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Sales Consultant (Auto Finance)

CURRICULUM / SYLLABUS

This program is aimed at training candidates for the job of a “Sales Consultant (Auto Finance)”, in the “Automotive” Sector/Industry and aims at building the following key competencies amongst the learner

Program Name	Showroom Hostess /Host		
Qualification Pack Code	ASC/Q2001		
Version No.	1.0	Version Update Date	
Pre-requisites Training to	Graduate degree or diploma in any discipline		
Training Outcomes	<p>After completing this programme, participants will be able to:</p> <ul style="list-style-type: none"> • Welcome the customer at showroom: Greeting the customer, offering refreshments, helping in making the customer feel comfortable etc. • Communicate effectively: Verbal and Non-Verbal communication, maintaining proper body language, understand gestures and signs etc. • Coordinate with the team: Team work, attending meetings, connecting customers to appropriate sales consultant at showroom etc. • Assist the customer and Resolve queries: Filling up enquiry forms related to finance and insurance of vehicles, service requests, clarification of doubts related to finance. • Follow Safety Measure at workplace: Understand processes, emergency and evacuation procedures, general safety measures, etc. • Plan and Organise work: Time management, Time stealers, Prioritizing, Pickle jar theory, etc. 		

This course encompasses 6 out of 6 National Occupational Standards (NOS) of “Sales Consultant (Auto Finance)” Qualification Pack issued by “Automotive”.

Sr. No.	Module	Key Learning Outcomes	Equipment Required
1	Introduction Theory Duration (hh:mm) 10:00	At the end of the module the learner should be able to <ul style="list-style-type: none"> - Understand General Discipline in the class room (Do's & Don'ts) - Introduction to automobile industry - Purpose and types of automobiles - History and invention of automobiles - Indian automobile industry 	Laptop, white board, marker, projector
2	Plan and analyse sales target for financing Theory Duration (hh:mm) 70:00 Practical Duration (hh:mm) 45:00 Corresponding NOS Code ASC/ N 2001	At the end of the module the learner should be able to <ul style="list-style-type: none"> - Analyse the sales target for OEM product & decide accordingly what financial products to offer. - Generate customers needs from vehicle dealers, brokers agents for financial products. - Explain all the terms and conditions for loans or financial products to potential customer. - Review customers credit applications & reports. - Prepare monthly sales reports & update companies system. - Maintain current knowledge base with regard to financial instruments. 	Laptop, white board, marker, projector, enquiry forms, brochures
3	Manage customer relationship Theory Duration (hh:mm) 25:00 Practical Duration (hh:mm) 15:00 Corresponding NOS Code ASC/ N 0004	<ul style="list-style-type: none"> - Check records of all pending stuck financing cases at various dealerships - Analyse key factors for pendency Stuck up cases & clear them for sending to superiors/bank officials. - present various financing options clearly to customers - Identify and mention correct credit history and financial status of the customer in the survey report schedule for quick loan approvals. 	
4	Manage financing operations Theory Duration (hh:mm) 70:00 Practical Duration (hh:mm) 45:00	<ul style="list-style-type: none"> - Understand complete customer requirements and deliver accordingly to customer satisfaction. - Resolve complete customer queries & complaints - Document feedbacks and reviews from the customers & implement within organization. 	

Sr. No.	Module	Key Learning Outcomes	Equipment Required
	Corresponding NOS Code ASC/ N 2002	<ul style="list-style-type: none"> - Maintain healthy & professional relationship with key accounts holders 	
5	Plan and organize work to meet expected outcomes Theory Duration (hh:mm) 25:00 Practical Duration (hh:mm) 15:00 Corresponding NOS Code ASC/N001	At the end of the module the learner should be able to <ul style="list-style-type: none"> - Perform the job within given time as per quality standards/work schedule - Identify and manage resource and use it efficiently and effectively - Perform in accordance with the organisational policies and procedures - Manage his/her time effectively at work - Apply best practices to keep workplace clean - Acquire knowledge and understanding required for planning & organising. 	Whiteboard/ Markers, Computer, Projector, screen typical 5 S literature
6	Work effectively in a team Theory Duration (hh:mm) 25:00 Practical Duration (hh:mm) 15:00 Corresponding NOS Code ASC/N 0002	At the end of the module the learner should be able to <ul style="list-style-type: none"> - Interact & communicate effectively with colleagues including members in the own group as well as other groups - Use all forms of verbal and non-verbal methods to communicate clearly and effectively with colleagues, supervisors, customers and other stakeholders - Judge customers' body language and use an appropriate approach to deal with them - Apply the best practices for grooming to look presentable and make good impression on customers - Use proper personal etiquettes at workplace - Acquire knowledge and understanding required for team working 	Whiteboard/ Markers, Computer, Projector, screen, case studies
7	Maintain a Healthy, Safe and Secure working environment Theory Duration	At the end of the module the learner should be able to <ul style="list-style-type: none"> - Perform as per organisation policies & procedures to maintain a safe, secure working 	Whiteboard/ Markers, Computer, Projector, Fire extinguisher, First aid, , BS IV-VI and disposal of hazardous

Sr. No.	Module	Key Learning Outcomes	Equipment Required
	(hh:mm) 25:00 Practical Duration (hh:mm) 15:00 Corresponding NOS Code ASC/N0003	environment - Maintain safe & secure workplace - Use best practice to remove potential hazards at workplace and prevent accidents - Apply appropriate strategies to deal with emergencies and accidents at workplace - Apply relevant norms to the vehicles and spare parts to ensure no damage to the environment	items and parts to provide an overview
	Total Duration Theory Duration 250:00 Practical Duration 150:00	Unique Equipment Required: Whiteboard/ Markers, Computer, Projector, Fire extinguisher, First aid, , BS IV-VI and disposal of hazardous items and parts to provide an overview, case studies for different modules.	

Grand Total Course Duration: **400 Hours, 0 Minutes**

(This syllabus/ curriculum has been approved by Automotive Skills Development Council)

Trainer Prerequisites for Job role: “Sales Consultant (Auto Finance)” mapped to Qualification Pack: “ASC/Q2001, v1.0”

Sr. No.	Area	Details
1	Description	To deliver accredited training sales , mapping to the curriculum detailed above, in accordance with the Qualification Pack “ASC/Q2001”.
2	Personal Attributes	<ul style="list-style-type: none"> • Aptitude for conducting training, and pre/ post work to Ensure competent, employable candidates at the end of the training. • Strong communication skills, interpersonal skills, ability to work as part of a team; a passion for quality and for developing others; well-organised and focused. • Eager to learn and keep oneself abreast of the latest developments and newer technologies used in the various systems of the vehicle and its aggregates is highly desirable. • Should be able to demonstrate the usage of workshop equipment, instruments, special instruments and tools. • Should have sharp diagnostic abilities for identifying reasons of problems in vehicles and troubleshoot. • Should be hands on with servicing of vehicles to provide Experiential training.
3	Minimum Educational Qualifications	Graduate degree or diploma in any discipline Post graduate degree or diploma in Business Administration
4a	Domain Certification	Certified for Job Role: “Sales” mapped to QP:ASC/Q2001 . Minimum qualifying score-80 % , as per ASDC guidelines.
4b	Platform Certification	Recommended that the Trainer is certified for the Job Role: “Trainer”, mapped to the Qualification Pack: “MEP/ Q0102”. Minimum accepted score as per MEPSC guidelines is 80%.
5	Experience	<ul style="list-style-type: none"> ▪ Minimum 6 years of experience in Automobile Sales for graduates ▪ Minimum 4 years of experience in Automobile Sales for MBA ▪ Must have relevant experience in any automobile dealership

Annexure: Assessment Criteria

Assessment Criteria	
Job Role	Sales Consultant (Auto Finance)
Qualification Pack	ASC/Q2001, v1.0
Sector Skill Council	Automotive

Sr. No.	Guidelines for Assessment
1	Assessment to be conducted by ASDC as per competency output defined in the NOS/QP and the assessment criteria provided in the NOS/QP
2	Assessment to be carried out by a third party Assessment Body duly affiliated to the SSC.
3	ASDC assessments will be comprehensive and cover all aspects of acquired knowledge, Practical skills and also basic ability to communicate. Accordingly, evaluation process would include: <ul style="list-style-type: none"> i. Theory/Knowledge test ii. Practical demonstration test iii. Face to Face Viva-Voce
4	Theory/Knowledge assessment will be carried out on line through a link provided for each assessment that generates a random paper from a bank of questions available at the back end. <ul style="list-style-type: none"> - Exception to an online test in favour of Paper Test would be subject to non-availability of requisite broadband and/or hardware. - On line test would be conducted in the presence of an ASDC assessor till web enabled proctoring is deployed.
5	ASDC assessor would be conducting Practical and Viva as per the criteria provided in the NOS/QP.
6	Cut off criteria for certification (Marks obtained in %): 80 %

NOS Title/ NOS Elements	NOS & Performance Criterion Description		Marks allocation	
ASC/N 2001	Plan and analyse sales target for financing	Theory	Viva	Practical
Analyse & drive sales for auto finance products	<p>To be competent, the user/individual on the job must be able to:</p> <p>PC1. analyse the assigned sales target for OEM products and decide accordingly what various financial products and schemes (e.g. different categories of loans) will be offered to the potential customers</p> <p>PC2. assist in field investigation and pre – sanction survey of the potential customers for their needs regarding financing options for OEM products</p> <p>PC3. generate customer leads from vehicle dealers, brokers, direct selling executives and direct sales agents in the assigned area</p> <p>PC4. convert these leads into sales by convincing potential customers to take finance or loans from the company</p> <p>PC5. collaborate with the sales team and general manager in order to maintain leading-edge knowledge and directly consults with our customers</p> <p>PC6. explain clearly all terms and conditions for the loan or financial product to the potential customers</p> <p>PC7. document all the findings of field investigation in a survey report</p> <p>PC8. mention credit history and financial status of the customer in the survey report</p> <p>PC9. review customer credit application and credit report</p> <p>PC10. present and articulate a menu of credit service options to the customer in order to optimize the transaction, and to also offer product protection choices in support of the purchase</p> <p>PC11. prepare monthly sales reports and update the company systems accordingly</p> <p>PC12. maintain an outstanding customer service delivery level within strict legal compliance and with unwavering ethics</p> <p>PC13. build customer rapport and effecting profitable</p>		18	50

	closure for the enterprise			
	<p>PC14. provide a true value-add to the closing support function of the sales life cycle</p> <p>PC15. maintain current knowledge base with regard to all financial instruments and value-add products/services</p> <p>PC16. works closely with sales management and other local reps in developing sales strategies and establishing best practices and to update them on dealer- specific extended service programs</p> <p>PC17. provide detailed Market Summary reports that give insight to market / industry trends, competitor programs, and product opportunities and challenges</p> <p>PC18. assist in training sales staff to consistently convey to their customers the benefits of dealership financing services</p>		8	24
	subtotal		26	74
ASC/N 2002	Manage financing operations	Theory	Viva	Practical
Check records for pending / struck cases to ensure early resolution of the cases	<p>To be competent, the user/individual on the job must be able to:</p> <p>PC1. collect all the relevant documents as required by bank/NBFC/financial services provider for processing of the loan, including properly filled loan application form and sort them</p> <p>PC2. handover the documents folder to the loan processing agents/executives of the company/bank/NBFC/financial services provider</p> <p>PC3. present various financing options in a clear and concise fashion to the customers</p> <p>PC4. prepare loan documents and its delivery documentation</p> <p>PC5. prepare other state and federal documents as appropriate</p> <p>PC6. collect and check for the final delivery order , once the loan is approved and handover to the finance section of the dealership for final bill processing of the vehicle</p> <p>PC7. examine the records for all pending or stuck financing cases at the dealership</p> <p>PC8. analyse the key factors for pendency of the financing cases</p> <p>PC9. enumerate all findings for pendency of the loan approval to the customer</p>		14	30

	PC10. clear all prerequisites for financing case to the customers PC11. compile all documents, including duly filled loan application, required for the clearance of the financing case			
Analyse & act on pendency	PC12. forward all the stuck cases to superiors for quick approvals PC13. identify and mention correct credit history and financial status of the customer in the survey report schedule for quick loan approvals PC14. identify all kinds of non-availability and shortages of documents required for financing approvals and state them to the customers PC15. maintain transparency in all the documents submitted for financing approvals to get faster delivery orders		7	24
			21	54
ASC/N 0004	Manage customer relationship	Theory	Viva	Practical
Manage the total customer satisfaction with enriching & pleasant customer experience	To be competent, the user/individual on the job must be able to: PC1. analyse and comprehend all customer requirements and needs PC2. document complete customer requisites and assess them PC3. deliver and assist in delivering as per the noted requirements PC4. understand complete customer queries and complaints PC5. document all customer queries in the prescribed format of the organisation PC6. ensure least turnaround time for any customer query handling/redressal especially issues related to warranty claims and other performance related issues PC7. maximise customer satisfaction through pleasant and excellent customer experience within the organisations framework PC8. document feedbacks and reviews from the customers & implement within the framework of the organization PC9. maintain a healthy & professional relationship with the customers especially key accounts and influencers in the market		30	70
	Subtotal		30	70
ASC/N 0001	Plan and organise work to meet expected outcomes	Theory	Viva	Practical

Work requirements including various activities within the given time and set quality standards	<p>To be competent, the user/individual on the job must be able to:</p> <p>PC1. keep immediate work area clean and tidy</p> <p>PC2. treat confidential information as per the organisation's guidelines</p> <p>PC3. work in line with organisation's policies and procedures</p> <p>PC4. work within the limits of job role</p> <p>PC5. obtain guidance from appropriate people, where necessary</p> <p>PC6. ensure work meets the agreed requirements</p>		14	40
Appropriate use of resources	<p>PC7. establish and agree on work requirements with appropriate people</p> <p>PC8. manage time, materials and cost effectively</p> <p>PC9. use resources in a responsible manner</p>		7	14
	subtotal		21	54
ASC/N 0002	Work effectively in a team	Theory	Viva	Practical
Interact & communicate effectively with colleagues including member in the own group as well as other groups	<p>To be competent, the user/individual on the job must be able to:</p> <p>PC1. maintain clear communication with colleagues (by all means including face-to-face, telephonic as well as written)</p> <p>PC2. work with colleagues to integrate work</p> <p>PC3. pass on information to colleagues in line with organisational requirements both through verbal as well as non-verbal means</p> <p>PC4. work in ways that show respect for colleagues</p> <p>PC5. carry out commitments made to colleagues</p> <p>PC6. let colleagues know in good time if cannot carry out commitments, explaining the reasons</p> <p>PC7. identify problems in working with colleagues and take the initiative to solve these problems</p> <p>PC8. follow the organisation's policies and procedures for working with colleagues</p>		21	54
	subtotal		21	54

ASC/N 0003	Maintain a healthy, safe and secure working environment	Theory	Viva	Practical
Resources needed to maintain a safe, secure working environment	<p>To be competent, the user/individual on the job must be able to:</p> <p>PC1. comply with organisation's current health, safety and security policies and procedures</p> <p>PC2. report any identified breaches in health, safety, and security policies and procedures to the designated person</p> <p>PC3. Coordinate with other resources at the workplace to achieve the healthy, safe and secure environment for all incorporating all government norms esp. for emergency situations like fires, earthquakes etc.</p> <p>PC4. identify and correct any hazards like illness, accidents, fires or any other natural calamity safely and within the limits of individual's authority</p> <p>PC5. report any hazards outside the individual's authority to the relevant person in line with organisational procedures and warn other people who may be affected</p> <p>PC6. follow organisation's emergency procedures for accidents, fires or any other natural calamity</p> <p>PC7. identify and recommend opportunities for improving health, safety, and security to the designated person</p> <p>PC8. complete all health and safety records are updates and procedures well defined</p>		23	52
	subtotal		23	52
	Total	25	142	358