



ALPHERA Training Portfolio.

Developing F&I Excellence.

Introduction.

ALPHERA Financial Services offers a comprehensive range of learning solutions designed to support your people and business. Through a blend of expert-led face-to-face training and free self-serve learning available on our Learning Platform, we help Business Managers, Retail Managers and Sales Executives build the regulatory, product and commercial knowledge needed to succeed in a fast-changing environment. Created by experienced F&I professionals, our programmes are practical, interactive and regularly updated to ensure ongoing relevance and value.

For further information, please contact your Business Development Manager, Key Account Manager, or email AlpheraBusinessSupport@alphera.co.uk



Alex Royall
Chief Sales Officer, Alphera



Training Overview.

Build capability. Drive performance.
Improve customer outcomes.

Access a comprehensive range of e-learning courses, workshops and training films created by BMW Group-certified trainers with extensive expertise in financial services and the automotive industry. Designed to be practical, engaging and business-focused, our learning solutions help strengthen compliance, enhance customer conversations and build the skills needed to drive performance. Whether you prefer flexible self-serve learning through our Learning Platform or bespoke face-to-face training tailored to your business, there is a solution to meet your needs.

The following pages provide further details on the content, learning outcomes and benefits of each programme.

Please click links below:

[Alpha Hub](#)

[Learning Platform](#)



Online Training courses.

Included as part of your partnership with ALPHERA are a wide range of complimentary online training courses, available on the ALPHERA Learning Platform accessed via the ALPHERA Partner Hub.

Our Learning Platform offers a comprehensive library of free e-learning courses and short films designed to help ALPHERA partners build knowledge, improve confidence and deliver better customer outcomes. Available to all employees, the content covers funding products, regulatory requirements, customer vulnerability, tax considerations and sales opportunities, providing easy-to-access learning that supports compliant customer conversations, increases efficiency and helps colleagues identify and maximise funding opportunities.



eLearning LCV & DCPU: Tax Made Easy.

Gain the knowledge and confidence to advise customers on the tax implications of Light Commercial Vehicles and Double-Cab Pick-Ups, explain key regulations clearly, and recommend the most suitable solution for their business needs.

eLearning Funding Essential Skills.

Build the knowledge and confidence to explain ALPHERA funding products clearly, support compliant customer conversations, and help customers make informed financial decisions.

eLearning Payout Portal System Training.

Learn how to use the ALPHERA Payout Portal confidently to complete funding applications efficiently, manage customer sign-up, and submit agreements accurately for payout.

Film: 5 minutes FCA Consumer Duty – Overview.

Understand the principles of Consumer Duty and your role in delivering good customer outcomes, helping you support compliant, customer-focused conversations with confidence.

Film: 8 minutes Vulnerable Customer Video.

Build the confidence to recognise vulnerability, adapt your approach to individual customer needs, and deliver consistently fair and compliant customer outcomes.

Film: 5 minutes Identifying Distance Sales.

Learn how to identify a distance sale confidently, understand the regulatory requirements, and take the appropriate action to ensure a compliant customer journey.

Film: 5 minutes Company Tax Rules for EVs.

Gain the knowledge to explain the tax, VAT and funding benefits of electric vehicles, helping customers make informed business decisions with confidence.

Film: 5 minutes Creating Funding Opportunities.

Build your confidence in customer conversations by understanding buying decisions and matching ALPHERA funding solutions to customer needs.

Film: 5 minutes ALPHERA Underwriting Top Tips.

Learn how to avoid common underwriting errors, improve application quality, and help achieve faster funding decisions for your customers.

Film: 5 minutes Is Refinance right for your customer?

Understand how refinancing works, recognise when it may be a suitable option, and confidently support customers in making informed decisions at the end of their finance agreement.

On-site Training courses.

The following training programmes are available to you and your team. To discuss your specific training requirements and receive a detailed cost breakdown, please contact your Key Account Manager or Business Development Manager. We will work together to identify suitable dates and arrange training at a time that works best for your business and our training team.

- Funding Essential Skills
- Selling to the Business User
- Effective Selling Skills
- Coaching for Performance
- Developing the Manager

See the following pages for more detailed information about the On-site course content.



Funding Essential Skills.

On-site

Who this course is aimed at.

This course is primarily aimed at Sales Executives.

The course is designed to help ensure all delegates understand the consumer funding products available from ALPHERA Financial Services and how the FCA affect consumer funding. It helps your teams to present and translate the features and benefits to their customers accurately and professionally in a compliant manner that will empower the customer in making an informed choice.

Course Overview:

The programme will ensure that delegates understand the role, Principles and Outcomes of the FCA within the consumer funding market place and how this impacts their role.

Upon completion delegates will be able to list and explain the structure, features and benefits of ALPHERA Financial Services funding products. Delegates will understand and be able to explain the details of agreements that consumers should be aware of, to allow a fully informed decision.

They will be able to gather the customers funding needs and wants in order to demonstrate ALPHERA funding options professionally using an effective structure to emphasise the key benefits.

Content.

- The FCA History, Principles and Outcomes.
- Alphera Financial Services funding products.
- Visually presenting the benefits, risks and responsibilities of the available consumer funding options.
- Where funding fits within the sales process.
- Defining a compliant sale.
- Qualification, asking the right questions at the right time.
- Practical case play exercises.
- Written Validation.

Duration

1 Day*

*This programme can be delivered via a digital pathway, please contact your Business Development Manager / Key Account Manager for more information.





Selling to the Business User.

On-site

Who this course is aimed at.

This course is aimed at those within the Partner (Retailer/Broker) who interact with business users from self-employed customers to large organisations, from a car funding perspective

The programme will reinforce the delegates knowledge of the more technical aspects of selling to the business user. In today's market place, selling to the business user demands a higher level of knowledge and sales skills in order to be effective and professional.

Course Overview:

Upon completion delegates will understand the structure and implications of dealing with the three principal business types. They will be able to list and explain the key features and benefits of business user funding products, develop a practical understanding of current business taxation / VAT implications when choosing to buy / run a car, and how to use them as part of the sales process. Delegates will gain knowledge on the current company car tax rules in relation to Benefit in Kind (BIK) and salary car allowance, enabling them to effectively qualify a business customer and professionally present the appropriate funding option(s).

Content.

- The legal structure of the three principal types of business.
- An introduction to the fundamental structure and language of business accounts.
- The benefits and risks of personal contract hire.
- Practical Tax and VAT calculations for the business user and how they can be used in a sale.
- Practical BIK calculations.
- Correctly qualifying the Business User.

Duration

2 Days

Effective Selling Skills.

On-site

Who this course is aimed at.

All individuals within the business who are selling to consumers, not specifically funding.

Delegates who are looking to develop and enhance their general selling skills in order to maximise their opportunities when leading customers through an effective sales journey.

Whilst learning proven sales techniques, this programme is designed to be tailored around and compliment the businesses own sales structure.

Course Overview:

This programme has been developed and is delivered by ALPHERA's own in house trainers, who have worked directly within the motor industry and have over 40 years of selling experience between them.

During the programme delegates will understand the importance of structured process and utilising the information gained to effectively present a product to a customer, handle objections, gaining commitment and maximising profitability.

Content.

- Qualification.
- Product Presentation.
- Objection Handling.
- Gaining Commitment.

Duration

1 Day





Coaching for Performance.

On-site

Who this course is aimed at.

All people managers within the business, who are responsible for developing employees.

In today’s challenging world companies need to look at different ways of ensuring they not only recruit the right people, but then train and develop their staff to maximise the company’s performance.

With this in mind, coaching has become a popular method to help individuals and businesses achieve their goals.

Course Overview:

This programme has been developed and is delivered by ALPHERA’s own in house trainers, who are qualified and practicing workplace coaches.

During the programme delegates will learn what coaching is and isn’t, how it fits into a people managers role, the benefits of effective workplace coaching and how to conduct coaching in order to drive performance.

There will be opportunity to understand the theory behind coaching, when to apply it, obtain a structure and perfect the skills required to develop a team.

Content.	Duration
• What is Coaching. • Success Factors. • Benefits of Coaching. • Questioning Techniques. • Coaching Model. • Coaching Application. • Coaching Practice.	2 Days

Developing the Manager. On-site

Who this course is aimed at.

This course is intended for newly appointed first time managers who want to develop their range of interpersonal skills beyond selling. It concentrates on their ability to make an impact as a team player, and provides an excellent platform from which to start their development as a professional manager.

Course Overview:

Delegates will develop an understanding of the key skills and techniques aimed at improving individual and team performance. They will be able to recognise and consider the effectiveness of utilising the management skills required to operate in a modern sales environment.

Upon completion of the programme delegates can utilise the management and team skills covered and relate them directly to improving working relations with the sales and management team, so enhancing the achievement of both personal and team sales objectives.

Content.

- Definitions of Manager and Management.
- What Makes a Manager.
- An Introduction to Personal Style.
- Effective Communication – Introduction to Communication Styles.
- Management Attitudes – Team Effect.
- Introduction to Teams and Teamwork.

- Team Members Attitudes.
- Managing Team Conflict.
- Managing the Business Manager’s Critical Success Factors.
- The DMIM Team Challenge.

Duration

2.5 Days





Should you require any further information then please contact your Business Development Manager or Key Account Manager. Alternatively, you can email us directly at AlpheraBusinessSupport@alphera.co.uk