



# Preparing for the future:

Understanding the skills & training needs  
of the automotive retail sector

Autoglazing



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# Introduction

## Purpose

Each year the Institute of the Motor Industry (IMI), as the Sector Skills Council (SSC) for the automotive retail sector, carries out a Sector Skills Assessment (SSA). The SSA, which is commissioned and funded by the UK Commission for Employment and Skills (UKCES), gives a high level overview of the skills needs of the sector.

In order to enable employers to prepare for the future, the IMI initiated and conducted an extensive programme of in-depth granular research building on the SSA, to fully understand the extent of the skills and training needs across each of the 12 sub-sectors within its footprint. The purpose of this research is to recognise, at job role level, within each distinct sub-sector, precise skills and needs within the existing workforce.

It is vital that the IMI, as the SSC and the professional association for the automotive retail sector, understand employers' immediate and critical skills needs in order to identify and/or formulate effective solutions to address these skills needs. We need to ensure that the automotive retail sector begins to improve its overall productivity and profitability. This will ultimately help business position themselves for economic recovery, when it comes, allowing them to compete in a globally competitive market.

## Methodology

To achieve our stated purpose the IMI engaged with employers, stakeholders, training providers and trade associations to ensure that the research findings were accurate, validated at each stage, robust and fit for purpose.

To accomplish this, a qualitative phase of research was carried out. This involved 170 in-depth telephone interviews, each lasting one and a half hours, with employers across each of the sub-sectors. The focus of these interviews was on skills and training needs within the business, the issues facing the employer and the future challenges they envisaged over the next 18 months – 2 years. This first qualitative element (i.e. the use of open questions to gain responses) successfully defined the broad skills needs of the sub-sector.

The second phase of the research, the quantitative phase, was designed to validate and expand on the issues raised in the first phase, by the use of a telephone survey which contained the summary findings and analysis from the first stage. The telephone interview asked respondents to confirm that the skills needs identified from the in-depth interviews were accurate, they were then asked to prioritise each of the skills and training needs identified. In total, 876 employers took part in the telephone interviews (100 from each sub-sector were targeted) to enable accurate data to be collected and robust conclusions to be drawn. This stage was complemented by a web survey, which furnished 630 additional responses, to ensure that as many employers as possible had the opportunity to

respond to the questionnaires in as many different ways as possible.

The final main phase of the research involved 12 focus groups with employers to benchmark their views on skills needs against the findings from the first and second phases of the research. This enabled us to arrive at a final set of core skills needs, covering technical, management and customer service job roles.

Once all the data had been collected it was analysed by channelling the responses from the initial in-depth interviews into a much more concise number of core skills needs, using the findings from each consecutive stage of the research as the starting point for the next. By doing this, we have achieved a high level of confidence in the conclusions we have arrived at.

For the autoglazing sub-sector, the first phase of research involved in-depth interviews with seven employers. The nature of qualitative interviewing allows conclusions to be drawn from small samples; essentially it is answering the 'what' and the 'why' question and not quantifying the response at this stage. In the second phase of the research 25 telephone surveys were carried out along with a focus group of industry experts to assist the IMI in prioritising skills needs, adding or refining the skills needs identified through the first phase. The data on skill needs are based on 28 responses as a further three responses were completed online. The web survey outcomes were used to assist in decision making should there be 'borderline' critical skills needs identified or where it was difficult to distinguish which skills needs should be categorised as critical.

# Background

Across the automotive retail sector as a whole, in 2008 the sector generated £146 billion or 4.7% of all UK turnover and contributed £25 billion or 2.8% of gross value added. The sales of motor vehicles sub-sector (SIC 50.10) generated the majority of turnover (70%) and contributed the most in value added terms (47%). Geographically England, as would be expected, generated the majority share in terms of both turnover and value added at 88%.

In the latest IMI State of the Sector Report (July 2011), businesses report that trading conditions remain challenging, with 54% of companies experiencing lower orders/sales over the last 6 months and 66% showing lower profit margins.

Predictions for the next 6 months are similar, with 41% showing reduced orders/sales and 21% predicting higher sales.

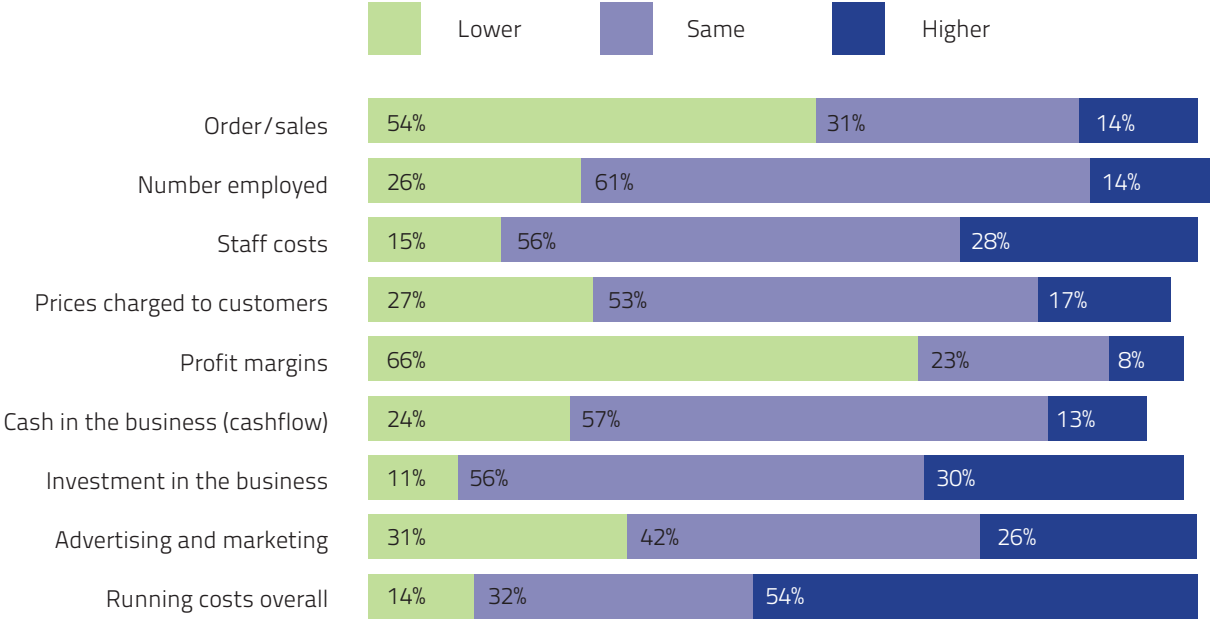


Table 1. Business performance in last 6 months, compared with previous 6 months  
Source: IMI State of the Sector (July 2011)

Respondents to this research were asked which issues affected their overall business. It was clear that three areas were critically important:

- Impact of changes in legislation, and changes in legislation forecast over the next 18 months.
- Trading conditions – the fall in car sales in particular over the last two years and the sluggish revival (particularly important to the sales sub-sector).
- The relentless drive in technology development across all vehicle types.

Across the whole automotive retail sector, 85% of businesses are micro, employing less than 10 people. However, they employ only 38% of the total sector workforce. While 57% of all employment is concentrated in those companies that employ over 11 (this accounts for only 14% of all companies), with the remaining 5% of the workforce working for large employers who account for less than 1% of all businesses (See table 2 below). Given the make up of the sector, we are confident that our telephone research was targeted at the appropriate range of businesses.

	% of workforce	All UK	Difference
1-10	38%	21%	16%
11-199	57%	47%	10%
200+	5%	32%	-26%

Table 2. Employees by business size  
Source: Annual Business Inquiry (2008)

Having experienced great difficulties in obtaining sub-sector business and workforce data in the format that the sector uses, e.g. the breakdown of vehicle maintenance and repair into autoglazing, fast fit, vehicle inspection, roadside assistance and recovery, accident repair and light and heavy vehicle, it is not

possible to state reliable government data on numbers of businesses and staff. According to the BMG telephone interview data, the autoglazing sub-sector employs at least 2,000 people in 400 businesses. Intelligence from the IMI shows this figure to be in excess of 4000.

# Autoglazing business approach to staff training and development

The table below shows 64% of businesses surveyed in the sub-sector employed between 2 - 10 people, compared to 36% employing more than 10 people (See Table 3). Businesses with 1-10 staff are more likely to operate from one site (75%), whereas all the businesses with 11+ staff that were surveyed operated from more than one site.

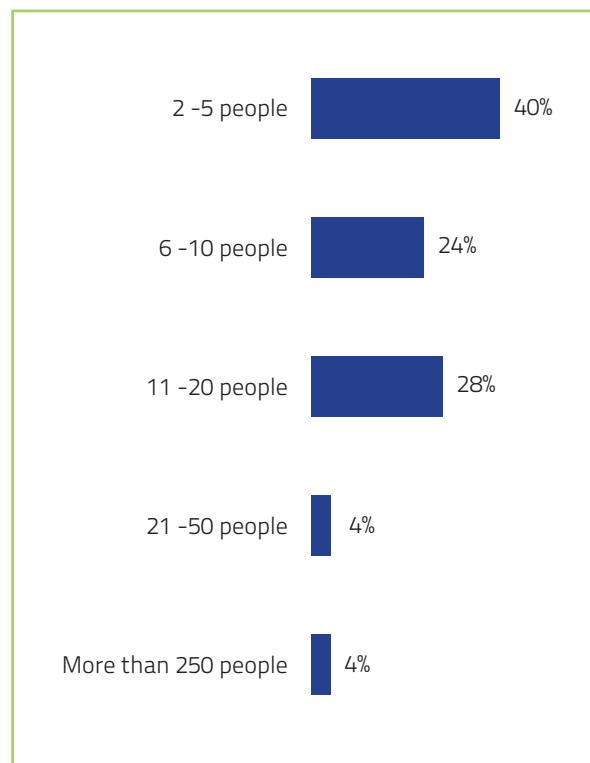


Table 3 Number of people employed – Autoglazing  
Source: IMI quantitative telephone interviews September 2011



Table 4 below shows the majority of larger businesses have a business plan and a training plan (78%). A significant majority of all businesses surveyed have undertaken training over the last two years (92%) although the proportion of businesses forecast to undertake training over the next two years drops to 64%.

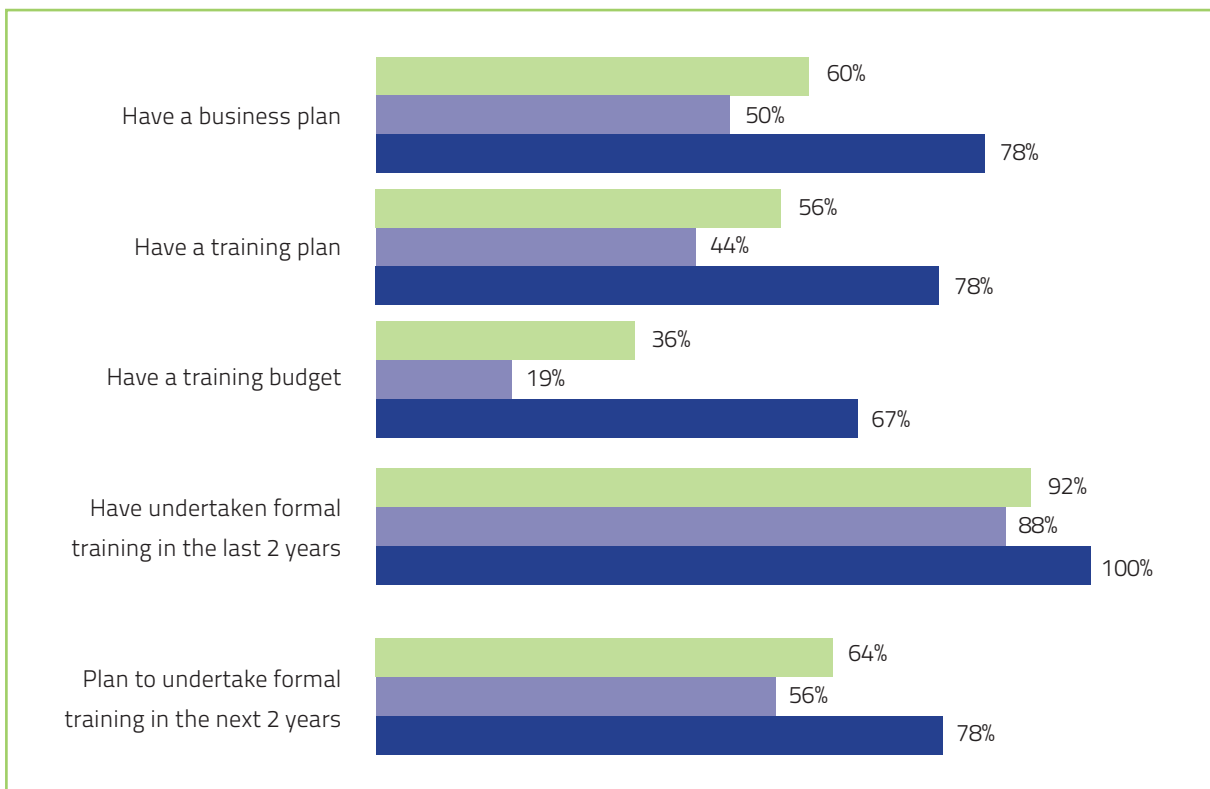


Table 4 Involvement in Training and Business Planning  
Source: IMI quantitative telephone interviews September 2011

All
  1-10 employees
  11+ employees

Table 5 shows the vast majority (56%) of larger businesses have a training and development programme as part of their business strategy, compared to 38% of smaller businesses.

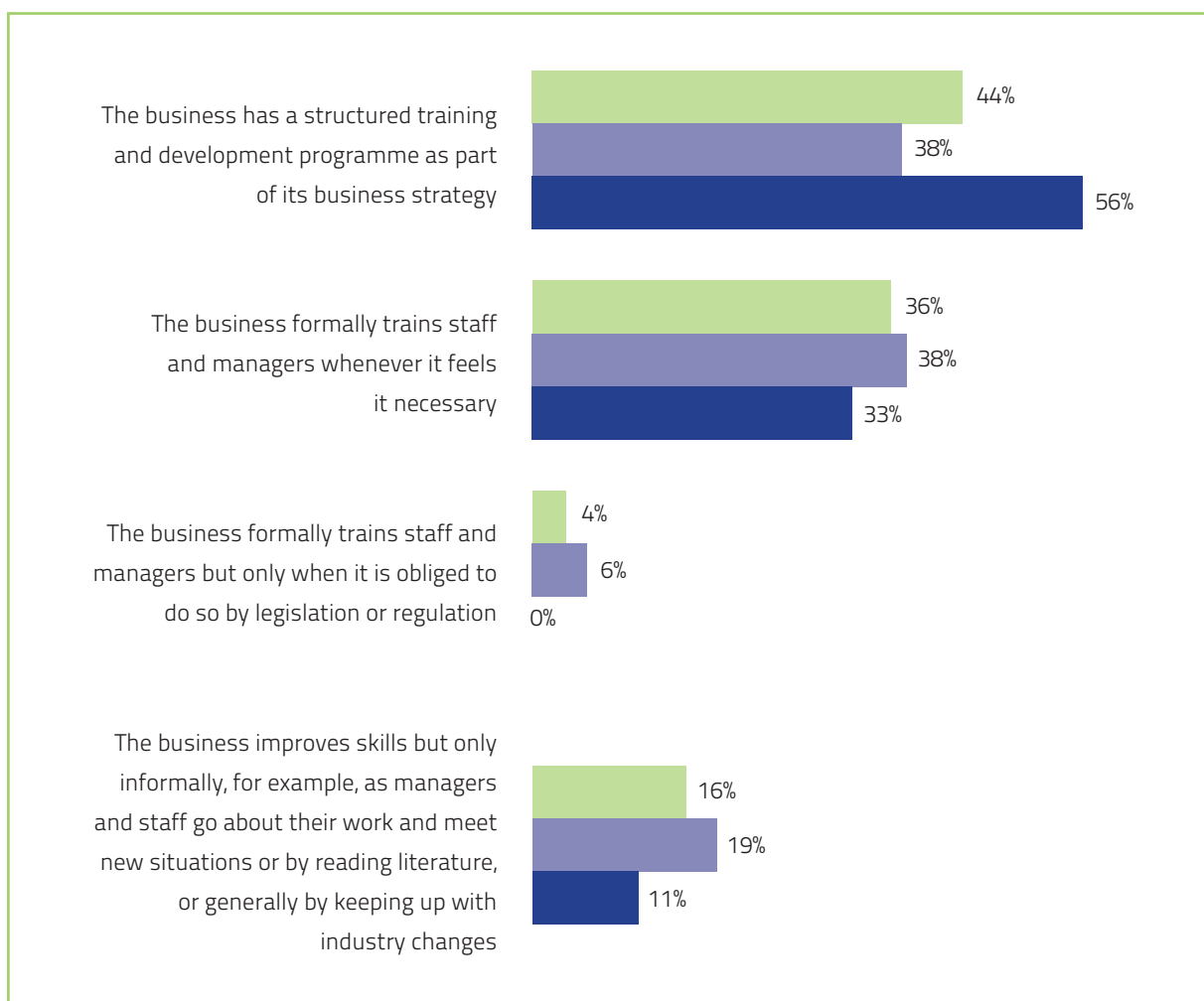


Table 5 Involvement in Training and Development  
Source: IMI quantitative telephone interviews September 2011



The most frequently given reason by businesses for not involving in training is that the business is small and all staff and managers are fully skilled (75%). This is followed by training being unavailable (50%).

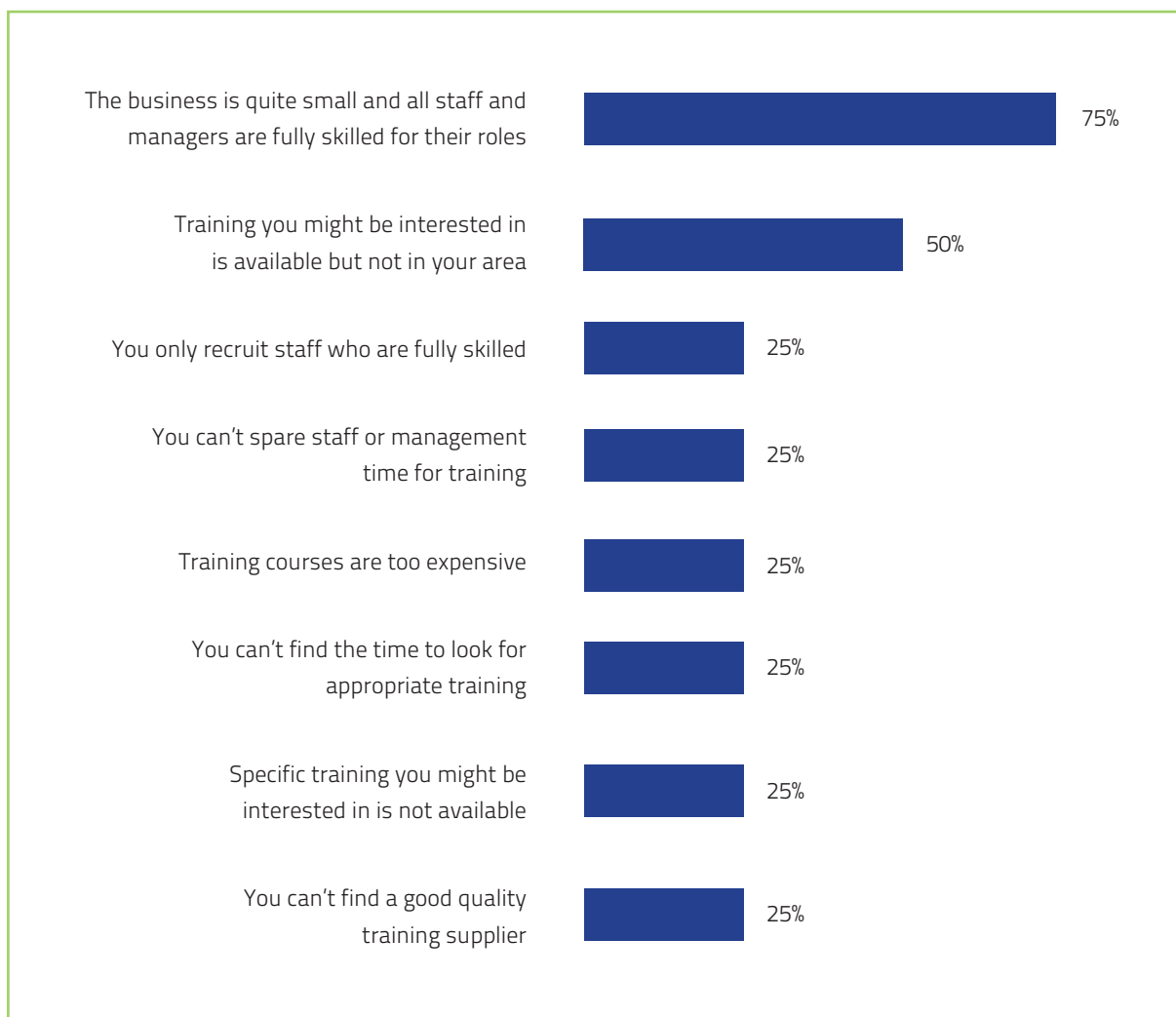


Table 6 Reasons for not training  
Source: IMI quantitative telephone interviews September 2011

# Qualitative in-depth interviews

Qualitative research was carried out with seven businesses within the autoglazing sub-sector. These were pre-arranged telephone conversations with previously identified, appropriate staff who could comment authoritatively on relevant job roles within their business. These interviews lasted approximately one and a half hours and were conducted by researchers from BMG Research, Birmingham.

The interviews were mostly unstructured and used open questioning (i.e. they didn't ask questions where an 'yes'/'no' answer could be given), covering a range of different types of organisation, mostly independents employing up to 50 people, but with a small number of franchise organisations contacted as well. Interviews were conducted across all nations, England, Scotland, Northern Ireland and Wales in August 2011.

The following questions were asked by the researchers, who asked to speak to employers capable of covering at least two job roles within the interview:

- What job roles exist within the business?
- What are the current skills and training needs required by (each job role)?
- Which of these skills and training needs are particularly important or critical to your business?
- What skills and training needs do you anticipate you will have in the next two years?

The focus was on identifying skills needs related to key job roles. From the responses to the open questions it was possible to identify the training and skills needs, which are listed overleaf.

# Job-role specific skills needs

The following skills needs were identified across the autoglazing sub-sector. The focus was on identifying skills needs related to key job roles. From the responses to the open questions it was possible to identify the training and skills needs, which are listed below.

## Technician/glazing assistant

- Procedures for pre-repair system operation/checking and post repair checks
- Keeping up to date with vehicle systems associated with glass repair/replacement and the implications there might be
- Understanding the correct repair procedure with regard to PPE and vehicle protection
- Assess and report on existing damage on the vehicle prior to starting repair
- Procedures that affect a quality repair – cleaning glass/bodywork before applying adhesives
- Knowledge of primers/adhesives/cleaners coming onto the market
- Accuracy in identifying correct replacement glass before removing damaged glass – understanding different types of glass on the market
- Understanding the implications of leaving broken glass in the vehicle/doors, heater vents etc.
- Assess the work environment for safety reasons – apply personal safety procedures
- Understand roadside safety procedures – informing the police – putting customers in a safe place
- Understand how to use appropriate tools – cutting wires, lifting tools, tools used for shaping/cutting glass
- Understand legal requirements of glass fitting and repair
- Understand the techniques used for cutting and shaping glass
- Keeping up to date with new glass technologies/adhesive and cleaning products
- Identifying the best procedures for a given vehicle/model
- Procedures used to repair glass – assessing what damage can be repaired
- Dismantling procedure including electrical/electronic components associated with the repair
- Procedures for the disposal of waste products
- Understanding the environmental impact of replacement glass over a repair and being sympathetic to the cost to the customer
- The use of diagnostic equipment to re-set vehicle computer systems
- Basic understanding of vehicle electrics – disconnecting batteries, electric window systems, rain sensors, aerial, heater elements, radios/speakers, SRS (electric vehicle high voltage, alarm systems)
- Understanding of rubber bonding techniques/procedures for older vehicles
- Administration skills – collecting information for invoicing, head office procedures, customer databases

## Customer service staff

- Communications with customers to identify vehicle details accurately. Describe what work needs to be done and give a price for the repair
- Understand and communicate the details of the guarantee/detail and scope of vehicle warranties in relation to the work to be carried out
- Understand the importance of friendly and polite conversation, putting the customer at ease, being smart, prompt and reliable, communicating delays
- Understand and communicate the insurance process, verify insurance details
- Elicit accurate information from the customer on the damage that needs repairing
- Provide information in a friendly and professional way, and with confidence
- Understand the procedure for post repair customer satisfaction checks on the vehicle
- Understand how to meet customer needs, the right body language, non-verbal and verbal communication that provides a good customer experience

## Glass repairers

- Procedures that affect a quality repair – e.g. cleaning glass and body work before applying adhesives
- Assess the work environment for safety and applying personal safety procedures
- Keeping up to date with vehicle systems associated with glass repair/replacement
- Understand the correct repair procedure with regards to PPE and vehicle protection
- Understanding the implications of leaving broken glass in the vehicle, doors, heater, vents etc.
- Accuracy in identifying correct replacement glass before removing damaged glass – understanding different types of glass on the market
- Understanding legal requirements of glass fitting and repair
- Procedures for the disposal of waste products
- Procedures for pre-repair system operation, checking and post repair
- Assess and report on existing damage on the vehicle prior to starting repair
- Understand how to use appropriate tools – cutting wires, lifting tools, tools used for shaping and or cutting glass
- Keeping up to date with new glass technologies, adhesives and cleaning products
- Procedures used to repair glass – assessing what damage can be repaired
- Understanding of rubber bonding techniques and procedures for older vehicles
- Knowledge of primers, adhesives, cleaners coming onto the market
- Dismantling procedure including electrical and electronic components associated with the repair
- Understanding the environmental impact of replacement glass over a repair and being sympathetic to the cost to the customer
- Administration skills – collecting information for invoicing, head office procedures, customer databases
- Basic understanding of vehicle electrics, disconnecting batteries, electric window systems, rain sensors, aerial, heater elements etc.
- Understand roadside safety procedures – informing the police – putting customers in a safe place
- Understand the techniques for cutting and shaping glass
- Identify the best procedures for a given vehicle and model – using the internet to find this information
- The use of diagnostic equipment to re-set vehicle computer systems

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## Management staff

- Developing effective communication within the team
- Understanding customer legislation within the sector
- Awareness and understanding of new models and changes in technology
- Understanding how the different parts of the business link together
- Effective decision making for managers
- People management, team working, motivation, recruitment, appraisals, delegation, discipline, target setting
- Developing effective time management for managers
- Developing an effective marketing function
- Effective ways to gain repeat business – driving a customer care culture
- Maintaining positive customer relations
- How to make a profit running an efficient department
- Developing effective IT skills for managers
- Developing awareness and understanding of company law/relevant legislation
- Having good product knowledge and awareness – new car and technology
- Understanding the business – how this fits in the industry structure
- Managing accounts / books
- Understanding customer finance routes
- Effective report writing
- Effective handling / procedures for staff shortages
- Effectively managing wages and bonuses for staff
- Effectively managing company-wide targets through the daily targets of staff
- Effectively managing meetings – conference calls
- Understanding health and safety legislation and applying it

# Skills needs across the autoglazing sub-sector over the next two years

Respondents were asked to record the changes they expected to their skills and training needs over the next two years.

One of the most striking features of the survey has been the references to new technology made in the in depth interviews, across all sub-sectors. It is clear that respondents are aware of a significant change in the underlying make up of vehicles, in particular the impact of advanced electronics both within the overall management and performance of the engine, and also across the brakes, gearbox, suspension, interior comfort management systems and both passive and active safety systems. This development impacts on how the modern vehicle works, how it needs to be maintained and serviced, and how it will react in the event of an accident.

The autoglazing sub-sector is characterised by a mobile workforce working away from their base, the sub-sector is highly competitive and quick to react to demand, resulting in an emphasis on maximising returns on investment in training and development. Dominated by a small number of large employers,

there is also a significant number of independent employers who are keen to see a consistently high quality offer being made to all customers.

For managers, modern employment law is expected to change quite dramatically, especially human rights, discrimination and bribery policies. There are also likely to be changes in the way organisations communicate with customers, for example, internet, web, apps etc. There is expected to be a greater emphasis on sales across all levels and roles and a growing requirement for managers to keep up to date with Human Resources legislation and health and safety.

The relentless drive in technology development across all vehicle types was noted across all sub-sectors, with the impact increasingly being felt within sales, technical and customer service roles within the sector (data taken from the IMI State of the Sector Report 2011).

## Quantitative telephone survey

Once the qualitative in-depth interviews had identified the skills needs of the autoglazing sub-sector, the quantitative series of telephone interviews were carried out. Respondents were prompted with the skills and training needs identified in the previous stage of research and were asked to rank them in order of priority: (i) critical need, (ii) some need or (iii) no need.

This survey quantified the initial set of responses and identified a potential set of skills and training needs that were seen as critical, of some need, or of no need. This phase of the research was pivotal in identifying those skills and training needs that were in need of priority action.

In total 25 interviews were conducted with employers and business owners across the autoglazing sub-sector. The data on skill needs are based on 28 responses as a further three responses were completed online.

The final outcomes of this process are detailed in the Conclusions section of this report.

## Focus groups and web survey

### Focus group

The autoglazing focus group was held in September 2011 and comprised representatives from employers and an awarding organisation. The main agenda for these group meetings was to confirm the validation of the findings from the qualitative and quantitative telephone interviews. For the sub-sector, this particular focus group raised no issues with the outcomes of either sets of interviews. The focus group confirmed the skills and training needs of the autoglazing sub-sector.

### Web survey

The web survey was conducted across the entire automotive retail sector, with respondents identifying which sub-sector they worked in and was able to comment on. Due to some sub-sectors having a small number of respondents, the outcomes of the web survey were only factored in, if the outcomes of the qualitative and quantitative telephone interviews, along with the focus groups, did not produce an unambiguous outcome in terms of identifying the criticality of skills and training needs for the sub-sector.



# Conclusions

The aim of this research was to be able to identify and prioritise the skills and training needs of the automotive retail sector at a 'granular' level, which has never been achieved before. We have been able to achieve this by looking at each individual sub-sector across the whole of the automotive sector footprint.

For the autoglazing sub sector we have achieved this aim, through a blended approach of telephone interviews, focus groups and web surveys.

The methodology applied was as follows:

- Taking the skills needs identified by the in-depth telephone survey at the beginning of the research project as the basis for the analysis.
- Taking the focus group and telephone responses and comparing the skills needs identified by the group with the results from the in-depth telephone survey, to arrive at a more refined set of skills, set in a priority listing.
- Taking the website results and applying these to the outcomes of the previous stages to either confirm or change the list.

In the autoglazing sub-sector there were very clear and unambiguous outcomes in terms of criticality and the web survey responses have been collated into the telephone survey results.

# Prioritised skills and training needs for the autoglazing sub-sector

As a result of the three-stepped approach outlined previously, the following sets of skills and training needs were identified as critical to the vehicle parts and distribution sub-sector. They have been ranked in order of criticality with 1 seen as the most critical.

## Glazing assistants

1. Keeping up to date with vehicle systems associated with glass repair (vehicle design, safety features, technical components and materials used in production).
2. Procedures that affect a quality repair – e.g. cleaning glass and body work before applying adhesives.
3. Assessing the work environment for safety and applying personal safety procedures (risk assessment and safety at the roadside).
4. Procedures for pre-repair system operation and checking post-repair.
5. Knowledge of the procedures for the disposal of waste products.

## Glass repairers

1. Procedures that affect a quality repair – e.g. cleaning glass and body work before applying adhesives.
2. Assess the work environment for safety and applying personal safety procedures.
3. Keeping up to date with vehicle systems associated with glass repair.
4. Understand the correct repair procedure with regards to PPE and vehicle protection.
5. Understanding the implications of leaving broken glass in the vehicle, doors, heater, vents etc.

## Management staff

1. Maintaining positive customer relation and dealing with complaints.
2. How to make a profit running an efficient department.
3. Understanding health and safety legislation and applying it.
4. Effective management level decision making.
5. Having a good product knowledge and awareness – new car and technology.

## Customer service staff

1. Understand the importance of friendly and polite conversation, putting the customer at ease and communicating any delays.
2. Provide information in a friendly and professional way, and with confidence.
3. Understand the procedure for post repair customer satisfaction checks on the vehicle.
4. Understand how to meet customer needs, the right body language, non-verbal and verbal communication that provides a good customer experience.
5. Communicate with customers to identify vehicle details accurately. Describe what work needs to be done and give a price for the repair.

# Recommendations

The skills and training needs in this report are those that employers have reported as being critical for their business. Numerous reports have identified the link between training and business performance. The IMI itself has recently conducted ROI studies across a number of sub-sectors that have identified significant increases in business performance from rolling out training and accreditation programmes. The studies show that up-skilling in the automotive retail sector delivers a conservative gross value added (GVA) of £4,000 per person per annum<sup>1</sup>.

56% of businesses in autoglazing have a training plan; This compares to 54% for the automotive retail sector as a whole. Larger organisations are much more likely to have a business plan and a training plan (78%).

Within the automotive retail sector as a whole, 78% of larger companies and 80% of franchise companies have training plans compared to just 38% of smaller companies (fewer than 10 staff) and 39% of independent businesses.

The value of this project is the underlying understanding and knowledge in granular detail required to direct provision across the sub-sector and all job roles. Our challenge is to use this research to ensure that training is relevant and up to date, meeting the needs of the whole sector.

As the SSC, the IMI will focus on developing skill solutions across job roles, against the priority skills needs highlighted in this report.

The IMI commits to prioritising the development of solutions to meet the skills needs where employers have identified their need as being either 'critical' or 'of some need'. Therefore, solutions to the following skills needs will be progressively developed over the next 12 months:

**For glazing assistants in the autoglazing sub-sector, the following were deemed 'critical' skills needs.**

- Assess the work environment for safety reasons – apply personal safety procedures enquiries<sup>2</sup>.
- Keeping up to date with vehicle systems associated with glass repair/replacement (including the likely implications of not doing so).

**For glazing repairers in the autoglazing sub-sector, the following were deemed 'critical' skills needs.**

- Assess the work environment for safety and applying personal safety procedures.
- Understanding the implications of leaving broken glass in the vehicle, doors, heater, vents etc

**For management staff in the sub-sector, the following were deemed 'critical' skills needs.**

- Having good product knowledge and awareness – new models and technology.
- People management – team working, motivation, recruitment, appraisals, delegation, discipline, target setting.

<sup>1</sup> [www.theimi.org.uk/information/roi-ata.html](http://www.theimi.org.uk/information/roi-ata.html)

<sup>2</sup> 100% of those surveyed agreed that this skill need was either critical or of some need.

In addition, the following were deemed 'critical' skill needs for management staff across all automotive retail sub-sectors.

- Understanding and awareness of health and safety legislation.
- People management/How to keep staff effective (8 including autoglazing).

For customer service staff in the sub-sector, the following were deemed 'critical' skills needs.

- Understand the importance of friendly and polite conversation, putting customer at ease, being smart, prompt and reliable, communicating delays.
- Provide information in a friendly and professional way, and with confidence.

In addition, for customer service staff across all automotive retail sub-sectors the following were deemed 'critical' skill needs.

- Effective communication skills.
- Effective problem solving – dealing with customers to ensure their needs are addressed.
- Effective telephone skills.

The autoglazing sector had a slightly lower than average incidence of training budget at 36% out of an average across the sector of 39%. Larger businesses in the autoglazing sub-sector are more likely to have a training budget (67%).

We commit to work with partners to:

- Develop high quality, cost effective training.
- Ensure that the link between business performance and training is clear.

Larger businesses are more likely to prefer online learning, 33% against 13% for those employing 1-10 staff.

As the SSC we commit to:

- Further develop the innovative online CPD management system for the sector.
- Create a common template for training in the sector by ensuring that all provision has clear and measurable learning outcomes that link training to increased business performance.

56% of all autoglazing businesses have a training plan but this reduces to only 44% for smaller businesses (see table 5).

- We will continue to work with SMEs to advocate the use of training plans.

The autoglazing sub-sector demonstrates an awareness of IMI at 100% which was the highest of all sub-sectors.

- As the SSC we will work to continue to build on the awareness of the IMI in the sub-sector and the awareness of skills solutions as being necessary for successful businesses.

We would like to express our gratitude to the employers and stakeholders who committed time to participate in the autoglazing part of this research project.

# Annex 1:

## Skills and training needs by job role and priority

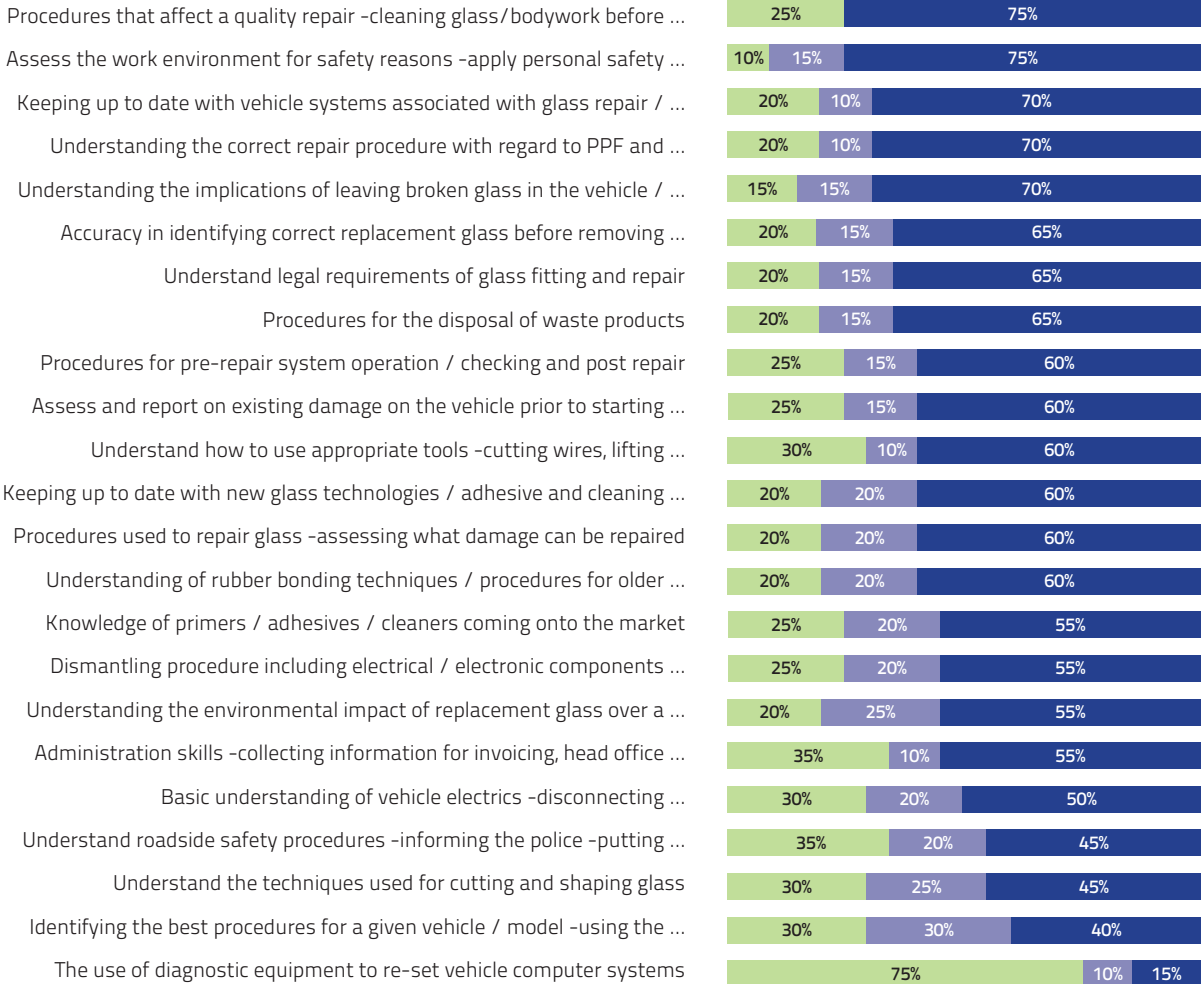
Given below are the detailed percentage results of the quantitative telephone survey carried out for the autoglazing sub-sector.

### Glazing assistants



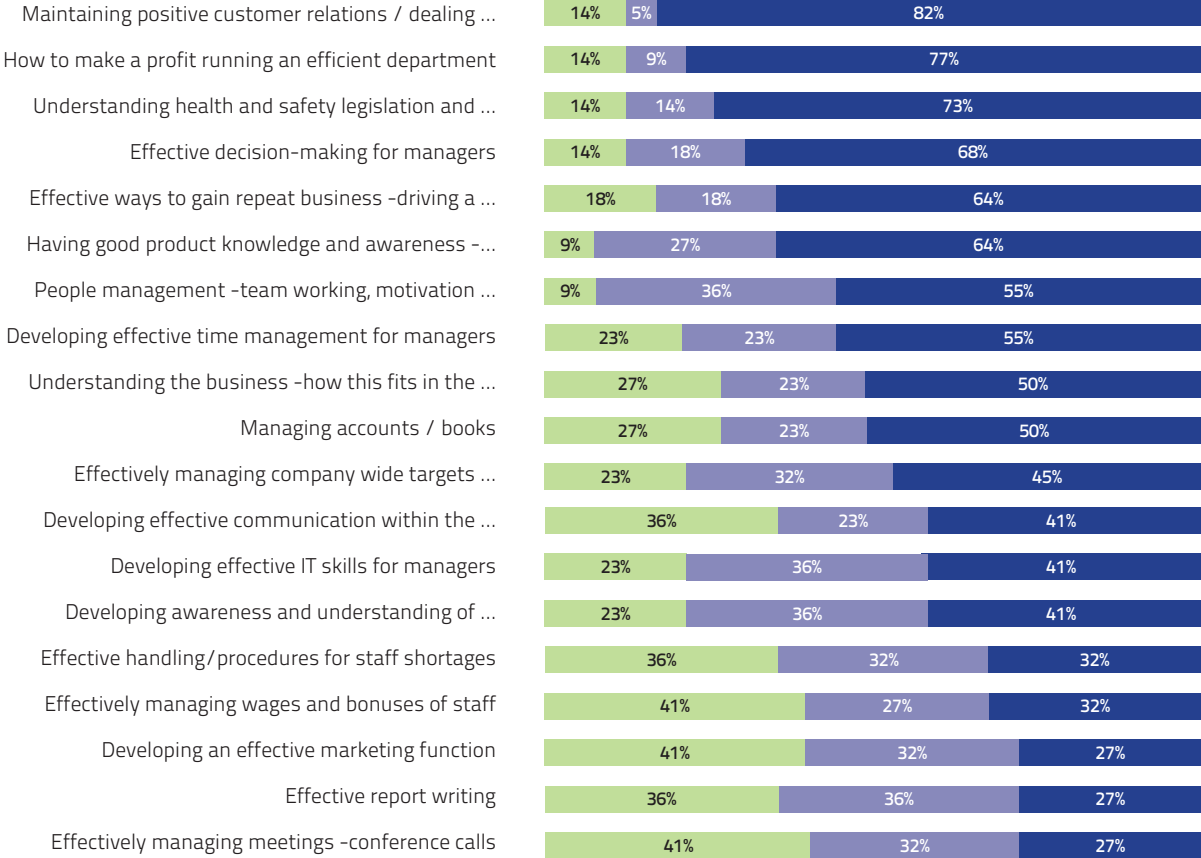
No skills or training need
  Some skills and training need
  Critical skills and training need

# Glass repairers



No skills or training need
  Some skills and training need
  Critical skills and training need

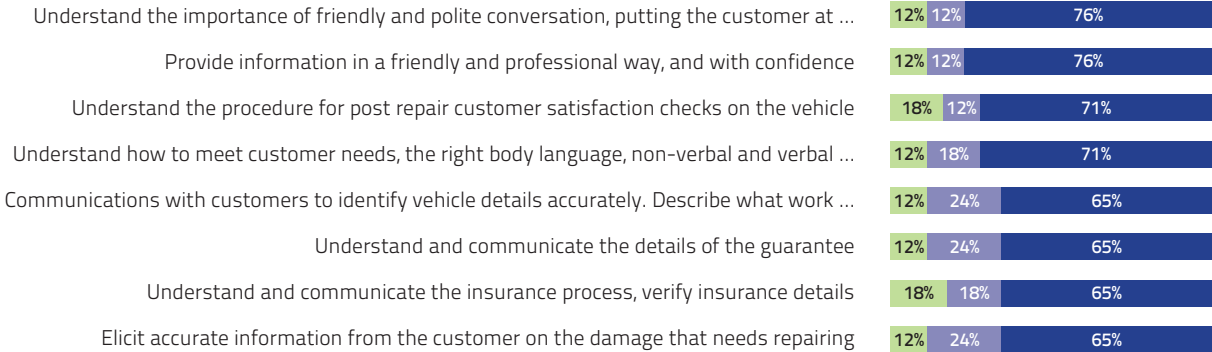
# Management staff



No skills or training need
  Some skills and training need
  Critical skills and training need



# Customer service staff



No skills or training need
  Some skills and training need
  Critical skills and training need

# Annex 2:

## Focus group

The focus group for autoglazing was conducted online in September 2011 and comprised of representatives from:

- The Independent Windscreen Academy
- GQA Qualifications
- AUTOGLASS
- GLASSTEC Automotive
- 1stGLASS Automotive Glazing



