

City & Guilds Level 2 and 3 Diploma in Vehicle Sales Principles (4151- 22-23)

September 2017 Version 1.1



Qualification at a glance

Subject area	Vehicle Parts
City & Guilds number	4151
Age group approved	16+
Entry requirements	There are no entry requirements
Assessment	Short answer questions Centre assessed
Fast track	Full approval is required in most cases; however, centres already approved for the Vehicle Sales Competence (4150-22 or -23) will have access to fast track.
Support materials	Centre handbook
Registration and certification	See online catalogue/Walled Garden for last dates.

Title and level	GLH	TQT	City & Guilds number	Accreditation number
City & Guilds Level 2 Diploma in Vehicle Sales Principles	531	780	4151-22	601/4683/7
City & Guilds Level 3 Diploma in Vehicle Sales Principles	389	590	4151-23	601/4687/4

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



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1 Introduction

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

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 2-3</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>Allows candidates to learn, develop and practise the skills required for employment and/or career progression in the automotive industry.</p>
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>These qualifications provide vehicle sales personnel with the underpinning knowledge when selling a wide range of vehicles. Allowing candidates to progress into employment or onto the Diploma in Vehicle Sales (4150).</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 Principles (4151-22)**, learners must achieve **59** credits:

- **6** credits must come from the mandatory generic units - 051 & 053
- **50** credits from the mandatory technical units 117, 121, 122, 123, 124, 126, 168, 169, 170, 171, 172, 173, 174, 175, 176
- a minimum of **3** credits must come from optional units – 177 or 178.

Unit no.	Unit accreditation number	Unit title	Level	Credit value	GLH
	Mandatory	Generic			
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	Technical			
117	L/502/6524	Skills in automotive retail negotiation and sales techniques	2	2	15
121	R/502/6525	Skills in constructing motor vehicle sales packages	3	3	25
122	Y/502/6526	Skills in delivering a vehicle sales static presentation	2	2	15
123	J/502/6523	Skills in handling vehicle sales telephone enquiries	2	2	12
124	K/502/6532	Skills in handover of the vehicle to the customer	2	2	15
126	H/502/6531	Skills in meeting and greeting vehicle sales customers	2	2	15
167	Y/502/6476	Knowledge of automotive retail negotiation and sales techniques	2	5	25
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

Unit no.	Unit accreditation number	Unit title	Level	Credit value	GLH
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				
177	D/502/6463	Knowledge of negotiating fleet and business buyer needs	3	3	17
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 Principles (4151-23)**, learners must achieve **78** credits.

- **11** credits must come from mandatory generic units 051, 053 & 056
- **64** credits from the mandatory technical units 116, 117, 121, 122, 123, 126, 130, 166, 167, 168, 169, 170, 171, 172, 173, 174, 175, 176, 179 & 180
- a minimum of **3** credits must come from optional units – 177 or 178.

Unit no.	Unit accreditation no.	Unit title	Level	Credit value	GLH
	Mandatory	Generic			
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	Technical			
116	H/502/6528	Skills in appraising vehicles for part exchange	3	2	12
117	L/502/6524	Skills in automotive retail negotiation and sales techniques	2	2	15
121	R/502/6525	Skills in constructing motor vehicle sales packages	3	3	25
122	Y/502/6526	Skills in delivering a vehicle sales static presentation	2	2	15
123	J/502/6523	Skills in handling vehicle sales telephone enquiries	2	2	12
126	H/502/6531	Skills in meeting and greeting vehicle sales customers	2	2	15
130	D/502/6530	Skills in valuing vehicles for part exchange	3	3	15
166	K/502/6482	Knowledge of appraising vehicles for part exchange	3	3	20
167	Y/502/6476	Knowledge of automotive retail negotiation and sales techniques	2	5	25
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

Unit no.	Unit accreditation no.	Unit title	Level	Credit value	GLH
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
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				
177	D/502/6463	Knowledge of negotiating fleet and business buyer needs	3	3	17
178	H/502/6478	Knowledge of promoting finance and insurance for vehicle sales	3	5	30

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 Principles	531	780
City & Guilds Level 3 Diploma in Vehicle Sales Principles	389	590



2 Centre requirements

Approval

Centres already approved to offer the Certificate in Vehicle Parts Operations (4010) will be automatically approved to register and certificate candidates on the 4151 (unless the centre is already subject to sanctions).

For all other 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 area(s) 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.

Assessor and Internal Quality Assurers

While the Assessor/Verifier (A/V) units are valued as qualifications for centre staff, they are not currently a requirement for this qualification.

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 internal 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.

Please note that for funding purposes, candidates should not be entered for a qualification of the same type, content and level as that of a qualification they already hold.

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 qualification
- 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 qualification, their responsibilities as a candidate, and the responsibilities of the centre. This information can be recorded on a learning contract.

Support materials

For further information to assist with the planning and development of the programme, please refer to the following:

- Candidate recording documentation.



4 Assessment

Candidates must complete

- An assignment or short answer questions for each knowledge unit
- A portfolio of evidence for each 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.

Skills units

If the VCQ (4150) is also being undertaken then performance evidence for these units may be taken from the candidate portfolio, where it meets the appropriate assessment requirements. The relevant knowledge assessments, for 4151, must also be completed. If this qualification is being undertaken as a 'standalone' qualification then centres may develop their own assessments which cover the learning outcomes and assessment criteria of the unit. Tasks should be drafted which are meaningful representations of real work tasks.

Centres may refer to the Practical Assessment Workbooks that have been developed.

Candidates must

1. produce evidence to show they have achieved **all** of the learning outcomes to the standard shown in the assessment criteria of the units
2. produce performance evidence resulting from work they have carried out in your training environment as managed and organised by an approved centre.
3. be observed by an assessor as defined in the IMI VCQ Assessment Strategy.
4. produce evidence of dealing with **both** internal and external customers.

The use of simulations are acceptable for these units.

Level 2 & 3 Diploma in Vehicle Sales Principles

Unit	Level	Unit title	Credit value	Assessment method
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
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
126	2	Competency in meeting and greeting vehicle sales customers	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

Unit	Level	Unit title	Credit value	Assessment method
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
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

VRQs

Full details of the assessment requirements relating to these qualifications can be obtained directly from the Institute of the Motor Industry (IMI)

<http://www.motor.org.uk>



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 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 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 polices 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: <ul 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: <ul 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: <ul 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: <ul 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 need
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

Skills in appraising vehicles for part exchange

UAN:	H/502/6528
Level:	3
Credit value:	2
GLH:	12
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 the skills they need to appraise the condition of vehicles and verify 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 **Skills 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 Skills Unit Assessment Requirements developed for the unit, both of which can be downloaded from the **IMI website**.

Unit 117

Skills in automotive retail negotiation and sales techniques

UAN:	L/502/6524
Level:	2
Credit value:	2
GLH:	15
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 the skills 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.	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 **Skills 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 Skills Unit Assessment Requirements developed for the unit, both of which can be downloaded from the **IMI website**.

Unit 121

Skills in constructing motor vehicle sales packages

UAN:	R/502/6525
Level:	3
Credit value:	3
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 the skills needed 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. 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 Skills 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 Skills Unit Assessment Requirements developed for the unit, both of which can be downloaded from the **IMI website**.

Unit 122

Skills in delivering a vehicle sales static presentation

UAN:	Y/502/6526
Level:	2
Credit value:	2
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 the skills 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.	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 Skills 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 Skills Unit Assessment Requirements developed for the unit, both of which can be downloaded from the **IMI website**.

Unit 123

Skills in handling vehicle sales telephone enquiries

UAN:	J/502/6523
Level:	2
Credit value:	2
GLH:	12
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 the skills they need for 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 Skills 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 Skills Unit Assessment Requirements developed for the unit, both of which can be downloaded from the **IMI website**.

Unit 124

Skills in handover of the vehicle to the customer

UAN:	K/502/6532
Level:	2
Credit value:	2
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 the skills 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.	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 the 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 **Skills 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 Skills Unit Assessment Requirements developed for the unit, both of which can be downloaded from the **IMI website**.

Unit 126

Skills in meeting and greeting vehicle sales customers

UAN:	H/502/6531
Level:	2
Credit value:	2
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 the skills 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.	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 **Skills 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 Skills Unit Assessment Requirements developed for the unit, both of which can be downloaded from the **IMI website**.

Unit 130

Skills in valuing vehicles for part exchange

UAN:	D/502/6530
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 the skills 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.	Be able to value vehicles for part exchange.
Assessment criteria	
The learner can:	
1.1	access and interpret the latest dealer approved price guides
1.2	accurately estimate part exchange recondition costs
1.3	calculate profit margins from related sales
1.4	calculate profit margins from related sales
1.5	highlight positive values of competitors' products.

Unit 130 **Skills 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 Skills Unit Assessment Requirements developed for the unit, 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	
<p>The learner can:</p> <ul style="list-style-type: none"> 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 enquiries 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.

Unit 179 Knowledge of self management and administration 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 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.



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 4150 Level 2 and 3 Diploma in Vehicle Parts Competence.

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 1 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.

Useful contacts

UK learners General qualification information	T: +44 (0)844 543 0033 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
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