

**Asset Protection Division**  
Post Office Box 770  
Deerfield, IL 60015-0770  
847-948-8988 / 800-323-5771



## **Business Management Course**

Thank you for your interest in the Protective Business Management Course. It is a premier finance and insurance training seminar, and one of the many important aspects of Protective's Dealer Services. Through the years, numerous dealership personnel, from salespeople to managers to dealers, have participated in our training seminars. A variety of topics are included in the class including but not limited to:

Menu Selling	Extended Service Contracts
Effective F&I Management	Credit Insurance
Laws and Regulations	GAP
Dealership Financing	Lender Relations
Objection Handling	Reporting

Protective's training instructors, who are AFIP-certified and are also certified as training instructors, have many years of experience and training in the automotive industry. They are familiar with the multiple issues presented to finance and insurance managers on a daily basis.

Additional benefits to the course include an extensive manual, form samples, motivational content, and networking opportunities with peers.

A key learning tool is videotaped role-playing. The participants will have a unique opportunity to view and critique their own selling performance with additional input from their peers and instructor. Participants keep their videos for future reference.

Additional information is enclosed, including the enrollment form. For further information, please contact our Business Management Course Administrator at 800-670-6032 option 3. Again, thank you for your interest in the course.

## **BUSINESS MANAGEMENT COURSE OBJECTIVES**

After completing this course, students will be able to:

- Reflect on their experiences in and with the F&I manager position
- Develop skills that are relevant to the F&I manager position
- Help ensure/improve dealer compliance
- Build/ensure product knowledge
- Reinforce/improve selling skills
- Maintain/increase professional skills and image

## **COURSE DAILY SCHEDULE**

### **Monday:**

- Course Introduction
- The Importance of F&I
- Communication
- Effective F&I Management
- Laws and Regulations (Federal) including Red Flag Guidelines
- Sales Meeting Presentations Overview
- Quiz

### **Tuesday:**

- Sales Presentations
- Dealership Financing
- Conversion
- GAP Coverage
- Warranties and Service Contracts
- Claims
- Credit Insurance
- F&I Sales Process
- Quiz

### **Wednesday:**

- Sales Presentations
- Menu Selling
- Demonstration and Practice of Menu Selling
- Participant Role Play and Videotape Participant Menu Selling

### **Thursday:**

- Sales Presentations
- Handling Objections Overview
- Demonstration and Practice of Handling Objections
- Participant Role Play and Videotape Handling Objections

### **Friday:**

- Sales Presentations
- Completing the Credit Statement
- Credit Bureau and Lender Relations
- The Internet
- Time Management
- Office Management, Forecasting and Reporting
- Final Exam
- Graduation and Farewell

**COURSE LOCATION:**

Protective  
2345 Waukegan Rd., Suite 210  
Bannockburn, IL 60015 (Chicago)  
800-323-5771

**COURSE SCHEDULE:**

For the next course date: Please call 800-670-6032  
Monday through Thursday: 9:00 a.m.-5:00 p.m.  
Friday: 9:00 a.m.-1:00 p.m.

**ENROLLMENT FEE:**

Protective & Western General Clients: \$ 995.00  
Standard Enrollment: \$1495.00

**ATTIRE:**

Business casual, i.e. golf shirt and khaki pants. No jeans or shorts please. Ladies may wish to bring a light sweater for comfort in the classroom.

**ACCOMMODATIONS:**

If you request arrangements by submitting Hotel Reservation Request/Credit Card Authorization Form, your room will be reserved for you at Embassy Suites Chicago North Shore/Deerfield as space is available. You may also make the reservation on your own direct with the hotel and request the Protective rate. The hotel's phone number is 847-945-4500. The rate is \$125 per night plus tax. You are responsible for this expense. Amenities include mini-fridge, microwave, coffeemaker, cooked-to-order breakfast buffet, evening reception, and complimentary business center. There is a full service restaurant on site and a pantry available at the hotel for light snacks and beverages.

**ARRIVAL/DEPARTURE:**

For students flying into the Chicago area, please plan your arrival for anytime on Sunday. You may schedule your flight for anytime after 4 p.m. on Friday.

**TRANSPORTATION ISSUES:**

- **Flights:** If you are flying, the closest airport is O'Hare (ORD). The other major airport is Midway (MDW).
- **Airport Transportation:** Car service may be arranged for transportation from the airport to the hotel by calling 847-816-7474. The car service from O'Hare is approximately \$60 each way (shared rate). Taxi rates average \$60 from O'Hare, and can be as high as \$120 from Midway. Pre-arranged taxi service is approximately \$30 plus tolls and gratuity through American Taxi at 847-945-9444.
- **Rental Car:** A rental car is not necessary but you may desire the convenience.
- **Directions:** Directions will be provided with your departure confirmation folder.
- **Hotel Shuttle:** Your hotel offers complimentary transportation to the Protective office, restaurants and shopping in the area. Check with the front desk for more information.

**Protective**   
**Business Management Course Enrollment Form**

**Student Information**

Name: \_\_\_\_\_  
Dealership: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State, Zip: \_\_\_\_\_  
Phone: (     ) \_\_\_\_\_ - \_\_\_\_\_      Fax: (     ) \_\_\_\_\_ - \_\_\_\_\_  
Cell: (     ) \_\_\_\_\_ - \_\_\_\_\_      **OR**      Home: (     ) \_\_\_\_\_ - \_\_\_\_\_  
E-Mail: \_\_\_\_\_  
Emergency Contact: \_\_\_\_\_  
Contact's Day Phone: (     ) \_\_\_\_\_ - \_\_\_\_\_      Eve: (     ) \_\_\_\_\_ - \_\_\_\_\_  
Account Exec./Referral Name: \_\_\_\_\_  
Current Job Title: \_\_\_\_\_      # of Years: \_\_\_\_\_  
Previous Industry Exp.: \_\_\_\_\_      # of Years: \_\_\_\_\_  
Current Data:    Per-Car Avg: \$ \_\_\_\_\_    No. of Cars/Mo.: \_\_\_\_\_    Finance: \_\_\_\_\_ %  
Average Penetration Percentage:  
    Credit Life: \_\_\_\_\_ %    Credit Disability: \_\_\_\_\_ %    GAP \_\_\_\_\_ %    VSC \_\_\_\_\_ %

**Enrollment Information**

Course Date Requested: \_\_\_\_\_  
Course Fee:     Preferred Client Rate of \$995.00       Standard Rate of \$1,495.00  
Payment Type:  Check (enclose with enrollment)       Credit Card (Visa/MC only)  
    Cardholder: \_\_\_\_\_  
    Card #: \_\_\_\_\_      Exp. Date: \_\_\_\_\_  
    Authorized Signature: \_\_\_\_\_  
Do you have medical, dietary or other special needs?  No     Yes \_\_\_\_\_

**Hotel Reservation Information: Please complete the next page if a room is needed. Lodging is NOT INCLUDED in course fee.**

Fax your completed enrollment form and hotel reservation request to Distribution Support at (800) 845-5016 and send the original form with your enrollment fee to:

Protective  
P.O. Box 770  
Deerfield, IL 60015

*An e-mail acknowledgement will be sent within 48 business hours of receipt of enrollment. Thank you for your commitment to professional F&I!*

## ***Hotel Reservation Request & Credit Card Authorization***

Please note, lodging is NOT included in the course fee. In order for Protective to reserve a room at Embassy Suites Deerfield on behalf of the attendee at the discounted rate of \$125 per night plus taxes, the following information must be submitted and is based on space availability. No shows will be charged by the hotel to the card provided. Questions regarding hotel reservations may be directed to Debra Engelhart at 847-572-6895. You may make your reservation on your own by contacting the hotel at 847-945-4500 and requesting the Protective rate.

### **Hotel Guest Information**

Guest name: \_\_\_\_\_  
Phone number: \_\_\_\_\_ Fax or alternate number: \_\_\_\_\_  
Arrival date: \_\_\_\_\_ Departure date: \_\_\_\_\_  
Relation to cardholder:  Self  Business Associate  Other: \_\_\_\_\_

### **Cardholder Information**

Name as it appears on the credit card: \_\_\_\_\_  
Card type:  Visa  MC  Amex  Diners/CB  Discover  JCB  
Account type:  Individual (personal credit card)  
 Corporate | Company Name: \_\_\_\_\_  
Card number: \_\_\_\_\_ Exp. date: \_\_\_\_\_  
Address: \_\_\_\_\_  
(where statement is mailed)  
City, State and Zip: \_\_\_\_\_  
Phone number: \_\_\_\_\_ Fax or alternate number: \_\_\_\_\_

### **Approved Charges – Third Party Authorization**

The following must be completed including cardholder signature if the cardholder is not the hotel guest. The hotel guest will need to present a credit card at check-in for incidental charges if “all charges” is not selected.

All Charges  Room & Tax  Telephone (LD)  Telephone (Local)  Restaurant  
 Room Service  Valet (Laundry)  Parking  HS Internet Access  Movies  
 Other: \_\_\_\_\_

I certify that all information is complete and accurate. I hereby authorize {**Embassy Suites Deerfield**} to collect payment for all charges as indicated in the Approved Charges section of this form by processing a charge to the credit card listed above. Charges must not exceed \_\_\_\_\_ for the entire stay/event. I understand that a new form will have to be completed if guest wishes to extend his/her stay. I certify that I am the authorized signer of the credit card listed above.

Cardholder name: (Printed) \_\_\_\_\_

Cardholder signature: \_\_\_\_\_ Date: \_\_\_\_\_

# **Business Management Courses**

## **2010**

January 11-15

Feb 8-12

March 8-12

April 12-16

May 3-7

June 7-11

July 12-16

August 9-13

September 13-17

October 11-15

November 8-12

December 6-10

## **2011**

January 10-14

Feb 7-11

March 14-18

April 11-15

May 16-20

June 13-17

July 11-15

August 8-12

September 12-16

October 10-14

November 7-11

December 5-9