

# F&I Certification School - Course Description

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**Rated as Top F&I Training Provider Nationally for 13 Consecutive Years (2005 – 2017)**

This is a comprehensive five-day certification course which includes ten modules important to the responsibilities and activity of a professional Business Manager.

**Hours** ..... Each day starts at 9:00 a.m. and concludes at approximately 5:00 p.m. on Monday through Thursday. We often finish our work earlier on Friday; however, flights should not be scheduled before 3:00 p.m.

**Evaluations..** Your efforts and level of achievement will be evaluated by the UDS Trainer throughout the week. This information will be conveyed to your sponsors upon course completion.

**Test** ..... There will be an Ethics & Compliance Certification Exam, two Quizzes, one Video role-play session and a written Final Exam.

## **Module 1: Introduction to F&I**

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This module is designed with all Business Managers in mind, regardless of experience. If they are new to F&I, this module will provide them with a solid foundation to begin building a career. If they are experienced Business Managers, this module will provide them with important elements to broaden their scope and expand performance.

## **Module 2: Administration and Management**

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There is more to F&I than just selling. Without question, the position of the Business Manager in today's dealership is the most detail-oriented role in the dealership's front-end operation. As the manager of this critical department, the development of specific administrative and management skills is required for consistent success. This Module will address all of the primary aspects of becoming a solid administrator as well as review the management traits it takes to becoming a leader in this field.

## **Module 3: Product Overview**

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Product knowledge creates confidence, which creates enthusiasm and enthusiasm sells. This module will review the common features of each F&I product and service offered in the F&I office today. It will also provide each participant with a feature presentation for those products that can be delivered in a non-confrontational manner.

## **Module 4: Ethics and Compliance**

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This module covers a variety of topics from Regulation B (Equal Credit Opportunity Act) to Regulation Z (Truth in Lending). It also covers specific Rules, Regulations and Laws pertaining to Red Flags Rule, OFAC, Adverse Action, Safeguard Rule, Privacy Act, 8300 Rule and Risk Based Pricing and more. The workshop ends with a final exam and those qualifying with a passing grade will receive a formal written certification.

## **Module 5: AutoMenu® Presentation Styles and Techniques**

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Mastering a basic menu presentation is one thing, but this module takes it to the next level. The module is designed to give a streamlined approach that will provide each participant with a more powerful presentation, and the techniques available to improve their product sales and increase dealership profits.

## **Module 6: Gaining Commitment**

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Many Business Managers are unprepared when handling customer concerns and they oftentimes “wing it” or use “one-liners” to try and persuade their customers to see it their way. Many do not have a consistent process for bringing out and handling objections. Some can handle one “no” but lack the knowledge to handle the second or even third “no”. This module is designed to provide the participant with a rational means to gaining customers commitment to purchase F&I protection products and services.

## **Module 7: Control through Finance**

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Without a doubt, the major factor in determining the successes and profitability of any F&I Office and the Dealership in general, is Finance Penetration. Statistics tell us that 85% of all F&I products and services sold are sold in conjunction with finance deals. This module is designed to provide the participant with the essential ingredients to maximizing the control of each deal.

## **Module 8: Lender Relations**

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The Business Manager is the liaison between the lending institution and the retail customer. When operating in this capacity, the Business Manager is responsible for dealing with the lender in an upfront and ethical manner and creating a relationship that will deliver when it counts. This module will provide the participant with an understanding on how to build better lender relations that result in a “team” approach making deals happen.

## **Module 9: Keys to Leasing**

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Automotive leasing is as viable a method of driving a new vehicle as is standard financing or paying cash. This module will examine the pros and cons of automotive leasing as well as explain the fairly simple logic and common terminology behind a consumer lease. This module is also designed to enlighten the participants to the F&I profit potential often overlooked on a lease transaction.

## **Module 10: Setting the Stage for Success**

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This Module brings it all together by recapping the entire weeks training. This module is designed to leave the participant with a fresh look at all of the preliminary aspects of being an effective and efficient Business Manager in today’s automotive environment.