

SELLING FOR THE AUTOMOTIVE INDUSTRY

DEALERSHIP FINANCIAL SERVICES MANAGER CERTIFICATION

Learning Objectives

This is a five day intensive Course, which reviews the fundamental requirements for becoming a successful "**Dealership Financial Services Manager.**" This Course focuses on the essential skills required for this position within a Dealership. Such skills includes presenting consumers with financing, leasing and product options, which are made available to customers when purchasing products from Dealerships selling automotive, marine, recreational and leisure. A specific step-by-step sales process is provided as a way of obtaining accurate customer information, and knowing how to enter and present applicable information in the best format available to facilitate closing and delivering the product. The importance of the legal and ethical responsibilities of the Dealership Financial Services Manager position is well explained. The rules of the governing bodies for Dealerships in British Columbia are examined in detail. A "back to basics" program is included that teaches a valuable method for individuals to reach a high performance level, that will exceed customer service expectations, and meet all Dealership and Manufacturer requirements

Learning Outcome

At the end of the course, the successful student would be able to:

1. Understand the operations of a dealership and the position of Financial Services Manager;
2. Understand consumer personality traits to achieve performance and customer service index;
3. Understand the various Dealership Management Systems/and Lending Portals;
4. Understand lending sources, financing/leasing requirements;
5. Understand qualifying requirements for obtaining and approving customer credit;
6. Demonstrate how to input data including deal information and determine financing/leasing options;
7. Demonstrate professional financing/leasing options and product presentations;
8. Understand the products required to facilitate attaining Dealership and Manufacturer performance targets;
9. Understand inputting information into Dealer Management Systems, and financing/leasing portals;
10. Complete all required documentation for the products, sale, and financing requirements;
11. Understand the different financing and leasing options available in the market place;
12. Demonstrate a professional delivery of all required documentation and products to the customer;
13. Utilize the Dealership Management System for proper customer service follow-up following delivery;
14. Understand managing monthly performance and creating daily reporting system;
15. Establish realistic performance targets and how to achieve;
16. Understand the legal requirements and importance of ethical behaviour;
17. Understand today's customer service index and the importance to the Dealership and Manufacturer;
18. Understand customer follow-up and retention for future sales and continued growth;



DOUGLAS COLLEGE
PETER LEGGE

International Institute for Sales Excellence
www.douglascollege.ca/salesinstitute
salesinstitute@douglascollege.ca TEL: 604-777-6282

