



CUSTOMER SERVICE ADVISOR-GUIDELINES

1. Introduction

ATA is governed by the Institute of the Motor Industry (IMI) in line with ATA requirements.

Under this scheme, any Customer Service Advisor (CSA) will be able to gain accredited status (at different levels) by successfully completing a series of practical assessments and knowledge tests.

Successful Customer Service Advisors will be issued with a photo ID card, valid for five years, and entered onto the ATA Register.

Organisations wishing to offer ATA assessments must be approved by a regulated awarding body recognised by the IMI to carry out such approvals.

To ensure consistent approach within all approved centres, assessments and supporting documents have been developed as a minimum requirement for assessment.

2. CSA Assessment Guidelines

Assessments must be undertaken off the job within an approved assessment centre. Each assessment must be carried out by occupationally competent and qualified assessors. Centres must also ensure that an internal verification process is in place for all ATA activities.

Note: All ATA assessors and verifiers must be approved by the awarding body in advance of carrying out assessments/verification.

To ensure currency of assessments, no more than twelve months may elapse between the first assessment and the last successful assessment.

Prior to assessment, the approved centre must ensure that the candidate:

- has been registered to take the assessments
- is eligible to take the assessments
- has signed the ATA Code of Conduct.

On the assessment day the centre must ensure the candidate has provided photographic proof of identity in the form of a driving licence or valid passport. The centre must take a digital photograph of the Customer Service Advisor in line with ATA requirements.

Following successful assessments, the centre must submit the candidate's photograph and claim their ID card on line.



Candidates who initially pass any of the practical tasks may 'bank' these assessments achieved for a maximum of twelve months. Candidates who are referred on any of the practical assessment tasks, may re-take these assessments within the twelve-month period.

Candidates may re-take the on-line knowledge test as many times as the centre considers appropriate. However, if they are not successful after three attempts and suitable refresher training, the centre should review whether they are being assessed at the most appropriate level.

3. Levels of Customer Service Advisor ATA

Customer Service Advisors may become accredited at the following levels:

- Customer Service Advisor
- Senior Customer Service Advisor (Pilot Stage - until July 2010)

4. Specification Guidelines for Candidates

Prior to candidate registration, the candidate should be aware of the level for which they are applying.

- Customer Service Advisor (level 2)
- Senior Customer Service Advisor (level 3)

A candidate should have a minimum level of industry experience in an appropriate role as follows:

- for Customer Service Advisor 3 months
- for Senior Customer Service Advisor 3 years

Or

- hold a relevant nationally recognised qualification at the same level (or equivalent CSA qualification) and have a minimum of one years experience post qualification industry experience in an appropriate role.

5. Assessment Details

To attain each level of accreditation, candidates will have to pass practical assessments and on-line knowledge test(s).

The practical assessments, comprising Customer Service Advisors instructions, work station requirements, marking schedules and associated paperwork can obtained by contacting the recognised awarding body. These documents are accessible to approved centres only.



The Under Pinning Knowledge assessment, to allow flexibility the online knowledge test can be taken before, during or after the assessment day. If all other assessments have not been completed within 12 months, the candidate will need to complete the UPK test again. The on-line test will be multiple choice and consist of randomised questions.



Customer Service Advisor (CSA)

To become an accredited Customer Service Advisor, candidates must pass a series of competences measured over four practical assessments and an on-line knowledge test.

Customer Service Advisor - practical assessments:

CSA 01: Appointment

CSA 02: Vehicle Acceptance

CSA 03: Completion and Handover

- your skills and ability to communicate effectively with the customer;
- your ability to greet the customer;
- an understanding of and ability to explain vehicle warranties and invoicing procedures;
- your ability to record vehicle information on a vehicle booking form for all relevant personnel;
- an ability to provide explanations of work required and any other recommendations;
- your ability to gather preliminary information and data on the vehicle;
- your ability to determine vehicle repair time and correct loading of the workshop;
- an understanding of vehicle warranties;
- an ability to ensure that all relevant departments are apprised of the service booking requirements;
- that you adopt the correct approach when dealing with customer issues;
- that you can offer the appropriate mobility solution;
- that you can correctly identify the customer's additional requirements;
- that you adopt the correct approach when dealing with customer issues;
- an ability to identify (through conversation) opportunities for additional sales;
- an ability to close on the transaction to the customer's satisfaction.

CSA 04: In-tray exercise

- your skills and ability to explain what action you would take and how to resolve problems that occur during the role of a customer service advisor.

Customer Service Advisor – underpinning knowledge test:



Customer Service Advisor – 30 questions

Total time for test - 45 Mins

The theory test includes the following areas to ensure that the candidate has the underpinning knowledge of parts operations:

- Business orientation
- Customer orientation
- Health and Safety
- Service
- Technical

Senior Customer Service Advisor (SCSA)



To become an accredited Senior Customer Service Advisor, candidates must pass a number of **practical assessments** and an **on-line knowledge test**. The practical assessments include:

Business Exercise

This is an individual exercise designed to assess your general “business understanding”.

Communication Role Play – Colleague Based

- your skills and ability to communicate effectively with your colleagues
- approachability and use of empathy and experience
- your ability to gather preliminary information and data in order to address a greater issue
- an understanding of the departmental requirements as part of the overall business
- that you adopt the correct approach when dealing with colleague issues
- appropriate responses to colleague’s objections
- Your ability to make appropriate choices under pressure

Approximate duration – 20mins

Communication Role Play – Customer Based

- your skills and ability to communicate effectively
- approachability and use of clear non-technical language
- your ability to gather preliminary information and data on the vehicle and parts required;
- an understanding of the detail of any contractual agreement
- that you adopt the correct approach when dealing with customer issues
- appropriate responses to customers objections
- that you can correctly identify the customer’s additional requirements
- ability to recognise opportunities for selling associated goods or services.
- Your ability to make appropriate choices under pressure

In-Tray Exercise

This is an individual exercise designed to measure your ability to evaluate and problem-solve effectively. You must work on your own with no conferring with other participants. There are 6 scenarios to be addressed in 45 minutes – there is no link between the scenarios. You are being measured on:



- Your ability to give a detailed, logical and rational explanation of the action that you would take in each case and how to resolve any likely problems
- The reasons why you would take the action
- Your awareness of related issues and the effect that the latter could have

Presentation Exercise

This exercise is designed to keep candidates' concentration at the highest level throughout the assessment day. You will be issued with a topic during the morning briefing and asked to prepare a 5-minute presentation on that topic during the course of the day. The exercise measures your ability to prepare and convey a concept using your own ideas in a concise, logical and convincing manner whilst working to a strict time limit. You will be asked to deliver your presentation to the assessor(s) at the end of this assessment day

Professional Discussion

This is a verbal exercise during which your assessor will ask you a series of questions relevant to your job role.

Your answers should use as much detail as possible and, where possible, "real life" examples from your own experience.

Under-pinning Knowledge Test (Multiple Choice on-line)

Senior Customer Service Advisor – 30 questions
Total time for test - 45 minutes

The theory test includes the following areas to ensure that the candidate has the underpinning knowledge of parts operations:

- Business orientation
- Customer orientation
- Health and Safety
- Service
- Technical