

Specification

**Edexcel BTEC Level 2 and 3 Diploma in Vehicle Sales
Principles (QCF)**

**Edexcel Level 2 and 3 Diploma in Vehicle Sales
Competence (QCF)**

For first registration November 2011



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Our specialist suite of qualifications include NVQs, Apprenticeships, WorkSkills, Functional Skills, Foundation Learning, as well as our exclusive range of BTECs, from entry level right through to Higher National Diplomas.

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Qualification titles covered by this specification

This specification gives you the information you need to offer the Edexcel Principles and Competence qualifications in Vehicle Sales (QCF) at Level 2 and Level 3.

Qualification title	Qualification Number (QN)	Operational start date
Edexcel BTEC Level 2 Diploma in Vehicle Sales Principles (QCF)	600/3551/1	01/11/2011
Edexcel BTEC Level 2 Diploma in Vehicle Sales Competence (QCF)	600/3554/7	01/11/2011
Edexcel BTEC Level 3 Diploma in Vehicle Sales Principles (QCF)	600/3581/X	01/11/2011
Edexcel BTEC Level 3 Diploma in Vehicle Sales Competence (QCF)	600/3556/0	01/11/2011

These qualifications have been accredited within the Qualifications and Credit Framework (QCF) and are eligible for public funding as determined by the Department for Education (DfE) under Section 96 of the Learning and Skills Act 2000.

The qualification titles listed above feature in the funding lists published annually by the DfE and the regularly updated website. They will also appear on the Learning Aim Reference Application (LARA), where relevant.

You should use the QCF Qualification Number (QN), when you wish to seek public funding for your learners. Each unit within a qualification will also have a unique QCF unit reference number, which is listed in this specification.

The QCF qualification title and unit reference numbers will appear on the learners' final certification document. Learners need to be made aware of this when they are recruited by the centre and registered with Edexcel.

Key features of the Edexcel Principles and Competence qualifications in Vehicle Sales (QCF) at Level 2 and Level 3

These qualifications:

- are nationally recognised
- are based on the Vehicle Sales National Occupational Standards (NOS). The NOS, assessment strategy and qualification structures are owned by the Sector Skills Council The Institute of the Motor Industry (IMI).

The Edexcel BTEC Level 2 Diploma in Vehicle Sales Principles (QCF) and the Edexcel Level 2 Diploma in Vehicle Sales Competence (QCF) have been approved as components of the Intermediate Apprenticeship in Vehicle Sales.

The Edexcel BTEC Level 3 Diploma in Vehicle Sales Principles (QCF) and the Edexcel Level 3 Diploma in Vehicle Sales Competence (QCF) have been approved as components of the Advanced Apprenticeship in Vehicle Sales.

What is the purpose and benefits of these qualifications?

These qualifications give learners flexible access to industry supported Level 2 and 3 skills programmes, which act as a real alternative to academic qualifications for those who prefer this style of learning and achievement. As part of apprenticeship frameworks, the qualification supports learners in providing a career pathway into jobs and training at technician level and higher.

Learners will have the opportunity to learn and demonstrate their skills, knowledge and competence in selling new and used vehicles.

Who are these qualifications for?

These qualifications are for all learners aged 16 and above who are capable of reaching the required standards.

Edexcel's policy is that the qualifications should:

- be free from any barriers that restrict access and progression
- ensure equality of opportunity for all wishing to access the qualifications.

Centres should be aware that within the Level 2 qualifications in this specification, learners will be required to meet the demands of units at Level 3. Centres are advised to consider the support, guidance and opportunities they give to learners to meet the demands of the higher level units during delivery and assessment of the qualification.

What are the potential job roles for those working towards these qualifications?

- Sales Adviser
- Senior Sales Advisor

What progression opportunities are available to learners who achieve these qualifications?

Learners can progress on to other Edexcel automotive apprenticeship programmes and/or related qualifications detailed in *Annexe A*. Other progression routes include: further work or work experience, academic qualification(s) such as one or more GCSEs, higher education programmes and/or Foundation Degree, or employment in a range of jobs at Levels 2 and 3.

What is the qualification structure for the Edexcel BTEC Level 2 Diploma in Vehicle Sales Principles (QCF)?

A minimum of 59 credits is required to achieve this qualification. 6 credits from the mandatory generic units in Group A, 50 credits from the mandatory specialist units in Group B and a minimum of 3 credits from one of the 2 option groups in Group C.

Individual units can be found in the *Units* section.

Unit No.	Unit Reference No.	Unit Title	Credit	Level
Group A – Mandatory generic units				
Learners must achieve 6 credits from this group.				
1	D/601/6171	Knowledge of Health, Safety and Good Housekeeping in the Automotive Environment	3	2
2	T/601/6175	Knowledge of Support for Job Roles in the Automotive Work Environment	3	3
Group B – Mandatory specialist units				
Learners must achieve 50 credits from this group.				
3	Y/502/6462	Knowledge of Brand, Product and Market Awareness in the Vehicle Sales and Supply Business	6	3
4	M/502/6466	Knowledge of Complying With The Legal Requirements And Regulations Of Vehicle Sales	3	2
5	H/502/6481	Knowledge of Conducting Vehicle Demonstration Drives	3	2
6	D/502/6477	Knowledge of Delivering A Vehicle Sales Static Presentation	3	2
7	R/502/6475	Knowledge of Handling Vehicle Sales Telephone Enquiries	3	2
8	D/502/6494	Knowledge of Handover Of The Vehicle To The Customer	4	2
9	R/502/6492	Knowledge of Managing Customer Relationships In A Vehicle Sales Environment	3	2

Unit No.	Unit Reference No.	Unit Title	Credit	Level
10	J/502/6490	Knowledge of Meeting And Greeting Vehicle Sales Customers	3	2
11	H/502/6531	Skills in Meeting And Greeting Vehicle Sales Customers	2	2
12	Y/502/6526	Skills in Delivering A Vehicle Sales Static Presentation	2	2
13	J/502/6523	Skills in Handling Vehicle Sales Telephone Enquiries	2	2
14	K/502/6532	Skills in Handover Of The Vehicle To The Customer	2	2

Unit No.	Unit Reference No.	Unit Title	Credit	Level
Group B – Mandatory specialist units continued				
15	L/502/6474	Knowledge of Constructing And Understanding Sales Packages	4	3
16	R/502/6525	Skills in Constructing Motor Vehicle Sales Packages	3	3
17	L/502/6524	Skills in Automotive Retail Negotiation And Sales Techniques	2	2
18	Y/502/6476	Knowledge of Automotive Retail Negotiation And Sales Techniques	5	2
Group C – Optional groups				
Learners must achieve a minimum of 3 credits from one of the Option Groups.				
Group C1 – Option group 1				
If this group is chosen, learners must achieve 3 credits from this group.				
19	D/502/6463	Knowledge of Negotiating Fleet And Business Buyer Needs	3	3
Group C2 – Option group 2				
If this group is chosen, learners must achieve 5 credits from this group.				
20	H/502/6478	Knowledge of Promoting Finance And Insurance For Vehicle Sales	5	3

What is the qualification structure for the Edexcel BTEC Level 2 Diploma in Vehicle Sales Competence (QCF)?

A minimum of 86 credits is required to achieve this qualification. 18 credits from the mandatory generic units in Group A, 53 credits from the mandatory specialist units in Group B and a minimum of 15 credits achieved by selecting two of the 4 option groups from Group C. All subcomponents of the chosen groups must be completed.

Individual units can be found in the *Units* section.

Unit No.	Unit Reference No.	Unit Title	Credit	Level
Group A – Mandatory generic units				
Learners must achieve 18 credits from this group.				
1	D/601/6171	Knowledge of Health, Safety and Good Housekeeping in the Automotive Environment	3	2
2	T/601/6175	Knowledge of Support for Job Roles in the Automotive Work Environment	3	3
21	A/601/6338	Competency in Health, Safety and Good Housekeeping in the Automotive Environment	7	2
22	K/601/6366	Competency in Supporting Job Roles in the Automotive Work Environment	5	3
Group B – Mandatory specialist units				
Learners must achieve 53 credits from this group.				
6	D/502/6477	Knowledge of Delivering A Vehicle Sales Static Presentation	3	2
8	D/502/6494	Knowledge of Handover Of The Vehicle To The Customer	4	2
5	H/502/6481	Knowledge of Conducting Vehicle Demonstration Drives	3	2
10	J/502/6490	Knowledge of Meeting And Greeting Vehicle Sales Customers	3	2
4	M/502/6466	Knowledge of Complying With The Legal Requirements And Regulations Of Vehicle Sales	3	2
7	R/502/6475	Knowledge of Handling Vehicle Sales Telephone Enquiries	3	2

Unit No.	Unit Reference No.	Unit Title	Credit	Level
3	Y/502/6462	Knowledge of Brand, Product and Market Awareness in the Vehicle Sales and Supply Business	6	3
23	A/502/6468	Competency in Complying With The Legal Requirements And Regulations Of Vehicle Sales	3	2
24	D/502/6480	Competency in Conducting Vehicle Demonstration Drives	3	2
Group B – Mandatory specialist units continued				
25	K/502/6479	Competency in Handover Of The Vehicle To The Customer	3	2
26	L/502/6488	Competency in Managing Customer Relationships In A Vehicle Sales Environment	3	2
27	M/502/6483	Competency in Delivering A Vehicle Sales Static Presentation	3	2
28	T/502/6467	Competency in Handling Vehicle Sales Telephone Enquiries	3	2
29	Y/502/6493	Competency in Meeting And Greeting Vehicle Sales Customers	3	2
9	R/502/6492	Knowledge of Managing Customer Relationships In A Vehicle Sales Environment	3	2
30	R/502/6461	Competency in Brand, Product and Market Awareness in the Vehicle Sales and Supply Business	4	3
Group C – Optional groups				
Learners must achieve a minimum of 15 credits by selecting two of the Option Groups. All subcomponents of the chosen groups must be completed.				
Group C1 – Option group 1				
If this group is chosen, learners must achieve 6 credits from this group.				
19	D/502/6463	Knowledge of Negotiating Fleet And Business Buyer Needs	3	3
31	H/502/6464	Competency in Negotiating Fleet And Business Buyer Needs	3	3

Unit No.	Unit Reference No.	Unit Title	Credit	Level
Group C2 – Option group 2				
If this group is chosen, learners must achieve 9 credits from this group.				
32	A/502/6471	Competency in Constructing Motor Vehicle Sales Packages	5	3
15	L/502/6474	Knowledge of Constructing And Understanding Sales Packages	4	3
Group C3 – Option group 3				
If this group is chosen, learners must achieve 9 credits from this group.				
33	J/502/6473	Competency in Automotive Retail Negotiation And Sales Techniques	4	2
18	Y/502/6476	Knowledge of Automotive Retail Negotiation And Sales Techniques	5	2
Group C4 – Option group 4				
If this group is chosen, learners must achieve 9 credits from this group.				
34	F/502/6472	Competency in Promoting Finance And Insurance For Vehicle Sales	4	3
20	H/502/6478	Knowledge of Promoting Finance And Insurance For Vehicle Sales	5	3

What is the qualification structure for the Edexcel BTEC Level 3 Diploma in Vehicle Sales Principles (QCF)?

A minimum of 78 credits is required to achieve this qualification. 11 credits from the mandatory generic units in Group A, 64 credits from the mandatory specialist units in Group B and a minimum of 3 credits from one of the 2 option groups in Group C.

Individual units can be found in the *Units* section.

Unit No.	Unit Reference No.	Unit Title	Credit	Level
Group A – Mandatory generic units				
Learners must achieve 11 credits from this group.				
1	D/601/6171	Knowledge of Health, Safety and Good Housekeeping in the Automotive Environment	3	2
2	T/601/6175	Knowledge of Support for Job Roles in the Automotive Work Environment	3	3
35	T/601/6242	Knowledge of how to Make Learning Possible through Demonstrations and Instruction	5	3
Group B – Mandatory specialist units				
Learners must achieve 64 credits from this group.				
6	D/502/6477	Knowledge of Delivering A Vehicle Sales Static Presentation	3	2
8	D/502/6494	Knowledge of Handover Of The Vehicle To The Customer	4	2
36	D/502/6530	Skills in Valuing Vehicles For Part Exchange	3	3
37	F/502/6469	Knowledge of Self Management And Administration In A Vehicle Sales Environment	4	3
5	H/502/6481	Knowledge of Conducting Vehicle Demonstration Drives	3	2
11	H/502/6531	Skills in Meeting And Greeting Vehicle Sales Customers	2	2
10	J/502/6490	Knowledge of Meeting And Greeting Vehicle Sales Customers	3	2

Unit No.	Unit Reference No.	Unit Title	Credit	Level
13	J/502/6523	Skills in Handling Vehicle Sales Telephone Enquiries	2	2
38	K/502/6482	Knowledge of Appraising Vehicles For Part Exchange	3	3
15	L/502/6474	Knowledge of Constructing And Understanding Sales Packages	4	3
17	L/502/6524	Skills in Automotive Retail Negotiation And Sales Techniques	2	2
4	M/502/6466	Knowledge of Complying With The Legal Requirements And Regulations Of Vehicle Sales	3	2

Unit No.	Unit Reference No.	Unit Title	Credit	Level
Group B – Mandatory specialist units continued				
39	R/502/6489	Knowledge of Valuing Vehicles For Part Exchange	4	3
16	R/502/6525	Skills in Constructing Motor Vehicle Sales Packages	3	3
3	Y/502/6462	Knowledge of Brand, Product and Market Awareness in the Vehicle Sales and Supply Business	6	3
18	Y/502/6476	Knowledge of Automotive Retail Negotiation And Sales Techniques	5	2
12	Y/502/6526	Skills in Delivering A Vehicle Sales Static Presentation	2	2
7	R/502/6475	Knowledge of Handling Vehicle Sales Telephone Enquiries	3	2
9	R/502/6492	Knowledge of Managing Customer Relationships In A Vehicle Sales Environment	3	2
40	H/502/6528	Skills in Appraising Vehicles For Part Exchange	2	3
Group C – Optional groups				
Learners must achieve a minimum of 3 credits from one of the Option Groups.				
Group C1 – Option group 1				
If this group is chosen, learners must achieve 3 credits from this group.				
19	D/502/6463	Knowledge of Negotiating Fleet And Business Buyer Needs	3	3
Group C2 – Option group 2				
If this group is chosen, learners must achieve 5 credits from this group.				
20	H/502/6478	Knowledge of Promoting Finance And Insurance For Vehicle Sales	5	3

What is the qualification structure for the Edexcel BTEC Level 3 Diploma in Vehicle Sales Competence (QCF)?

A minimum of 125 credits is required to achieve this qualification. 28 credits from the mandatory generic units in Group A, 91 credits from the mandatory specialist units in Group B and a minimum of 6 credits from one of the option groups in Group C. All subcomponents of the chosen groups must be completed.

Individual units can be found in the *Units* section.

Unit No.	Unit Reference No.	Unit Title	Credit	Level
Group A – Mandatory generic units				
Learners must achieve 28 credits from this group.				
1	D/601/6171	Knowledge of Health, Safety and Good Housekeeping in the Automotive Environment	3	2
2	T/601/6175	Knowledge of Support for Job Roles in the Automotive Work Environment	3	3
21	A/601/6338	Competency in Health, Safety and Good Housekeeping in the Automotive Environment	7	2
22	K/601/6366	Competency in Supporting Job Roles in the Automotive Work Environment	5	3
35	T/601/6242	Knowledge of how to Make Learning Possible through Demonstrations and Instruction	5	3
41	Y/601/6380	Competency in Making Learning Possible through Demonstrations and Instruction	5	3
Group B – Mandatory specialist units				
Learners must achieve 91 credits from this group.				
6	D/502/6477	Knowledge of Delivering A Vehicle Sales Static Presentation	3	2
8	D/502/6494	Knowledge of Handover Of The Vehicle To The Customer	4	2
5	H/502/6481	Knowledge of Conducting Vehicle Demonstration Drives	3	2

Unit No.	Unit Reference No.	Unit Title	Credit	Level
10	J/502/6490	Knowledge of Meeting And Greeting Vehicle Sales Customers	3	2
4	M/502/6466	Knowledge of Complying With The Legal Requirements And Regulations Of Vehicle Sales	3	2
7	R/502/6475	Knowledge of Handling Vehicle Sales Telephone Enquiries	3	2
3	Y/502/6462	Knowledge of Brand, Product and Market Awareness in the Vehicle Sales and Supply Business	6	3

Unit No.	Unit Reference No.	Unit Title	Credit	Level
Group B – Mandatory specialist units continued				
23	A/502/6468	Competency in Complying With The Legal Requirements And Regulations Of Vehicle Sales	3	2
24	D/502/6480	Competency in Conducting Vehicle Demonstration Drives	3	2
25	K/502/6479	Competency in Handover Of The Vehicle To The Customer	3	2
26	L/502/6488	Competency in Managing Customer Relationships In A Vehicle Sales Environment	3	2
27	M/502/6483	Competency in Delivering A Vehicle Sales Static Presentation	3	2
28	T/502/6467	Competency in Handling Vehicle Sales Telephone Enquiries	3	2
29	Y/502/6493	Competency in Meeting And Greeting Vehicle Sales Customers	3	2
9	R/502/6492	Knowledge of Managing Customer Relationships In A Vehicle Sales Environment	3	2
37	F/502/6469	Knowledge of Self Management And Administration In A Vehicle Sales Environment	4	3
42	T/502/6470	Competency in Self Management And Administration In A Vehicle Sales Environment	3	3
32	A/502/6471	Competency in Constructing Motor Vehicle Sales Packages	5	3
15	L/502/6474	Knowledge of Constructing And Understanding Sales Packages	4	3
34	F/502/6472	Competency in Promoting Finance And Insurance For Vehicle Sales	4	3
20	H/502/6478	Knowledge of Promoting Finance And Insurance For Vehicle Sales	5	3
43	J/502/6487	Competency in Appraising Vehicles For Part Exchange	3	3
38	K/502/6482	Knowledge of Appraising Vehicles For Part Exchange	3	3

Unit No.	Unit Reference No.	Unit Title	Credit	Level
44	L/502/6491	Competency in Valuing Vehicles For Part Exchange	3	3
39	R/502/6489	Knowledge of Valuing Vehicles For Part Exchange	4	3
30	R/502/6461	Competency in Brand, Product and Market Awareness in the Vehicle Sales and Supply Business	4	3

Group C – Optional groups

Learners must achieve a minimum of 6 credits from **one** of the Option Groups. All subcomponents of the chosen group must be completed.

Group C1 – Option group 1

If this group is chosen, learners must achieve 6 credits from this group.

19	D/502/6463	Knowledge of Negotiating Fleet And Business Buyer Needs	3	3
31	H/502/6464	Competency in Negotiating Fleet And Business Buyer Needs	3	3

Group C2 – Option group 2

If this group is chosen, learners must achieve 9 credits from this group.

33	J/502/6473	Competency in Automotive Retail Negotiation And Sales Techniques	4	2
18	Y/502/6476	Knowledge of Automotive Retail Negotiation And Sales Techniques	5	2

How are the qualifications graded and assessed?

The overall grade for the qualifications is a 'pass'. The learner must achieve all the required units within the specified qualification structure.

To pass a unit the learner must:

- achieve **all** the specified learning outcomes
- satisfy **all** the assessment criteria by providing sufficient and valid evidence for each criterion
- show that the evidence is their own.

The qualifications are designed to be assessed:

- in the workplace or
- in conditions resembling the workplace, as specified in the assessment requirements/strategy for the sector, or
- as part of a training programme.

Assessment strategy for competence-based qualifications (VCQs)

The assessment strategy for the competence-based qualifications (VCQ) has been included in *Annexe C*. It has been developed by IMI in partnership with employers, training providers, awarding organisations and the regulatory authorities. The assessment strategy includes details on:

- criteria for defining realistic working environments
- roles and occupational competence of assessors, expert witnesses, internal verifiers and standards verifiers
- quality control of assessment
- evidence requirements.

Evidence of competence may come from:

- **current practice** where evidence is generated from a current job role
- a **programme of development** where evidence comes from assessment opportunities built into a learning/training programme whether at or away from the workplace
- the **Recognition of Prior Learning (RPL)** where a learner can demonstrate that they can meet the assessment criteria within a unit through knowledge, understanding or skills they already possess without undertaking a course of learning. They must submit sufficient, reliable and valid evidence for internal and standards verification purposes. RPL is acceptable for accrediting a unit, several units or a whole qualification
- a **combination** of these.

It is important that the evidence is:

Valid	relevant to the standards for which competence is claimed
Authentic	produced by the learner
Current	sufficiently recent to create confidence that the same skill, understanding or knowledge persist at the time of the claim
Reliable	indicates that the learner can consistently perform at this level
Sufficient	fully meets the requirements of the standards.

Types of evidence

To successfully achieve a unit the learner must gather evidence which shows that they have met the required standard in the assessment criteria. Evidence can take a variety of different forms including the examples below. Centres should refer to the assessment strategy for information about which of the following are permissible.

Centres should also refer to the assessment strategy (for competence based qualifications (VCQs) and the assessment requirements/evidence requirements section within each individual unit.

- direct observation of the learner's performance by their assessor (O)
- outcomes from oral or written questioning (Q&A)
- products of the learner's work (P)
- personal statements and/or reflective accounts (RA)
- outcomes from simulation, where permitted by the assessment strategy (S)
- professional discussion (PD)
- assignment, project/case studies (A)
- authentic statements/witness testimony (WT)
- expert witness testimony (EWT)
- evidence of Recognition of Prior Learning (RPL).

The abbreviations may be used for cross-referencing purposes.

Learners can use one piece of evidence to prove their knowledge, skills and understanding across different assessment criteria and/or across different units. It is, therefore, not necessary for learners to have each assessment criterion assessed separately. Learners should be encouraged to reference the assessment criteria to which the evidence relates.

Evidence must be made available to the assessor, internal verifier and Edexcel standards verifier. A range of recording documents is available on the Edexcel website www.edexcel.com. Alternatively, centres may develop their own.

Centre recognition and approval

Centre recognition

Centres that have not previously offered Edexcel qualifications need to apply for and be granted centre recognition as part of the process for approval to offer individual qualifications. New centres must complete both a centre recognition approval application and a qualification approval application.

Existing centres will be given 'automatic approval' for a new qualification if they are already approved for a qualification that is being replaced by the new qualification and the conditions for automatic approval are met. Centres already holding Edexcel approval are able to gain qualification approval for a different level or different sector via Edexcel online.

Approvals agreement

All centres are required to enter into an approvals agreement which is a formal commitment by the head or principal of a centre to meet all the requirements of the specification and any linked codes or regulations. Edexcel will act to protect the integrity of the awarding of qualifications, if centres do not comply with the agreement. This could result in the suspension of certification or withdrawal of approval.

Quality assurance

Quality assurance is at the heart of vocational qualifications. Assessment on BTEC and Competency qualifications is completed by your centre. You use quality assurance to ensure that your managers, internal verifiers and assessors are standardised and supported. We use quality assurance to check that all centres are working to national standards. It gives us the opportunity to identify and provide support where it is needed in order to safeguard certification. It also allows us to recognise and support good practice.

For the qualifications in this specification, the Edexcel quality assurance model will follow one of the three processes listed below.

- 1 Delivery of the **Competence and Principles** qualifications as part of a BTEC apprenticeship (single click registration)
 - integrated annual visits by a Standards Verifier to review centre-wide quality assurance systems and sampling of internal verification and assessor decisions
- 2 Delivery of the Competence qualification outside the apprenticeship
 - annual visits to centres by a Centre Quality Reviewer to review centre-wide quality assurance systems
 - annual visits by a Standards Verifier for sampling of internal verification and assessor decisions for the qualification
- 3 Delivery of the Principles qualification outside the apprenticeship
 - annual visits to centres by a Centre Quality Reviewer to review centre-wide quality assurance systems
 - Lead Internal Verifier accreditation. This involves online training and standardisation of Lead Internal Verifiers using our OSCA platform, accessed via Edexcel Online. Please note that not all qualifications are covered by Lead Internal Verifier accreditation. Where this is the case we will annually allocate a Standards Verifier to conduct postal sampling of internal verification and assessor decisions for the Principal Subject Area.

For further details, go to the UK BTEC Quality Assurance Handbook 2011-12 <http://www.edexcel.com/quals/BTEC/quality/Pages/documents.aspx>

What resources are required?

Each qualification is designed to support learners working in the automotive sector. Physical resources need to support the delivery of the qualifications and the assessment of the learning outcomes and must be of industry standard.

For competence based qualifications (VCQs), centres must meet any specific resource and staff requirements outlined in *Annexe C: Assessment strategy*.

Unit format

Each unit in this specification contains the following sections.

Unit title:					The unit title is approved on the QCF and this form of words will appear on the learner's Notification of Performance (NOP).	
Unit reference number:					This code is a unique reference number for the unit.	
QCF level:					All units and qualifications within the QCF have a level assigned to them, which represents the level of achievement. There are nine levels of achievement, from Entry level to level 8. The level of the unit has been informed by the QCF level descriptors and, where appropriate, the NOS and/or other sector/professional.	
Credit value:					All units have a credit value. The minimum credit value is one, and credits can only be awarded in whole numbers. Learners will be awarded credits when they achieve the unit.	
Guided learning hours:					A notional measure of the substance of a qualification. It includes an estimate of the time that might be allocated to direct teaching or instruction, together with other structured learning time, such as directed assignments, assessments on the job or supported individual study and practice. It excludes learner-initiated private study.	
Unit summary:					This provides a summary of the purpose of the unit.	
Assessment requirements/evidence requirements:					The assessment/evidence requirements are determined by the SSC. Learners must provide evidence for each of the requirements stated in this section.	
Learning outcomes:	Assessment criteria:	Evidence type:	Portfolio reference:	Date:		
			The learner should use this box to indicate where the evidence can be obtained eg portfolio page number.	The learner should give the date when the evidence has been provided.		
Learning outcomes state exactly what a learner should know, understand or be able to do as a result of completing a unit.		The assessment criteria of a unit specify the standard a learner is expected to meet to demonstrate that a learning outcome, or a set of learning outcomes, has been achieved.		Learners must reference the type of evidence they have and where it is available for quality assurance purposes. The learner can enter the relevant key and a reference. Alternatively, the learner and/or centre can devise their own referencing system.		

Units

Unit 1: Knowledge of Health, Safety and Good Housekeeping in the Automotive Environment

Unit reference number: D/601/6171

QCF level: 2

Credit value: 3

Guided learning hours: 30

Unit Summary

This unit enables the learner to develop an understanding of:

- routine maintenance and cleaning of the automotive environment and using resources economically
- 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.

Assessment requirements/evidence requirements:

If this unit is offered within a competence qualification (VCQ) it must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*).

This unit must adhere to the IMI Knowledge Unit Syllabus as set out below:

Economic use of resources

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

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

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

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

Routine maintenance of the workplace

- a) trainees 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 manufacturers recommendations
- m) location of routine maintenance information eg electrical safety check log

Legislation relevant to Health and Safety

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

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

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

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 manufacturers recommendations
- h following application procedures eg hazardous substances
- i the correct selection and use of extraction equipment

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
- d) unserviceable PPE.

- e) 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

Fire and extinguishers

- a) classification of fire types
- b) using a fire extinguisher effectively
- c) types of extinguishers
 - i foam
 - ii dry powder
 - iii CO2
 - iv water
 - v fire blanket

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

- a) the procedure as:
 - i raise the alarm
 - ii fight fire only if appropriate
 - iii evacuate building
 - iv call for assistance

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

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

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

Personal responsibilities

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

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

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the correct personal and vehicle protective equipment to be used within the automotive environment	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			
2	Understand effective housekeeping practices in the automotive environment	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			

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
3	Understand key health and safety requirements relevant to 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				
		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				
		4.1	identify key hazards and risks in an automotive environment				
4	Understand about hazards and potential risks relevant to the 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				

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
		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			
5	Understand personal responsibilities	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			

Learner name: _____ Date: _____
Learner signature: _____ Date: _____
Assessor signature: _____ Date: _____
Internal verifier signature: _____ Date: _____
(if sampled)

Unit 2: Knowledge of Support for Job Roles in the Automotive Work Environment

Unit reference number: T/601/6175

QCF level: 3

Credit value: 3

Guided learning hours: 20

Unit Summary

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.

Assessment requirements/evidence requirements:

If this unit is offered within a competence qualification (VCQ) it must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*). This unit must adhere to the IMI Knowledge Unit Syllabus as set out below:

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

Sources of information

- b) other staff
- c) manuals
- d) parts lists
- e) computer software and the internet
- f) manufacturer
- g) diagnostic equipment

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

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

Organisational and customer requirements:

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

Choice of communication

- a) distance
- b) location
- c) job responsibility

Importance of maintaining positive working relationships:

- a) morale
- b) productivity
- c) company image
- d) customer relationships
- e) colleagues

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand key organisational structures, functions and roles within the automotive work environment	1.1	identify the purpose of different sections of a typical automotive work environment			
		1.2	explain 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: a trainee b skilled technician c supervisor d manager			
2	Understand the importance of obtaining, interpreting and using information in order to support their job role within the automotive work environment	2.1	explain the importance of different sources of information in a automotive work environment			
		2.2	explain how to find, interpret and use relevant sources of information			
		2.3	describe the main legal requirements relating to the vehicle, including road safety requirements			
		2.4	explain the importance of working to recognised procedures and processes			

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
		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				
3	Understand the importance of different types of communication within the automotive work environment	3.1	explain where different methods of communication would be used within the automotive environment				
		3.2	explain the factors which can determine your choice of communication				
		3.3	explain how the communication of information can change with the target audience to include uninformed and informed people				
4	Understand communication requirements when carrying out vehicle repairs in the automotive work environment	4.1	explain how to report using written and verbal communication				
		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				

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
5	Understand how to develop good working relationships with colleagues and customers in the automotive workplace	5.1	describe how to develop positive working relationships with colleagues and customers			
		5.2	explain the importance of developing positive working relationships			
		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			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 3: Knowledge of Brand, Product and Market Awareness in the Vehicle Sales and Supply Business

Unit reference number: Y/502/6462

QCF level: 3

Credit value: 6

Guided learning hours: 35

Unit Summary

This unit will help the learner develop the 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.

Assessment requirements/evidence requirements:

If this unit is offered within a competence qualification (VCQ) it must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*).

This unit must adhere to the IMI Knowledge Unit Syllabus as set out below:

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

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

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.)

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

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

The structure and inter-departmental relationships of a typical dealership

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

The function of each type and their relationship to other departments

The different job roles and responsibilities of each to include:

- a) owners/directors
- b) managers
- c) sales controllers/executives
- d) technicians
- e) other personnel

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

Low volume – high margin

High volume – low margin

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

The principles of cash flow within a retail vehicle business

The correlation between vehicle sales targets and financial targets

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

Factors influencing retained profit

Own financial operating parameters to include:

- a) vehicle type
- b) finance
- c) insurance
- d) warranty

Limits of authority

Approval process when limits of authority are exceeded

Bonus structures to include:

- a) manufacturers incentives
- b) finance company incentives
- c) insurance company incentives
- d) dealer incentives (individual and team)

Own personal targets

Job description to include:

- a) planning personal objectives
- b) organising work schedules
- c) implementing
- d) monitoring
- e) evaluating
- f) setting new objectives

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)

Alignment of own and dealership targets

Brands to include:

- a) definition
- b) examples

Brand values to include:

- a) safety
- b) reliability
- c) comfort
- d) performance
- e) efficiency

Typical brand names and influence on customer expectations

The economic factors that can influence potential buyers to include:

- a) pricing
- b) terms of payment
- c) promotions
- d) seasonal commitments

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

The nature and ethics of selling

Negative images and stereotypes of selling to include:

- a) hard selling
- b) miss-selling
- c) bribery

Positive images of selling

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

Post-sale to include:

- a) processing the order
- b) delivery/hand over
- c) customer follow-up
- d) after sales service
- e) gaining referrals and recommendations
- f) identifying repeat selling opportunities
- g) self analysis and seeking feedback

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

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

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the role of dealerships in the retail vehicle industry	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			
2	Understand the factors that influence profitability in the retail vehicle industry	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			
3	Understand own contribution to the profitability of the dealership	3.1	explain margins and bonus structures			
		3.2	describe own personal targets and personal impact on dealership profitability			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Understand the influence of brands in the retail vehicle industry	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			
5	Understand the factors that influence customer behaviour	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			
6	Understand the sales process	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			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 4: Knowledge of Complying With The Legal Requirements And Regulations Of Vehicle Sales

Unit reference number: M/502/6466

QCF level: 2

Credit value: 3

Guided learning hours: 15

Unit Summary

This unit will help the learner develop the 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.

Assessment requirements/evidence requirements:

If this unit is offered within a competence qualification (VCQ) it must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*).

This unit must adhere to the IMI Knowledge Unit Syllabus as set out below:

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

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

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
- b) procedure for reporting theft, loss, destruction

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

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

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

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

The legal and moral responsibility of the organisation in relation to vehicle sales to include:

- a) trading standards and ethics
- b) corporate social responsibility

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the regulation and legislation relevant to vehicle sales	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			
2	Understand own and organisational responsibilities in relation to regulation and legislation relevant to vehicle sales	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			

Learner name: _____ Date: _____
Learner signature: _____ Date: _____
Assessor signature: _____ Date: _____
Internal verifier signature: _____ Date: _____
(if sampled)

Unit 5: Knowledge of Conducting Vehicle Demonstration Drives

Unit reference number: H/502/6481

QCF level: 2

Credit value: 3

Guided learning hours: 20

Unit Summary

This unit will help the learner develop the 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.

Assessment requirements/evidence requirements:

If this unit is offered within a competence qualification (VCQ) it must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*).

This unit must adhere to the IMI Knowledge Unit Syllabus as set out below:

The objective of the demonstration drive

- a) purpose of the demonstration drive
- b) key benefits for the customer

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

The characteristics of a test drive

- a) route planning principles
- b) effective customer driving experiences
- c) vehicle handling characteristics

The dealer demonstration vehicle standards

- a) vehicle condition
- b) roadworthy
- c) fuelled
- d) parked to facilitate eg static demonstration, drive off

The process for booking demonstration drives

- a) appropriate vehicle
 - i available
 - ii presentable
 - iii roadworthy
 - iv trade plates available
 - v planned routes accessibility

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

The legal requirements that apply to test drives

- a) driving licence
- b) insurance
- c) trade plates
- d) fitness to drive

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

- a) health and safety risk assessment
- b) security risk assessment

Trade plates

- a) dealership policy
 - i use
 - ii storage
 - iii security

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the purpose and value of a test drive	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			
2	Understand how to prepare for a test drive	2.1	describe the dealer demonstration vehicle standards			
		2.2	describe the process for booking demonstration drives			
		2.3	describe the demonstration preparation process			
3	Understand the legal and regulatory requirements that apply to test drives	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			

Learner name: _____ Date: _____
Learner signature: _____ Date: _____
Assessor signature: _____ Date: _____
Internal verifier signature: _____ Date: _____
(if sampled)

Unit 6: Knowledge of Delivering A Vehicle Sales Static Presentation

Unit reference number: D/502/6477

QCF level: 2

Credit value: 3

Guided learning hours: 20

Unit Summary

This unit will help the learner develop the 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.

Assessment requirements/evidence requirements:

If this unit is offered within a competence qualification (VCQ) it must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*).

This unit must adhere to the IMI Knowledge Unit Syllabus as set out below:

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

How to conduct a 360 degree vehicle walk around

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

How to use information derived from customer interaction to structure the presentation to include:

- 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

How to identify key sale indicators, to include:

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

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

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

- a) information systems including:
 - i dealer promotions
 - ii franchise support
 - iii brochures
 - iv leaflets
 - v internet
 - vi intranet

The importance of relaying information accurately to the customer

- a) the qualities of the salesperson:
 - i knowledgeable
 - ii honest
 - iii helpful
 - iv reliable
 - v motivated

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to deliver a vehicle sales static presentation	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			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 7: Knowledge of Handling Vehicle Sales Telephone Enquiries

Unit reference number: R/502/6475

QCF level: 2

Credit value: 3

Guided learning hours: 20

Unit Summary

This unit will help the learner develop the knowledge and understanding they need for handling and logging telephone enquiries and the identification of caller's needs.

Assessment requirements/evidence requirements:

If this unit is offered within a competence qualification (VCQ) it must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*).

This unit must adhere to the IMI Knowledge Unit Syllabus as set out below:

The generic sales process

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

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

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

d) inbound sales enquiries:

- i advertising campaigns
- ii internet
- iii intranet
- iv manufacturers' referrals
- v customer referrals

e) outbound sales enquiries:

- i maintaining rapport
- ii raise awareness of promotions
- iii identify current needs

- iv seek appointments
- v identify referrals
- vi market intelligence
- vii build customer data base

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
- b) the enquiry logging and booking system used in the organisation
- c) purpose and nature of diary systems and logs
- d) organisational policy for maintaining accurate logs and diary systems to include:
 - i pre sales planning
 - ii recording activities
 - iii follow up
- e) the concept of percentage contact loss in telephone communication to include:
 - i procedures for monitoring and evaluating performance

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to handle vehicle sales telephone enquiries	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			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 8: Knowledge of Handover Of The Vehicle To The Customer

Unit reference number: D/502/6494

QCF level: 2

Credit value: 4

Guided learning hours: 25

Unit Summary

This unit will help the learner develop the 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.

Assessment requirements/evidence requirements:

If this unit is offered within a competence qualification (VCQ) it must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*).

This unit must adhere to the IMI Knowledge Unit Syllabus as set out below:

The importance of the handover to the overall sales process

Customer expectations from placing the order to the handover event

Business impact of successful handovers

The point in the sales process the handover begins

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

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

The potential effect on the customer of the handover experience

Customer expectations during the handover event

The effect of handover on customer satisfaction index score

Index score systems

Business impact of successful handovers

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

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

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the impact and importance of handover in the sales process	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			
2	Understand the opportunities provided by the handover process	2.1	explain how to recognise the opportunity for repeat and referral business from the handover experience			
3	Know the documentation and timescales involved in a successful handover	3.1	identify the required documentation and timescales involved in a successful handover event			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 9: Knowledge of Managing Customer Relationships In A Vehicle Sales Environment

Unit reference number: R/502/6492

QCF level: 2

Credit value: 3

Guided learning hours: 20

Unit Summary

This unit will help the learner 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.

Assessment requirements/evidence requirements:

If this unit is offered within a competence qualification (VCQ) it must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*).

This unit must adhere to the IMI Knowledge Unit Syllabus as set out below:

The potential long term value of the customer in relation to profit and unit goals for both the salesperson and the organisation

Organisational aims and objectives

a) personal targets eg units and financial

Franchise agreements and customer service standards

The methodology for customer relationship management including:

- a) follow up
- b) problem solving
- c) referral business

The significance of maintaining accurate customer records, including:

- a) customer data base, contact logs and diaries
- b) customer care policies
- c) customer service feedback, eg monitoring and review systems

Factors that lead to potential complaints and prevention measures

Simple ways to recognise and investigate problems

Internal and external support process for solving problems

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)

The importance of effective communication with the customer at all times

Pareto's principle

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

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to manage customer relationships in a vehicle sales environment	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			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 10: Knowledge of Meeting And Greeting Vehicle Sales Customers

Unit reference number: J/502/6490

QCF level: 2

Credit value: 3

Guided learning hours: 20

Unit Summary

This unit will help the learner 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.

Assessment requirements/evidence requirements:

If this unit is offered within a competence qualification (VCQ) it must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*).

This unit must adhere to the IMI Knowledge Unit Syllabus as set out below:

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

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

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

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

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

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

Organisational aims and objectives, personal targets

- a) planning and scheduling activities around primary aims and objectives
- b) urgent/important matrix
- c) responding appropriately to meet customer needs

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the customer communication process	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			
2	Understand the importance of initial contact with the customer	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			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 11: Skills in Meeting And Greeting Vehicle Sales Customers

Unit reference number: H/502/6531

QCF level: 2

Credit value: 2

Guided learning hours: 15

Unit Summary

This unit will help the learner 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.

Assessment requirements/evidence requirements:

This unit must adhere to the IMI Skills Unit Assessment Requirements developed for the unit as set out below:

You must:

- 1 produce evidence to show you achieve **all** of the Learning Outcomes to the standard shown in the assessment criteria
- 2 produce performance evidence resulting from work you 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 Assessment Strategy on at least one occasion
- 4 produce evidence of using effective communication methods to offer a re-assuring, knowledgeable and confident platform for interaction and provide a positive first impression to the customer **on at least 3 separate** occasions. The evidence must include details of the following:
 - recognising customer's personal style and building rapport
 - attentively maintaining interest
 - active listening
 - questioning and qualifying
 - anticipating and overcoming objections
 - exploring options
 - presenting offers representing value for the organisation and customer
 - negotiating and seeking agreement

- advancing the sales cycle during the interactions while creating a positive impression
- 5 be observed using effective communication methods to offer a re-assuring, knowledgeable and confident platform for interaction and providing a positive first impression to the customer **on at least 2 separate** occasions

Evidence from simulated activities is **not** acceptable for this unit.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to qualify the selling opportunity	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			
2	Be able to engage the customer in the selling process	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			

Learner name: _____
Learner signature: _____
Assessor signature: _____
Internal verifier signature: _____
(if sampled)

Date: _____
Date: _____
Date: _____
Date: _____

Unit 12: Skills in Delivering A Vehicle Sales Static Presentation

Unit reference number: Y/502/6526

QCF level: 2

Credit value: 2

Guided learning hours: 15

Unit Summary

This unit will help the learner 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.

Assessment requirements/evidence requirements:

This unit must adhere to the IMI Skills Unit Assessment Requirements developed for the unit as set out below:

You must:

- 1 produce evidence to show you achieve **all** of the Learning Outcomes to the standard shown in the assessment criteria
- 2 produce performance evidence resulting from work you 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 Assessment Strategy on at least one occasion
- 4 produce evidence of delivering effective sales presentations to maximise sales potential **on at least 3 separate** occasions. The evidence must include details of the following:
 - the product features and benefits identified to support the presentation
 - the potential objections identified and strategies planned for overcoming these
 - building rapport
 - qualification using active listening, open and closed questioning
 - information systems accessed where appropriate
 - products matched and presented representing value for the

- organisation and customer
 - negotiating agreement
 - trial closures
- 5 be observed delivering effective sales presentations to maximise sales potential **on at least 2 separate** occasions

Evidence from simulated activities is **not** acceptable for this unit.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to deliver a vehicle sales static presentation	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			
2	Be able to build a relationship with customers when delivering a vehicle sales static presentation	2.1	actively listen to customers' needs and requirements			
		2.2	respond appropriately to customers' needs and requirements			
3	Be able to gain customer agreement to a product or service during a vehicle sales static presentation	2.3	generate rapport with the customer			
		3.1	gain customer agreement for vehicle or service at the preliminary stage of the sale			

Learner name: _____
Learner signature: _____
Assessor signature: _____
Internal verifier signature: _____
(if sampled)

Date: _____
Date: _____
Date: _____
Date: _____

Unit 13: Skills in Handling Vehicle Sales Telephone Enquiries

Unit reference number: J/502/6523

QCF level: 2

Credit value: 2

Guided learning hours: 12

Unit Summary

This unit will help the learner develop the skills they need for handling and logging telephone enquiries and identifying caller's needs.

Assessment requirements/evidence requirements:

This unit must adhere to the IMI Skills Unit Assessment Requirements developed for the unit as set out below:

You must:

- 1 produce evidence to show you achieve **all** of the Learning Outcomes to the standard shown in the assessment criteria
- 2 produce performance evidence resulting from work you 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 Assessment Strategy on at least one occasion
- 4 produce evidence of handling and logging telephone enquiries and the identification of caller's needs **on at least 3 separate** occasions. The evidence must include details of the following:
 - identification of caller needs
 - product knowledge and advice provided to the caller
 - effective handling of objections
 - summarising the conversation
 - methods used to secure transition to the next stage of the sales cycle
 - effective closure of the conversation
 - information collected and the call log entry
- 5 be observed handling and logging telephone enquiries and the identification of caller's needs **on at least 2 separate** occasions

Evidence from simulated activities is **not** acceptable for this unit.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to handle vehicle sales telephone enquiries	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			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 14: Skills in Handover Of The Vehicle To The Customer

Unit reference number: K/502/6532

QCF level: 2

Credit value: 2

Guided learning hours: 15

Unit Summary

This unit will help the learner 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.

Assessment requirements/evidence requirements:

This unit must adhere to the IMI Skills Unit Assessment Requirements developed for the unit as set out below:

You must:

- 1 produce evidence to show you achieve **all** of the Learning Outcomes to the standard shown in the assessment criteria
- 2 produce performance evidence resulting from work you 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 Assessment Strategy on at least one occasion
- 4 produce evidence of handing over the vehicle to the customer on **at least 3** occasions. The evidence must include details of the following:
 - communications with the customer between taking the order and the handover
 - the vehicle preparation processes and people involved
 - part exchange vehicle re-appraisal on at least one occasion
 - documentation completed and exchanged at the handover event
 - elements of the sales cycle applied when interacting with the customer
- 5 be observed handing over the vehicle to the customer on **at least 2 separate** occasions

Evidence from simulated activities is **not** acceptable for this unit.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to liaise with the customer during the handover process	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			
2	Be able to prepare the handover of a vehicle to the customer	2.1	ensure that all colleagues relevant to the event are made aware of their place in the schedule			
		2.2	ensure that the vehicle is prepared and is the correct specification			
		2.3	ensure that vehicle has been allocated adequate space for the handover event to run smoothly			
		2.4	ensure the vehicle is parked safely			
		2.5	allow sufficient time to apply all aspects of the handover procedure			
		2.6	ensure the customer is able to adhere to handover schedule			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to complete the handover of a vehicle to the customer	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			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 15: Knowledge of Constructing And Understanding Sales Packages

Unit reference number: L/502/6474

QCF level: 3

Credit value: 4

Guided learning hours: 25

Unit Summary

This unit will help the learner develop the knowledge and understanding they need for constructing and understanding sales packages based on information from manufacturer, dealership and government, whilst complying with audit requirements.

Assessment requirements/evidence requirements:

If this unit is offered within a competence qualification (VCQ) it must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*).

This unit must adhere to the IMI Knowledge Unit Syllabus as set out below:

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

The options and combinations contained within available sales packages to include:

- a) current product promotions
 - i manufacturer
 - ii finance
 - iii insurance
 - iv dealership

Individual product margins and operating parameters

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

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

Significance of using accurate current information during sales negotiations to include:

- a) informed customers
- b) non informed customers
- c) Operation and function of a Dealer Management System (DMS) to include:
 - i accessing and managing information
 - ii sales administration
 - iii proposals and quotations
 - iv sales orders
 - v electronic order management
 - vi sales information systems
 - vii developing the customer data base

The operating philosophy of own organisation, identifying sales packages and additional promotions that fit into its context

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

Audit requirements resulting from government and industry regulations to include:

- a) documentation eg electronic and hard copy
- b) secure storage and retention requirements:
 - i FSA requirements
 - ii accounting records
 - iii contracts
 - iv data protection

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to construct sales packages	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			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 16: Skills in Constructing Motor Vehicle Sales Packages

Unit reference number: R/502/6525

QCF level: 3

Credit value: 3

Guided learning hours: 25

Unit Summary

This unit will help the learner develop the skills they need for constructing and understanding sales packages based on information from manufacturer, dealership and government, whilst complying with audit requirements.

Assessment requirements/evidence requirements:

This unit must adhere to the IMI Skills Unit Assessment Requirements developed for the unit as set out below:

You must:

- 1 produce evidence to show you achieve **all** of the Learning Outcomes to the standard shown in the assessment criteria
- 2 produce performance evidence resulting from work you 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 Assessment Strategy on at least one occasion
- 4 produce evidence of constructing and understanding sales packages and complying with audit requirements **on at least 3 separate** occasions. The evidence must include details of the following:
 - sources of information and factors influencing package structure
 - audit compliance requirements
 - elements of the sales cycle applied when presenting the deal offer to the customer
 - restructuring and alignment with current promotions and different customers
 - the decision structure of the business that introduces the sales
 - packages and promotions
- 5 be observed constructing and understanding sales packages and complying with audit requirements **on at least 2 separate** occasions

Evidence from simulated activities is **not** acceptable for this unit.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to construct motor vehicle sales packages	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			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 17: Skills in Automotive Retail Negotiation And Sales Techniques

Unit reference number: L/502/6524

QCF level: 2

Credit value: 2

Guided learning hours: 15

Unit Summary

This unit will help the learner develop the skills they need to develop the customer service and negotiation skills required to sell a vehicle. It covers qualification, objection handling, negotiation and closing skills.

Assessment requirements/evidence requirements:

This unit must adhere to the IMI Skills Unit Assessment Requirements developed for the unit as set out below:

You must:

- 1 produce evidence to show you achieve **all** of the Learning Outcomes to the standard shown in the assessment criteria
- 2 produce performance evidence resulting from work you 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 Assessment Strategy on at least one occasion
- 4 produce evidence of using customer service and negotiation skills to sell a vehicle **on at least 3 separate** occasions. The evidence must include details of the following:
 - customer service standards applied
 - meeting and greeting
 - building rapport
 - qualification using active listening, open and closed questioning
 - product features and benefits described
 - objection handling
 - negotiation
 - the proposal — representing value for the organisation and customer
 - asking for the business
 - closing the sale

5 be observed using customer service and negotiation skills to sell a vehicle **on at least 2 separate** occasions

Evidence from simulated activities is **not** acceptable for this unit.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to establish an effective relationship with the vehicle customer	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			
2	Be able to negotiate a vehicle sale with the customer	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			

Learner name: _____
Learner signature: _____
Assessor signature: _____
Internal verifier signature: _____
(if sampled)

Date: _____
Date: _____
Date: _____
Date: _____

Unit 18: Knowledge of Automotive Retail Negotiation And Sales Techniques

Unit reference number: Y/502/6476

QCF level: 2

Credit value: 5

Guided learning hours: 25

Unit Summary

This unit will help the learner develop the 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.

Assessment requirements/evidence requirements:

If this unit is offered within a competence qualification (VCQ) it must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*).

This unit must adhere to the IMI Knowledge Unit Syllabus as set out below:

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

- a) basic influences on customers' buying behaviour
 - i. distinguishing between needs, wants and expectations

The elements of the 4P marketing mix to include:

- a) product eg features and benefits
- b) place eg territory
- c) price eg high, low, competitive
- d) promotion eg advertising, sales promotion, direct marketing, publicity/public relations (including sponsorship)

The buying process

- a) The AIDA model (1.Awareness/attention, 2. Interest, 3.Desire, 4.Action)

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

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)

The difference between price and value:

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

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

How success in customer service is achievable irrespective of the presence of a specific financial reward

The customer experience, both physical and emotional

Importance of customer service standards, to include:

- a) courtesy
- b) respect

- c) fairness
- d) clarity
- e) accessibility
- f) timeliness
- g) responsiveness

Maintaining rapport

Gaining referrals and recommendations

Identifying repeat sales opportunities

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

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

Establishing customer aims and objectives:

- a) personal/business use
- b) vehicle requirements
- c) budgets and means
- d) part exchange

Matching products to satisfy needs

Presenting a sales proposal

Why it is important to use accurate and correct terminology when dealing with customers

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

A range of accurate and correct terminology to use when dealing with customers

- a) examples of industry jargon and more appropriate terminology to use

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

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

How to conclude negotiations in order to close a sale

a) basic closing

- i buying signals
- ii summarise and ask for order

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to present vehicle sales solutions to the customer	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			
2	Understand how to provide customer service during the vehicle sales process	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			
3	Understand how to communicate with the customer in a vehicle sales environment	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			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
		3.5	explain the principle of active listening which involves reinforcing what the customer is saying and by asking relevant questions			
4	Understand how to deal with customer objections in a vehicle sales environment	4.1	explain how to clarify customer objections			
		4.2	describe how to apply objection handling techniques			
5	Know how to close a sale in a vehicle sales environment	5.1	explain how to conclude negotiations in order to close a sale			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 19: Knowledge of Negotiating Fleet And Business Buyer Needs

Unit reference number: D/502/6463

QCF level: 3

Credit value: 3

Guided learning hours: 17

Unit Summary

This unit will help the learner 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 customers' need.

Assessment requirements/evidence requirements:

If this unit is offered within a competence qualification (VCQ) it must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*).

This unit must adhere to the IMI Knowledge Unit Syllabus as set out below:

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

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

The group and brand expectation of profit and volume in the business market to include:

- a) market profile
- b) brand image
- c) targets
- d) manufacturers bonus

Why a business driver needs a longer test drive than a retail buyer

Identifying business aims and objectives

Typical company structures to include:

- a) small, medium, large
- b) the decision making unit (DMU)
- c) gatekeeper
- d) influencer
- e) decider
- f) user
- g) buyer

Summarise the tax implications for a business buyer

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

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

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

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

The reasoning and methodology applicable to the sales process bespoke to a business client

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

Competitor activity in the context of fleet and business sales

SWOT analysis

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the importance and value of the business market for vehicle sales	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			
2	Understand how to meet business vehicle buyers' needs	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			
3	Understand how to adapt the sales process to individual business buyers	3.1	explain the reasoning and methodology applicable to the sales process bespoke to a business client			

Learner name: _____
Learner signature: _____
Assessor signature: _____
Internal verifier signature: _____
(if sampled)

Date: _____
Date: _____
Date: _____
Date: _____

Unit 20: Knowledge of Promoting Finance And Insurance For Vehicle Sales

Unit reference number: H/502/6478

QCF level: 3

Credit value: 5

Guided learning hours: 30

Unit Summary

This unit will help the learner 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.

Assessment requirements/evidence requirements:

If this unit is offered within a competence qualification (VCQ) it must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*).

This unit must adhere to the IMI Knowledge Unit Syllabus as set out below:

The different finance and insurance products available

- a) credit facilities
 - i cost plus interest
 - ii hire purchase
 - iii credit sale

Personal contract plans

Manufacturers' terms

Leasing

Contract hire (with option to buy)

GAP schemes

Other options:

- a) warranties (mandatory and extended)
- b) insurance for parts and labour

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

The principles and requirements of treating a customer fairly, to include:

- a) FSA standards
- b) trading standards
- c) codes of practice
- d) personal standards
- e) the qualities of the salesperson
 - i knowledgeable
 - ii honest
 - iii helpful
 - iv reliable
 - v motivated

When and where to refer a customer for more specialised information and guidance**The role of the business or finance manager****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

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to promote finance and insurance for vehicle sales	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			
		2.1	summarise the current relevant legislation, regulation, codes of practice and guidelines relating to finance and insurance for vehicle sales			
2	Understand relevant legislation, regulation, codes of practice and guidelines relating to finance and insurance for vehicle sales					

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 21: Competency in Health, Safety and Good Housekeeping in the Automotive Environment

Unit reference number: A/601/6338

QCF level: 2

Credit value: 7

Guided learning hours: 60

Unit Summary

This unit will enable the learner to develop competency in order to:

- carry out day to day work area cleaning, clearing away, dealing with spillages and disposal of waste, used materials and debris
- identify hazards and risks in the automotive environment and complying with relevant legislation and good practice
- work safely at all times within the automotive environment, both as an individual and with others.

Assessment requirements/evidence requirements:

This unit must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*) and adhere to the IMI Competency Unit Assessment Requirements as detailed below:

You must:

- 1 produce evidence to show you meet **all** of the Learning Outcomes
- 2 produce performance evidence resulting from work you have carried out on real vehicles in your normal workplace or as defined within the IMI VCQ Assessment Strategy as managed and organised by an approved centre when naturally occurring performance evidence does not occur at frequent intervals in your normal workplace or when safety is at risk
- 3 be observed by an assessor as defined in the IMI VCQ Assessment Strategy
- 4 produce evidence of use of personal and vehicle protection, cleaning the work environment and disposal of waste on **3** separate **occasions**
- 5 be observed by your assessor on at least **1** occasion carrying out the above

- 6 produce evidence of identifying risks which may result from at least **2** of the items listed below:
 - the use and maintenance of machinery or equipment
 - the use of materials or substances
 - working practices which do not conform to laid down policies
 - unsafe behaviour
 - accidental breakages and spillages
 - environmental factors
- 7 be observed by your assessor on at least **1** occasion carrying out the above
- 8 produce evidence of following at least **4** of the workplace policies listed below:
 - the use of safe working methods and equipment
 - the safe use of hazardous substances
 - smoking, eating, drinking and drugs
 - what to do in the event of an emergency
 - personal presentation
 - be observed by your assessor following workplace policies on at least 1 occasion

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to use correct personal and vehicle protection within the automotive environment	1.1	select and use personal protective equipment throughout activities. To include appropriate protection of: a eyes b ears c head d skin e feet f hands g lungs			
		1.2	select and use vehicle protective equipment throughout all activities			
2	Be able to carry out effective housekeeping practices in the automotive environment	2.1	select and use cleaning equipment which is of the right type and suitable for the task			
		2.2	use utilities and appropriate consumables, avoiding waste			
		2.3	use materials and equipment to carry out cleaning and maintenance duties in allocated work areas, following automotive work environment policies, schedules and manufacturer's instructions			

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
		2.4	perform housekeeping activities safely and in a way which minimizes inconvenience to customers and staff				
		2.5	keep the work area clean and free from debris and waste materials.				
		2.6	keep tools and equipment fit for purpose by regular cleaning and keeping tidy				
		2.7	dispose of used cleaning agents, waste materials and debris to comply with legal and workplace requirements				
3	Be able to recognise and deal with dangers in order to work safely within the automotive workplace	3.1	name and locate the responsible persons for health and safety in their relevant workplace				
		3.2	identify and report working practices and hazards which could be harmful to themselves or others				
		3.3	carry out safe working practices whilst working with equipment, materials and products in the automotive environment				
		3.4	rectify health and safety risks encountered at work, within the scope and capability of their job role				

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to conduct themselves responsibly	4.1	show personal conduct in the workplace which does not endanger the health and safety of themselves or others			
		4.2	display suitable personal presentation at work which ensures the health and safety of themselves and others at work			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 22: Competency in Supporting Job Roles in the Automotive Work Environment

Unit reference number: K/601/6366

QCF level: 3

Credit value: 5

Guided learning hours: 40

Unit Summary

This unit will help the learner develop competency in order to keep good working relationships with all colleagues and customers in the automotive work environment by using effective communication and support.

Assessment requirements/evidence requirements:

This unit must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*) and adhere to the IMI Competency Unit Assessment Requirements as detailed below:

You must:

- 1 produce evidence to show you meet **all** of the Learning Outcomes
- 2 produce performance evidence resulting from work you have carried out on real vehicles in your normal workplace or as defined within the IMI VCQ Assessment Strategy as managed and organised by an approved centre when naturally occurring performance evidence does not occur at frequent intervals in your normal workplace or when safety is at risk
- 3 be observed by an assessor as defined in the IMI VCQ Assessment Strategy
- 4 produce evidence that you have worked well with others in the automotive industry
- 5 be observed by your assessor on at least **3** occasions carrying out the above whilst performing your normal work duties

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to work effectively within the organisational structure of the automotive work environment	1.1	respond promptly and willingly to requests for assistance from customers and colleagues			
		1.2	refer customers and colleagues to the correct person should requests fall outside their responsibility and capability			
2	Be able to obtain and use information in order to support their job role within the automotive work environment	2.1	select and use legal and manufacturers information, in an automotive work environment			
3	Be able to communicate with and support colleagues and customers effectively within the automotive work environment	3.1	use methods of communication with customers and colleagues which meet their needs			
		3.2	give customers and colleagues accurate information			
		3.3	make requests for assistance from or to customers and colleagues clearly and courteously			
		3.4	report any anticipated delays in completion to the relevant persons promptly			
4	Be able to develop and keep good working relationships in the automotive work environment	4.1	contribute to team work by initiating ideas and co-operating with customers and colleagues			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
	4.2	treat customers and colleagues in a way which shows respect for their views and opinions				
	4.3	make and keep achievable commitments to customers and colleagues				
	4.4	inform colleagues promptly of anything likely to affect their own work				

Learner name: _____ Date: _____
Learner signature: _____ Date: _____
Assessor signature: _____ Date: _____
Internal verifier signature: _____ Date: _____
(if sampled)

Unit 23: Competency in Complying With The Legal Requirements And Regulations Of Vehicle Sales

Unit reference number: A/502/6468

QCF level: 2

Credit value: 3

Guided learning hours: 15

Unit Summary

This unit will help the learner show their competence in meeting legal requirements in the vehicle sales environment. The latter to be achieved whilst adopting best practice and include data protection, trading law relevant to the sales process etc.

Assessment requirements/evidence requirements:

This unit must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*) and adhere to the IMI Competency Unit Assessment Requirements as detailed below:

You must:

- 1 produce evidence to show you achieve **all** of the Learning Outcomes to the standard shown in the assessment criteria on more than one occasion
- 2 produce performance evidence resulting from work you have carried out in a real sales environment or as defined within the IMI VCQ Assessment Strategy as managed and organised by an approved centre when naturally occurring performance evidence does not occur at frequent intervals in your normal workplace or when safety is at risk
- 3 be observed by an assessor as defined in the IMI VCQ Assessment Strategy on at least one occasion
- 4 produce evidence of complying with the legal requirements and regulations of vehicle sales
- 5 evidence for this unit must be assessed by Professional Discussion conducted by your assessor

Evidence from simulated activities is **not** acceptable for this unit.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to apply regulation and legislation appropriate to vehicle sales	1.1	identify the impact of regulation, legislation, data protection and trading law has on own role			
		1.2	determine the level of knowledge required to maintain understanding of regulation, legislation, data protection and trading law relevant to own role			
		1.3	access appropriate sources of relevant information on regulation, legislation, data protection and trading law relevant to own role			
		1.4	communicate relevant regulation, legislation, data protection and trading law using accurate terminology to the customer as appropriate			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 24: Competency in Conducting Vehicle Demonstration Drives

Unit reference number: D/502/6480

QCF level: 2

Credit value: 3

Guided learning hours: 15

Unit Summary

This unit will help the learner show their competence in planning and carrying out demonstration drives with customers. Particular attention is paid to the safety and security of the individual and the vehicle.

Assessment requirements/evidence requirements:

This unit must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*) and adhere to the IMI Competency Unit Assessment Requirements as detailed below:

You must:

- 1 produce evidence to show you achieve **all** of the Learning Outcomes to the standard shown in the assessment criteria on more than one occasion
- 2 produce performance evidence resulting from work you have carried out in a real sales environment or as defined within the IMI VCQ Assessment Strategy as managed and organised by an approved centre when naturally occurring performance evidence does not occur at frequent intervals in your normal workplace or when safety is at risk.
- 3 be observed by an assessor as defined in the IMI VCQ Assessment Strategy on at least one occasion.
- 4 produce evidence of conducting vehicle demonstration drives on **at least 3** occasions. The evidence must include details of the following:
 - vehicle roadworthiness checks conducted prior to test drive
 - routes planned to optimise the customer's driving experience
 - contingencies planned for abnormalities including alternative routes in the event of traffic congestion, road works, accidents
 - customer's data checks and eligibility to undertake the test drive
 - risk assessments conducted
 - elements of the sales cycle applied when interacting with the customer

5 be observed conducting vehicle demonstration drives with customers on **at least 2** occasions

Evidence from simulated activities is **not** acceptable for this unit.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to conduct a vehicle test drive	1.1	obtain the required customer data and paperwork prior to the drive			
		1.2	obtain the required customer data and paperwork prior to the drive			
		1.3	present features and benefits during the drive with due care and safety			
		1.4	identify risks to self, customer and vehicle			
		1.5	evaluate the risks to self, customer and vehicle			
		1.6	carry out a trial close when necessary			

Learner name: _____ Date: _____
 Learner signature: _____ Date: _____
 Assessor signature: _____ Date: _____
 Internal verifier signature: _____ Date: _____
(if sampled)

Unit 25: Competency in Handover Of The Vehicle To The Customer

Unit reference number: K/502/6479

QCF level: 2

Credit value: 3

Guided learning hours: 15

Unit Summary

This unit will help the learner show their competence in making a successful handover of a vehicle to a customer, ensuring the effective communication with the customer from placing the order to the handover event.

Assessment requirements/evidence requirements:

This unit must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*) and adhere to the IMI Competency Unit Assessment Requirements as detailed below:

You must:

- 1 produce evidence to show you achieve **all** of the Learning Outcomes to the standard shown in the assessment criteria on more than one occasion
- 2 produce performance evidence resulting from work you have carried out in a real sales environment or as defined within the IMI VCQ Assessment Strategy as managed and organised by an approved centre when naturally occurring performance evidence does not occur at frequent intervals in your normal workplace or when safety is at risk
- 3 be observed by an assessor as defined in the IMI VCQ Assessment Strategy on at least one occasion
- 4 produce evidence of handing over the vehicle to the customer on **at least 3** occasions. The evidence must include details of the following:
 - communications with the customer between taking the order and the handover
 - the vehicle preparation processes and people involved
 - part exchange vehicle re-appraisal on at least one occasion
 - documentation completed and exchanged at the handover event
 - elements of the sales cycle applied when interacting with the customer

- 5 be observed handing over the vehicle to the customer on at least 2 separate occasions

Evidence from simulated activities is **not** acceptable for this unit.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to liaise with the customer during the handover process	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			
2	Be able to prepare the handover of a vehicle to the customer	2.1	ensure that all colleagues relevant to the event are made aware of their place in the schedule			
		2.2	ensure that the vehicle is prepared and is the correct specification			
		2.3	ensure that vehicle has been allocated adequate space for the handover event to run smoothly			
		2.4	ensure the vehicle is parked safely			
		2.5	allow sufficient time to apply all aspects of the handover procedure			
		2.6	ensure the customer is able to adhere to handover schedule			
3	Be able to complete the handover of a vehicle to the customer	3.1	reinforce with the customer their decision to buy			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	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			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 26: Competency in Managing Customer Relationships In A Vehicle Sales Environment

Unit reference number: L/502/6488

QCF level: 2

Credit value: 3

Guided learning hours: 15

Unit Summary

This unit will help the learner show their competence in effective customer relationship management to create opportunities for referral and repeat business, to achieve short or long term success.

Assessment requirements/evidence requirements:

This unit must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*) and adhere to the IMI Competency Unit Assessment Requirements as detailed below:

You must:

- 1 produce evidence to show you achieve **all** of the Learning Outcomes to the standard shown in the assessment criteria on more than one occasion
- 2 produce performance evidence resulting from work you have carried out in a real sales environment or as defined within the IMI VCQ Assessment Strategy as managed and organised by an approved centre when naturally occurring performance evidence does not occur at frequent intervals in your normal workplace or when safety is at risk
- 3 be observed by an assessor as defined in the IMI VCQ Assessment Strategy on at least one occasion
- 4 produce evidence of managing customer relationships in a vehicle sales environment during and post-sale **on at least 3 separate** occasions. The evidence must include details of the following:
 - communicating and maintaining rapport with the customer
 - referrals gained from the customer
 - repeat business
 - customer satisfaction level

- 5 produce evidence of minimising the risk of costly error and customer disillusionment identified when interacting with the customer in **at least 2 situations**. The evidence must include details of the following:
 - the customer service risk identified
 - the solution presented
 - the action taken
 - the customer satisfaction level post-interaction
- 6 be observed managing customer relationships in a vehicle sales environment during and post-sale on **at least 2 separate occasions**

Evidence from simulated activities is **not** acceptable for this unit.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to manage customer relationships in a vehicle sales environment	1.1	work to maintain a positive relationship with the customer both during and after they have taken delivery of their vehicle or service			
		1.2	use a positive relationship with the customer in order to create the opportunity for both referral and repeat business			
		1.3	use a structured approach to customer relationship management in order to: <ul style="list-style-type: none"> a maximise the potential for short and long term success b minimise the risk of costly error and customer disillusionment 			
		1.4	offer a professional and reassuring service throughout the buying experience			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 27: Competency in Delivering A Vehicle Sales Static Presentation

Unit reference number: M/502/6483

QCF level: 2

Credit value: 3

Guided learning hours: 15

Unit Summary

This unit will help the learner show their competence in delivering effective sales presentations to maximise sales potential. It includes giving bespoke presentations to the customer and providing opportunities for questions to be asked.

Assessment requirements/evidence requirements:

This unit must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*) and adhere to the IMI Competency Unit Assessment Requirements as detailed below:

You must:

- 1 produce evidence to show you achieve **all** of the Learning Outcomes to the standard shown in the assessment criteria on more than one occasion
- 2 produce performance evidence resulting from work you have carried out in a real sales environment or as defined within the IMI VCQ Assessment Strategy as managed and organised by an approved centre when naturally occurring performance evidence does not occur at frequent intervals in your normal workplace or when safety is at risk
- 3 be observed by an assessor as defined in the IMI VCQ Assessment Strategy on at least one occasion
- 4 produce evidence of delivering effective sales presentations to maximise sales potential **on at least 3 separate** occasions. The evidence must include details of the following:
 - the product features and benefits identified to support the presentation
 - the potential objections identified and strategies planned for overcoming these
 - building rapport
 - qualification using active listening, open and closed questioning

- information systems accessed where appropriate
 - products matched and presented representing value for the organisation and customer
 - negotiating agreement
 - trial closures
- 5 be observed delivering effective sales presentations to maximise sales potential on **at least 2 separate occasions**

Evidence from simulated activities is **not** acceptable for this unit.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to deliver a vehicle sales static presentation	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			
2	Be able to build a relationship with customers when delivering a vehicle sales static presentation	2.1	actively listen to customers' needs and requirements			
		2.2	respond appropriately to customers' needs and requirements			
3	Be able to gain customer agreement to a product or service during a vehicle sales static presentation	2.3	generate rapport with the customer			
		3.1	gain customer agreement for vehicle or service at the preliminary stage of the sale			

Learner name: _____
Learner signature: _____
Assessor signature: _____
Internal verifier signature: _____
(if sampled)

Date: _____
Date: _____
Date: _____
Date: _____

Unit 28: Competency in Handling Vehicle Sales Telephone Enquiries

Unit reference number: T/502/6467

QCF level: 2

Credit value: 3

Guided learning hours: 15

Unit Summary

This unit will help the learner show their competence in handling and logging telephone enquiries and identifying caller's needs.

Assessment requirements/evidence requirements:

This unit must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*) and adhere to the IMI Competency Unit Assessment Requirements as detailed below:

You must:

- 1 produce evidence to show you achieve **all** of the Learning Outcomes to the standard shown in the assessment criteria on more than one occasion
- 2 produce performance evidence resulting from work you have carried out in a real sales environment or as defined within the IMI VCQ Assessment Strategy as managed and organised by an approved centre when naturally occurring performance evidence does not occur at frequent intervals in your normal workplace or when safety is at risk
- 3 be observed by an assessor as defined in the IMI VCQ Assessment Strategy on at least one occasion
- 4 produce evidence of handling and logging telephone enquiries and the identification of caller's needs **on at least 3 separate** occasions. The evidence must include details of the following:
 - identification of caller needs
 - product knowledge and advice provided to the caller
 - effective handling of objections
 - summarising the conversation
 - methods used to secure transition to the next stage of the sales cycle
 - effective closure of the conversation
 - information collected and the call log entry

5 be observed handling and logging telephone enquiries and the identification of caller's needs on **at least 2 separate occasions**
Evidence from simulated activities is **not** acceptable for this unit.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to handle vehicle sales telephone enquiries	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			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 29: Competency in Meeting And Greeting Vehicle Sales Customers

Unit reference number: Y/502/6493

QCF level: 2

Credit value: 3

Guided learning hours: 15

Unit Summary

This unit will help the learner show their competence in effective communication methods to offer a re-assuring, knowledgeable and confident platform for interaction and provide a positive first impression.

Assessment requirements/evidence requirements:

This unit must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*) and adhere to the IMI Competency Unit Assessment Requirements as detailed below:

You must:

- 1 produce evidence to show you achieve **all** of the Learning Outcomes to the standard shown in the assessment criteria on more than one occasion
- 2 produce performance evidence resulting from work you have carried out in a real sales environment or as defined within the IMI VCQ Assessment Strategy as managed and organised by an approved centre when naturally occurring performance evidence does not occur at frequent intervals in your normal workplace or when safety is at risk
- 3 be observed by an assessor as defined in the IMI VCQ Assessment Strategy on at least one occasion
- 4 produce evidence of using effective communication methods to offer a re-assuring, knowledgeable and confident platform for interaction and provide a positive first impression to the customer **on at least 3 separate** occasions. The evidence must include details of the following:
 - recognising customer's personal style and building rapport
 - attentively maintaining interest
 - active listening
 - questioning and qualifying
 - anticipating and overcoming objections
 - exploring options

- presenting offers representing value for the organisation and customer
 - negotiating and seeking agreement
 - advancing the sales cycle during the interactions while creating a positive impression
- 5 be observed using effective communication methods to offer a re-assuring, knowledgeable and confident platform for interaction and providing a positive first impression to the customer on **at least 2 separate occasions**

Evidence from simulated activities is **not** acceptable for this unit.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to qualify the selling opportunity	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			
2	Be able to engage the customer in the selling process	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			

Learner name: _____ Date: _____
Learner signature: _____ Date: _____
Assessor signature: _____ Date: _____
Internal verifier signature: _____ Date: _____
(if sampled)

Unit 30: Competency in Brand, Product and Market Awareness in the Vehicle Sales and Supply Business

Unit reference number: R/502/6461

QCF level: 3

Credit value: 4

Guided learning hours: 20

Unit Summary

This unit will enable the learner show their competence in monitoring the achievement of personal sales, contribution and profit against targets, demonstrating how to communicate brand and product values in customer handling and market awareness throughout the sales process.

Assessment requirements/evidence requirements:

This unit must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*) and adhere to the IMI Competency Unit Assessment Requirements as detailed below:

You must:

- 1 produce evidence to show you achieve **all** of the Learning Outcomes to the standard shown in the assessment criteria on more than one occasion
- 2 produce performance evidence resulting from work you have carried out in a real sales environment or as defined within the IMI VCQ Assessment Strategy as managed and organised by an approved centre when naturally occurring performance evidence does not occur at frequent intervals in your normal workplace or when safety is at risk
- 3 be observed by an assessor as defined in the IMI VCQ Assessment Strategy on at least one occasion
- 4 produce evidence of negotiating fleet and business buyer needs on **at least 3** occasions. The evidence must include details of the following:
 - the strategies used to secure appointments
 - the financial options offered
 - the tax benefits of the options offered
 - the benefits of the brand to the buyer
 - key elements of the sales cycle applied when interacting with the buyer

5 be observed negotiating fleet and business buyer needs on **at least 2 occasions**

Evidence from simulated activities is **not** acceptable for this unit.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to monitor personal sales achievement	1.1	monitor achievement of personal sales against targets			
		1.2	monitor achievement of contribution, profit, and volume against targets			
2	Be able to make value-centred vehicle sales	2.1	communicate brand and product values in customer handling and throughout the sales process			
		2.2	sell value over price			
3	Be able to find solutions to improving personal sales performance	3.1	interpret performance data and trends with a view to applying appropriate and pragmatic solutions to improve own sales performance			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 31: Competency in Negotiating Fleet And Business Buyer Needs

Unit reference number: H/502/6464

QCF level: 3

Credit value: 3

Guided learning hours: 17

Unit Summary

This unit will enable the learner to show their competence in negotiating fleet and business buyers' needs for vehicles.

Assessment requirements/evidence requirements:

This unit must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*) and adhere to the IMI Competency Unit Assessment Requirements as detailed below:

You must:

- 1 produce evidence to show you achieve **all** of the Learning Outcomes to the standard shown in the assessment criteria on more than one occasion
- 2 produce performance evidence resulting from work you have carried out in a real sales environment or as defined within the IMI VCQ Assessment Strategy as managed and organised by an approved centre when naturally occurring performance evidence does not occur at frequent intervals in your normal workplace or when safety is at risk
- 3 be observed by an assessor as defined in the IMI VCQ Assessment Strategy on at least one occasion
- 4 produce evidence of negotiating fleet and business buyer needs on **at least 3** occasions. The evidence must include details of the following:
 - the strategies used to secure appointments
 - the financial options offered
 - the tax benefits of the options offered
 - the benefits of the brand to the buyer
 - key elements of the sales cycle applied when interacting with the buyer

5 be observed negotiating fleet and business buyer needs on **at least 2** occasions

Evidence from simulated activities is **not** acceptable for this unit.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to negotiate fleet and business buyer needs	1.1	make clear the financial options available to the buyer			
		1.2	help the buyer to understand the advantages/disadvantages of the financial options available			
		1.3	help the buyer to understand the tax implications of the purchase			
		1.4	communicate the unique selling points of the brand and dealer group to the business community			

Learner name: _____ Date: _____
 Learner signature: _____ Date: _____
 Assessor signature: _____ Date: _____
 Internal verifier signature: _____ Date: _____
(if sampled)

Unit 32: Competency in Constructing Motor Vehicle Sales Packages

Unit reference number: A/502/6471

QCF level: 3

Credit value: 5

Guided learning hours: 25

Unit Summary

This unit will help the learner show their competence in constructing and understanding sales packages based on information from manufacturer, dealership and government, whilst complying with audit requirements.

Assessment requirements/evidence requirements:

This unit must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*) and adhere to the IMI Competency Unit Assessment Requirements as detailed below:

You must:

- 1 produce evidence to show you achieve **all** of the Learning Outcomes to the standard shown in the assessment criteria on more than one occasion
- 2 produce performance evidence resulting from work you have carried out in a real sales environment or as defined within the IMI VCQ Assessment Strategy as managed and organised by an approved centre when naturally occurring performance evidence does not occur at frequent intervals in your normal workplace or when safety is at risk.
- 3 be observed by an assessor as defined in the IMI VCQ Assessment Strategy on at least one occasion.
- 4 produce evidence of constructing and understanding sales packages and complying with audit requirements **on at least 3 separate** occasions. The evidence must include details of the following:
 - sources of information and factors influencing package structure
 - audit compliance requirements
 - elements of the sales cycle applied when presenting the deal offer to the customer
 - restructuring and alignment with current promotions and different customers

- the decision structure of the business that introduces the sales
 - packages and promotions
- 5 be observed constructing and understanding sales packages and complying with audit requirements **on at least 2 separate** occasions

Evidence from simulated activities is **not** acceptable for this unit.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to construct motor vehicle sales packages	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			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 33: Competency in Automotive Retail Negotiation And Sales Techniques

Unit reference number: J/502/6473

QCF level: 2

Credit value: 4

Guided learning hours: 20

Unit Summary

This unit will help the learner show their competence in the customer service and negotiation skills required to sell a vehicle. It covers qualification, objection handling, negotiation and closing skills.

Assessment requirements/evidence requirements:

This unit must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*) and adhere to the IMI Competency Unit Assessment Requirements as detailed below:

You must:

- 1 produce evidence to show you achieve **all** of the Learning Outcomes to the standard shown in the assessment criteria on more than one occasion
- 2 produce performance evidence resulting from work you have carried out in a real sales environment or as defined within the IMI VCQ Assessment Strategy as managed and organised by an approved centre when naturally occurring performance evidence does not occur at frequent intervals in your normal workplace or when safety is at risk
- 3 be observed by an assessor as defined in the IMI VCQ Assessment Strategy on at least one occasion
- 4 produce evidence of using customer service and negotiation skills to sell a vehicle **on at least 3 separate** occasions. The evidence must include details of the following:
 - customer service standards applied
 - meeting and greeting
 - building rapport
 - qualification using active listening, open and closed questioning
 - product features and benefits described
 - objection handling

- negotiation
 - the proposal — representing value for the organisation and customer
 - asking for the business
 - closing the sale
- 5 be observed using customer service and negotiation skills to sell a vehicle **on at least 2 separate** occasions

Evidence from simulated activities is **not** acceptable for this unit.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to establish an effective relationship with the vehicle customer	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			
2	Be able to negotiate a vehicle sale with the customer	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			

Learner name: _____
Learner signature: _____
Assessor signature: _____
Internal verifier signature: _____
(if sampled)

Date: _____
Date: _____
Date: _____
Date: _____

Unit 34: Competency in Promoting Finance And Insurance For Vehicle Sales

Unit reference number: F/502/6472

QCF level: 3

Credit value: 4

Guided learning hours: 20

Unit Summary

This unit will help the learner show their competence in securing the necessary finance and insurance in order to enable customers to purchase vehicles. It includes identifying the customer's finance and insurance needs before presenting possible options.

Assessment requirements/evidence requirements:

This unit must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*) and adhere to the IMI Competency Unit Assessment Requirements as detailed below:

You must:

- 1 produce evidence to show you achieve **all** of the Learning Outcomes to the standard shown in the assessment criteria on more than one occasion
- 2 produce performance evidence resulting from work you have carried out in a real sales environment or as defined within the IMI VCQ Assessment Strategy as managed and organised by an approved centre when naturally occurring performance evidence does not occur at frequent intervals in your normal workplace or when safety is at risk
- 3 be observed by an assessor as defined in the IMI VCQ Assessment Strategy on at least one occasion
- 4 produce evidence of promoting the features and benefits of finance and insurance for vehicle sales on **at least 3** occasions. The evidence must include details of the promoting the following:
 - finance
 - repayment protection
 - GAP
 - warranty
 - elements of the sales cycle applied when interacting with the customer

5 be observed promoting the features and benefits of finance and insurance for vehicle sales on **at least 2** occasions

Evidence from simulated activities is **not** acceptable for this unit.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to promote finance and insurance for vehicle sales	1.1	identify the customers funding requirements			
		1.2	demonstrate the different finance offers available through the dealership along with their relative benefits to different customers			
		1.3	demonstrate the different insurance offers available through the dealership along with their relative benefits to different customers			
		1.4	promote the features and benefits of finance and insurance offers in conjunction with the product range			
		1.5	promote commercial advantage through industry and competitor knowledge			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 35: Knowledge of how to Make Learning Possible through Demonstrations and Instruction

Unit reference number: T/601/6242

QCF level: 3

Credit value: 5

Guided learning hours: 45

Unit Summary

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.

Assessment requirements/evidence requirements:

If this unit is offered within a competence qualification (VCQ) it must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*).

This unit must adhere to the IMI Knowledge Unit Syllabus as set out below:

Separate areas of demonstration which encourage learning. To include:

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

Types of learning which are best achieved and supported through demonstrations. To include:

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

How to structure demonstration and instruction sessions. To include:

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

How to identify individual learning needs

- a) Diagnose the learning needs of your audience to include:
 - i what competencies they already have
 - ii what experience they have of the subject area
 - iii what competencies they need to achieve
 - iv what demonstration techniques are best suited to their needs
 - v how you will assess their needs have been met

What factors are likely to prevent learning. To include:

- 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

How to check learners understanding and progress

- a) questionnaires
- b) verbal questioning
- c) observation
- d) assessment
- e) role play
- f) projects/assignments
- g) multi-choice questions
- h) simulation
- i) tests

How to organise information and prepare materials

- a) identify the course aim
- b) identify the subject aim
- c) identify the lesson aim
- d) complete a lesson plan — plan the teaching
- e) identify a series of 'cues' to be used during the lesson
- f) logically organise the information

- g) use suitable resources and equipment to maximise learning opportunities
- h) assess the learners progress and understanding

Instructional techniques

- a) types of instructional techniques to include:
 - i lectures
 - ii handouts
 - iii team teaching
 - iv peer teaching
 - v discussion – individual, group and peer
 - vi question and answer
 - vii multimedia
 - viii seminars
 - ix case studies
 - x project/assignments

Environmental factors that effect learning

- a) environmental factors that should be considered before demonstration/instruction to include:
 - i loud noises
 - ii bright colours
 - iii bright lights
 - iv strong smells
 - v atmosphere
 - vi temperature
 - vii classroom seating
 - viii classroom layout
 - ix bright lights

Health and safety factors that effect learning

- a) health and safety factors that should be considered before demonstration/instruction to include:
 - i assessment of risk and hazards
 - ii condition of electrical/electronic equipment
 - iii position of cables and wires
 - iv safety of equipment used in demonstration/instruction

- v condition of classroom equipment/furniture/structure
- vi suitable protective clothing/equipment

Analysis of demonstration/instruction

- a) Analysis of demonstration/instruction to include:
 - i feedback from students
 - ii feedback from colleagues
 - iii organisational quality assessment
 - iv feedback from external organisations
 - v awarding body requirements

Developments in learning. To include:

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

How to choose and prepare appropriate materials. To include:

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

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the nature and role of demonstrations and instruction	1.1	classify the separate areas of demonstrations which encourage learning			
		1.2	identify which types of learning are best achieved and supported through demonstrations			
		1.3	explain how to identify and use different learning opportunities			
		1.4	explain how to structure demonstrations and instruction sessions			
		1.5	explain how to choose from a range of demonstration techniques			
2	Understand the principles and concepts of demonstration and instruction	2.1	describe how to put learners at ease and encourage them to take part			
		2.2	justify the choice between demonstration and instruction as a learning method			
		2.3	explain how to identify individual learning needs			
		2.4	clarify which factors are likely to prevent learning and how to overcome them			
		2.5	explain how to check learners' understanding and progress			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand the external factors influencing human resource development	2.6	explain how to choose and prepare appropriate materials			
		2.7	explain the separate areas of instructional techniques which encourage learning			
		2.8	describe which types of learning are best achieved and supported through instruction			
		3.1	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			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 36: Skills in Valuing Vehicles For Part Exchange

Unit reference number: D/502/6530

QCF level: 3

Credit value: 3

Guided learning hours: 15

Unit Summary

This unit will help the learner 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.

Assessment requirements/evidence requirements:

This unit must adhere to the IMI Skills Unit Assessment Requirements developed for the unit as set out below:

You must:

- 1 produce evidence to show you achieve **all** of the Learning Outcomes to the standard shown in the assessment criteria on more than one occasion
- 2 produce performance evidence resulting from work you have carried out in a real sales environment or as defined within the IMI VCQ Assessment Strategy as managed and organised by an approved centre when naturally occurring performance evidence does not occur at frequent intervals in your normal workplace or when safety is at risk
- 3 be observed by an assessor as defined in the IMI VCQ Assessment Strategy on at least one occasion
- 4 produce evidence of valuing vehicles for part exchange on **at least 3** occasions. The evidence must include details of the following:
 - information sources used to estimate current market value
 - appraisal information that influenced the valuation
 - reconditioning estimates
 - factors that influenced the balance between profitability and sales volume
 - customer's response to the price offer

5 be observed valuing vehicles for part exchange on **at least 2** occasions

Evidence from simulated activities is **not** acceptable for this unit.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to value vehicles for part exchange	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			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 37: Knowledge of Self Management And Administration In A Vehicle Sales Environment

Unit reference number: F/502/6469

QCF level: 3

Credit value: 4

Guided learning hours: 25

Unit Summary

This unit will help the learner develop the knowledge and understanding they need for time management, meeting sales targets, achieving objectives and using information technology to facilitate own role.

Assessment requirements/evidence requirements:

If this unit is offered within a competence qualification (VCQ) it must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*).

This unit must adhere to the IMI Knowledge Unit Syllabus as set out below:

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 and electronic
- d) confidentiality/security of records to include:
 - i levels of access, backup, virus protection, legal aspects
- e) Data Protection Act

The importance of time keeping in a vehicle sales environment to include:

- a) terms and conditions of employment
- b) working according to organisation’s objectives, policies, procedures, and priorities

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
- c) when supplying services, the need for:
 - i reasonable care and skill
 - ii completion in a reasonable time
 - iii completion at a reasonable charge

The likely cost to the organisation if promises are not kept to include:

- a) tangible and intangible costs of negative customer experiences

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

How to use a browser and search engine to include:

- a) basic operation of internet and intranet
- b) organisational policy and limitations

How to use relevant operating systems required to effectively carry out own role

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

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

How to use dealership logs and diary systems to record activity and schedule follow up

Purpose and nature of diary systems and logs

Organisational policy for maintaining accurate logs and diary systems to include:

- a) pre sales planning
- b) recording activities
- c) follow up

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the importance of self-management and administration in a vehicle sales environment	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			
2	Understand how to manage own work and administration in a vehicle sales environment	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			

Learner name: _____
Learner signature: _____
Assessor signature: _____
Internal verifier signature: _____
(if sampled)

Date: _____
Date: _____
Date: _____
Date: _____

Unit 38: Knowledge of Appraising Vehicles For Part Exchange

Unit reference number: K/502/6482

QCF level: 3

Credit value: 3

Guided learning hours: 20

Unit Summary

This unit is about appraising the condition of vehicles and verifying vehicle identity, ownership and history to confirm that there are no vehicle ownership problems.

Assessment requirements/evidence requirements:

If this unit is offered within a competence qualification (VCQ) it must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*).

This unit must adhere to the IMI Knowledge Unit Syllabus as set out below:

The difference between the used vehicle appraisal and the valuation after

- a) purpose of the appraisal
- b) reasons for the evaluation

The objective of the used vehicle appraisal

- a) ownership
- b) history
- c) informing the valuation process
- d) check list for final hand over

The process of used vehicle appraisal

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

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

Hire purchase investigation (HPI)

- a) vehicle mileage declaration (VMD)
- b) vehicle mileage check (VMC)

The customer's expectations of the appraisal process

- a) open sources of information influencing customers expectations

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

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the purpose of used vehicle appraisal for part exchange	1.1	define the difference between the used vehicle appraisal and the valuation after			
		1.2	describe the objective of the used vehicle appraisal			
2	Understand how to appraise vehicles for part exchange	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			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 39: Knowledge of Valuing Vehicles For Part Exchange

Unit reference number: R/502/6489

QCF level: 3

Credit value: 4

Guided learning hours: 40

Unit Summary

This unit will help the learner develop the knowledge and understanding 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.

Assessment requirements/evidence requirements:

If this unit is offered within a competence qualification (VCQ) it must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*).

This unit must adhere to the IMI Knowledge Unit Syllabus as set out below:

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

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

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

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

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

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

How to highlight positive values of competitors' products, to include:

- a) monitoring competitor activity and sales strategies
- b) SWOT analysis

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the purpose of used vehicle valuation for part exchange	1.1	explain the value of the used vehicle in the sales process			
		1.2	describe the objective of the used vehicle valuation			
2	Understand how to value vehicles for part exchange	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			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 40: Skills in Appraising Vehicles For Part Exchange

Unit reference number: H/502/6528

QCF level: 3

Credit value: 2

Guided learning hours: 12

Unit Summary

This unit will help the learner 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.

Assessment requirements/evidence requirements:

This unit must adhere to the IMI Skills Unit Assessment Requirements developed for the unit as set out below:

You must:

- 1 produce evidence to show you achieve **all** of the Learning Outcomes to the standard shown in the assessment criteria
- 2 produce performance evidence resulting from work you 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 Assessment Strategy on at least one occasion
- 4 produce evidence of appraising the condition of vehicles and verifying identity, ownership and history to enable a valuation **on at least 3 separate** occasions. The evidence must include details of the following:
 - conducting and documenting accurate and dynamic vehicle appraisals
 - verifying vehicle identity
 - confirming ownership and history
 - interacting effectively with the customer during the appraisal
 - managing customer expectations
 - presenting the appraisal to the manager
 - presenting the price offer to the customer

- 5 be observed appraising the condition of vehicles, verifying identity, ownership and history to enable a valuation and presenting a price offer **on at least 2 separate** occasions

Evidence from simulated activities is **not** acceptable for this unit.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to appraise vehicles for part exchange	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			
2	Be able to present vehicle appraisals for part exchange with the customer	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			

Learner name: _____ Date: _____
Learner signature: _____ Date: _____
Assessor signature: _____ Date: _____
Internal verifier signature: _____ Date: _____
(if sampled)

Unit 41: Competency in Making Learning Possible through Demonstrations and Instruction

Unit reference number: Y/601/6380

QCF level: 3

Credit value: 5

Guided learning hours: 40

Unit Summary

This unit will help the learner to develop competency in order to carry out demonstrations and instruction which will help the learner to learn. It includes demonstrating equipment, showing skills, giving instruction, deciding when to use demonstration or instruction, potential of technology based learning, checking on learners' progress and giving feedback.

Assessment requirements/evidence requirements:

This unit must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*) and adhere to the IMI Competency Unit Assessment Requirements as detailed below:

You must:

produce evidence to show you meet **all** of the Learning Outcomes

- 1 produce performance evidence resulting from work you have carried out in your normal workplace or as defined within the IMI VCQ Assessment Strategy as managed and organised by an approved centre when naturally occurring performance evidence does not occur at frequent intervals in your normal workplace or when safety is at risk
- 2 be observed by an assessor as defined in the IMI VCQ Assessment Strategy **or** by a witness who has been previously agreed with the assessor prior to the observation taking place
- 3 provide at least **1 record** of an activity which has been demonstrated
- 4 provide records of at least 2 observations, 1 of which must be by your assessor, which cover at least 1 demonstration and 1 instruction or a combination of both

It is expected that the **records** must include evidence to show how you:

- decided on the sequence of the demonstration
- ensured that the demonstration was accurate and realistic
- identified which learning outcomes were achieved
- ensured a safe environment for the demonstration and allowed all learners to see the demonstration clearly

In preparing the records you should consider:

- which types of learning are best achieved and supported through demonstrations
- how to choose between instruction and demonstration as learning methods
- how to identify individual learning needs
- which factors are likely to prevent learning and how to overcome them
- how to choose and prepare appropriate materials, including technology based materials.
- which types of learning are best achieved through instruction
- how to make sure everybody acts in line with health, safety and environmental protection legislation and best practice
- how to analyse developments in learning and new ways of delivery, including technology based learning

It is also expected that evidence from your observations **will show** how you:

- structured the demonstration so that the learner got the most out of it
- encouraged learners to ask questions and get explanations at appropriate stages in the demonstration
- gave learners the opportunities to practice the skill being demonstrated
- gave learners positive feedback
- reinforced learning by repeating demonstration
- responded to the needs of learners during the demonstration
- reduced distractions and disruptions as much as possible
- matched instruction to the needs of learners
- ensured that the manner, level and speed of the instruction encourages learners to take part
- regularly check that learners understand and adapt instruction as appropriate
- gave learners positive feedback on the learning experience and the outcome achieved
- identified anything that prevented learning and reviewed this with the learner

Learning outcomes and assessment criteria

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

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
		1.9	reduce distractions and disruptions as much as possible				
2	Be able to instruct learners	2.1	implement instruction which is matched to the needs of learners				
		2.2	use identified learning outcomes which can be achieved through instruction				
		2.3	perform instruction, ensuring that the manner, level and speed of the instruction encourages learners to take part				
		2.4	perform instruction whilst regularly checking that the learners understand and adapt instruction as appropriate				
		2.5	give learners positive feedback on the learning experience and the outcomes achieved				
		2.6	carry out a review with the learners to identify anything that prevented learning and adapt instruction as appropriate				

Learner name: _____
Learner signature: _____
Assessor signature: _____
Internal verifier signature: _____
(if sampled)

Date: _____
Date: _____
Date: _____
Date: _____

Unit 42: Competency in Self Management And Administration In A Vehicle Sales Environment

Unit reference number: T/502/6470

QCF level: 3

Credit value: 3

Guided learning hours: 15

Unit Summary

This unit will help the learner show their competence in time management, meeting sales targets, achieving objectives and using information technology to facilitate own role.

Assessment requirements/evidence requirements:

This unit must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*) and adhere to the IMI Competency Unit Assessment Requirements as detailed below:

You must:

- 1 produce evidence to show you achieve **all** of the Learning Outcomes to the standard shown in the assessment criteria on more than one occasion
- 2 produce performance evidence resulting from work you have carried out in a real sales environment or as defined within the IMI VCQ Assessment Strategy as managed and organised by an approved centre when naturally occurring performance evidence does not occur at frequent intervals in your normal workplace or when safety is at risk
- 3 be observed by an assessor as defined in the IMI VCQ Assessment Strategy on at least one occasion
- 4 produce evidence of using the relevant operating systems to perform the following on **at least 3 separate** occasions:
 - completing contract and order forms
 - completing dealership logs
 - accessing the internet and appropriate intranet applications
 - performing basic internet searches
 - implementing effective time management

5 be observed using the relevant operating systems to perform the following on **at least 2 separate** occasions:

- completing contract and order forms
- completing dealership logs
- accessing the internet and appropriate intranet applications
- performing basic internet searches
- implementing effective time management

Evidence from simulated activities is **not** acceptable for this unit.

Learning outcomes and assessment criteria

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

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 43: Competency in Appraising Vehicles For Part Exchange

Unit reference number: J/502/6487

QCF level: 3

Credit value: 3

Guided learning hours: 15

Unit Summary

This unit will help the learner show their competence in appraising the condition of vehicles and verifying vehicle identity, ownership and history to confirm that there are no vehicle ownership problems and to enable a valuation to be placed on them.

Assessment requirements/evidence requirements:

This unit must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*) and adhere to the IMI Competency Unit Assessment Requirements as detailed below:

You must:

- 1 produce evidence to show you achieve **all** of the Learning Outcomes to the standard shown in the assessment criteria on more than one occasion
- 2 produce performance evidence resulting from work you have carried out in a real sales environment or as defined within the IMI VCQ Assessment Strategy as managed and organised by an approved centre when naturally occurring performance evidence does not occur at frequent intervals in your normal workplace or when safety is at risk.
- 3 be observed by an assessor as defined in the IMI VCQ Assessment Strategy on at least one occasion.
- 4 produce evidence of appraising the condition of vehicles and verifying identity, ownership and history to enable a valuation **on at least 3 separate** occasions. The evidence must include details of the following:
 - conducting and documenting accurate and dynamic vehicle appraisals
 - verifying vehicle identity
 - confirming ownership and history
 - interacting effectively with the customer during the appraisal
 - managing customer expectations

- presenting the appraisal to the manager
 - presenting the price offer to the customer
- 5 be observed appraising the condition of vehicles, verifying identity, ownership and history to enable a valuation and presenting a price offer **on at least 2 separate** occasions

Evidence from simulated activities is **not** acceptable for this unit.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to appraise vehicles for part exchange	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			
2	Be able to present vehicle appraisals for part exchange with the customer	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			

Learner name: _____
Learner signature: _____
Assessor signature: _____
Internal verifier signature: _____
(if sampled)

Date: _____
Date: _____
Date: _____
Date: _____

Unit 44: Competency in Valuing Vehicles For Part Exchange

Unit reference number: L/502/6491

QCF level: 3

Credit value: 3

Guided learning hours: 15

Unit Summary

This unit will help the learner demonstrate their competence in reviewing the information presented by the appraisal and make judgments regarding; recondition costs, current demand and value of the part exchange, and the impact on retained profit from the related sales.

Assessment requirements/evidence requirements:

This unit must be assessed in accordance with the IMI Assessment Strategy (*Annexe C*) and adhere to the IMI Competency Unit Assessment Requirements as detailed below:

You must:

- 1 produce evidence to show you achieve **all** of the Learning Outcomes to the standard shown in the assessment criteria on more than one occasion
- 2 produce performance evidence resulting from work you have carried out in a real sales environment or as defined within the IMI VCQ Assessment Strategy as managed and organised by an approved centre when naturally occurring performance evidence does not occur at frequent intervals in your normal workplace or when safety is at risk
- 3 be observed by an assessor as defined in the IMI VCQ Assessment Strategy on at least one occasion
- 4 produce evidence of valuing vehicles for part exchange on **at least 3** occasions. The evidence must include details of the following:
 - information sources used to estimate current market value
 - appraisal information that influenced the valuation
 - reconditioning estimates
 - factors that influenced the balance between profitability and sales volume
 - customer's response to the price offer

5 be observed valuing vehicles for part exchange on **at least 2** occasions

Evidence from simulated activities is **not** acceptable for this unit.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to value vehicles for part exchange	1.1	interpret the latest dealer approved price guides correctly			
		1.2	estimate part exchange recondition costs accurately			
		1.3	calculate profit margins from related sales			
		1.4	present the valuation effectively			
		1.5	highlight positive values of competitors' products			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Further information

Our customer service numbers are:

BTEC and NVQ	0844 576 0026
GCSE	0844 576 0027
GCE	0844 576 0025
The Diploma	0844 576 0028
DiDA and other qualifications	0844 576 0031

Calls may be recorded for training purposes.

Useful publications

Related information and publications include:

- *Centre Handbook for Edexcel QCF NVQs and Competence-based Qualifications* published annually
- functional skills publications – specifications, tutor support materials and question papers
- *Regulatory Arrangements for the Qualification and Credit Framework* (published by Ofqual, August 2008)
- the current Edexcel publications catalogue and update catalogue.

Edexcel publications concerning the Quality Assurance System and the internal and standards verification of vocationally related programmes can be found on the Edexcel website.

NB: Some of our publications are priced. There is also a charge for postage and packing. Please check the cost when you order.

How to obtain National Occupational Standards

To obtain the National Occupational Standards go to www.ukstandards.org.uk.

Professional development and training

Edexcel supports UK and international customers with training related to NVQ and BTEC qualifications. This support is available through a choice of training options offered in our published training directory or through customised training at your centre.

The support we offer focuses on a range of issues including:

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing student-centred learning and teaching approaches
- building functional skills into your programme
- building effective and efficient quality assurance systems.

The national programme of training we offer can be viewed on our website (www.edexcel.com/training). You can request customised training through the website or by contacting one of our advisers in the Training from Edexcel team via Customer Services to discuss your training needs.

The training we provide:

- is active
- is designed to be supportive and thought provoking
- builds on best practice
- may be suitable for those seeking evidence for their continuing professional development.

Annexe A: Progression pathways

The Edexcel qualification framework for the Automotive sector

Level	BTEC vocationally-related qualifications	BTEC specialist qualification/ professional	NVQ/ competence
5	BTEC Level 5 HND Diploma in Vehicle Operations Management (QCF)		
4	BTEC Level 4 HNC Diploma in Vehicle Operations Management (QCF)		

Level	BTEC vocationally-related qualifications	BTEC specialist qualification/ professional	NVQ/ competence
3		<p>Edexcel BTEC Level 3 Diploma in Light Vehicle Maintenance and Repair Principles (QCF)</p> <p>Edexcel BTEC Level 3 Diploma in Heavy Vehicle Maintenance and Repair Principles (QCF)</p> <p>Edexcel BTEC Level 3 Diploma in Auto Electrical and Mobile Electrical Principles (QCF)</p> <p>Edexcel BTEC Level 3 Diploma in Vehicle Fitting Supervisory Principles (QCF)</p> <p>Edexcel BTEC Level 3 Diploma in Vehicle Accident Repair Body Principles (QCF)</p> <p>Edexcel BTEC Level 3 Diploma in Vehicle Accident Repair Paint Principles (QCF)</p> <p>Edexcel BTEC Level 3 Diploma in Lift Truck Maintenance and Repair Principles (QCF)</p> <p>Edexcel BTEC Level 3 Diploma in Motorcycle Maintenance and Repair Principles (QCF)</p> <p>Edexcel BTEC Level 3 Diploma in Vehicle Sales Principles (QCF)</p> <p>Edexcel BTEC Level 3 Diploma in Body Building Principles (QCF)</p>	<p>Edexcel Level 3 Diploma in Light Vehicle Maintenance and Repair Competence (QCF)</p> <p>Edexcel Level 3 Diploma in Heavy Vehicle Maintenance and Repair Competence(QCF)</p> <p>Edexcel Level 3 Diploma in Auto Electrical and Mobile Electrical Competence (QCF)</p> <p>Edexcel Level 3 Diploma in Vehicle Fitting Supervisory Competence (QCF)</p> <p>Edexcel Level 3 Diploma in Vehicle Accident Repair Body Competence (QCF)</p> <p>Edexcel Level 3 Diploma in Vehicle Accident Repair Paint Competence (QCF)</p> <p>Edexcel Level 3 Diploma in Lift Truck Maintenance and Repair Competence (QCF)</p> <p>Edexcel Level 3 Diploma in Motorcycle Maintenance and Repair Competence (QCF)</p> <p>Edexcel Level 3 Diploma in Vehicle Sales Competence (QCF)</p> <p>Edexcel Level 3 Diploma in Body Building Competence (QCF)</p>

Level	BTEC vocationally-related qualifications	BTEC specialist qualification/ professional	NVQ/ competence
2		<p>Edexcel BTEC Level 2 Diploma in Light Vehicle Maintenance and Repair Principles (QCF)</p> <p>Edexcel BTEC Level 2 Diploma in Heavy Vehicle Maintenance and Repair Principles (QCF)</p> <p>Edexcel BTEC Level 2 Diploma in Auto Electrical and Mobile Electrical Principles (QCF)</p> <p>Edexcel BTEC Level 2 Diploma in Vehicle Fitting Principles (QCF)</p> <p>Edexcel BTEC Level 2 Diploma in Vehicle Accident Repair Paint Principles (QCF)</p> <p>Edexcel BTEC Level 2 Diploma in Vehicle Accident Repair Body Principles (QCF)</p> <p>Level 2 Diploma in Lift Truck Maintenance & Repair Principles (QCF)</p> <p>Edexcel BTEC Level 2 Diploma in Motorcycle Maintenance and Repair Principles (QCF)</p> <p>Edexcel BTEC Level 2 Diploma in Vehicle Sales Principles (QCF)</p> <p>Edexcel BTEC Level 2 Diploma in Vehicle Accident Repair Mechanical, Electrical and Trim (MET) Principles (QCF)</p> <p>Edexcel BTEC Level 2 Diploma in Body Building Principles (QCF)</p> <p>Edexcel BTEC Level 2 Diploma in Heavy Vehicle Trailer Maintenance & Repair Principles (QCF)</p>	<p>Edexcel Level 2 Diploma in Light Vehicle Maintenance and Repair Competence(QCF)</p> <p>Edexcel Level 2 Diploma in Heavy Vehicle Maintenance and Repair Competence (QCF)</p> <p>Edexcel Level 2 Diploma in Auto Electrical and Mobile Electrical Competence (QCF)</p> <p>Edexcel Level 2 Diploma in Vehicle Fitting Competence (QCF)</p> <p>Edexcel Level 2 Diploma in Vehicle Accident Repair Paint Competence (QCF)</p> <p>Edexcel Level 2 Diploma in Vehicle Accident Repair Body Competence (QCF)</p> <p>Edexcel Level 2 Diploma in Lift Truck Maintenance & Repair Competence (QCF)</p> <p>Edexcel Level 2 Diploma in Motorcycle Maintenance and Repair Competence (QCF)</p> <p>Edexcel Level 2 Diploma in Vehicle Sales Competence (QCF)</p> <p>Edexcel Level 2 Diploma in Vehicle Accident Repair Mechanical, Electrical and Trim (MET) Competence (QCF)</p> <p>Edexcel Level 2 Diploma in Body Building Competence (QCF)</p> <p>Edexcel Level 2 Diploma in Heavy Vehicle Trailer Maintenance & Repair Competence (QCF)</p>

Level	BTEC vocationally-related qualifications	BTEC specialist qualification/ professional	NVQ/competence
1			
Entry			

Annexe B: Centre certification and registration

Edexcel Standards Verifiers will provide support, advice and guidance to centres to achieve Direct Claims Status (DCS). Edexcel will maintain the integrity of Edexcel QCF NVQs through ensuring that the awarding of these qualifications is secure. Where there are quality issues identified in the delivery of programmes, Edexcel will exercise the right to:

- direct centres to take action
- limit or suspend certification
- suspend registration.

The approach of Edexcel in such circumstances is to work with the centre to overcome the problems identified. If additional training is required, Edexcel will aim to secure the appropriate expertise to provide this.

What are the access arrangements and special considerations for the qualifications in this specification?

Centres are required to recruit learners to Edexcel qualifications with integrity.

Appropriate steps should be taken to assess each applicant's potential and a professional judgement should be made about their ability to successfully complete the programme of study and achieve the qualification. This assessment will need to take account of the support available to the learner within the centre during their programme of study and any specific support that might be necessary to allow the learner to access the assessment for the qualification. Centres should consult Edexcel's policy on learners with particular requirements.

Edexcel's policy on access arrangements and special considerations for Edexcel qualifications aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by the Equality Act 2010) without compromising the assessment of skills, knowledge, understanding or competence. Please refer to Access Arrangements and Special Considerations for BTEC and Edexcel NVQ Qualifications for further details. www.edexcel.com.

Please refer to Edexcel's Equality Policy for further details, www.edexcel.co/policies/pages/home.aspx



THE INSTITUTE OF THE MOTOR INDUSTRY

Assessment Strategy For

Vocational Competency Qualifications (VCQs)

Introduction

This document sets out the recommendations of IMI for the assessment of VCQ qualifications based on IMI developed National Occupational Standards. The Strategy is designed to operate across all four nations, bringing parity to all learners. Awarding Organisations wishing to operate VCQs in the retail motor sector must take full part in the IMI Awarding Body Forum.

This is the overarching strategy for the assessment and verification of competency based qualifications (VCQs) that are based upon National Occupational Standards from the IMI and will come into force on the 30th June 2010, it will apply to any new competence based units and qualifications.

Assessment

VCQs are a type of qualification which reflects the unique needs of the workplace. They should be assessed in a holistic way by technically competent assessors. The primary method of assessment should always be direct workplace observation. Some use of simulation is allowed (please see section on Workplace Assessment/Simulation)

Additionally Awarding Organisations are encouraged to make use of naturally occurring quality assurance and monitoring systems where they exist in workplace assessment environments.

The Institute of the Motor Industry require Awarding Organisations delivering VCQs to participate in an Awarding Body Forum. This will, as a minimum, involve an annual meeting to discuss issues of assessment and verification.

VCQ must attest to competence in an occupational role (where competence is defined as the ability to apply knowledge, understanding, practical and thinking skills to be effective in work: these skills will usually include problem-solving, being flexible to meet changing demands and the ability to work with or alongside others).

Any assessment must attest to competence in an occupational role (where competence is defined as the ability to apply knowledge, understanding, practical and thinking skills to be effective in work: these skills will usually include problem-solving, being flexible to meet changing demands and the ability to work with or alongside others)

Evidence Requirements for VCQ

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

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

Rules of combination

Rules of combination must be that determined by the IMI SSC.

Evidence other than from direct workplace observation

Workplace Assessment/Simulation

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

These assessment situations can only be set up after:

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

We suggest that centres seek written confirmation before proceeding with assessment. The need for simulation may result from consideration of:

- Safety
- Legislation
- Regulation
- Contingency
- Cost
- Frequency

In addition, IMI recognises that candidates using these credit based units in the context of a Level 1 qualification may be in a learning environment and not in a workplace. In these situations, centres may set up or devise assessment situations as required, with prior written agreement of the external verifier.

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

IMI re-iterates that its credit based units have been designed to be capable of assessment in the normal workplace and that subject to the arrangements for simulation described above this should be the case.

Simulation will be monitored by the Awarding Organisations and where it is found to be the 'norm' rather than the exception suitable action will need to be taken.

Realistic Work Environment

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

Expert Witnesses

The use of **witness testimony** and **expert witness testimony** are appropriate methods for assessors to collect supplementary evidence on candidates' performance.

Witness testimonies can be obtained from people that are occupationally competent and who may be familiar with the national occupational standards, such as the candidate's line manager.

The assessor must judge the validity of the witness testimony and these may vary depending on the source. Witness testimonies can only support the assessment process and may remove or reduce the need to collect supplementary evidence, however, the awarding organisation's/body's quality assurance requirements must be met. Additionally the person or persons providing the Witness Testimony evidence must make themselves available to the External Verifier for confirmation of evidence validity if required.

Remote Observation

The use of direct observation from a remote location is permitted as long as the centre seeks and receives the approval of their awarding organisation prior to its use and the awarding organisation discusses and agree this with the IMI prior to its use.

Assessor Requirements

The assessment of VCQs must be carried out by approved industry competent assessors.

Assessors will be responsible for, and accountable for, the validity, reliability and authenticity of evidence.

The primary responsibility of the assessor is to ensure that candidates satisfy the requirements of the national occupational standards. It is important that an assessor can recognise occupational competence as specified by the national occupational standards. Assessors therefore need to have a thorough understanding of assessment and quality assurance practices, as well as have in depth technical competence related to the qualifications for which they are assessing candidates.

It will be the responsibility of the approved centre to select and appoint assessors.

It will be the responsibility of the Awarding Organisation to approve centre selected assessors.

To be an approved assessor the person must:

- have sufficient and relevant technical/occupational competence in the Unit, at or above the level of the Unit being assessed
- have in depth knowledge of the Qualification or credit based unit evidence requirements.
- hold or be working towards a relevant assessors award as specified by the Institute of the Motor Industry. This will include, but not be limited to the Assessor qualifications, Level 3 Award in Assessing Competence in the Work Environment, Level 3 Award in Assessing Vocationally Related Achievement, Level 3 Certificate in Assessing Vocational Achievement. (and by implication legacy Assessor units A1, A2 and D32/33 unit) but may be an appropriate equivalent as defined by the IMI, SSC)..
- assessors working towards a relevant assessor qualification must achieve their qualification within 12 months.
- demonstrate knowledge and understanding of the competencies that a learner is required to demonstrate for the qualification that they are undertaking
- provide evidence of completing 5 days working/job shadowing in industry within their professional area in a 24 month period.
- provide evidence of 30 hours of technical/qualification related CPD within a 12 month period.(This is in additional to working/job shadowing).
- be approved by the Awarding Organisation to carry out assessments for the VCQs they are competent in.

Approval of assessors can be **removed**.

Assessors **cannot** assess the VCQ if they are not currently approved by, or have had their approval removed by, the Awarding Organisation.

Internal Verifier Requirements

VCQs must be underpinned by quality assurance appropriate to workplace based delivery. At a minimum this should reflect the principles outlined below.

Internal Verification of VCQ shall be the responsibility of approved industry competent internal verifiers.

The primary responsibility of the internal verifier is to assure the quality and consistency of assessments by the assessors for whom they are responsible. Internal verifiers therefore need to have a thorough understanding of quality assurance and assessment practices, as well as technical competence related to the qualifications that they are internally verifying.

Internal verifiers will be responsible for, and accountable for consistency, quality and reliability of evidence and assessors.

It will be the responsibility of the approved centre to select and appoint internal verifiers .

It will be the responsibility of the Awarding Organisation to approve centre selected internal verifiers.

To be an approved internal verifier the person must:

- have in-depth knowledge of the occupational standards and credit based unit evidence requirements.
- be occupationally aware of the relevant industry sector being internally verified
- hold or be working towards a relevant verifier award as specified by the Institute of the Motor Industry. This will include, but not be limited to the Quality Assurance qualifications Level 4 Award in the Internal Quality Assurance of Assessment Processes and Practice, Level 4 Certificate in Leading the Internal Quality Assurance of Assessment Processes and Practice, (and by implication legacy Internal Verifier unit V1 D34 unit) but may be an appropriate equivalent as defined by the SSC.
- verifiers working towards a relevant qualification must achieve their qualification within 12 months.
- provide evidence of CPD totalling not less than 30 hours from within their professional area within a 12 month period.
- be approved by the Awarding Organisation to carry out internal verification for relevant VCQ(s)
- demonstrate knowledge and understanding of the quality assurance processes required by the centre and the awarding organisation

Approval of internal verifiers can be **removed**.

Internal Verifiers **cannot** verify the VCQ if they are not approved by, or have had their approval removed by the Awarding Organisation.

Multi Discipline Assessors and Internal Verifiers

Assessors and Internal Verifiers who work across multi disciplines must agree to a programme of CPD that will, over an agreed period of time, show their competence across all areas that they assess.

The programme of CPD and the timescale must be agreed for each multi discipline assessor by their External Verifier and may be subject to scrutiny by the IMI.

It is the responsibility of the centre to keep a record of these agreements.

External Verifier Requirements

Awarding Organisations will be responsible for selection and appointment of external verifiers.

To be an approved external verifier or moderator the person must:

- hold or be working towards an appropriate qualification as specified by the Institute of the Motor Industry, confirming their competence to externally verify VCQ assessments This will include, but not be limited to the Level 4 Award in Externally Assuring the Quality of Assessment Processes and Practice, Level 4 Certificate in Leading the External Quality Assurance of Assessment Processes and Practice, (and by implication legacy External Verifier unit V2 and D35 units) but may be an appropriate equivalent as defined by the SSC.
- external verifiers working towards a relevant qualification must achieve their qualification within 12 months.
- have experience of working within the Automotive Industry gained through current or prior employment in order to have an up to date technical awareness relevant to the VCQ they are seeking to externally verify
- have a sound and in-depth knowledge of the VCQ requirements
- demonstrate their commitment to maintaining their industry knowledge by providing evidence of CPD totalling not less than 30 hours from within their professional area within a 12 month period.

External Quality Control

It is expected that the awarding of qualifications will be underpinned by quality assurance appropriate to workplace based delivery. At a minimum this should reflect the principles outlined below.

External quality control of assessment is the responsibility of the Awarding Organisations, they must ensure that common approaches are employed and that consistent, high standards are achieved.

External verifiers will be required to implement rigorous risk management strategies consistently across all centres for which they are responsible.

IMI recommends that Awarding Organisations adopt a risk rating and risk management system for centres offering IMI VCQs.

IMI recommend that such systems identify:

- Commercial Risk – is there potential for commercial pressures to ensure that candidates achieve qualifications within unduly short time frames?
- Assessment/Verification risk – are factors apparent in the relationship between candidates, assessors and verifiers that might prejudice a fair and consistent assessment process?

Where risks or potential risks are identified, IMI expects that the Awarding Organisation, via the external verifier takes appropriate action to ensure that the credibility of the assessment process is not prejudiced.

Awarding Organisations will be responsible for and accountable for the quality of VCQs delivered and assessed by their approved assessment centres.

