

## FSA Tracker™

Motor Sales Edition

*FSA Compliance and F&I logging  
in one easy to use package!*

### System Requirements

*The minimum recommended specification required for a PC to run the Software: Pentium 3 Processor 1GHz, 512MB RAM, Windows 2000 or better, Internet Explorer 6, Broadband Internet Access*

### In Summary

Since the FSA regulations came into force on January 15<sup>th</sup> 2005, the way insurance products are sold within the Motor Trade has changed significantly.

Many Dealers however, still view the regulations as something to be complied with, a hurdle to be negotiated. But looking at it that way means that many dealers are missing a trick. A tool like FSA tracker™ lets you lay down a formal procedure for qualifying exactly what your customer needs. Used correctly, that means more sales of extended warranty, insurance, GAP, service plans etc.

FSA tracker™ is our solution not only to complying with the Financial Services Act, but also to securing your ability to prove compliance. FSA tracker™ however offers much, much more than simple FSA compliance.

System flexibility allows it to be tailored to your exact requirements, whether it's for straightforward FSA compliance, or for use as a full-blown F&I system. It can be configured to include electronic finance proposals and be used as an electronic insurance delivery system sending information directly to your insurer.

The system can be used in a stand-alone dealership or a multi franchised national large group or manufacturer. Whatever you want FSA tracker™ can provide.

Using innovative thinking combined with the latest web-based technology, FSA tracker™ not only ensures you are fully FSA compliant, but also maximises your F&I earnings by turning the FSA compliance procedure into a sales tool.

**Make compliance work for you now!**

### Key Features

- Three Levels of System to Suit Your Business
- Online FSA Competency Training
- FSA 'Compliance In A Box'
- Complete Reporting
- Increase Your Profits
- Training And Support



## Three Levels Of System To Suit Your Business

FSA Tracker™ gives you the flexibility to choose the type of system that best suits your business; whether you are looking for simple FSA compliance or a full blown F&I system, FSA Tracker™ lets you decide.

FSA Tracker Lite™, our entry level FSA Compliance system, allows the user to work through the FSA regulations with a customer in a simple, step by step process that maximises insurance sales and still ensures that you stay on the right side of the law.

If you require the system to do more, you can move up to a more sophisticated version which offers additional features such as on-line quotations and more comprehensive reporting.

For those needing a complete F&I system, FSA Tracker™ can act as a finance proposal and both an insurance quotation and delivery system, including full finance optimisation; ensuring that you always get the best rates available at the time.

Different modes of the system can be operated at different locations, ensuring that the system is tailored specifically for each individual dealership's need.

Whichever mode, you can be confident that every deal is recorded in detail as the executive works through it with the customer. There is no wasted time because there's no need to write up records later, and any questions or disputes that may arise in the future, should be instantly resolved as the information can be retrieved by the simple click of a button.

With FSA Tracker™, you can rest in the knowledge that proof of FSA compliance is only a click away!



## Online FSA Competency Training

Get Online FSA Competency Training when your Business Managers & Salespeople need it – on-demand!

Keep on top of the FSA statutory training requirement! FSA Tracker™ gives you instant online access to on-demand web-based FSA training courses, so your staff can learn and stay competent without leaving the showroom.

FSA Tracker's e-Learning module, is a web based learning and evaluation program which allows users to remotely learn about the FSA regulations and about your products at their own pace in the comfort of home or office.

Its simplistic design allows it to be tailored exactly to your own range of products, and allows management to monitor delegate activity and results through a sophisticated yet simple, set of reports.

Revision is an essential part of FSA Tracker's distance learning, with delegates able to check out what they know at the end of each module or section as many times as they wish. Training records are kept for all your participating staff, so there's no danger of missing anything, and you will always have all the necessary proofs to demonstrate staff competence at any time in the future.

At the end of the course there is a final exam to check delegates complete knowledge. Questions are multiple choice and randomised so that delegates who retake the exam get a different set each time.

Get FSA Competence and Compliance, in one easy, simple package!



## FSA 'Compliance In A Box'

FSA Tracker™ takes the Sales Executive and the customer through a logical friendly fact find and recommendation process. What the customer needs, doesn't need, (or ought to have but declines) are laid out clearly and inarguably. The demands and needs questions are tailored to your business and to your product range. The system provides a simple quotation process, clearly laying out the features and benefits of the product, as well as the costs. At the end of the process the system prints out all the necessary FSA documentation, which can be tailored to your exact needs.

In Brief, FSA Tracker™ Will:

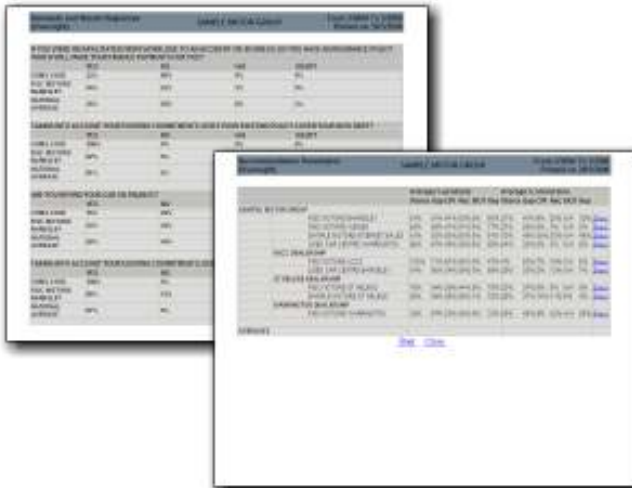
- Give You On-Line Competency Training On Demand
- Record & Monitor All Staff Training
- Give You A Defined Sales Track, Recording:
  - Customer Details
  - Vehicle Details
  - Status Disclosure
  - Demands & Needs
  - Product Recommendations
  - Price Disclosure
  - Policy Summary
  - Product Profitability
- Print A Full Customer FSA Pack
- Give A Complete Suite Of Sales Reports
- Give A Complete Suite Of Compliance Reports
- Allow Electronic Finance Proposals
- Print All Documents And Insurance Certificates
- Allow You To Fully Bespoke To Your Company ID

## Complete Reporting

Management information is the key in any business. Being able to put your finger on critical data is vital, whether it's to monitor product sales, profitability, or to check on a Dealership or Business Manager's performance, FSA Tracker™ does this and a whole lot more!

Whether you are an individual Dealership or part of a National Group, you will be able to see your sales department's complete sales performance at the click of a button. Check on how many cars have been sold; look at the overall departmental GP - Nationally, Regionally, by Dealership, or by Sales Executive or Business Manager in seconds!

See Full F&I performance across any period by any criteria; print off full F&I logs; see every detail of your F&I profitability right up to the minute in incredible detail!



Check a user's compliance in seconds; see how many Status Disclosures have been done; view the answers to the Demands and Needs questions displayed as averages by Business Manager or Sales Executive; see product penetrations in relation to product recommendations; drill down to find users who are not compliant. It's all there in seconds!

Monitor training through FSA Tracker's online learning module; make sure that users remain competent by ensuring that they visit the learning site regularly.

Need to find prospects? Use FSA Tracker™ as a prospecting tool; run off a list of customers filtered by your own criteria, with full details for re-solicitation.

### Increase Your Profit

FSA Tracker™ would be worth the investment if all it did was to keep you out of trouble. But its contribution to your business is far more positive than that. To begin with, it helps Business Managers & Sales Executives to

map out a customer's financing needs with insurance, warranty, monthly payments and so on become clearer and less confusing for everyone.

It also provides management with a suite of reports to keep track of his or her department; as a whole or by sales executive or business manager. It also consolidates reports across multiple dealerships, by region, zone or nationally for larger groups.

The number one reason that F&I income is not at the required levels, is that in many instances, the products are simply not being offered to customers. Simply by ensuring that all of your customers are presented with all of your product range every time, means that FSA Tracker™ will increase your F&I performance. This, together with its reporting capability, puts you firmly in control of your sales department, which in turn will ensure that you maximise your profitability!

### Training & Support

We provide full product training and support for the FSA Tracker™ system, with full on-site training coming as a standard part of the FSA Tracker™ package, with all relevant personnel fully trained in both the setting up, and use of the system.

Ongoing support from our help desk is only ever a phone call away, ensuring that any problems, questions or queries are handled quickly and solved in the shortest possible time. We pride ourselves on our service and back up and the reliability of our entire product range.

**Call us now on 0871 989 9859  
for a full demonstration!**