

Observation Record

Unit(s) to be Assessed
(Insert Unit Number(s) and
Titles(s))

317 318 325 339 416

PLEASE NOTE: all names in this record have been changed

NAME: Carol Black

Skills/Activities Observed

I carried out a direct observation of Carol 's skills in relation to the above units on Monday 5th March 2018 at the Braes Exhaust and Tyre Centre. Carol manages the office and all administration activities for the business. This involved a range of very varied administration work including dealing with customers, making up quotes, handing customer calls, ordering stock from a range of suppliers, managing budgets, entering stock into bespoke software, managing financial transactions, managing customer appointments, making up adverts for the local newspaper, and managing their social media pages etc. When visiting Carol she was busy working away on reception. The reception area was clean, tidy and well presented.

Carol keeps the business Facebook page up to date; this includes listing videos, new stock arriving, photographs of work undertaken, tyre performance information etc. There is also a review facility that Carol keeps a close eye on, to monitor customer feedback. The current rating is 5 stars, which shows that the business is meeting customers' needs well. Carol is fully aware of the importance of having an online presence on Facebook, as it is a very easy way to promote their products and services to local people. At the top of their page, they have information regarding products with contact details so that customer can contact them for a quote. Other business promotions are advertised through the local newspaper and via the local radio station. (325 P8, K1, K6, K11)

Facebook page header with search bar and navigation icons.



Home

- Posts
- Reviews
- Videos
- Photos
- Groups
- About
- Community
- Offers
- Notes

Create a Page

GET A QUOTE

MAXXIS TIRES










Like Follow Share

Call Now Send Message

Status

Write something on this Page...

Posts

(UK)'s video.
9 November 2017 · €

Most common sizes now in stock.



18,421 Views

Like Page

Motor vehicle company

5.0 ★★★★★



ABOUT

A familiar spot for all of your exhaust & tyre requirements, having undergone extensive renovations....

See more

Very responsive to messages

Community See all

Invite your friends to like this Page

5.0 ★ 5.0 of 5 stars
4 reviews

5 stars ———— 4

4 stars ————

3 stars ————

2 stars ————

1 star ————

MOST HELPFUL MOST RECENT STAR RATING

Tell people what you think

★★★★★

viewed [redacted]

1 February at 23:39 · €

Amazing customer service- ran me to my work and dropped the car off at my work as I wouldn't be able to get it back! Made it seem like no issue and offered in the first place. Great price too and got seen within an hour. Will definitely be coming back!

Like Comment Share

[redacted] thank you so much for taking the time to post such a positive review, we are so glad we could satisfy your expectations. Wish you all the best and look forward to seeing you in the future.

Like Reply 3w

Leave your comment...

viewed [redacted]

10 October 2017 · €

Excellent service, very professional. Would highly recommend and will definitely be using again

Like Comment Share

Above is a screen print from the Braes Exhaust and Tyre Centre Facebook page showing customer reviews. Currently the rating is 5 stars. You can view customer feedback above. I asked Carol why it was important to regularly monitor feedback, and use feedback to improve the services. She stated that it was very important to monitor customer satisfaction, and if or when negative feedback is received to look at how areas of weakness can be addressed, and identify measures to ensure standards remain as high as possible. She stated that improvements are of utmost importance to make sure customers are happy and subsequently use the service again in the future, and hopefully recommend the business to others. Carol stated that recently they have been looking into providing customers with a vending machine or tea/coffee service while customers wait for their tyres/exhausts to be fitted. After looking into this in great depth, it was identified that offering a full beverage service meant that they would have to provide toilets. Recently the business purchased additional space next to their garage; the future development of this space will be to have a small shop, new reception area, and a waiting room with professional beverage service, television, and customer toilets. These improvements will help customers to feel more comfortable while waiting for their car to be fixed. (325 P1, P8, P9, P10, K2, K3, K4, K8, K11, K12)

Facebook search results for a motor vehicle company. The search bar shows a redacted name. The navigation bar includes: All, Posts, People, Photos, Videos, Pages, Places, Groups, Apps.

Filter results

POSTS FROM

- Anyone
- You
- Your friends and groups
- Choose a source...

POSTED IN GROUP

- Any group
- Your groups
- Choose a group...

TAGGED LOCATION

- Anywhere
- Lerwick
- Choose a location...

DATE POSTED

- Any date
- 2018
- 2017
- 2016
- Choose a date...

Pages [See all](#)

 **5.0** ★★★★★ (4)
 Motor vehicle company · 255 like this
 Exhausts Tyres Suspension Brakes Servicing Competitive rates guaranteed

[Like](#)

[See all](#)

Public posts

 **26 February at 17:03** ·  [Like Page](#) 



Huge stocks of tyres for cars, light commercials, 4x4s, trailers, ATVs and quad bikes

We provide a tyre supply and fitting service for cars, vans, 4x4s, trailers, caravans, ATVs and Quads, including wheel balancing.

Huge stocks of tyres

Orders of non-stock items available within 24 hours

[See more](#)

I asked Carol what her day-to-day activities included, she stated that communicating with customers is a large part of her job; she answers the telephone regularly throughout each working day. Carol explained that when she deals with customers she takes time to identify their needs, to look at options available for tyres, exhausts. She provides different pricing options for different makes, and models and tries to listen actively to what the customers' needs are regarding the quality/budget of items. She will check stock levels, price items online and provide the customer with a quote, and timescale for the fitting of tyres or exhausts. I asked her why it was important to provide accurate timing for the fitting of items. She said that this was very important, as customers need to know when their vehicle can be booked in, and when it will be ready. By providing accurate timings, customers can make arrangements for their car to be delivered, and look at alternative ways to get around. Sometimes staff members will run customers back home, or to work if needed. (325 P1, P3, P4, K1, K2, K4, K6, K7)

In order to meet customers' needs Carol regularly orders stock i.e. tyres and exhausts. Carol stated that the business keeps a very limited range of stock in the building. This is because there is not enough room to stock a large range of tyres and exhausts; also that it is hard to predict what customers want to buy. Furthermore, it is very expensive to have a large range of items in stock. Therefore, regular online purchasing means that the business only purchases items that are guaranteed to be sold to customers. I asked Carol if this means that customers wait longer, she stated that this is correct, however timescales are very good, items purchased before 1pm from Aberdeen can be delivered to Braes the next day, this therefore means that customers are not waiting long for their items. Each time a customer requires items, Carol will discuss the best options, look at price range of goods and provide the customer with all the information needed in order for them to make an informed choice about what best meets their needs and budget. Carol will then go ahead and order the goods online. She will look at all the different suppliers, identify what items are coming in at the best price, she also considers shipping costs, timescales for delivery, once this has all been calculated and she is happy, she will then order the goods online. She will receive a confirmation email to confirm her order. When items arrive she enters the items into her information system called TEAM, she then contacts the customer to arrange for them to come in to have the items fitted. Branded products sourced include Maxxis, Firelli, Event, Riken, Apollo, BF Goodrich. (318 P1, P2, P3, P4, P5, K1, K2, K3, K4, K9)

In order to handle financial transactions Carol uses a bespoke software system called TEAM. This system is used to handle stock, create invoices, log payments, log purchase orders, and to handling customers contact details. Carol can navigate and use the system with ease. She demonstrated how she looks up customer information, how information can be entered and edited with ease, she can also create invoices quickly and can create reports to monitor the monthly budgets etc. I asked Carol why it was important to keep the information system up to date. She stated that this was of upmost importance in order to accurately keep track of the business finances and to ensure that invoices are sent, and payments are tracked, she can therefore provide correctly information regarding incoming and outgoing funds. Linking customer accounts to invoicing, and linking payments. (339 ST1.1, ST1.2, ST3.4) (317 P3, K5)

Another large part of Carol's administration duties is to ensure that budgets are monitored accurately, and sales information is logged and analysed on a regular basis to ensure business activity is successful. Carol also stated that it is important to try to grow the business therefore regularly analysing and reporting sales data helps to confirm if promotions and special offers have been successful in attract more customers, and also look at how well marketing activities are helping to grow their business. Regular sales data is given to her manager in the agreed format within designated timescale. Informal meetings or conversations are conducted to discuss the report findings, and to agree the success or development needs to attract new customers, to promote new products or to ensure customers return to buy additional items. (317 P1, P2, P3, P8, K5)

When ordering goods and items that will be held in stock Carol will discuss requirements with her manager, they will then agree a budget. In order to provide an accurate budget to her manager Carol will source products online, she will look at the different types of products needed and compare prices. She will then tally up all the required items and produce a realistic budget. She will then give the budget documentation to her manager. Once approved Carol will then go ahead and order the required items. She will enter the

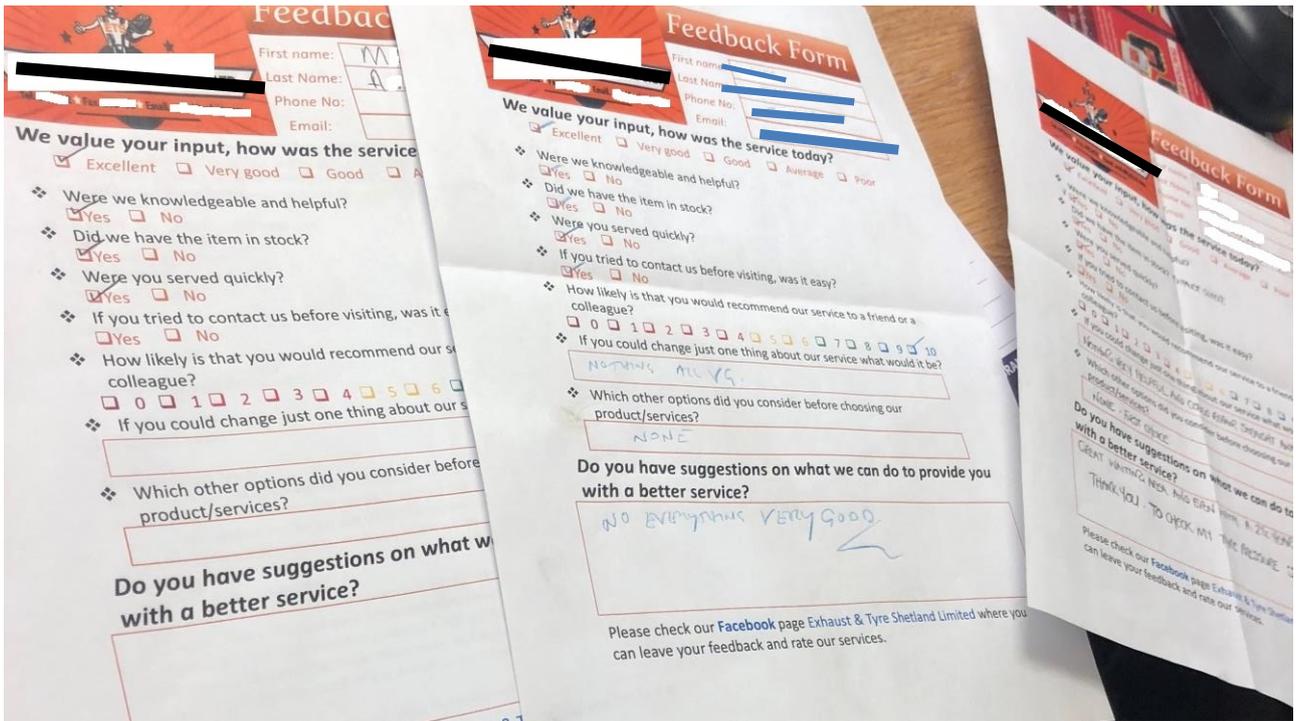
items into stock once they arrive. She will then monitor sales of these items. If at any time stock starts to run low, she would then make updates to the agreed budget, and forward the information to her manager for agreement. At the end of each month Carol will provide her manager with sales report and if requested she can easily pull together a list of all items held in stock. (416 P1, P2, P3, P4, P5, P7, P8, K1, K3, K4, K14)



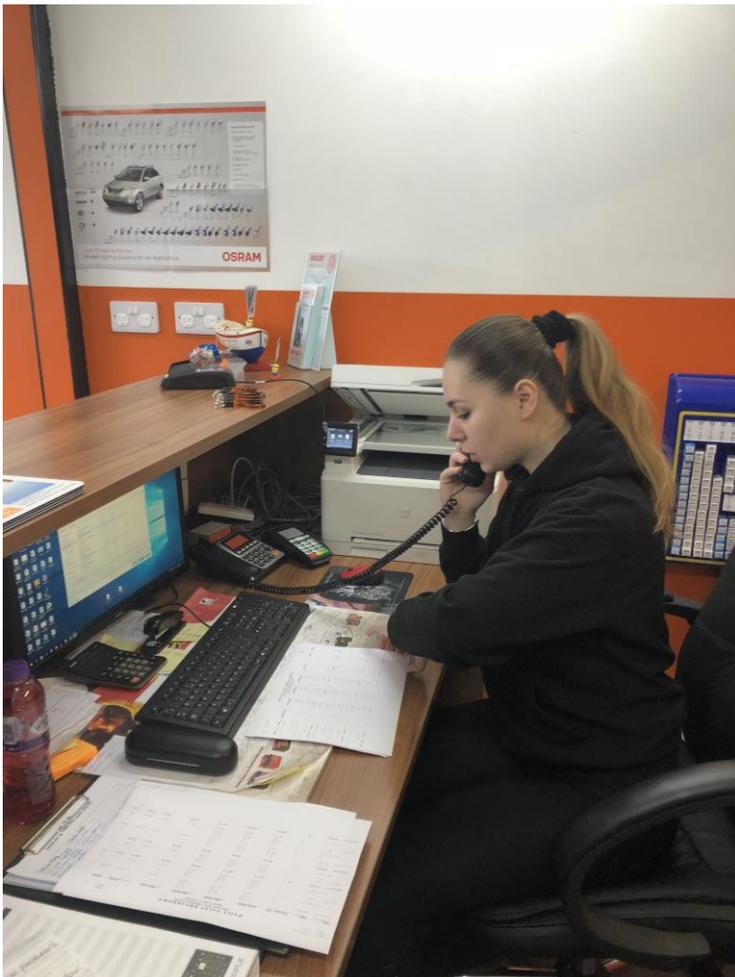
Photograph of Carol on reception



Photograph of the customer waiting area in reception. The area was very well presented; there was a good selection of magazines and newspapers, leaflets, and a feedback form. The area was very clean and tidy. (325 K1, K1, K2, K4)



Completed feedback sheets from customers. (325 P8, K11)

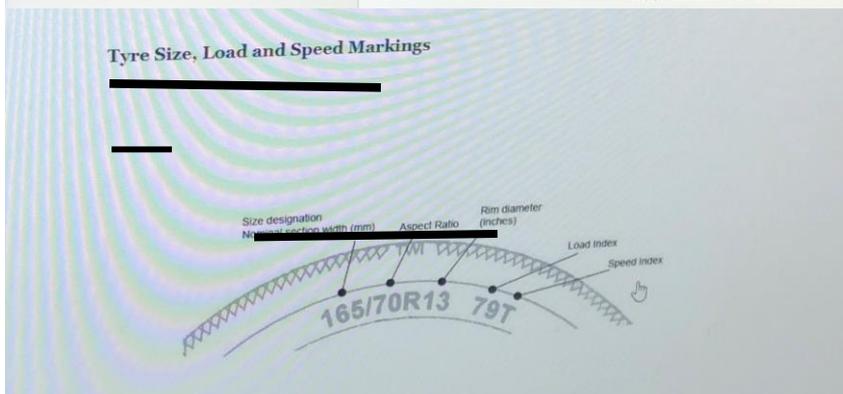
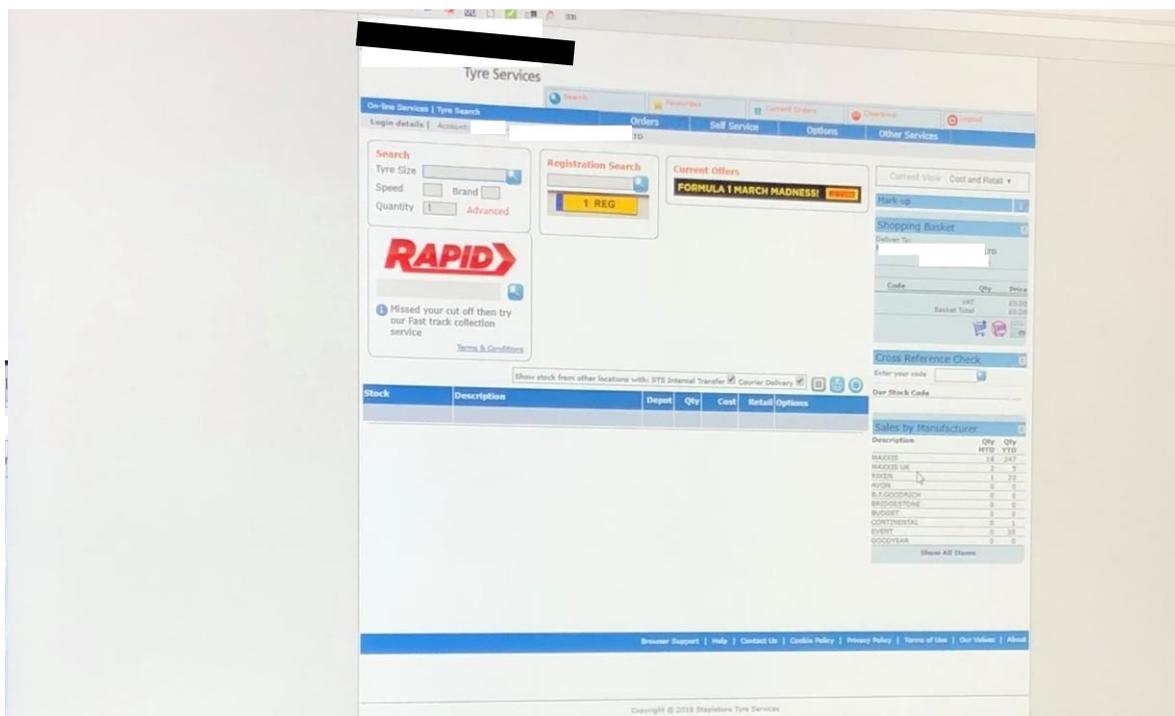


Photograph of Carol talking to a customer on the telephone. (325 P1, K3)

Team software used to collate a sales breakdown report (317 P1, K3)

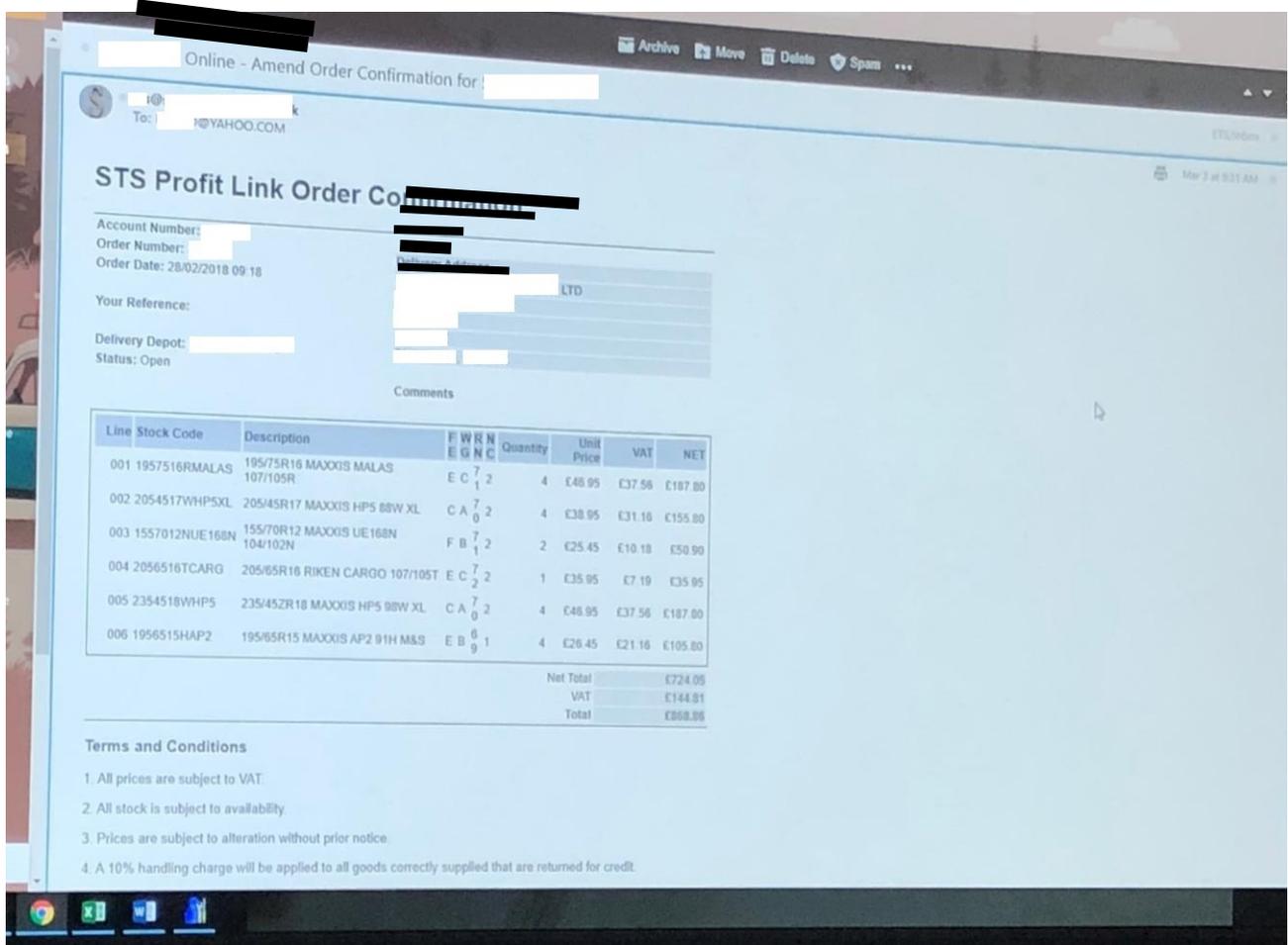
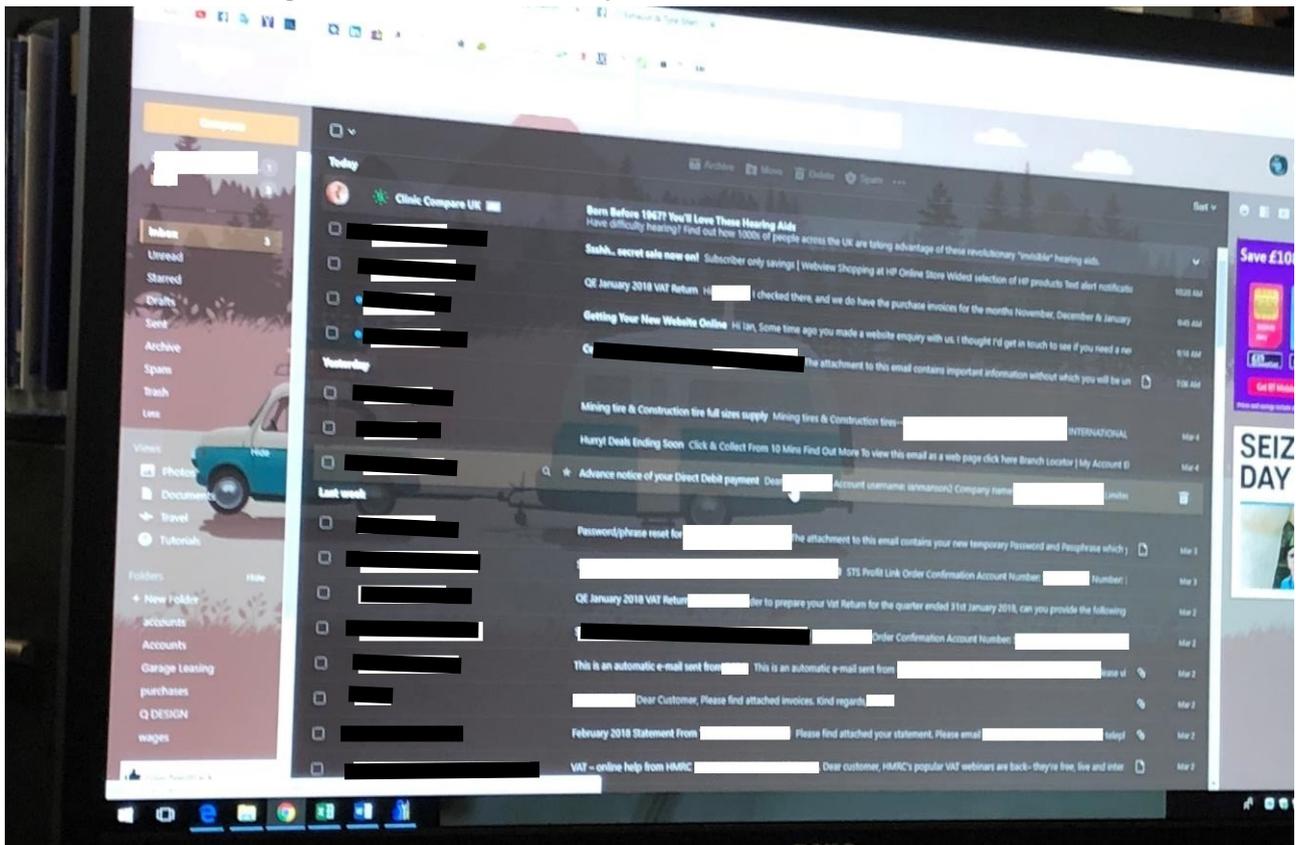
Photograph of Carol scanning the sales breakdown document into the computer as a PDF file prior to emailing it to their accountant.

Photograph of the XYZ website that Carol uses to source tyres for customers. She stated that some customers don't know what tyres they need. She said that customers can give her their car registration number, she can then search for information regarding the cars tyres from there, or alternatively she would go outside and look at the actual tyres if the customer has taken their car to the garage. She stated that she posted information on Facebook recently regarding how customers can check their car tyre details. Carol sources tyres on a daily basis, she always tries to make sure she sources the best tyres to meet customers requirement's at best value for money. Carol stated that she sometimes she has to order more expensive tyres from ABC who are based in Aberdeen if XYZ cannot deliver on time. Carol is fully aware of the importance of sourcing quality products at best value for money. This helps to make sure that the customer receives the best deal possible. (318 P1, P4, K1, K2, K6, K7)



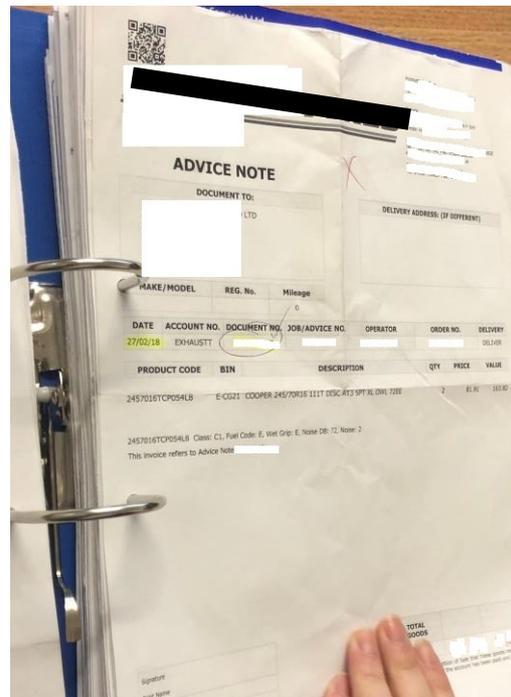
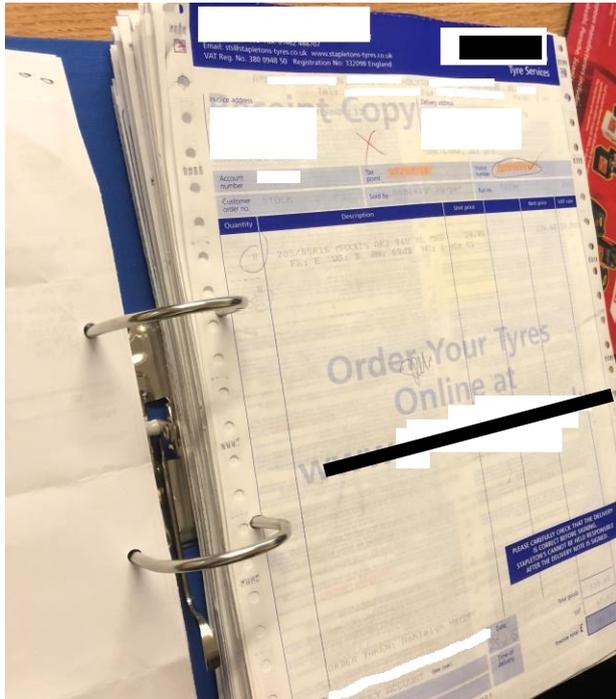
Facebook customer information on how to check tyre size, load, speed markings. (325 P1, P3, K1, K2, K4)

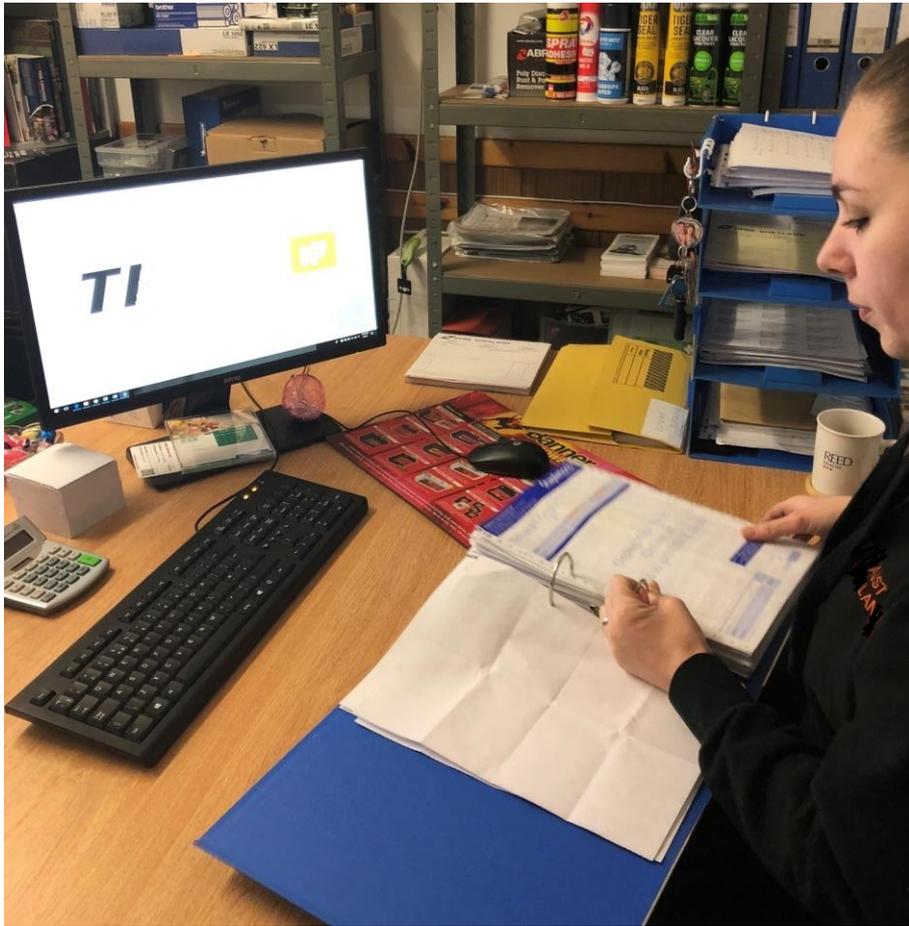
Photograph below shows Carol checking her email inbox. She stated that she checks her email inbox at regular intervals each day.



I asked Carol how she orders tyres and exhausts, she stated that she orders all stock online, she then receives confirmation emails. An example is shown below: (318 P3, P5, P7, K2, K7, K9)

Once the stock arrives she enters the information into Team so that it appears in stock. She showed me her deliver note folder shown below: she also demonstrated how items are entered into stock. She explained that if the same items are re-ordered they have a stock code, it is a quick and easy process to enter these items.





Photograph of Carol entering incoming stock into Team. (318 K9)

All purchases are entered into a spreadsheet as shown below: (318 K7, K9)

Date	Description	Category	Price 1	Price 2	Price 3
17.11.17	PREMIER	BUSINESS SERVICES	£140.00	£28.00	£168.00
17.11.17	TYRES	STOCK	£98.00	£19.60	£117.60
17.11.17	TYRES	STOCK	£379.56	£75.91	£455.47
17.11.17	TYRES	STOCK	£195.52	£39.10	£234.62
17.11.17		STOCK	£81.35	£16.27	£97.62
18.11.17		EQUIPMENT	£59.00	£11.80	£70.80
18.11.17	TYRES	STOCK	£159.60	£31.92	£191.52
19.11.17		STOCK	£11.81	£2.36	£14.17
19.11.17	S	STOCK	£170.80	£34.16	£204.96
19.11.17		SUNDRIES	£16.67	£3.33	£20.00
20.11.17		STOCK	£108.62	£21.72	£130.34
20.11.17		STOCK	£140.29	£28.06	£168.35
20.11.17		WASTE SERVICES	£48.10	£0.00	£48.10
20.11.17		WASTE SERVICES	£77.70	£0.00	£77.70
21.11.17		STOCK	£67.60	£13.52	£81.12
21.11.17	TYRES	STOCK	£132.00	£26.40	£158.40
21.11.17	TYRES	STOCK	£191.10	£38.22	£229.32
21.11.17		STOCK	£663.20	£132.64	£795.84
22.11.17		SUNDRIES	£0.29	£0.06	£0.35
22.11.17		FREIGHT	£80.95	£16.19	£97.14
22.11.17	TYRES	STOCK	£410.88	£82.17	£493.05
22.11.17	TYRES	STOCK	£196.80	£39.36	£236.16
23.11.17	GARAGE	VEHICLE REPAIRS	£842.65	£168.53	£1,011.18
23.11.17		PARTS	£7.30	£1.46	£8.76
23.11.17		TOOLS	£28.77	£5.76	£34.53
23.11.17	MARINE	CLOTHING	£116.58	£23.32	£139.90
23.11.17		FUEL	£8.33	£1.67	£10.00
23.11.17	GARAGE	FUEL	£16.67	£3.33	£20.00
23.11.17		FIRST AID SUPPLIES	£10.05	£2.01	£12.06
23.11.17		SUNDRIES	£9.52	£0.00	£9.52
23.11.17		STOCK	£258.55	£51.71	£310.26
23.11.17		STOCK	£80.35	£16.07	£96.42
23.11.17		STOCK	£263.80	£52.76	£316.56
24.11.17		STOCK	£181.15	£36.23	£217.38
24.11.17		STOCK	£49.68	£9.93	£59.61
24.11.17	TYRES	STOCK	£179.84	£35.97	£215.81
24.11.17	TYRES	STOCK	£51.18	£10.24	£61.42
24.11.17		LEASE	£303.34	£60.67	£364.01

Screen below shows Carol entering stock into Team. (318 K9)

Stock Details

Normal Details | Extended Details | IntraStat / Waste Management | Best Buy

Stock Code: _____ Category: CAR TYRES Active

Description: _____ VAT Code: 0% Special Offer

Comment: _____

Quick Search: _____

Selling Prices: _____ Supplier: _____ Width: _____

Retail Price: 0.00 Discount Code: _____ Diameter: _____

Trade Price: 0.00 ReOrder Level: 0 Studs: _____

Special Price: 0.00 Max. Level: 0 PCD: _____

List Price: 0.00 Bar Code: _____ PCD 2: _____

Manufacturer: _____ Location: _____ Last Ref: _____

Manufacturer's Unique Reference: _____ Last Invoice: _____

Analysis: _____

Current Level: 0 Average Cost: 0.00 Last Cost: 0.00

Screen below shows Carol entering stock into Team. (318 K9)

Stock Details - Edit Stock Item

Normal Details | Extended Details | IntraStat / Waste Management | Best Buy

Stock Code: MX155 Category: VAN TYRES Active

Description: 155/70 N UE16 Special Offer

Comment: 104/10 VAT Code: 1 20%

Quick Search: []

Selling Prices:

Retail Price	43.27
Trade Price	0.00
Special Price	0.00
List Price	0.00

Supplier: [] Width: 155

Discount Code: [] Profile: 70

ReOrder Level: 0 Diameter: 12

Max. Level: 0 Speed Rating: N

Load Index: []

Manufacturer: [] Bar Code: [] Last Ref: []

Manufacturer's Unique Reference: [] Location: [] Last Invoice: []

Analysis: []

Current Level: 0 Average Cost: 25.45 Last Cost: 25.45 Save

I asked Carol if the company has ongoing marketing. She stated that the business is always trying to promote new products, service and generally keep local people informed about their business. Marketing includes Facebook, local newspaper and the local radio. Carol showed me a new package deal she was given from the Braes Times, she had an information booklet, in which she showed me the deal (starter package) they have signed up for recently. The marketing will run for three months. (318 P1, P3, P4, P5, P7, K1, K2, K3, K5, K7) (325 P1, K4)

