

ATA 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 (see section 6).

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

2. CSA ATA 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.

A minimum ratio of one assessor to one candidate is required for any ATA CSA role play assessments. An actor will also be needed during the role play assessment unless the assessment is recorded using video equipment. It is important that the assessors ensure that candidates comply with health and safety guidelines throughout.

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 (see section 3 below)
- 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.

Customer Service Advisors who are referred on one or two practical assessments may re-take these assessments within the twelve-month period. Customer Service Advisors who are referred on more than two practical assessments will have to retake **all** the assessments again.

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 (in development)

4. Pre-requisites for Candidates

A requirement of Customer Service Advisor ATA is that candidates must meet specified pre-requisites before they may take an assessment. To be eligible, a Customer Service Advisor must:

- 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

- Senior Customer Service Advisor - hold a relevant NQF qualification at the level 3 (or equivalent CSA qualification) and have a minimum of one years post qualification 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 be 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

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 appraised 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 minutes

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

- business orientation,
- customer orientation,
- Health and Safety,
- Service
- Technical

Senior Customer Service Advisor

To become an accredited Senior Customer Service Advisor, candidates must pass a number of practical assessments and an on-line knowledge test. ***This level is currently in development .***

6. Centre Approval

To become an approved centre to offer this ATA route contact:

City & Guilds
Guiltspur Street
London
EC1A 9DD

Tel: 0207 294 2800

Email: ata@cityandguilds.com

IMI Awards Ltd
Fanshaws
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