



Contact:
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5 Day Finance Class – Level 1

Agenda

Monday: (8:30-5:30)

- Introductions
- Student objectives for class
- Finance Managers Responsibilities
- Selling Techniques
- Finance Product Overview (Service Contracts, Auto Security, Gap, Surface Protection, Credit Life & Disability (if applicable))
- Legal Considerations in today's marketplace
- Road to a Retail Sale
- Road to an F&I Sale
- Package Presentation
 - Customer introduction / interview
 - Package presentation
 - Introduction to the Customer Option Form / Menu
 - Keys to Study by / Homework

Tuesday: (8:30-5:30)

- Video tape role-play: All students will video the customer introduction and package presentation
- Video tape review
- Review Credit Life & Disability Homework
- Product Knowledge Gap & Service Contract
- Gap Benefits & Objections
- Objection handling: **Service Contracts**
 - Problems to Solve
 - Objection handling presentations
 - Over Coming Objections (Service Contract & Gap)

Wednesday: (8:30-5:30)

- Video tape role-play: All students will video the customer introduction, package presentation and over-come Service Contract Objections
- Work on Packaging Products
- Video tape review
- Review Retail installment contract
- Product Knowledge: F&I Products
 - Auto Security
 - Surface Protection

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- Objection handling: ***After Market Products***
 - Problems to Solve
 - Objection handling presentations
 - Over Coming Objections (F&I Products)

Thursday: (8:30-5:30)

- Video tape role-play: All students will video the customer introduction, package presentation, and over-come F&I Products & Service Contract objections
- Video tape review
- Federal Testing
- Introduction to Lender Relations
 - Problems to Solve
 - Lender Guide Lines
 - Lender Advances
 - Credit Report
 - Customer Interviews
 - OFAC

Friday: (8:30-4:00)

- Practice role-play of package presentation and all objection handling as needed
- Adapting package presentation to leasing
- Menu Max Presentation
- Review Contracts
- Legal considerations (Federal Laws Quiz)
- Compliance Tape
- Introduction to Credit Union Conversions
 - Problems to Solve
 - Conversion presentations