



Accredited Africa Training Institute for Capacity Development

Unit FO409, Hatfield Plaza · 1122 Burnett St, Hatfield 0028 · Pretoria, Gauteng · South Africa

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COURSE BROCHURE

Vehicle Appointment Scheduling And Customer Flow Management

Services / Wholesale and Retail

Unit Standard 259957 · NQF Level 4 · 10 Credits · 7 Days

COURSE OVERVIEW

This course equips learners with the skills to efficiently schedule vehicle appointments and manage the flow of customer vehicles through a service or repair facility. Participants will learn to coordinate bookings, optimise workshop capacity, and ensure a seamless customer experience from arrival to departure.

Category	Services
Subfield	Wholesale and Retail
Unit Standard	259957
Accreditation	SAQA Accredited · NQF Level 4 · 10 Credits
Duration	7 days
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Apply effective appointment scheduling techniques to optimise workshop capacity and minimise customer wait times.
- Implement a structured vehicle reception process to control the flow of customer vehicles from arrival to handover.
- Analyse customer requirements and vehicle condition to prioritise appointments and allocate resources appropriately.
- Communicate appointment details and service updates clearly to customers, ensuring transparency and managing expectations.
- Evaluate appointment scheduling data to identify bottlenecks and improve workflow efficiency.
- Demonstrate adherence to organisational policies and relevant regulations when managing customer vehicle flow.

WHO SHOULD ATTEND

- This course is designed for service advisors, workshop controllers, and customer service staff in the automotive industry who are responsible for appointment scheduling and managing vehicle throughput.

COURSE OUTLINE

Day 1: Introduction to Vehicle Appointment Scheduling and Customer Flow Management

- Overview of the automotive service value chain
- Benefits of effective scheduling: reduced wait times, improved customer satisfaction
- Key metrics: appointment adherence, cycle time, throughput
- Common scheduling systems: manual, digital, hybrid
- Introduction to customer flow concepts: arrival patterns, service stages
- Challenges: overbooking, no-shows, bottlenecks
- Technology enablers: online booking, CRM integration
- Industry best practices overview

Day 2: Customer Communication and Appointment Booking Protocols

- Communication channels: phone, email, SMS, online portals
- Booking process steps: inquiry, vehicle details, service needs, time slot
- Confirmation and reminder procedures
- Handling cancellations and rescheduling: policies and empathy
- Managing customer expectations: service duration, courtesy vehicles
- Scripting for consistency and professionalism
- Data capture accuracy: customer info, vehicle specs
- Role-play: booking scenarios

Day 3: Scheduling Techniques and Capacity Planning

- Scheduling methods: fixed, flexible, wave, open scheduling
- Capacity planning: technician availability, bay count, equipment
- Time slot duration: standard vs. custom service times
- Demand forecasting: historical data, seasonal trends
- Overbooking strategies and risk mitigation
- Buffer time management for unexpected delays
- Tools: spreadsheets, scheduling software features
- Case study: capacity analysis for a sample workshop

Day 4: Customer Flow Analysis and Process Mapping

- Customer journey mapping: touchpoints, wait stages
- Process mapping techniques: swimlane diagrams, value stream maps
- Bottleneck identification: check-in delays, service delays, payment
- Lean tools: 5S, Kaizen, waste reduction
- Performance metrics: average wait time, service time, turnaround time
- Data collection methods: observation, time studies, system logs
- Analyzing flow data to identify improvement opportunities
- Group exercise: map a current process and propose improvements

Day 5: Technology Solutions for Scheduling and Flow Management

- Overview of scheduling software: features, benefits, limitations
- CRM integration: customer history, vehicle records
- Real-time dashboards for monitoring flow
- Online booking portals: setup and management
- Mobile apps for customer check-in and status updates

- Automation: reminders, follow-ups, feedback requests
- Data security and privacy considerations
- Demonstration: setting up a scheduling system

Day 6: Managing Peak Periods and Exceptional Situations

- Peak period planning: seasonal strategies, staffing adjustments
- Communication during delays: proactive updates, transparency
- Complaints handling: de-escalation, problem-solving
- Contingency planning: technician absence, equipment failure
- Flexibility: dynamic scheduling, overtime, outsourcing
- Customer recovery: compensation, follow-up
- Stress management for staff
- Role-play: handling a peak period scenario

Day 7: Continuous Improvement and Integration

- Continuous improvement cycle: Plan-Do-Check-Act
- Key performance indicators: appointment fill rate, customer satisfaction score, wait time
- Reporting and dashboards for management
- Integration with parts inventory, billing, and customer service
- Staff training and change management
- Auditing and compliance with industry standards
- Developing a personalized implementation plan
- Final assessment and course wrap-up

ASSESSMENT & CERTIFICATION

Delegates are assessed through exercises and a final test. A mark of **50% or above** earns an **AATICD Certificate of Completion**, issued digitally with a unique verification code. This course carries **10 NQF credits** at **NQF Level 4**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 28,200.00	R 28,200.00
1	In-House	R 36,700.00	R 36,700.00
1	On-Campus (Pretoria)	R 42,300.00	R 42,300.00

UPCOMING SESSIONS

Start	End	Method	Venue
03 Aug 2026	11 Aug 2026	On-Campus	Mauritius
04 Aug 2026	12 Aug 2026	On-Campus	Cape Town, South Africa
05 Aug 2026	13 Aug 2026	On-Campus	Dubai, UAE
06 Aug 2026	14 Aug 2026	On-Campus	Pretoria, South Africa
06 Aug 2026	14 Aug 2026	On-Campus	Lagos, Nigeria
07 Aug 2026	17 Aug 2026	On-Campus	Johannesburg, South Africa
10 Aug 2026	18 Aug 2026	On-Campus	Cape Town, South Africa
11 Aug 2026	19 Aug 2026	On-Campus	Dubai, UAE

Contact us if no suitable date is listed – on-demand sessions can be arranged for groups.

HOW TO GET A QUOTE OR APPLY

1. **Get an instant quotation online:** visit www.aaticd.co.za, open the page for this course (Unit Standard 259957) and click **Get A Quote / Apply**. Select your training method and number of delegates – your quotation is generated immediately and emailed to you with the course brochure attached.
2. **Apply by email:** send the course title, your preferred training method (Online, In-House or On-Campus Pretoria), the number of delegates and your preferred dates to apply@aaticd.co.za – our team will reply with a formal quotation.
3. **Apply by phone or WhatsApp:** call +27 12 004 8389 or WhatsApp +27 65 077 6310 and we will prepare your quotation and reserve your seats.
4. **Confirm your booking:** accept the quotation and settle the invoice. As soon as payment is confirmed your delegates are enrolled and receive their AATICD LMS login details by email, along with joining instructions for their chosen training method.

Group discounts apply automatically – the more delegates you enrol, the lower the price per delegate. No payment is required to request a quotation.

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