Written Experience Assessment

Senior Strategic Manager

Overview

Experience Assessments provide you with a route into IMI Membership and Professional Registration if you do not have a Nationally Recognised Qualification or Accreditation.

This written assessment can take into account relevant previous experience (ideally within the last five years) but should focus on your current role and can be completed at your own pace. The assessor is looking for people who are able to demonstrate the breadth and balance of knowledge and skills to fulfil a complete senior strategic management role, not just strength in one particular area.

Pre assessment checklist

Please make sure you meet the following base qualifying criteria before completing this written assessment:

a) Have at least 5 years' relevant experience at a senior, strategic management level
b) Have read and agree to sign up to the Management and Leadership Professional Standard. This can be found at https://tide.theimi.org.uk/membership/professional-standards
c) Are leading on significant areas of work and on strategies that deliver excellent customer service and business success
d) Are leading on customer service improvement strategies, plans and actions and can provide customer feedback
e) Are willing to share experience, knowledge, skills and best practice to develop others for the benefit of the business and the wider industry
f) Are willing to support the work of IMI including proactively promoting IMI membership and Professional Registration to others

Completing the assessment

Please provide clear, concise and to the point answers on the following pages to detail how you meet each of the assessment criteria within your job role. Once you have completed the assessment fully, please email this sheet to hello@theimi.org.uk

Please note that the boxes will expand as you type.

Supporting evidence

Where appropriate, you may provide evidence to support your answers. Evidence may include:

- Strategic / business plans
- Financial management records
- People management records
- People performance records

- Business processes
- Career successes / high points which clarify management skills and knowledge

This can be sent via email, along with your completed written assessment sheet to hello@theimi.org.uk

After the assessment

The assessor will check your answers against the criteria and create a full report which goes to a moderation panel with a recommended outcome. Once moderated the assessor will contact you personally with the result. This will be done as soon as possible but typically within 3 weeks of receiving this assessment sheet. If successful, and you meet other grading criteria, you will be awarded the grade of Registered Fellow.

Need help?

If you have any questions, please contact the membership team on +44 (0)1992 519025 or email hello@theimi.org.uk

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Assessment Criteria

How do you meet the criteria? Please type into the boxes below each criterion and note that the boxes will expand as you type.

Professional Competence
Strategic and Business Planning
1. Creating an overall vision and direction for the business
In my role leading Example Org, I have created and embedded a clear vision: to raise professional standards in the vehicle installation and conversion sector through accredited training, robust audits and a recognised professional community. I have defined our purpose, values and strategic priorities, ensuring they are understood by staff, members and partners. This includes positioning Example Org as the go-to body for competency, compliance and best practice, and aligning all major activities – training, membership, partnerships and events – to that vision. I regularly communicate this direction through strategy sessions, briefings and external presentations so that stakeholders understand where we are going and why.
2. Guiding the creation of short and long-term strategic plans

I lead the development of both annual and multi-year strategic plans for Example Org. In practice, this means setting measurable objectives around membership growth, accredited training delivery, audit coverage, brand recognition and financial sustainability, then working with my committee and key partners to translate these into detailed work plans. I balance short-term operational priorities (for example, delivering specific courses or audits) with long-term goals such as expanding our footprint into new market segments (blue-light, commercial fleets, recovery, etc.). I review progress regularly and adjust priorities in response to market changes, member feedback and performance data.

3. Ensuring the provision of annual business plans based on the business strategy

Each year I coordinate an annual business planning process that turns the strategy into a realistic, costed plan. This includes setting targets for training courses, audits, events, partnership activity, marketing campaigns and membership numbers, alongside associated income and expenditure. I ensure the plan is supported by clear KPIs, resource allocations and timelines, and that team members understand their responsibilities. Throughout the year, I track delivery against the plan, identify variances and take corrective action where needed to keep us on track.

4. Influencing the creation of marketing strategies to support and deliver the business strategy

I work closely with our marketing and communications support to ensure that all campaigns directly support our strategic objectives. This includes shaping messaging that emphasises quality, professionalism and compliance; targeting key audiences such as fleet operators, installation companies, manufacturers and industry bodies; and using channels such as LinkedIn, industry events, roadshows and partner activity. I regularly review campaign performance (engagement, enquiries, conversions) and use that insight to refine future marketing activity so that it continues to underpin growth in membership, training and partnerships.

Business Information and Performance Measurement

5. Using business information and performance measurement in relation to:

    a) productivity - efficiency of operations
    b) reducing cost
    c) customer service, satisfaction and retention
    d) competitor performance - market share
    e) economic and market changes and trends
    f) return on investment
    g) internal and external audits
    h) identifying opportunities – innovation

I use a range of business information to monitor performance and make decisions across Example Org.

For productivity and efficiency, I track the number of courses delivered, audits completed and members supported against staff time and resources, identifying where processes can be streamlined or digitised.

To reduce cost, I review expenditure by category, compare suppliers and look for opportunities to share resources with partners or use technology to lower administrative overheads.

Customer service, satisfaction and retention are measured through direct feedback, post-course surveys, member renewal rates and informal conversations when I visit sites; I use this feedback to refine course content, audit processes and support. I monitor competitor performance and market position by following industry news, similar organisations and membership offerings, ensuring that our proposition remains differentiated and competitive. I keep a close eye on economic and market trends affecting fleets and installers so we can adapt our pricing, scheduling and focus areas. Return on investment is assessed by comparing the cost of initiatives (for example, a new course, event or marketing campaign) with income generated, member growth or strategic impact. I also use findings from internal and external audits to identify risks, compliance gaps and opportunities for innovation, for example developing new modules in response to emerging technology or regulation.
Financial Management
6. Leading on financial planning and the process to agree and review budgets
I lead the overall financial planning process for Example Org, working with our finance support to develop annual budgets aligned to the strategic and business plan. This involves forecasting income from membership, training, audits and sponsorship, and agreeing expenditure on staff, facilities, marketing, events and systems. I present and agree the budget with our governance structure, then review performance regularly, making adjustments where income or costs vary from plan.
7. Managing financial performance, growth and profitability by interpreting key financial and accounting statements
I review monthly management accounts, cash-flow forecasts and year-to-date performance against budget. I interpret key statements to understand trends in income, margins by activity, debtor and creditor positions and overall reserves. When I identify underperformance or overspend, I investigate the root cause and implement actions such as re-profiling activity, revising pricing or controlling discretionary spend. This approach has supported sustainable growth while allowing us to reinvest in training materials, facilities and member benefits.
8. Ensuring the provision of financial controls
I ensure appropriate financial controls are in place, including documented approvals for expenditure, separation of duties where possible, clear invoicing processes and credit control routines. I oversee the creation and regular review of finance policies and ensure they are followed. I work with our accountant/bookkeeper to ensure accurate record-keeping, compliance with statutory requirements and timely production of financial information.
9. Protecting the business from financial risk
I regularly assess financial risks such as income concentration, cash-flow pressures, cost inflation and bad debt. Where risks are identified, I mitigate them through prudent cash-flow management, diversified income streams (membership, training, audits, sponsors), appropriate terms and conditions, and clear communication with customers about payment expectations. I also ensure we hold adequate reserves for unexpected events and maintain appropriate insurance.
10. Creating financial contingency plans
As part of our planning, I consider “what if” scenarios, for example a sudden drop in course bookings, changes in regulation, or loss of a major partner. I prepare contingency options such as scaling activity, revising delivery

models, prioritising essential spending and seeking alternative revenue sources. This forward planning ensures the organisation can adapt quickly without compromising service levels or long-term sustainability.
Customer Service
11. Creating a ‘customer first culture’ based on defined customer expectations
Our members and partners are at the core of Example Org’s purpose, and I have set clear expectations that customer service is everyone’s responsibility. I have defined what good service looks like – timely responses, clear communication, professional conduct, and consistent delivery of training and audits – and I reinforce this through induction, team discussions and daily behaviour. I lead by example in how I interact with members and partners, demonstrating that we will always try to find solutions and add value.
12. Using customer feedback to deliver customer satisfaction and retention strategies and improvements
I proactively seek feedback from members, course delegates, audited companies and partners via surveys, informal conversations, social media engagement and follow-up calls. I review this feedback to identify common themes and areas for improvement, such as course content updates, scheduling, communication or documentation. Actions have included revising course material, developing new modules, clarifying processes and increasing touchpoints with members. This has supported strong renewal levels and positive word-of-mouth referrals.
13. Integrating brand/company values into customer-focused ways of working across the business
The Example Org brand is built around quality, safety, integrity and professionalism. I ensure these values are reflected in our policies, marketing, training materials and day-to-day interactions with customers. For example, our audit approach is supportive but rigorous, explaining the “why” behind standards and helping customers improve. I regularly reinforce these values with staff and partners so that the way we work is consistent with the brand promise.
14. Inspiring marketing activities that grow customer value, loyalty, advocates and referrals
I use direct marketing and social media activities to build long-term relationships rather than just one-off transactions. This includes sharing success stories, case studies and testimonials, highlighting the benefits members and partners gain from being part of Example Org. I encourage members to become advocates, for example by speaking at events or sharing their experiences online. I measure engagement and response to see what content and activity best drives loyalty, repeat business and referrals.
15. Creating customer friendly areas within the business
Where we have physical training or audit environments, I ensure they are safe, welcoming and professional, with clear signage and appropriate facilities. For online interactions, I focus on making processes straightforward – for example, clear instructions, accessible documents and simple booking approaches. I regularly review the customer journey from first enquiry to ongoing membership to identify and remove friction points. I feel it is important to encourage interaction between members attending courses.
16. Managing and resolving customer complaints
I personally oversee significant complaints or sensitive issues, ensuring that they are acknowledged quickly, investigated fairly and resolved professionally. I listen to the customer’s perspective, review the facts, and where we are at fault, I apologise and agree corrective actions. I use complaints as an opportunity to learn and improve our systems, training or communication to prevent recurrence.
Legal and Environmental
17. Conducting risk analysis to identify legal exposure
I regularly review our activities to identify legal and regulatory risks, including health and safety, data protection, contractual obligations, training claims and professional standards. I use simple risk assessment tools to consider

likelihood and impact, and I prioritise actions to mitigate these exposures. This risk review is built into our strategic and operational planning cycles.
18. Keeping up-to-date with current legislation that affects the business operation
Given the nature of our sector, I keep myself informed about relevant legislation and standards affecting vehicle installations, training, professional bodies and employment. I follow updates from regulators, government departments and industry bodies, and attend events or briefings where necessary. I then interpret what these changes mean for Example Org and our members and adapt our guidance, training content and policies accordingly.
19. Implementing policy and procedures to ensure legal compliance
I ensure that areas such as health and safety, safeguarding (where applicable), data protection, equality and diversity, and financial compliance are covered by clear policies and procedures. I oversee their implementation, ensure staff are aware of their responsibilities and review them periodically. Where needed, I commission updates to documentation or training to ensure ongoing compliance.
20. Using legal advice to handle staff or customer issues to minimise risk
When dealing with more complex staff or customer issues – for example serious complaints, contractual disputes or disciplinary matters – I seek professional legal or HR advice. I provide accurate information, follow the advice given and document decisions and actions carefully. This ensures that we manage issues fairly, minimise risk to the business and protect all parties involved.
21. Creating corporate and social responsibility strategies and actions
Example Org has a strong focus on safety and professionalism which inherently supports wider social responsibility. In addition, I promote ethical behaviour, fair treatment of staff and members, and responsible use of resources. Where possible, I support the wider community and industry through knowledge-sharing, engagement with educational and youth organisations and participation in sector initiatives aimed at improving standards and road safety.
Managing People
22. Deploying human resources to meet the needs of the strategy
I review our strategic priorities and allocate people to activities accordingly, ensuring we have the right skills focused on training, audits, membership support, marketing and administration. Where capacity is limited, I prioritise high-impact work and look at options such as outsourcing, partnering or phased delivery. I keep roles under review as the organisation evolves.
23. Ensuring the provision of: a) staff policies and controls b) job descriptions c) contracts of employment
I have overseen the development and maintenance of core HR documentation, including job descriptions, contracts and key staff policies (such as conduct, grievance, leave and performance). I ensure these are kept up to date, legally compliant and reflect the culture and expectations of the AVI. New starters receive appropriate documentation and understand the standards required of them.
24. Creating an environment where staff feel motivated and inspired
I aim to create a positive, mission-driven culture where staff understand the impact of their work on the industry and feel proud to be part of the AVI. I involve them in discussions about strategy and new initiatives, recognise

their contributions and provide opportunities for growth. I encourage open communication and try to remove barriers that prevent them from doing their best work.
25. Enabling staff to contribute ideas to the strategy, business plans and the business operation
I actively invite ideas from staff and associates on how we can improve our services and operations. This may be through formal planning meetings, debriefs after courses or audits, or informal discussions. Good ideas are considered and, where appropriate, built into our plans. This engagement improves buy-in and often leads to practical, implementable improvements.
26. Empowering staff to take ownership, action and to make decisions
Within agreed boundaries, I delegate authority to staff to manage their areas – for example, shaping course delivery, resolving member queries, or making on-the-day decisions during audits and events. I provide clear expectations and support but avoid micromanaging. This builds confidence, speeds up decision-making and supports personal development.
27. Providing stability, adapting and leading others through times of change, difficulty and pressure
The organisation has experienced periods of rapid growth and external uncertainty. I have provided stability by communicating clearly, sharing honest assessments of the situation and setting out a realistic plan. I support staff individually, adjust workloads if necessary and model a calm, solutions-focused approach. This has helped the team remain focused and resilient.
28. Making staff feel valued - operating recognition and reward schemes and celebrating success
I ensure staff are thanked and recognised for their work, both informally and through more structured recognition, such as highlighting achievements in meetings, on social media or in internal communications. Where possible, I link rewards to performance and contribution, and I celebrate milestones such as successful audits, positive feedback or major partnership wins.
29. Operating a staff appraisal scheme linking to strategic objectives and performance results
I operate a performance review process that links individual objectives to AVI's strategic goals. During appraisals we review achievements, discuss development needs and agree clear goals for the next period. I use this process to recognise strong performance, address issues early and ensure that staff understand how their work contributes to the bigger picture.
30. Providing open, honest and effective communication routes to support staff in their roles
I maintain open channels of communication through regular meetings, one-to-ones and informal check-ins. I share relevant information about strategy, performance and upcoming changes, and I encourage staff to raise issues or concerns early. I listen actively and respond constructively, ensuring people feel heard and supported.
31. Mentoring and coaching staff and leading by example
I provide mentoring and coaching, particularly to less experienced staff and engineers, helping them develop both technical understanding of the sector and broader professional skills such as communication and planning. I lead by example in my behaviour, work ethic and commitment to standards, knowing that my actions set the tone for others.
32. Ensuring the provision of policy and process to address staff grievance, conduct and performance issues
I ensure we have documented procedures for handling grievances, conduct issues and underperformance, and that these are communicated clearly. When issues arise, I follow the process fairly and consistently, seeking advice where necessary and focusing on resolution, improvement and learning while protecting the organisation and individuals.
Recruitment and Induction
33. Initiating strategies to attract and engage the right people

I lead efforts to attract staff, associates, trainers and auditors who share the AVI's values and bring the right mix of technical and professional skills. This includes targeted advertising, networking within the industry and using referrals from trusted partners. I ensure our messaging emphasises our mission, standards and development opportunities.
34. Ensuring the provision of recruitment and selection policy and process
I have implemented a structured recruitment approach that includes clear role profiles, fair shortlisting criteria and robust interviewing, often using competency-based questions. This ensures consistency and fairness in how we assess and select candidates, and that we comply with legal and best practice requirements.
35. Managing staff turnover with effective methods and approaches to fill vacancies quickly
Where turnover occurs, I analyse the reasons and look for patterns to address any underlying issues. I maintain a pipeline of potential candidates and networks of associates so that vacancies can be filled promptly. I prioritise continuity of service to members while ensuring we do not compromise on quality when replacing staff.
36. Influencing staff succession planning strategies
I identify key roles and individuals and consider succession risks and opportunities. This includes developing existing staff so they can step up, documenting critical knowledge, and considering how the organisation might need to evolve in future. I build succession planning into our broader strategic and workforce planning.
37. Ensuring the provision of staff on-boarding or induction policy and process
I have established an induction process that introduces new staff to our vision, values, policies, systems and key activities. This includes shadowing opportunities, access to key documents and structured time to understand our training and audit programmes. Effective induction ensures new team members can contribute quickly and confidently.
Continuing Professional Development (CPD)
Developing Others and Self
38. Creating a culture of continuing professional development across the business
I promote CPD as a core part of being a professional, not just a requirement. I encourage staff and associates to log and reflect on their learning, and I recognise those who take proactive steps to upskill. Our messaging to members also reinforces the importance of ongoing development.
39. Influencing learning and development strategies to maintain staff skills
I identify the skills and knowledge needed now and, in the future. For example, emerging vehicle technologies, regulations and teaching methods – and use this to shape our learning and development plans. This might include formal courses, attendance at conferences, peer learning, or project-based development. I ensure training is aligned to both organisational needs and individual aspirations.
40. Having a personal commitment to CPD to maintain professional competence
I maintain my own CPD by attending relevant events, engaging with industry bodies, completing training, and keeping up-to-date with sector developments. I record my learning and reflect on how to apply it in AVI. By demonstrating a strong personal commitment to CPD, I set the expected standard for others.
41. Reviewing own performance to identify areas for improvement and development
I regularly reflect on my own performance, seeking feedback from colleagues, partners and board members. I consider where I can improve – for example in delegation, communication, or use of data – and build these into my personal development plan. I am open about these goals, which encourages a culture of continuous improvement.

42. Focusing CPD on subjects that are developmental, effective and appropriate to the job role or career progression
I prioritise CPD activities that clearly support my role leading the AVI and my broader career in management and leadership. This includes areas such as strategic planning, governance, financial management, coaching, and sector-specific regulation and technology. I evaluate CPD activities afterwards to ensure they have delivered value and adjust my focus where necessary.
43. Planning CPD through regular learning activities
Rather than treating CPD as occasional, I plan it as a regular activity through the year. I schedule time for reading, attending events, structured training and reflection. I integrate CPD into my objectives and review it during my own performance discussions.
44. Taking every opportunity to learn and develop using a variety of formal and informal sources of CPD
I use a blend of formal learning (courses, qualifications, conferences) and informal learning (peer discussions, mentoring, online resources, industry forums). I learn from day-to-day experiences, particularly complex cases or new projects, and consciously extract lessons that can improve how I lead and manage.
45. Learning from others when help is required
I am comfortable asking for help and advice when needed, whether from colleagues, board members, external specialists or peers in other organisations. I see this as a strength and a key way to expand my perspective. I then share what I have learned with the team so that the whole organisation benefits.
Additional Notes
The activities described in this submission demonstrate how I apply strategic leadership, operational management and continuous improvement within my role. Through developing clear strategy, managing resources effectively and maintaining strong relationships with stakeholders, I have supported organisational growth, strengthened professional standards within the sector and ensured that Example Org continues to deliver value to its members and partners.

Assessment Outcome (For IMI Use Only)

Concluding remarks:

Recommended grade:

Grade if not recommended as Member:

Primary reason for not giving Member Grade:

Assessor: Date:

Lead Moderator comments:

Lead Moderator: Date: