



## **F&I Management Certification - Course Description**

**Rated as Top F&I Training Provider Nationally for 19 Consecutive Years  
2005 – 2023**

**Hours:** We will begin each session promptly at 9:00 a.m. and will conclude at approximately 5:00 p.m., Tuesday through Friday. We often finish our work earlier on Friday; however, flights should not be scheduled before 4:00 p.m.

**Evaluations:** Your efforts and level of achievement will be evaluated throughout the week. This information will be conveyed to your dealers or sponsor upon course completion

**Test:** There will be competitive interactive quizzes at the end of each module, an Ethics & Compliance Certification Online pre-work, an Ethics and Compliance Exam, 1 scored video role play menu requirement along with a Final Exam. The Exams are CLOSED BOOK examinations.

**Participation:** We will hold discussions and perform exercises as a group. We urge you to enter these discussions freely and ask any questions you may have.

### **Module 1: Ethics and Compliance Review**

This module examines the practical in dealership application of knowledge gained in the Ethics and Compliance on-line prework. The module ends with a final exam and those qualifying with a passing grade will receive an Ethics and Compliance Certification.

### **Module 2: Introduction to F&I**

This module is designed with all F&I 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 F&I Managers, this module will provide them with important elements to broaden their scope and expand performance.

### **Module 3: Administration and Management**

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

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## **Module 4: Product Knowledge and Product Grouping**

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 give each participant the tools needed to create value by matching each product's features and benefits to customer needs.

## **Module 5: Training, Coaching and Effective Communication**

Training is one of an F&I Manager's primary responsibilities. This module will give the F&I Manager the tools needed to be an effective leader who can communicate clearly, effectively and with the impact needed to positively influence all stakeholders in F&I.

## **Module 6: F&I Processes**

This module is the most robust in the certification curriculum. In this module the participants will learn the skills needed to be a highly effective consultative F&I Manager. Gathering information on the customer, preparation of all documents, interaction with technology, menu disclosure and handling any customer concerns.

## **Module 7: Remote Deliveries**

This module will prepare the participant to thrive in the remote delivery F&I environment. The participant will also gain an understanding of the compliance challenges in a remote delivery deal structure and the processes to meet those challenges.

## **Module 8: Leasing, Cash and Outside Liens**

This module is designed to examine the structure and benefits of consumer leasing. This module will also provide the key techniques needed to enable the F&I Manager to unlock the profit potential of every lease, cash and outside lien opportunity.

## **Module 9: Lender Relations and Credit**

Understanding deal structure from all angles increases profitability and drives more approvals. This module will provide the participant with a practical way to build better deal structure through a deeper understanding of credit and how lenders evaluate deals based on risk, leading to more approvals.

## **Module 10: F&I Follow-up and Creating Multiple Revenue Streams into F&I**

This module teaches the F&I Manager how to generate multiple streams of income into F&I through customer follow-up, marketing and existing dealership resource utilization.