, advantages and benefits of offers available from the manufacturer, the dealership and government
1.2	explain the options and combinations contained within available sales packages
1.3	explain the importance of keeping information up to date in order to offer the best possible business opportunity to the customers and to the organisation
1.4	explain the operating philosophy of own organisation, identifying sales packages and additional promotions that fit into its context
1.5	describe audit requirements resulting from government and industry regulations.

Unit 171 Knowledge of constructing and understanding sales packages

Supporting information

Guidance and range

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Knowledge Unit Syllabus, both of which can be downloaded from the **IMI website**.

- 1. The features, advantages and benefits of offers available from the manufacturer, the dealership and Government**
 - a. Product range:
 - i. vehicles
 - ii. specifications
 - iii. accessories
 - iv. finance
 - v. insurance
 - vi. warranty
 - vii. GAP schemes
 - viii. product features and benefits.

- 2. The options and combinations contained within available sales packages to include:**
 - a. current product promotions:
 - i. manufacturer
 - ii. finance
 - iii. insurance
 - iv. dealership.

- 3. Individual product margins and operating parameters**

- 4. Package permutations and their alignment with:**
 - a. organisational aims and objectives
 - b. authorisation processes and limits of authority
 - c. individual and organisational product targets
 - d. profitability
 - e. pricing tactics, sales, discounts, promotions
 - f. sales standards and ethics.

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

- 6. Significance of using accurate current information during sales negotiations to include:**
 - a. informed customers
 - b. non informed customers.

- 7. Operation and function of a Dealer Management System (DMS) to include:**
 - a. accessing and managing information
 - b. sales administration
 - c. proposals and quotations
 - d. sales orders
 - e. electronic order management
 - f. sales information systems
 - g. developing the customer data base.

- 8. The operating philosophy of own organization, identifying sales packages and additional promotions that fit into its context**

- 9. Organisational aims and objectives**
 - a. Sales strategies and the organisations market to include:
 - i. geographic
 - ii. demographic
 - b. Role of the salesperson in relation to promotional mix:
 - i. advertising
 - ii. sales promotion
 - iii. direct marketing
 - iv. public relations
 - v. personal selling
 - vi. sponsorship
 - vii. events
 - viii. the internet
 - ix. sales literature, brochures.
 - c. Role of the sales person in carrying out research:
 - i. market sensing
 - ii. market intelligence
 - iii. eyes and ears of the organisation
 - iv. building a network of contacts
 - v. recommending opportunities to enhance sales.

- 10. Audit requirements resulting from government and industry regulations to include:**
 - a. documentation eg electronic and hard copy.

- 11. Secure storage and retention requirements:**
 - a. FSA requirements.
 - b. Accounting records.
 - c. Contracts.
 - d. Data protection.

Unit 172

Knowledge of delivering a vehicle sales static presentation

UAN:	D/502/6477
Level:	Level 2
Credit value:	3
GLH:	20
Relationship to NOS:	This unit is linked to IMI NOS VS08
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop knowledge and understanding they need to deliver effective sales presentations to maximise sales potential. It includes giving bespoke presentations to the customer and providing opportunities for questions to be asked.

Learning outcome	The learner will:
1.	Understand how to deliver a vehicle sales static presentation.
Assessment criteria	
The learner can:	
1.1	describe the features and benefits of own product portfolio
1.2	explain how to conduct a 360 degree vehicle walk around
1.3	explain how to use information derived from customer interaction to structure the presentation
1.4	explain how to identify key sale indicators
1.5	explain how to apply key sales indicators as relevant features and benefits during the presentation
1.6	describe how to source and update own knowledge relating to benefits and features of products and services
1.7	describe the importance of relaying information accurately to the customer.

Unit 172 Knowledge of delivering a vehicle sales static presentation

Supporting information

Guidance and range

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Knowledge Unit Syllabus, both of which can be downloaded from the **IMI website**.

- 1. The features and benefits of own product portfolio to include:**
 - a. product range:
 - i. vehicles
 - ii. specifications
 - iii. accessories
 - iv. finance
 - v. insurance
 - vi. warranty
 - b. product features and benefits.

- 2. How to conduct a 360 degree vehicle walk around**

- 3. Sales cycle integration to include:**
 - a. pre-sale:
 - i. display area eg franchise requirements, dealer standards
 - ii. vehicle eg ease of access
 - iii. personal preparation
 - iv. planning delivery sequence.

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

Sales cycle integration

- a. Sale:
 - i. breaking the ice and building rapport
 - ii. recognising personal style eg visual, auditory, kinaesthetic
 - iii. identifying needs through questioning
 - iv. establishing customer aims and objectives eg personal / business use, vehicle requirements, budgets and means, part exchange.

- b. Matching products to satisfy needs:
 - i. presenting a sales proposal
 - ii. handling objections
 - iii. negotiating agreement
 - iv. closing.
- c. Post-sale:
 - i. processing the order
 - ii. self analysis and seeking feedback.

5. How to identify key sale indicators, to include:

- a. observation
- b. active listening
- c. sensing
- d. questioning
- e. verbal and non verbal communications.

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

- a. buying signals
- b. typical indicators, to include:
 - i. comfort
 - ii. safety
 - iii. efficiency
 - iv. performance
 - v. security
 - vi. economy
- c. reflecting
- d. affirming.

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

Information systems including:

- a. dealer promotions
- b. franchise support
- c. brochures
- d. leaflets
- e. internet
- f. intranet.

8. The importance of relaying information accurately to the customer

The qualities of the salesperson:

- a. knowledgeable
- b. honest
- c. helpful
- d. reliable
- e. motivated.

Unit 173

Knowledge of handling vehicle sales telephone enquiries

UAN:	R/502/6475
Level:	Level 2
Credit value:	3
GLH:	20
Relationship to NOS:	This unit is linked to IMI NOS VS05
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop knowledge and understanding they need for handling and logging telephone enquires and the identification of caller's needs.

Learning outcome	The learner will:
	1. Understand how to handle vehicle sales telephone enquiries.
Assessment criteria	
The learner can:	
1.1 describe the generic sales process	
1.2 explain the validity of each component of the generic sales process to vehicle sales telephone enquiries	
1.3 explain the objective of the inbound telephone sales call	
1.4 summarise the relevant data to collect on the telephone	
1.5 describe the enquiry logging and booking system used in the organisation	
1.6 explain the concept of percentage contact loss in telephone communication.	

Unit 173 Knowledge of handling vehicle sales telephone enquiries

Supporting information

Guidance and range

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Knowledge Unit Syllabus, both of which can be downloaded from the **IMI website**.

1. **The generic sales process**
2. **Blending the sales cycle with inbound and outbound telephone conversations to include:**
 - a. pre-sale - preparation
 - i. product knowledge
 - ii. current campaigns
 - iii. potential scripts
 - iv. typical objections and strategies for handling
 - v. environment eg conducive to concentration and active listening and interruption free
 - b. sale:
 - i. breaking the ice and building rapport
 - c. recognising personal style:
 - i. visual
 - ii. auditory
 - iii. kinaesthetic
 - iv. identifying needs through questioning
 - d. establishing customer aims and objectives:
 - i. personal / business use
 - ii. vehicle requirements
 - iii. budgets and means
 - iv. part exchange
 - v. matching products to satisfy needs
 - vi. presenting a sales proposal
 - vii. handling objections
 - viii. negotiating agreement
 - ix. closing
 - e. post-sale:
 - i. processing the order
 - ii. customer follow-up
 - iii. after sales service
 - iv. gaining referrals and recommendations
 - v. identifying repeat selling opportunities
 - vi. self analysis and seeking feedback.

- 3. The validity of each component of the generic sales process to vehicle sales telephone enquiries to include:**
 - a. the advantages and disadvantages of telephone selling.

- 4. The objective of the inbound telephone sales call to include:**
 - a. factors that inspire inbound and outbound vehicle sales enquiries
 - b. organisational aims and objectives
 - c. personal targets:
 - i. inbound sales enquiries:
 - advertising campaigns
 - internet
 - intranet
 - manufacturers' referrals
 - customer referrals
 - ii. outbound sales enquiries:
 - maintaining rapport
 - raise awareness of promotions
 - identify current needs
 - seek appointments
 - identify referrals
 - market intelligence
 - build customer data base.

- 5. The relevant data to collect on the telephone**
 - a. Organisational requirements and records (basic data) to include:
 - i. date / time
 - ii. sales person
 - iii. customer name
 - iv. telephone number
 - v. nature of call
 - vi. comments
 - vii. follow up.

- 6. The enquiry logging and booking system used in the organisation**

- 7. Purpose and nature of diary systems and logs**

- 8. Organisational policy for maintaining accurate logs and diary systems to include:**
 - a. pre sales planning
 - b. recording activities
 - c. follow up.

- 9. The concept of percentage contact loss in telephone communication to include:**
 - a. procedures for monitoring and evaluating performance.

Unit 174

Knowledge of handover of the vehicle to the customer

UAN:	D/502/6494
Level:	2
Credit value:	4
GLH:	25
Relationship to NOS:	This unit is linked to IMI NOS VS14
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop knowledge and understanding they need to make a successful handover of a vehicle to a customer, ensuring the effective communication with the customer from placing the order to the handover event.

Learning outcome	The learner will:
1.	Understand the impact and importance of handover in the sales process.
Assessment criteria	
The learner can:	
1.1	explain the importance of the handover to the overall sales process
1.2	identify at what point in the sales process the handover begins
1.3	explain the potential effect on the customer of the handover experience
1.4	describe the effect of handover on customer satisfaction index score.

Learning outcome	The learner will:
2.	Understand the opportunities provided by the handover process.
Assessment criteria	
The learner can:	
2.1	explain how to recognise the opportunity for repeat and referral business from the handover experience.

Learning outcome	The learner will:
	3. Know the documentation and timescales involved in a successful handover.
Assessment criteria	
The learner can:	
3.1 identify the required documentation and timescales involved in a successful handover event.	

Unit 174 Knowledge of handover of the vehicle to the customer

Supporting information

Guidance and range

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Knowledge Unit Syllabus, both of which can be downloaded from the **IMI website**.

- 1. The importance of the handover to the overall sales process**
- 2. Customer expectations from placing the order to the handover event**
- 3. Business impact of successful handovers**
- 4. The point in the sales process the handover begins**
- 5. Sales cycle in the context of preparation and handover**
 - a. Sale:
 - i. breaking the ice and building rapport
 - ii. identifying needs through questioning
 - iii. presenting a sales proposal
 - iv. handling objections
 - v. negotiating agreement
 - vi. closing.
 - b. Post-sale:
 - i. processing the order
 - ii. communicating and building rapport
 - iii. delivery / hand over
 - iv. customer follow-up
 - v. after sales service
 - vi. gaining referrals and recommendations
 - vii. identifying repeat selling opportunities
 - viii. self analysis and seeking feedback.
- 6. Vehicle preparation to agreed specifications eg new vehicles, used vehicles**
 - a. People involved, lead times and activities:
 - i. order
 - ii. delivery
 - iii. condition checks
 - iv. preparation eg workshop, bodyshop, valet, fuel, registration.

- 7. The potential effect on the customer of the handover experience**
- 8. Customer expectations during the handover event**
- 9. The effect of handover on customer satisfaction index score**
- 10. Index score systems**
- 11. Business impact of successful handovers**
- 12. The opportunity for repeat and referral business from the handover experience**
 - a. Sales cycle in the context of after sales:
 - i. communicating and maintaining rapport.
- 13. The required documentation and timescales involved in a successful handover event**
 - a. Part exchange vehicle:
 - i. re-check process eg current condition and specifications
 - ii. documentation requirements.
 - b. New vehicle:
 - i. documentation requirements
 - ii. briefing and familiarisation process.

Unit 175

Knowledge of managing customer relationships in a vehicle sales environment

UAN:	R/502/6492
Level:	2
Credit value:	3
GLH:	20
Relationship to NOS:	This unit is linked to IMI NOS VS13
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop the knowledge and understanding they need to use effective customer relationship management to create opportunities for referral and repeat business, to achieve short or long term success.

Learning outcome	The learner will:
1.	Understand how to manage customer relationships in a vehicle sales environment.
Assessment criteria	
The learner can:	
1.1	explain the potential long term value of the customer in relation to profit and unit goals for both the salesperson and the organisation
1.2	describe the methodology for customer relationship management including: a. follow up b. problem solving c. referral business
1.3	explain the relationship between structured customer relationship management and long-term success, in conjunction with the necessity for short-term goal setting
1.4	define the importance of effective communication with the customer at all times.

Unit 175 Knowledge of managing customer relationships in a vehicle sales environment

Supporting information

Guidance and range

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Knowledge Unit Syllabus, both of which can be downloaded from the **IMI website**.

- 1. The potential long term value of the customer in relation to profit and unit goals for both the salesperson and the organisation**
- 2. Organisational aims and objectives:**
 - a. Personal targets eg units and financial.
- 3. Franchise agreements and customer service standards**
- 4. The methodology for customer relationship management including:**
 - a. follow up
 - b. problem solving
 - c. referral business.
- 5. The significance of maintaining accurate customer records including:**
 - a. including customer data base, contact logs and diaries
 - b. customer care policies
 - c. customer service feedback, eg monitoring and review systems.
- 6. Factors that lead to potential complaints and prevention measures**
- 7. Simple ways to recognise and investigate problems**
- 8. Internal and external support process for solving problems**
- 9. The relationship between structured customer relationship management and long-term success, in conjunction with the necessity for short-term goal setting**
 - a. the sales cycle blended with providing a positive customer service experience (from initial pre sale contact through to post sale activities).

- 10. The importance of effective communication with the customer at all times**
- 11. Pareto's principle**
- 12. The significance of customer loyalty and opportunities that arise with regards to:**
 - a. customer retention
 - b. repeat business
 - c. referrals
 - d. networking
 - e. market intelligence
 - f. business growth.

Unit 176

Knowledge of meeting and greeting vehicle sales customers

UAN:	J/502/6490
Level:	2
Credit value:	3
GLH:	20
Relationship to NOS:	This unit is linked to IMI NOS VS15
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop the knowledge and understanding they need to use effective communication methods to offer a re-assuring, knowledgeable and confident platform for interaction and provide a positive first impression.

Learning outcome	The learner will:
1.	Understand the customer communication process.
Assessment criteria	
The learner can:	
1.1	explain how and why it is important to use effective communication methods with customers
1.2	explain the importance of verbal and non-verbal communication skills when dealing with customers
1.3	describe the different types of communication methods that can be used when dealing with customers.

Learning outcome	The learner will:
2.	Understand the importance of initial contact with the customer.
Assessment criteria	
The learner can:	
2.1	explain the value of a structured approach to making a first impression
2.2	describe the limited window of opportunity that is represented by a new customer enquiry.

Unit 176 Knowledge of meeting and greeting vehicle sales customers

Supporting information

Guidance and range

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Knowledge Unit Syllabus, both of which can be downloaded from the **IMI website**.

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

- a. Purpose and nature of communications in the context of vehicle sales:
 - i. opportunities to gain new business
 - ii. customer retention
 - iii. customer referrals
 - iv. repeat business
 - v. customer service index.

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

3. **Benefits of an open minded and non judgmental approach to interacting with others**

- a. Understanding personal style
- b. Understanding others' styles and how these may differ
- c. Adapting own style and interacting effectively to meet customer needs
- d. The importance of recognising diversity in relation to age, disability, national origin, religion, sexual orientation, values, ethnic culture, education, lifestyle, beliefs, physical appearance, social class and economic status
- e. Aspects of face-to-face communication, including appearance, impact, body language.
- f. Active listening and questioning skills.
- g. The stages in communication eg sender, encoding, transmission, decoding, receiver.
- h. Possible barriers to communication and methods to overcome them.

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

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

5. The value of a structured approach to making a first impression

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

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

7. Organisational aims and objectives, personal targets

- a. Planning and scheduling activities around primary aims and objectives:
 - i. urgent / important matrix.
- b. Responding appropriately to meet customer needs.

Unit 177

Knowledge of negotiating fleet and business buyer needs

UAN:	D/502/6463
Level:	3
Credit value:	3
GLH:	17
Relationship to NOS:	This unit is linked to IMI NOS VS02
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop the knowledge and understanding they need to understand the methods of acquisition available to a 'business buyer' within the automotive sector and meeting the business customer's need.

Learning outcome	The learner will:
1.	Understand the importance and value of the business market for vehicle sales.
Assessment criteria	
The learner can:	
1.1	explain the longer term value and potential of a business buyer to the organisation
1.2	explain the importance of the business market to the organisation and within the motor industry as a whole
1.3	describe the group and brand expectation of profit and volume in the business market.

Learning outcome	The learner will:
2.	Understand how to meet business vehicle buyers' needs.
Assessment criteria	
The learner can:	
2.1	explain why a business driver needs a longer test drive than a retail buyer
2.2	summarise the tax implications for a business buyer
2.3	explain the importance of providing accurate and appropriate advice in relation to the tax implications of vehicle purchase
2.4	summarise the unique selling points of the brand and dealer group to the business community
2.5	describe the funding options available to the business buyer.

Learning outcome	The learner will:
3. Understand how to adapt the sales process to individual business buyers.	
Assessment criteria	
The learner can:	
3.1	explain the reasoning and methodology applicable to the sales process bespoke to a business client.

Unit 177 Knowledge of negotiating fleet and business buyer needs

Supporting information

Guidance and range

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Knowledge Unit Syllabus, both of which can be downloaded from the **IMI website**.

- 1. The longer term value and potential of a business buyer to the organisation to include:**
 - a. significance of contract wins
 - b. organisation and brand endorsements
 - c. referrals
 - d. repeat business
 - e. after sales and service absorption.

- 2. The importance of the business market to the organisation and within the motor industry as a whole to include:**
 - a. market penetration
 - b. volume and statistics.

- 3. The group and brand expectation of profit and volume in the business market to include:**
 - a. purpose and nature of communications in the context of vehicle sales:
 - i. market profile
 - ii. brand image
 - iii. targets
 - iv. manufacturer's bonus.

- 4. Why a business driver needs a longer test drive than a retail buyer**

- 5. Identifying business aims and objectives**
 - a. Typical company structures to include:
 - i. small, medium, large
 - ii. the Decision Making Unit (DMU)
 - iii. gatekeeper
 - iv. influencer
 - v. decider
 - vi. user
 - vii. buyer.

- 6. Summarise the tax implications for a business buyer**
- 7. Basic company accounting systems in the context of vehicles to include:**
 - a. assets and depreciation
 - b. operating costs
 - c. residual values
 - d. Corporation Tax
 - e. VAT registration
 - f. VAT payments and returns
 - g. fuel emissions and tax bands.
- 8. The importance of providing accurate and appropriate advice in relation to the tax implications of vehicle purchase to include:**
 - a. the qualities of the salesperson:
 - i. knowledgeable
 - ii. honest
 - iii. helpful
 - iv. reliable
 - v. motivated.
- 9. The unique selling points of the brand and dealer group to the business community to include:**
 - a. brand features and benefits
 - b. dealership networks and after sales services.
- 10. The funding options available to the business buyer to include:**
 - a. product range
 - b. leasing:
 - i. contract hire
 - ii. purchase
 - iii. company cars
 - iv. car allowance schemes
 - v. finance
 - vi. insurance
 - vii. warranty
 - c. product features and benefits:
 - i. mileage
 - ii. mileage penalties
 - iii. after sales
 - iv. disposal
 - v. FSA regulations.
- 11. The reasoning and methodology applicable to the sales process bespoke to a business client**

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

- a. pre-sale:
 - i. prospecting
 - ii. targeting customers
 - iii. making appointments
 - iv. diary planning
 - v. researching individual customers
 - vi. personal preparation
 - vii. setting objectives for the sales call
- b. sale:
 - i. breaking the ice and building rapport
 - ii. identifying needs through questioning
 - iii. presenting a sales proposal
 - iv. handling objections
 - v. negotiating agreement
 - vi. closing
- c. post sale:
 - i. processing the order
 - ii. delivery / hand over
 - iii. customer follow-up
 - iv. after sales service
 - v. gaining referrals and recommendations
 - vi. identifying repeat selling opportunities
 - vii. self analysis and seeking feedback.

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

14. SWOT analysis

Unit 178

Knowledge of promoting finance and insurance for vehicle sales

UAN:	H/502/6478
Level:	3
Credit value:	5
GLH:	30
Relationship to NOS:	This unit is linked to IMI NOS VS10
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop the knowledge and understanding they need to secure the necessary finance and insurance in order to enable them to purchase vehicles. It includes identifying the customer's finance and insurance needs before presenting possible options.

Learning outcome	The learner will:
1.	Understand how to promote finance and insurance for vehicle sales.
Assessment criteria	
The learner can:	
1.1	compare the different finance and insurance products available
1.2	define the criteria used to apply the features and benefits to each individual customer need
1.3	explain the principles and requirements of treating a customer fairly
1.4	describe when and where to refer a customer for more specialised information and guidance.

Learning outcome	The learner will:
2.	Understand relevant legislation, regulation, codes of practice and guidelines relating to finance and insurance for vehicle sales.
Assessment criteria	
The learner can:	
2.1	summarise the current relevant legislation, regulation, codes of practice and guidelines relating to finance and insurance for vehicle sales.

Unit 178 Knowledge of promoting finance and insurance for vehicle sales

Supporting information

Guidance and range

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Knowledge Unit Syllabus, both of which can be downloaded from the **IMI website**.

- 1. The different finance and insurance products available**
 - a. Credit facilities:
 - i. cost plus interest
 - ii. hire purchase
 - iii. credit sale.
- 2. Personal contract plans**
- 3. Manufacturers' terms**
- 4. Leasing**
- 5. Contract hire (with option to buy)**
- 6. GAP schemes**
- 7. Other options:**
 - a. warranties (mandatory and extended)
 - b. insurance for parts and labour.
- 8. The criteria used to apply the features and benefits to each individual customer need, to include:**
 - a. the Financial Services Authority (FSA) regulations
 - b. accreditation requirements
 - c. proposals
 - d. quotations.
- 9. The principles and requirements of treating a customer fairly, to include:**
 - a. FSA standards
 - b. trading standards
 - c. codes of practice
 - d. personal standards.

- 10. The qualities of the salesperson:**
 - a. Knowledgeable.
 - b. Honest.
 - c. Helpful.
 - d. Reliable.
 - e. Motivated.

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

- 12. The role of the business or finance manager**

- 13. The current relevant legislation, regulation, codes of practice and guidelines relating to finance and insurance for vehicle sales:**
 - a. Financial Services Act.
 - b. Consumer Protection Act.
 - c. Terms and conditions of an order.

Unit 179

Knowledge of self management and administration in a vehicle sales environment

UAN:	F/502/6469
Level:	3
Credit value:	4
GLH:	25
Relationship to NOS:	This unit is linked to IMI NOS VS04
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop the knowledge and understanding they need for time management, meeting sales targets, achieving objectives and using information technology to facilitate own role.

Learning outcome	The learner will:
1.	Understand the importance of self management and administration in a vehicle sales environment
Assessment criteria	
The learner can:	
1.1	explain the importance of effective self management and accurate administration in a vehicle sales environment
1.2	explain the importance of time keeping in a vehicle sales environment
1.3	explain the importance of keeping promises on time in a vehicle sales environment
1.4	describe the likely cost to the organisation if promises are not kept.

Learning outcome	The learner will:
2.	Understand how to manage own work and administration in a vehicle sales environment.
Assessment criteria	
The learner can:	
2.1	describe how to prioritise time for specific tasks
2.2	describe how to use a browser and search engine
2.3	describe how to use relevant operating systems required to effectively carry out own role
2.4	explain how to apply self management and administration skills within a team environment and across the business
2.5	describe how to use dealership logs and diary systems to record activity and schedule follow up.

Supporting information

Guidance and range

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Knowledge Unit Syllabus, both of which can be downloaded from the **IMI website**.

- 1. The importance of effective self management and accurate administration in a vehicle sales environment to include:**
 - a. personal effectiveness and CPD:
 - i. role and purpose of objectives and targets
 - ii. organisation's objectives and significance for own development
 - iii. the importance of taking responsibility for own personal development
 - iv. evaluating personal development opportunities to improve own performance
 - v. use of job description
 - vi. obtaining feedback on performance from line managers and colleagues
 - vii. simple training needs analysis- eg using outcomes of SWOT analyses to plan personal development
 - viii. identification of preferred learning styles
 - b. the significance of maintaining accurate administration systems in the organisation:
 - i. sales documentation
 - ii. customer records and databases
 - iii. legal requirements
 - iv. financial – audits and tax
 - v. quality – audits and customer service
 - c. storage, indexing and information retrieval systems to include:
 - i. manual
 - ii. electronic
 - d. confidentiality/security of records to include:
 - i. levels of access
 - ii. backup
 - iii. virus protection
 - iv. legal aspects
 - e. Data Protection Act.

2. **The importance of time keeping in a vehicle sales environment to include:**
 - a. terms and conditions of employment
 - b. working according to organisation's:
 - i. objectives
 - ii. policies
 - iii. procedures
 - iv. priorities.

3. **The importance of keeping promises on time in a vehicle sales environment to include:**
 - a. The Supply of Goods and Services Act
 - b. implied terms and contracts for services.

when supplying services, the need for:

 - c. reasonable care and skill
 - d. completion in a reasonable time
 - e. completion at a reasonable charge.

4. **The likely cost to the organisation if promises are not kept to include:**
 - a. tangible and intangible costs of negative customer experiences.

5. **How to prioritise time for specific tasks to include:**
 - a. planning techniques appropriate to job activity eg tasks, schedules, timetables, rotas
 - b. setting and using smart objectives to manage own work
 - c. strategies to establish priorities eg urgent / important matrix and making most effective use of time
 - d. use of milestones to monitor progress
 - e. importance of monitoring and revising plans in line with progress
 - f. recognising limiting factors that could hinder the achievement of objectives.

6. **How to use a browser and search engine to include:**
 - a. basic operation of internet and intranet
 - b. organisational policy and limitations.

7. **Operation, effective and economical use of organisational resources to include:**
 - a. information systems
 - b. dealer management systems
 - c. computer systems
 - d. internet
 - e. intranet
 - f. communication systems
 - g. authorisations and limitations.

- 8. How to apply self management and administration skills within a team environment and across the business to include:**
 - a. organisational structure, aims and objectives
 - b. individual roles and responsibilities
 - c. maintaining effective working relationships
 - d. own contribution to achieving organisational and team objectives
 - e. recognising achievements
 - f. supporting performance improvement.

- 9. How to use dealership logs and diary systems to record activity and schedule follow up**

- 10. Purpose and nature of diary systems and logs**

- 11. Organisational policy for maintaining accurate logs and diary systems to include:**
 - a. pre sales planning
 - b. recording activities
 - c. follow up.

Unit 180

Knowledge of valuing vehicles for part exchange

UAN:	R/502/6489
Level:	3
Credit value:	4
GLH:	40
Relationship to NOS:	This unit is linked to IMI NOS VS12.
Endorsement by a sector or regulatory body:	This unit is endorsed by IMI, the Sector Skills Council for the automotive retail industry.
Aim:	This unit will enable the learner to develop the knowledge and they need to review the information presented by the appraisal and make judgments regarding; recondition costs, current demand and value of the part exchange, and the impact on retained profit from the related sales.

Learning outcome	The learner will:
1.	Understand the purpose of used vehicle valuation for part exchange.
Assessment criteria	
The learner can:	
1.1	explain the value of the used vehicle in the sales process
1.2	describe the objective of the used vehicle valuation.

Learning outcome	The learner will:
2.	Understand how to value vehicles for part exchange.
Assessment criteria	
The learner can:	
2.1	describe the process of used vehicle valuation
2.2	identify the resources used in the valuation of used vehicles
2.3	describe the factors that influence the vehicle value, both nationally and locally
2.4	explain how to highlight positive values of competitors' products.

Unit 180 Knowledge of valuing vehicles for part exchange

Supporting information

Guidance and range

This unit must be assessed in accordance with the IMI Assessment Strategy and adhere to the Knowledge Unit Syllabus, both of which can be downloaded from the **IMI website**.

- 1. The value of the used vehicle in the sales process**
 - a. Benefits of the used vehicle purchase in the context of:
 - i. new (newer) vehicle sales
 - ii. used vehicle stock
 - iii. margins.

- 2. Negative aspects of the used vehicle purchase in the context of:**
 - a. retail sale:
 - i. preparation costs
 - ii. latent defects
 - b. trade sale:
 - i. margins
 - ii. time
 - iii. storage.

- 3. The objective of the used vehicle valuation, to include:**
 - a. importance of accurate valuations and impact on dealership profitability
 - b. valuations as an aid to successful sales negotiations
 - c. information sources influencing customer expectations.

- 4. The process of used vehicle valuation, to include:**
 - a. financial operating parameters - variables aligned with new (newer) vehicle type and related margins
 - b. reviewing evidence generated by the appraisal
 - c. calculating refurbishment costs
 - d. establishing ownership
 - e. HPI checks
 - f. finance settlement calculations
 - g. VAT calculations.

- 5. The resources used in the valuation of used vehicles, to include:**
 - a. appraisal documentation
 - b. electronic images
 - c. dealer approved price guides
 - d. franchise
 - e. CAP
 - f. glass's
 - g. workshop estimates
 - h. bodyshop estimates
 - i. parts and accessories estimates.

- 6. The factors that influence the vehicle value, both nationally and locally, to include:**
 - a. vehicle type and market trends
 - b. vehicle history eg mileage, condition, warranty
 - c. potential buyers and sales income from retail, trade, other.

- 7. How to highlight positive values of competitors' products, to include:**
 - a. monitoring competitor activity and sales strategies
 - b. SWOT analysis.



Appendix 1 Relationships to other qualifications

Links to other qualifications

Centres are responsible for checking the different requirements of all qualifications they are delivering and ensuring that candidates meet requirements of all units/qualifications.

These qualifications have connections to the 4151 Level 2 and 3 Diplomas in Vehicle Parts Principles.

Literacy, language, numeracy and ICT skills development

These qualifications can develop skills that can be used in the following qualifications:

- Functional Skills (England) – see www.cityandguilds.com/functionalskills
- Essential Skills (Northern Ireland) – see www.cityandguilds.com/essentialskillsni
- Essential Skills Wales – see www.cityandguilds.com/esw



Appendix 2 Sources of general information

The following documents contain essential information for centres delivering City & Guilds qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the **Centres and Training Providers homepage** on www.cityandguilds.com.

Centre Manual - Supporting Customer Excellence contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve 'approved centre' status, or to offer a particular qualification, as well as updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document includes sections on:

- The centre and qualification approval process
- Assessment, internal quality assurance and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Management systems
- Maintaining records
- Assessment
- Internal quality assurance
- External quality assurance.

Our Quality Assurance Requirements encompasses all of the relevant requirements of key regulatory documents such as:

- SQA Awarding Body Criteria (2007)
- NVQ Code of Practice (2006)

and sets out the criteria that centres should adhere to pre and post centre and qualification approval.

Access to Assessment & Qualifications provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

The **centre homepage** section of the City & Guilds website also contains useful information such on such things as:

- **Walled Garden:** how to register and certificate candidates on line
- **Events:** dates and information on the latest Centre events
- **Online assessment:** how to register for e-assessments.

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Useful contacts

UK learners

General qualification information

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E: learnersupport@cityandguilds.com

International learners

General qualification information

T: +44 (0)844 543 0033

F: +44 (0)20 7294 2413

E: **intcg@cityandguilds.com**

Centres

Exam entries, Certificates, Registrations/enrolment, Invoices, Missing or late exam materials, Nominal roll reports, Results

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: **centresupport@cityandguilds.com**

Single subject qualifications

Exam entries, Results, Certification, Missing or late exam materials, Incorrect exam papers, Forms request (BB, results entry), Exam date and time change

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

F: +44 (0)20 7294 2404 (BB forms)

E: **singlesubjects@cityandguilds.com**

International awards

Results, Entries, Enrolments, Invoices, Missing or late exam materials, Nominal roll reports

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: **intops@cityandguilds.com**

Walled Garden

Re-issue of password or username, Technical problems, Entries, Results, e-assessment, Navigation, User/menu option, Problems

T: +44 (0)844 543 0000

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