4 Day Financial Services Manager Certification School

Hours: The school runs Monday -Thursday starting promptly at 9:00 a.m. and finishes each day at approximately 4:30 p.m.

Evaluations: Attendees efforts and level of achievement are evaluated throughout the week and conveyed to their dealer or sponsor upon course completion.

Test: There are quizzes at the end of each class session as well as an Ethics & Compliance Certification Exam and video role play session prior to the class's completion.

Participation: This will not be a lecture session. There will be discussions and role play sessions throughout the 4 days.

Course Content

Financial Services Manager 101: Financial Services Manager 101 focuses on the typical duties, responsibilities and standard procedures required to maintain high levels of F&I efficiency.

Legal and Ethical Standards: Legal and Ethical Standards is a course, which overviews the laws and regulations that directly affect a dealership's variable operations. Attendees who participate in the course have a better understanding of the laws that impact their day-to-day activities and are more prepared to act in a legally compliant manner. At the end of the course, attendees must pass a certification exam.

Conversion Techniques: Capitalize on the opportunity by converting cash and OSL customers. Conversion Techniques focuses on essential F&I principles and practices required to succeed in today's "social media" environment. Special emphasis is placed on monitoring and maximizing the opportunities with each type of deal whether done on the internet, over the phone or on-site.

The FS Process: The FS Process focuses on three key areas that make for a streamlined FS menu/option disclosure presentation. Product knowledge, customer knowledge and better knowledge of the deal at hand. Financial Services Managers will learn how confidence and establishing credibility with customers can be the game changer. Special emphasis is placed on group exercises and interactive role-play.

The Menu/Option Disclosure Presentation: This section is designed to give the Financial Services Manager a streamlined approach to the option disclosure/menu presentation. An approach that delivers a more efficient presentation intended to improve customer adherence thereby increasing customer satisfaction, product sales and profits. Special emphasis is placed on group exercises and interactive role-play.

Asking for the Business**:** Addressing Customer Concerns emphasizes the "how" to get customers engaged after the menu/option disclosure presentation. This workshop presents a non-confrontational process that gets more customers saying, "yes I'll take it". Special emphasis is placed on group exercises and interactive role-play.

A Lesson on Leasing: A Lesson on Leasing is designed to expand Financial Services Managers knowledge of automotive leasing and enlighten them to the profit potential often overlooked on lease transactions.

Dealership Financing Fundamentals: This Workshop is designed to give the Financial Services Manager a better understanding of how credit works and provide them with the skills to improve lender relations that result in better callbacks and approvals.