



Model Curriculum

Customer Relation Executive

SECTOR: Automotive
SUB-SECTOR: Automotive vehicle sales (dealer)
OCCUPATION: Sales support
REF ID: ASC/Q1106, v1.0
NSQF LEVEL: 4



Certificate

CURRICULUM COMPLIANCE TO QUALIFICATION PACK – NATIONAL OCCUPATIONAL STANDARDS

is hereby issued by the

AUTOMOTIVE SKILL DEVELOPMENT COUNCIL

for the

MODEL CURRICULUM

Complying to National Occupational Standards of
Job Role/ Qualification Pack: 'Customer Relation Executive'
QP No. 'ASC/Q1106 NSQF Level 4'

Date of Issuance: January 24th, 2019

Valid up to*: January 23rd, 2022

**Valid up to the next review date of the Qualification Pack*

Authorised Signatory
(Automotive skill development council)



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Customer Relation Executive

CURRICULUM / SYLLABUS

This program is aimed at training candidates for the job of a “Customer Relation Executive”, in the “Automotive” Sector/Industry and aims at building the following key competencies amongst the learner.

Program Name	Customer Relation Executive		
Qualification Pack Name & Reference ID.	ASC/Q1106, v1.0		
Version No.	1.0	Version Update Date	06 th February 2019
Pre-requisites to Training	Class XII		
Training Outcomes	After completing this programme, participants will be able to: <ul style="list-style-type: none">• Generate sales leads and pass on the leads to sales team achieve sales closure.• Handle post-delivery services for better customer satisfaction.• Plan and organise work to meet expected outcomes.• Work effectively in a team.• Maintain a healthy, safe and secure working environment.		

This course encompasses 5 out of 5 National Occupational Standards (NOS) of “Customer Relation Executive” Qualification Pack issued by “Automotive Skill Development Council (ASDC)”.

Sr. No.	Module	Key learning outcomes	Equipment Required
1	<p>Introduction</p> <p>Theory Duration (hh:mm) 06:00</p> <p>Practical Duration (hh:mm) 00:00</p> <p>Corresponding NOS Code Bridge Module</p>	<ul style="list-style-type: none"> Describe the role and responsibilities of a Customer Relation Executive. Explain the organisation structure of the sales department in a dealership. Interpret standard operating procedure (SOP) to implement quality culture at the organisation. Describe organisational and professional code of ethics and standards of practice. Describe various types of automobiles and their history in brief. Explain the present structure of the automobile industry in India. List the various purposes and uses of automobiles. 	<p>Training Kit (Presentations, Trainer Guide).</p>
2	<p>Managing customer experience at the dealership showroom</p> <p>Theory Duration (hh:mm) 38:00</p> <p>Practical Duration (hh:mm) 60:00</p> <p>Corresponding NOS Code ASC/N1105</p>	<ul style="list-style-type: none"> Describe standard operating procedures of the OEM related with telemarketing and sales process. Explain local market procedures and customer preferences of that area. Identify sales peculiarities based on geographical nuances etc. Organise client entertainment & promotional events to ensure maximum customer engagement for selling OEM products in future. Communicate function details and client requirements to operations department. Coordinate with other members of Sales Team to actively promote sales opportunities, exchange information and to increase professionalism. Describe customer relationship management (CRM) related framework provided by the organisation. Explain software or format used for customer relationship management (CRM) in the organisation. Identify customer problems and queries and document it in the organisation’s prescribed format. Describe standard operating procedures for query and problem reporting and their redressal in the organisation. 	<p>Training Kit (Presentations, Trainer Guide), software or format used for sales and marketing presentations, reporting and surveys like MS powerpoint, MIS (Management information system) and CRM (customer relationship management) software, software or format used for billing, financing of the vehicles, services records and warehousing like Tally, SAP and primaware, software or format used for reporting like MS Excel and MS Word.</p>

Sr. No.	Module	Key learning outcomes	Equipment Required
		<ul style="list-style-type: none"> • Explain how to handle and resolve basic customer queries. • Handle leads from various sources like showroom walk-ins, telephonic enquiries, other marketing campaigns and ATL / BTL activities. • State safety and health related policies and regulations for the workplace. • Identify complete process flow for a business cycle of sales. • Describe documentation requirements for each procedure carried out. • Interpret training modules and scripts provided by the OEM for the telemarketing. • Call to enquire about buying plans or interests, as per the calling script, from the prospective calling list assigned to get sales lead. • Obtain information on reasons for considering purchase from potential customers. • Interpret all customer requirements and needs. • Explain software or format used for sales and marketing presentations, reporting and surveys like MS PowerPoint, MIS (Management information system) and CRM. • Communicate effectively with clients/ customers to gain commitment towards the organisation and products via telephone, face-to-face and written communication. • Identify the technical aspects related with all varieties of vehicles at the dealership. • List technical specifications of OEM vehicles at the dealership. • Communicate features, advantages, benefits and USPs of the vehicle OEM brands available at the dealership over the competitor models to the customers. • Resolve customer objections/queries regarding the OEM products. • Explain technical details and problems related with service of all kinds of vehicles. • Interpret the key customer requirements from a vehicle (during sales pitch) and any pending service related issue (during service calls 	

Sr. No.	Module	Key learning outcomes	Equipment Required
		<p>follow-ups to generate repeat/ referral sales) and highlight the requirements/ issues for early redressal.</p> <ul style="list-style-type: none"> • Respond to customer needs and requests timely. • Manage key customer relationships by coordinating with sales to ensure that all pending responses are responded to in a timely and satisfactory manner as per instruction. • Collect feedback accurately from the client. • Record all feedbacks and complaints from customers in the system in the prescribed OEM format by maintaining an effective tracking system. • Communicate sales and marketing department about client feedback/ comments related to product content and pricing. • Describe the process for passing on sales leads to sales consultants. • Describe the process for booking test drives based on customer preferences. • Follow up on all free trials with phone calls and visits to the accounts. • Invite, fix and record prospective customer's visit for test drive, either at showroom or at any mutually agreed location. • Explain software or format used for billing, financing of the vehicles, Customer Relationship Manager Dealer Management System (CRMDMS) Operations, services records and warehousing like Tally, SAP and primaware. • Collect revenues from sales as per planned payment cycle through effective follow up & relationship building with customers. • Explain software or format used for reporting like MS Excel and MS Word. • Maintain contract renewal reports and profiling of existing accounts. • Arrange for vehicle pick up and drops to and from work shops. 	
3	<p>Handle post-delivery services for better customer satisfaction</p> <p>Theory Duration (hh:mm)</p>	<ul style="list-style-type: none"> • Describe standard operating procedures of the OEM related with after-sales service maintenance. • Describe standard operating procedures of the dealership related 	<p>Training Kit (Presentations, Trainer Guide), technical specifications of OEM vehicles at</p>

Sr. No.	Module	Key learning outcomes	Equipment Required
	<p>38:00</p> <p>Practical Duration (hh:mm) 58:00</p> <p>Corresponding NOS Code ASC/N1106</p>	<p>with customer experience and satisfaction.</p> <ul style="list-style-type: none"> • Describe the importance of JD Power Satisfaction Surveys and their relevance. • List technical specifications of OEM vehicles at the dealership along with the service schedules for each of the model / variant of vehicle (including both free service & paid service). • Identify the various changes in schedules of the service as specified by the OEM from time-to-time in the various service circulars released. • Update management information systems for service revenue recovery and post-service collections and provide time-based, qualified reports on the overall performance of the workshop and service target achievement through various sale of value added services (like Annual Maintenance Contracts, Reconditioned aggregates sale). • Follow-up with customers after service or repairs on their vehicle and take feedback on the experience. • Call to existing customers to follow up for service reminders and to promote other value-added services. • Call to new vehicle buyers to follow up on service requirements as per the “free service” schedule of the OEM. • Call to existing customers to enquire about the overall level of satisfaction with the work done at the workshop and the overall resolution of the complaints which was reported by the customer at the workshop. • Explain how to use internal CRM related systems to ensure accurate delivery of services. • Verify the accuracy of delivered orders to customers utilizing the organisations’ internal CRM/mainframe systems and customer purchase orders. • Explain how to coordinate between sales function and customers to resolve queries effectively. • Respond to customer service requests for order changes, including the maintenance of customer information files. 	<p>the dealership, management information system software.</p>

Sr. No.	Module	Key learning outcomes	Equipment Required
		<ul style="list-style-type: none"> Communicate any changes from the customer side to the service department. Report any complaints or queries from customers to the concerned person(s) in the organisation. Provide information to customer service management department for inclusion in various scheduled and special reports by accessing the company's internal systems. Explain various back-office operations like prompt issuance of Allotment letters, demand notes, agreements and timely dispatch of all post-sale revenue realization devices like reminders and notices for recovery if required. Perform back-office operations like prompt issuance of allotment letters, demand notes, agreements and timely dispatch of all post-sale revenue realization devices like reminders and notices for recovery if required. Collect revenues from services as per planned payment cycle (esp. For the key account / corporate customers who tend to pay in a cycle) through effective follow up & relationship building with customers. 	
6	<p>Plan and organise work to meet expected outcomes</p> <p>Theory Duration (hh:mm) 08:00</p> <p>Practical Duration (hh:mm) 12:00</p> <p>Corresponding NOS Code ASC/N0001</p>	<ul style="list-style-type: none"> Interpret Standard Operating Procedures (SOP) and plan sequence of operations correctly. Adhere to 5S practices and keep the work area clean and tidy. Organise required tools and equipment for the task to be carried out. Maintain information confidentiality and share the information with the concerned authority only. Seek guidance from the appropriate authority as per the policy. Interpret the work correctly and agree on the timelines to complete the work accurately. Manage time, resources and cost effectively to achieve better results. 	Training kit (Trainer guide, Presentations).
7	<p>Work effectively in a team</p> <p>Theory Duration (hh:mm) 05:00</p>	<ul style="list-style-type: none"> State the importance of communication. Describe various communication methods. Explain the importance of listening skills in day to day activities. 	Training kit (Trainer guide, Presentations).

Sr. No.	Module	Key learning outcomes	Equipment Required
	<p>Practical Duration (hh:mm) 10:00</p> <p>Corresponding NOS Code ASC/N0002</p>	<ul style="list-style-type: none"> • Explain the importance of non- verbal communication. • Describe principles of effective team formation • Communicate required information to colleagues for necessary action as per the organisation policy and protocols. • Interact with customers and colleagues demonstrating respectful behaviour at all times. • Adhere to commitments made to complete the work timely and accurately. • Demonstrate problem solving and decision making abilities. • Collaborate with team members to achieve the task. • Carry out required documentation as per the policy. • Communicate effectively with colleagues and customers. • Read instructions and applicable guidelines accurately. • Seek clarification or advice from the concerned authority. • Check the quality of work and ensure that the work is complete in all respects. 	
8	<p>Maintain a healthy, safe and secure working environment</p> <p>Theory Duration (hh:mm) 05:00</p> <p>Practical Duration (hh:mm) 10:00</p> <p>Corresponding NOS Code ASC/N0003</p>	<ul style="list-style-type: none"> • Describe organization's policy regarding health, safety and security. • Identify potential hazards at the workplace and take necessary actions to avoid such hazards. • Report any identified safety breaches to the concerned authority. • Identify the components of a first aid kit. • Provide first aid to minor injuries at the workplace. • Explain the term 'Fire Triangle'. • Identify various types of fire extinguishers and state their application. • Operate a fire extinguisher to extinguish the fire. • Read and interpret various safety symbols. 	<p>Training Kit (Presentations, Trainer Guide) first aid kit, different types of fire extinguishers, personal protective equipment (PPE).</p>
	<p>Total Duration 250:00</p> <p>Theory Duration 100:00</p> <p>Practical Duration</p>	<p>Unique equipment required: Training Kit (Presentations, Trainer Guide), software or format used for sales and marketing presentations, reporting and surveys like MS powerpoint, MIS (Management information system) and CRM (customer relationship management) software, software or format used for billing, financing of the vehicles, services records and warehousing like Tally, SAP and</p>	

Sr. No.	Module	Key learning outcomes	Equipment Required
	150:00	primaware, software or format used for reporting like MS Excel and MS Word, technical specifications of OEM vehicles at the dealership, management information system software, Personal Protective Equipment (PPE), First Aid Kit, Different types of Fire Extinguishers.	

Grand Total Course Duration: **250 Hours, 0 Minutes**

(This syllabus/ curriculum has been approved by [Automotive Skill Development Council](#))

Trainer Prerequisites for Job role: “Customer Relation Executive” mapped to Qualification Pack: “ASC/Q1106, v1.0”

Sr. No.	Area	Details
1	Description	A Trainer for “ <u>Customer Relation Executive</u> ” trains candidates in overseeing service; repairing and performing maintenance work in the workshop as per the OEM guidelines and managing the work done by mechanics and other aggregate specialists within the expected time and cost to ensure minimum repeat complaints.
2	Personal Attributes	An individual on this job must have good communication and interpersonal skills in addition to being a team player, as the job requires coordination with various internal and external stakeholders to ensure timely and cost effective service, maintenance and repair of the vehicle. The individual must have a technical bend of mind to understand the technical aspects of various aggregates/ components in the vehicle. The individual should have time management skills to manage the day-to-day operations of the technicians/ aggregate specialists in the workshop. The individual should be methodological and systematic in his way of working to supervise the working of the Technicians and Specialists and ensure adherence to systems and processes.
3	Minimum Educational Qualifications	Degree/Diploma in Automobile/Mechanical Engineering
4a	Domain Certification	Certified for Job Role: “ <u>Customer Relation Executive</u> ” mapped to QP: “ <u>ASC/Q1106, v1.0</u> ”. Minimum accepted score is 80%
4b	Platform Certification	Recommended that the Trainer is certified for the Job Role: “ <u>Trainer</u> ”, mapped to the Qualification Pack: “ <u>MEP/Q0102</u> ”. Minimum accepted as per respective SSC guidelines is 80%.
5	Experience	<ul style="list-style-type: none"> • 2-3 years of work experience as a Customer Relation Executive • 1-2 years of teaching/training experience is preferred

Annexure: Assessment Criteria

Criteria For Assessment Of Trainees

Job Role: Customer Relation Executive

Qualification Pack: ASC/Q1106, v1.0

Sector Skill Council: Automotive Skill Development Council

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:
 - i. Theory/Knowledge test
 - ii. Practical demonstration test
 - iii. Face to Face
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.
 - 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 %):70%

Compulsory NOS				Marks Allocation	
Total Marks: 500				Theory	Skills Practical
Assessment outcomes	Assessment Criteria for outcomes	Total Marks	Out of		
ASC/N1105 Generate sales leads and pass on the leads to sales team achieve sales closure	PC1.handle all leads from various sources like showroom walk-ins, telephonic enquiries, other marketing campaigns and ATL / BTL activities	100	6	2	4
	PC2.identify and develop sources of potential clients and customer contacts interested in buying OEM products		6	2	4
	PC3.call and enquire about buying plans or interests, as per the calling script, from the prospective calling list assigned		6	2	4
	PC4.greet the customers and get vehicle buying interests and time schedule from the prospective calling list to get sales leads		5	1	4

PC5.effectively communicate with clients/ customers to gain commitment to purchase and products via telephone, face-to-face and written communication	6	2	4
PC6.mention FAB (features / advantages / benefits) and USPs of the vehicle OEM brands available at the dealership over the competitor models respond to customer need and requests from time to time	7	3	4
PC7.follow up on all free trials with phone calls and visits to the accounts	4	1	3
PC8.maintain contract renewal reports and profiling of existing accounts	4	1	3
PC9.invite, fix and record customer prospective visit for test drive, either at showroom or at any mutually agreed location	5	2	3
PC10.ask potential customers for information on reasons for considering purchase and comprehend all customer requirements and needs	4	1	3
PC11.assist in management of key customer relationship and coordinate with sales to ensure that all pending responses are responded to in a timely and satisfactory manner	5	2	3
PC12.respond positively to and resolve customer objections/queries against the OEM products	5	2	3
PC13.take accurate enquiry details from client and Advise Sales and Marketing department about client feedback/ comments relating to product content and pricing	5	2	3
PC14.maintain an effective tracking system to record all feedbacks and complaints from customers in the system in a prescribed OEM format	5	1	4
PC15.effectively communicate function details and client requirements to operations	5	1	4
PC16.arrange for vehicle pick up and drops to and from work shops	4	1	3

	PC17.understand the key customer requirements from a vehicle (during sales pitch) and any pending service related issue (during service calls follow-ups to generate repeat/ referral sales) and highlight the requirements/ issues for early redressal		5	1	4
	PC18.ensure realization of revenues from sales as per planned payment cycle through effective follow up & relationship building with customers		4	1	3
	PC19.assist in organizing client entertaining & promotional events to ensure maximum customer engagement for selling OEM products in future		5	1	4
	PC20.liaise with other members of Sales Team to actively promote sales opportunities, exchange information and increase professionalism		4	1	3
		Total	100	30	70
ASC/N1106 Handle post-delivery services for better customer satisfaction	PC1.receive, process and verify the accuracy of delivered orders from customers utilizing the organisation’s internal CRM/mainframe systems and customer purchase orders	100	12	4	8
	PC2.initiate required action for response to customer service requests for order changes, including the maintenance of customer information files and communicates changes to the service function		9	2	7
	PC3.make follow up calls to existing customers for service reminders and to promote other value-added services		8	2	6
	PC4.make calls to new vehicle buyers for following up on service requirements as per the “free service” schedule of the OEM		8	2	6
	PC5.follow up with customers after service or repairs on their vehicle and take feedback on the experience		9	2	7
	PC6.make calls to existing customers to enquire the overall level of satisfaction with the work done at the workshop and the overall resolution of the complaints which was reported by the customer at the workshop		9	2	7

	PC7.report any complaints or queries from customers to the concerned persons in the organisation		8	2	6
	PC8.maintain Management Information Systems for service revenue recovery and post-service collections and provide time-phased, qualified reports on the overall performance of the workshop and service target achievement through various sale of value added services (like Annual Maintenance Contracts, Reconditioned aggregates sale)		10	2	8
	PC9.ensure realization of revenues from services as per planned payment cycle (esp. for the key account / corporate customers who tend to pay in a cycle) through effective follow up & relationship building with customers		11	3	8
	PC10.manage and ensure execution of all Back-Office operations like prompt issuance of allotment letters, demand notes, agreements and timely dispatch of all post-sale revenue realization devices like reminders and notices for recovery if required		8	2	6
	PC11.access the company's internal systems to obtain and extract information and provide customer service management with data for inclusion in various scheduled and special reports		8	2	6
		Total	100	25	75
ASC/N0001 Plan and organize work to meet expected outcomes	PC1.keep immediate work area clean and tidy	100	11	2	9
	PC2.treat confidential information as per the organisation's guidelines		8	2	6
	PC3.work in line with organisation's policies and procedures		11	3	8
	PC4.work within the limits of job role		9	3	6
	PC5.obtain guidance from appropriate people, where necessary		10	3	7
	PC6.ensure work meets the agreed requirements		14	3	11
	PC7.establish and agree on work requirements with appropriate people		12	3	9

	PC8.manage time, materials and cost effectively		14	3	11
	PC9.use resources in a responsible manner		11	3	8
		Total	100	25	75
ASC/N0002 Work effectively in a team	PC1.maintain clear communication with colleagues	100	14	4	10
	PC2.Work with colleagues to integrate work		9	2	7
	PC3.pass on information to colleagues in line with organisational requirements both through verbal as well as non-verbal means		11	3	8
	PC4.work in ways that show respect for colleagues		11	3	8
	PC5.carry out commitments made to colleagues		10	2	8
	PC6.let colleagues know in good time if cannot carry out commitments, explaining the reasons		10	2	8
	PC7.identify problems in working with colleagues and take the initiative to solve these problems		13	4	9
	PC8.follow the organisation's policies and procedures for working with colleagues		12	3	9
	PC9.ability to share resources with other members as per priority of tasks		10	2	8
				Total	100
ASC/N0003 Maintain a healthy, safe and secure working environment	PC1.comply with organisation's current health, safety and security policies and procedures	100	12	3	9
	PC2.report any identified breaches in health, safety, and security policies and procedures to the designated person		13	3	10
	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.		13	3	10
	PC4.identify and correct any hazards like illness, accidents, fires or any other natural calamity safely and within the limits of individual's authority		15	5	10

	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		12	3	9
	PC6.follow organisation's emergency procedures for accidents, fires or any other natural calamity		13	3	10
	PC7.identify and recommend opportunities for improving health, safety, and security to the designated person		11	3	8
	PC8.complete all health and safety records are updates and procedures well defined		11	2	9
	Total	500	100	25	75