

-YOUNG ENTREPRENEUR HOSTING ACADEMY-

National Certificate: New Venture Creation
(SMME)

SAQA ID 49648 Level 2

FACILITATOR/ASSESSOR SUMMATIVE ASSESSMENT GUIDE & MEMO

Module 3 **Market Requirements**

Identify and demonstrate entrepreneurial ideas

Unit Standard 119673 Level 2 Credits 7

Match new venture opportunity to market needs

Unit Standard 119669 Level 2 Credits 6

Manage marketing and selling processes

Unit Standard 119672 Level 2 Credits 7

Apply the basic skills of customer service

Unit Standard 114974 Level 2 Credits 2



CONTENTS

CONTENTS	i
Contact Details	1
Competence	2
Appeals & Disputes	3
Assessment Process Flow	4
PORTFOLIO OF EVIDENCE.....	5
Portfolio Building.....	5
Plan Your Portfolio	5
Gather The Evidence	5
Evaluate Your Evidence	5
Cross-Reference Your Evidence To The Unit Standards	5
Organise Your Information.....	6
Learner Documents	7
Learner Curriculum Vitae.....	7
Attendance Registers	8
ASSESSMENT STRATEGY	9
Assessment Preparation	10
Preparing The Candidate	10
Assessor's declaration:.....	11
Agreed Assessment Plan 119673	12
UNIT STANDARD 119673	15
Formative Assessments.....	19
Summative Assessment Readiness Statement.....	20
SUMMATIVE ASSESSMENTS	21
Knowledge Questionnaire 119673	21
Practical Workplace Logbook	23
Acknowledgment of Receipt	23
Indirect Evidence.....	24
Declaration Of Authenticity Of Evidence.....	25
Evidence Locator & Sign-off 119673	26
Record Of Learning	32
ASSESSMENT REVIEW.....	33
Assessor Review	34
Candidate Feedback Report	36
Candidate Appeal Form	37
Assessor's Report 119673	40

Moderator's Report 119673	41
Agreed Assessment Plan 119669	42
UNIT STANDARD 119669	45
Formative Assessments.....	49
Summative Assessment Readiness Statement.....	50
SUMMATIVE ASSESSMENTS	51
Knowledge Questionnaire 119669	51
Practical Workplace Logbook	53
Acknowledgment of Receipt	53
Indirect Evidence.....	54
Declaration Of Authenticity Of Evidence.....	55
Evidence Locator & Sign-off 119669	56
Record Of Learning	61
ASSESSMENT REVIEW.....	62
Assessor Review	63
Candidate Feedback Report	65
Candidate Appeal Form	66
Assessor's Report 119669	68
Moderator's Report 119669	69
Agreed Assessment Plan 119672	70
UNIT STANDARD 119672	73
Formative Assessments.....	77
Summative Assessment Readiness Statement.....	78
SUMMATIVE ASSESSMENTS	79
Knowledge Questionnaire 119672	79
Practical Workplace Logbook	81
Acknowledgment of Receipt	81
Indirect Evidence.....	82
Declaration Of Authenticity Of Evidence.....	83
Evidence Locator & Sign-off 119672	84
Record Of Learning	88
ASSESSMENT REVIEW.....	89
Assessor Review	90
Candidate Feedback Report	92
Candidate Appeal Form	93
Assessor's Report 119672	95
Moderator's Report 119672	96
Agreed Assessment Plan 114974	97

UNIT STANDARD 114974	100
Formative Assessments.....	103
Summative Assessment Readiness Statement.....	104
SUMMATIVE ASSESSMENTS	105
Knowledge Questionnaire 114974	105
Practical Workplace Logbook	109
Acknowledgment of Receipt	109
Indirect Evidence.....	110
Declaration Of Authenticity Of Evidence.....	111
Evidence Locator & Sign-off 114974	112
Record Of Learning	115
ASSESSMENT REVIEW.....	116
Assessor Review	117
Candidate Feedback Report	119
Candidate Appeal Form	120
Assessor's Report 114974	122
Moderator's Report 114974	123
MODERATION	124
WORKPLACE ASSIGNMENT WORKBOOK.....	1
Introduction to the Practical Workplace Logbook	2
Responsibilities.....	4
Responsibilities of the learner	4
Mentor	4
Responsibilities of the Employer	5
Training Provider Responsibility.....	5
SUMMATIVE WORKPLACE ASSESSMENTS.....	6
Workplace Assignments 119673	6
Assignment 1: Entrepreneurship	6
Assignment 2: Strengths and Weaknesses.....	7
Assignment 3: Characteristics	11
Assignment 4: Entrepreneurial Opportunities	13
Assignment 5: Goals and personal growth	17
Workplace Assignments 119669	19
Assignment 6: Marketing In Relation To New Venture	19
Assignment 7: Conduct Market Research.....	20
Assignment 8: Identify Market Segments	21
Assignment 9: Incorporate Market Research	22
Assignment 10: Explore Product/Service Life Cycle	23
Workplace Assignments 119672	25

Assignment 11: Implement Marketing Plan	25
Assignment 12: Negotiate A Deal With A Customer.....	26
Assignment 13: Processes and Principles for Completing Basic Quotes	28
Workplace Assignments 114974	29
Assignment 14: Explain Customer Service	29
Assignment 15: Interact With Customers; Communication Skills and Process Queries .	31
Logbook 119673	33
Logbook 119669	34
Logbook 119672	35
Logbook 114974	36



Contact Details

Assessor Details				
Name				
SETA			Registration No:	
Contact Details	e mail:			
	Phone:		Fax:	
Moderator Details				
Name				
SETA			Registration No:	
Contact Details	e mail:			
	Phone:		Fax:	
Candidate Details				
Surname			Name	
Employer			ID No	
Branch				
Contact Details	e mail:			
	Phone:		Fax:	

Competence

Congratulations on completing the following programme. We sincerely hope you enjoyed the programme and that the learning experience was enriching.

The fact that you have attended training, however, is not sufficient evidence of your competence for us to award you a certificate and the credits attached to this programme. You are required to undergo assessment in order to prove your competence to achieve credits leading to a national qualification.

Being Declared Competent Entails:

Competence is the ability to perform whole work roles, to the standards expected in employment, in a real working environment.

There are three levels of competence:

- ❖ Foundational competence: an understanding of what you do and why
- ❖ Practical competence: the ability to perform a set of tasks in an authentic context
- ❖ Reflexive competence: the ability to adapt to changed circumstances appropriately and responsibly, and to explain the reason behind the action

To receive a certificate of competence and be awarded credits, you are required to provide evidence of your competence by compiling a portfolio of evidence, which will be assessed by a Services SETA accredited assessor.

You Have to Submit a Portfolio of Evidence

A portfolio of evidence is a structured collection of evidence that reflects your efforts, progress and achievement in a specific learning area, and demonstrates your competence.

The Assessment of Your Competence

Assessment of competence is a process of making judgments about an individual's competence through matching evidence collected to the appropriate national standards. The evidence in your portfolio should closely reflect the outcomes and assessment criteria of the unit standards of the learning programme for which you are being assessed. To determine a candidate's knowledge and ability to apply the skills before and during the learning programme, formative assessments are done to determine the learner's progress towards full competence. This normally guides the learner towards a successful summative (final) assessment to which the assessor and the candidate only agree when they both feel the candidate is ready.

Should it happen that a candidate is deemed not yet competent upon a summative assessment, that candidate will be allowed to be re-assessed. The candidate can, however, only be allowed two reassessments. When learners have to undergo re-assessment, the following conditions will apply:

- ❖ Specific feedback will be given so that candidates can concentrate on only those areas in which they were assessed as not yet competent
- ❖ Re-assessment will take place in the same situation or context and under the same conditions as the original assessment
- ❖ Only the specific outcomes that were not achieved will be re-assessed

Candidates who are repeatedly unsuccessful will be given guidance on other possible and more suitable learning avenues. In order for your assessor to assess your competence, your portfolio should provide evidence of both your knowledge and skills, and of how you applied your knowledge and skills in a variety of contexts. This Candidate's Assessment Portfolio directs you in the activities that need to be completed so that your competence can be assessed and so that you can be awarded the credits attached to the programme.

Appeals & Disputes

The candidate has the right to appeal against assessment decision or practice they regard as unfair. An Appeals and Disputes procedure is in place and communicated to all assessment candidates in order for them to appeal on the basis of:

- ❖ Unfair assessment
- ❖ Invalid assessment
- ❖ Unreliable assessment
- ❖ Unethical practices
- ❖ Inadequate expertise and experience of the assessor

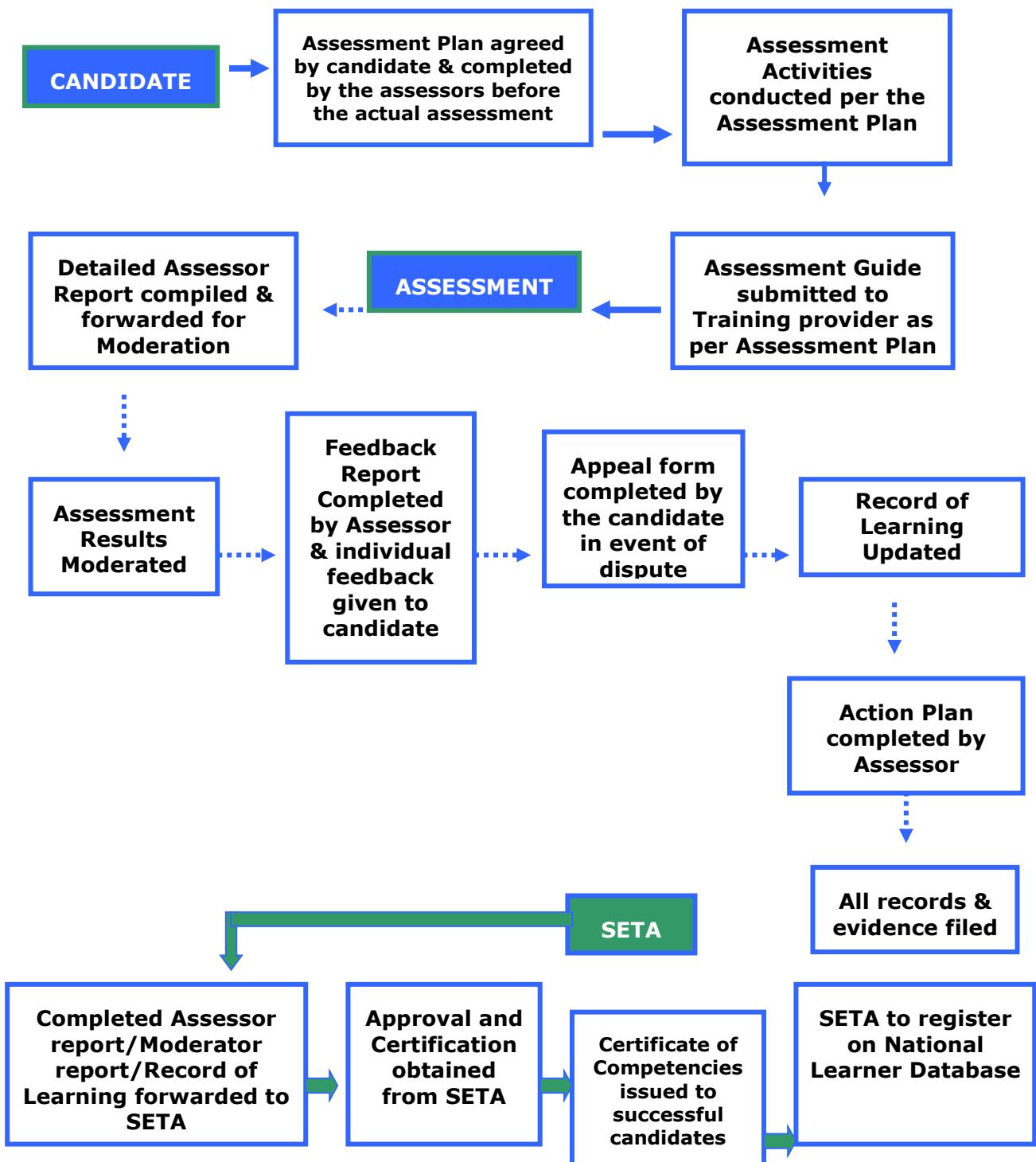
Appeals have to be lodged in writing (Candidate Appeal Form) & submitted to the Training Provider internal moderator within 48 hours, following the assessment in question. The moderator will consider the appeal & make a decision regarding the granting of a re-assessment. The learner will be informed about the appeal-outcome within 3 days of lodging the appeal. Should the learner not be satisfied with the internal appeal outcome, the learner will be advised of the rights to refer the matter to the SETA ETQA.

Abbreviations used in this guide:

C = Competent

NYC = Not Yet Competent

Assessment Process Flow



PORTFOLIO OF EVIDENCE

Portfolio Building

Your Portfolio of Evidence (PoE) contains the evidence needed to declare you competent and to award credits towards the award of this qualification to you. Evidence should be authentic and reflect both your knowledge of the subject and your ability to apply this knowledge in the workplace. Thus, evidence day to day activities supporting the specific outcomes addressed by this learning programme should complement the theoretical learning you attended and were assessed on.

There are FIVE key steps in creating a portfolio that will reflect your competence.

Plan Your Portfolio

Plan and document the sequence, graphics and layout of your portfolio. This will assist you in following a logical sequence, which makes the Portfolio also much more user friendly and understandable for the assessor. It will also reflect your professional approach and attitude towards the subject matter, your work and your life. Impact and appearance always contribute to or affect your chances of being taken seriously and declared competent!

Gather The Evidence

An evidence checklist has been provided (Section 4) to tell you what evidence needs to be gathered for assessment purposes. However, there are four broad categories of evidence that you should include:

- ❖ Knowledge evidence (your knowledge questionnaire)
- ❖ Direct performance evidence (actual samples of your work or records of activities captured on audio or video tape)
- ❖ Indirect performance evidence (documentary records of your performance e.g. appraisals, photographs, testimonials, self-assessments, customer ratings etc.)
- ❖ Supplementary evidence (to confirm the authenticity of your evidence)

Evaluate Your Evidence

Once you have collected your evidence, evaluate each piece by ensuring that it is:

- ❖ Valid (relevant to the unit standard/s being assessed)
- ❖ Authentic (clearly your own work)
- ❖ Current (not more than 2 years old)
- ❖ Sufficient (adequate to prove your competence against all of the assessment criteria and range statements in the unit standard/s)

Cross-Reference Your Evidence To The Unit Standards

Evidence for assessment against unit standards must be linked to the outcomes of the unit standard in question. An evidence locator grid is useful for this.

Organise Your Information

How you structure your portfolio is critical. Your design and layout must look professional and clearly articulate your achievements, and it should make sense to someone seeing it for the first time. Use the following structure as a guide:

1. A title page indicating:
 - The title of the programme
 - The unit standard titles to which the programme is aligned
 - The assessment centre (The training provider)
 - Your name, position and organisation
 - Your contact details
 - The name of your assessor
 - The name of your moderator
 - The date
2. An index
3. Background information
 - Curriculum Vitae
 - Organisation profile
 - Job profile
 - Organisation/department structure
4. A copy of the unit standard/s
5. Your assessment plan
6. Your completed Knowledge Questionnaire
7. An evidence locator grid
8. The evidence itself
9. Supporting evidence e.g. witness testimonies, reflections and witness status list
10. Assessment records

Learner Documents

Learner Curriculum Vitae

Please file your CV behind this page. Please remember to include a copy of your Identity Document (ID).

Attendance Registers

File your attendance registers behind this page.



ASSESSMENT STRATEGY

These assessment exercises will cover the assessment criteria for the unit standard in order to prove competence. The purpose of the assessment process is to gather enough evidence to prove that the assessment criteria were achieved.

Competency will be assessed through a knowledge questionnaire as well as workplace activities and assignments recorded in POE. Assessment evidence should be sufficient to prove that the candidate is capable in all required tasks set by the unit standards and a competency judgement will be made regarding the exit level outcome. Principles of fairness, validity, practicability, reliability and consistency will be adhered to throughout.

Unit standard	Market Requirements NVC L2		Unit Standard Codes	119673; 119669; 119672; 114974.
Level	2		Credits	22
Purpose of Assessment	The purpose of this assessment is to achieve the first step into applying the acquired skills and knowledge in the workplace			
Assessment Procedures	<ul style="list-style-type: none"> ❖ An integrated assessment approach will be followed to allow for practical and theoretical components. This entails the assessment of a number of unit standards, outcomes and criteria together in one assessment activity ❖ Candidates are not only assessed against specific outcomes, but also on critical outcomes, attitudes and values ❖ A summative competence judgment will be made on the basis of all assessment evidence produced, that proves that the candidate can be consistently judged as competent against the outcomes of the unit standards and the qualification as a whole. ❖ Candidates take responsibility for their own assessment and should notify the assessor when they are ready for assessment ❖ Candidates will receive feedback after the summative assessment, which will be discussed after all assessments have been completed ❖ All assessments will be reviewed to ensure that assessment practices are valid, fair, transparent, consistent and current ❖ An Internal/External moderator will moderate assessment practices ❖ The SETA will also conduct external moderation 			
Context of Assessment	Assessment Method	Assessment Conditions	Who will conduct assessment	Assessment results and feedback
	Questionnaires Work sample Observation	Input based assessments	Assessor	Immediate

Assessment Preparation

Preparing The Candidate

Name of Candidate		Date	
		Time	
Name of Assessor		Venue	
How to prepare the candidate	Document Requirements	Agree (tick)	Action Required
Explain to the candidate why your are meeting and the purpose of the assessment	NQF Framework Assessment process		
Discuss the assessment plan in detail	Assessment strategy		
Explain assessment process, show assessment instruments to candidate and describe assessment conditions	Assessment instruments		
Identify the role-players during assessment	Assessors Moderator		
Describe the evidence required to be declared competent	Examples of evidence		
Explain how evidence will be judged			
Explain to the candidate how to prepare: Give candidate summative task description	Summative task description		
Confirm with the candidate what he/she should bring to the assessment	Detailed briefing on exact requirements to be given to candidate		
Ensure that candidate understands the procedures of all assessment practices	Appeals procedure Moderation procedure Assessment policy		
Ask the candidate if he/she foresees any problems or identify any special needs	List needs		

Check with candidate that he/she clearly understands the assessment procedure			
Comments or questions:			

Assessor's declaration:

I hereby declare that I have prepared the candidate for assessment, the candidate was consulted and all stakeholders have been informed and the workplace is prepared to ensure valid and fair assessment.

Assessor Name	Signature

Agreed Assessment Plan 119673

Candidate's Name:			
Assessor's Name:			
Unit Standard Title:	119673 Identify and demonstrate entrepreneurial ideas and opportunities		
Special Assessment Requirements			
Event	Date, time and location	Resources required	Evidence to be generated
Attend Training		Training material, Facilitator	Attendance Register
Complete assessments		Assessments	Completed Assessments
Complete Portfolio of Evidence		Portfolio of Evidence guide	Completed Portfolio of Evidence
Submit Portfolio of Evidence to Training provider			Acknowledgement of receipt from Training provider
Assessor roles and responsibility			
Roles	<ul style="list-style-type: none"> ❖ Assessor ❖ Guide ❖ Feedback Agent ❖ Reviewer 		
Responsibilities	<ul style="list-style-type: none"> ❖ Consult candidate re assessment, assessment process and plan ❖ Agree assessment process and plan with candidate ❖ Forward documentation to candidate: plan, guide and assessment instruments ❖ Assess candidate with the use of different instruments ❖ Provide feedback on assessment findings ❖ Support candidate through assessment process ❖ Source feedback from candidate on assessment process ❖ Review assessment process and outcome ❖ Use assessment process as opportunity to transform assessment activities and outcomes 		

Candidate roles and responsibility	
Roles	<ul style="list-style-type: none"> ❖ Candidate ❖ Feedback agent ❖ Reviewer
Responsibilities	<ul style="list-style-type: none"> ❖ Be available for assessment ❖ Be actively involved in the consultative process ❖ Learn from the assessment process ❖ Provide feedback to the assessor in terms of the assessment as learning activity ❖ Provide feedback to the assessor on the efficacy of the assessment process ❖ Review own role and assessor role in the assessment process
Assessment Instruments	<ul style="list-style-type: none"> ❖ Portfolio of evidence ❖ Work sample ❖ Observation
Assessment Process	
Step	Date
<ul style="list-style-type: none"> ❖ Evaluation of POE addressing Essential Embedded Knowledge in unit standards ❖ Evaluation of Research Projects and other evidence address specific unit standards ❖ Consultation: assessment plan and assessment activities and instruments. Pre-assessment moderation and interviews conducted at this stage ❖ Observation: feedback on assessment against specific outcomes, critical outcomes and constructs in unit standards ❖ Feedback: to candidate regarding sufficiency of evidence and possible interview to gain supplementary evidence ❖ Feedback to candidate regarding assessment findings as well as review process 	
Feedback	Written feedback to be given to all stakeholders at the end of the assessment process, as well as verbal feedback to the candidate during assessment activities
Recording Process	Process and findings to be recorded and submitted for record keeping purposes as well as moderation and verification
Review Process	The review process is the responsibility of the assessor and the candidate. Joint reviewing will take place after feedback has been given to the candidate
Right to appeal	The candidate must be advised of the right to appeal

	Step	Date
Accessibility and safety of environment	<ul style="list-style-type: none"> ❖ Site inspection conducted ❖ Pre-assessment moderation conducted 	
Resources Required	<ul style="list-style-type: none"> ❖ Assignments ❖ POE ❖ Assessments 	

I confirm that:

- ❖ I have been consulted on and have agreed to the training and assessment process as detailed in the assessment guide
- ❖ I have been advised of my right to appeal against any assessment that is unfair, unreliable, invalid or impracticable
- ❖ I have read and understood the appeal procedure
- ❖ I know that assessments may be moderated or verified by an external party
- ❖ The purpose of the assessment has been clearly explained to me
- ❖ The criteria have been discussed with me, and I know I will be assessed against these criteria
- ❖ I know when and where I will be assessed, and I was given fair notice
- ❖ I know how the assessment will be done, and any other requirements related to the assessment
- ❖ I am ready to be assessed

Signed: _____

Date: _____

Overall Assessment Decision	Competent	Not yet competent	
Candidate's Signature		Date	
Assessor's Signature		Date	
Moderator's Signature		Date	

UNIT STANDARD 119673

Unit Standard Title

Identify and demonstrate entrepreneurial ideas and opportunities

NQF Level

2

Credits

7

Purpose Of The Unit Standard

Learners working towards this standard will be learning towards the full qualification, or will be working within a SMME (Small, Medium, Micro Enterprise) environment, specialising in New Venture Ownership and Management, where the acquisition of competence against this standard will add value to one's job. This standard will also add value to entrepreneurs who are seeking to develop their entrepreneurial skills so that they can become more marketable for bigger contracts, including commercial and public sector contracts, for example the Department of Public Works programmes.

The qualifying learner is capable of:

- ❖ Describing and discussing entrepreneurship.
- ❖ Identifying own entrepreneurial strengths and weaknesses in relation to opportunity identified.
- ❖ Identifying the characteristics of a typical entrepreneur.
- ❖ Identifying entrepreneurial opportunities in own context.
- ❖ Compiling entrepreneurial goal and personal growth plan.

Learning Assumed To Be In Place And Recognition Of Prior Learning

All learners accessing this qualification must be in possession of a GETC or equivalent qualification. The learner must be competent in Communication Literacy at NQF level 1.

Unit Standard Range

N/A

Specific Outcomes and Assessment Criteria:

Specific Outcome 1

Describe and discuss entrepreneurship.

Assessment Criteria

- ❖ An understanding of what makes up a business is demonstrated and explained in terms of proposed business context.
- ❖ Entrepreneurship is discussed in terms of employment opportunities.
- ❖ Advantages and disadvantages of entrepreneurship are explained with examples.
- ❖ Typical examples of entrepreneurship are presented and explained in terms of the proposed business context.
- ❖ Reasons for business failure and successes are identified and discussed with examples.
- ❖ Cultural, gender and social barriers that relate to entrepreneurship are identified and ideas raised on how to overcome them.

- ❖ The importance of a workable business plan is identified and explained in terms of proposed business context.

Specific Outcome 2

Identify own entrepreneurial strengths and weaknesses in relation to opportunity identified.

Assessment Criteria

- ❖ An entrepreneurial profile test is completed and strengths and weaknesses are identified according to profile benchmarks.
 - **RANGE** An entrepreneurial profile includes but is not limited to credit worthiness, entrepreneurial skills and abilities.
- ❖ The profile is matched to a suitable business opportunity.
- ❖ A plan of action to address weaknesses is compiled according to results of profile.
- ❖ Programmes to address skills weaknesses are identified and attended within given time frames.
- ❖ Ongoing measurement and evaluation tools to maximise strengths and reduce weaknesses are understood and used to measure skills growth.
- ❖ Entrepreneurial skills are improved according to skills plans and programmes.
- ❖ Entrepreneurial progress is monitored on an ongoing basis.

Specific Outcome 3

Identify the characteristics of a typical entrepreneur.

Assessment Criteria

- ❖ The characteristics of a typically successful entrepreneur are identified and discussed with examples.
 - **RANGE** Characteristics include but are not limited to the ability to take calculated risks, taking initiative, ensuring sustainability.
- ❖ Typical entrepreneurial skills, personality traits and values of entrepreneurial behaviour are clearly differentiated with examples.
- ❖ The importance of each characteristic is analysed in the context of a specific new venture.
- ❖ The technical, business, managerial and personal traits and characteristics required for establishing a successful venture are explained with examples.

Specific Outcome 4

Identify entrepreneurial opportunities in own context.

Assessment Criteria

- ❖ Entrepreneurial opportunities are identified and described in relation to own context.
 - **RANGE** Own context includes but is not limited to family, community, wider economic trends and development, credit worthiness, entrepreneurial profile.
- ❖ Entrepreneurial opportunities are identified and described in relation to the talents, interests and profile of the learner.
- ❖ Problem-solving and critical thinking techniques in relation to entrepreneurial opportunities are utilised to match opportunity and own talents and interests to proposed new business venture.
- ❖ Possible problems and limitations of identified opportunity are identified and ways to overcome them are described within scope of opportunity.

- ❖ A range of risks associated with the new venture are analysed in relation to own context and a decision whether to proceed with business is made according to results of analyses.
 - **RANGE** The analysis of risks include but is not limited to technical, performance, time, community, environmental and cultural contexts.

Specific Outcome 5

Compile entrepreneurial goals and personal growth plan.

Assessment Criteria

- ❖ Short, medium and long-term goals are planned in relation to entrepreneurial goals.
- ❖ Short-term goals for self in entrepreneurial context are clearly described and discussed in relation to personal growth and entrepreneurial goals.
- ❖ A plan of action to develop technical, business, managerial and personal skills in relation to entrepreneurial opportunity is compiled and implemented according to plan.
- ❖ Suitable mentors and coaches to assist in implementation of plan are identified based on availability and capacity.
- ❖ Resources to ensure successful implementation of plan are identified and utilised on an ongoing basis.

Unit Standard Accreditation And Moderation Options

- ❖ Any individual wishing to be assessed (including through RPL) against this unit standard may apply to an assessment agency, assessor or provider institution accredited by the relevant ETQA, or an ETQA that has a Memorandum of Understanding with the relevant ETQA.
- ❖ Anyone assessing a learner against this unit standard must be registered as an assessor with the relevant ETQA, or an ETQA that has a Memorandum of Understanding with the relevant ETQA.
- ❖ Any institution offering learning that will enable achievement of this unit standard or assessing this unit standard must be accredited as a provider with the relevant ETQA, or an ETQA that has a Memorandum of Understanding with the relevant ETQA.
- ❖ Moderation of assessment will be conducted by the relevant ETQA at its discretion.

Unit Standard Essential Embedded Knowledge

The learner must demonstrate an understanding of:

- ❖ The principles and skills of entrepreneurship.
- ❖ Completing entrepreneurial profile tests.
- ❖ The ability to analyse one's own strengths and weaknesses.
- ❖ Goal setting techniques.
- ❖ Compiling personal growth plans.

Critical Cross-Field Outcomes (CCFO):

Identifying

Identify and solve problems using critical and creative thinking processes to identify entrepreneurial opportunities, own entrepreneurial profile and personal growth plan.

Working

Work effectively with others as a member of a team, group, organisation or community to identify and pursue entrepreneurial opportunities.



Organising

Organise and manage oneself and one's activities responsibly and effectively in order to compile and develop a personal growth plan within a new venture creation.

Collecting

Collect, analyse, organize and critically evaluate information in order to gather information pertaining to entrepreneurial opportunities.

Communicating

Communicate effectively using visual, mathematical and/or language in the modes of oral and/or written persuasion to source data pertaining to new venture opportunity.

Science

Use science and technology effectively and critically, showing responsibility to the environment and health of others in ensuring that risk probability factors are effectively determined.

Demonstrating

Demonstrate an understanding of the world as a set of interrelated systems by recognising that problem-solving contexts do not exist in isolation in relation to entrepreneurial opportunities and own context.

Contributing

Participating as responsible citizens in the life of local, national and global communities by analysing all aspects of entrepreneurial opportunities identified.

Formative Assessments

During your training, you were required to complete a number of activities within each Lesson in your Learner Study Guide. You need to complete these activities and attach the evidence of each in this section of your PoE.



Summative Assessment Readiness Statement

Note: **R = Ready** for summative assessment. **NYR = Not Yet Ready** for summative assessment

Candidate's Name			ID No.	
Assessor's Name			Reg. No.	
Unit Standard Title	119673 Identify and demonstrate entrepreneurial ideas and opportunities			
ASSESSMENT DECISION				
Specific Outcome	R	NYR	Comments	
Describe and discuss entrepreneurship				
Identify own entrepreneurial strengths and weaknesses in relation to opportunity identified				
Identify the characteristics of a typical entrepreneur				
Identify entrepreneurial opportunities in own context				
Compile entrepreneurial goals and personal growth plan				

Assessor's / Facilitator's Declaration:

I hereby declare that I have assessed the learner's formative assessment and find the learner ready / not yet ready for the summative assessment

Assessor / Facilitator Name	Signature



SUMMATIVE ASSESSMENTS

Knowledge Questionnaire 119673

1. Explain what a business is. (2)

A business is any person, group of people or organisation that takes resources (1) and turns them into products or offers a service to sell to meet a need in the market for a profit. (1)

2. Explain a small business. (2)

it is generally a description of any enterprise with 50 - 100 employees (1) and includes profit-making enterprises (businesses) (1) as well as non-profit enterprises

3. Explain your own business idea. (2)

Any description that is clear is worth 2 points

4. For your own business idea, explain why a workable business plan is important. You must list and explain at least two factors. (4)

One point each for listing and one point each for explaining factors such as: having a document against which to compare the performance of the business, securing financial assistance, etc.

5. Describe the characteristics of entrepreneurs, using the information in the table below to guide you. (8)

One point for each explanation and one point for each example.

Characteristic	Explanation	Give an example of an entrepreneur that you think has this characteristic
Entrepreneurs take risks	Entrepreneurs take calculated risks and try to minimise existing risks.	
Anyone can become an entrepreneur	Yes, if they acquire the necessary knowledge and skills	
Entrepreneurs have to ensure sustainability of their enterprises.	By ensuring that the business is sustainable, the entrepreneur makes sure that his income and that of his employees is ensured, that creditors are paid, etc. Only one explanation is required.	
Entrepreneurs have to take the initiative	The entrepreneur must take opportunities when they arise, make opportunities when	

needed, keep up to date on developments in their industry, etc.

6. Who will be able to act as your mentor in order to put your business idea and business plan into action? Also describe their knowledge and skills. (2)

One point each

TOTAL: 20



Practical Workplace Logbook

Attach the completed workplace logbook and workbook behind this page

Acknowledgment of Receipt

I _____

(Learner) acknowledge receipt of my Workplace assignment workbook on this the

_____ day of _____ 20_____

The process of on-the-job training has been explained to me.

Signature of Learner

Name of Facilitator/Mentor/Supervisor:

Signature of Facilitator/Mentor/Supervisor



Indirect Evidence

Indirect Evidence is evidence produced about the learner from another source. This is usually in the form of reports of third party sources, i.e. sources other than the assessor.

Indirect evidence can be used to verify the authenticity of other forms of evidence. In addition, it may be necessary to corroborate these forms of evidence.

Sources of indirect evidence include:

- ❖ Team outputs
- ❖ Work completed at an earlier stage
- ❖ Performance appraisals
- ❖ Training records
- ❖ Testimonials
- ❖ Reviews and commendations
- ❖ Certificates and qualifications
- ❖ Medals, prizes and trophies
- ❖ Customer / client ratings

Please attach any indirect evidence you may have on the required outcomes within the PoE behind this page.



Declaration Of Authenticity Of Evidence

I (Initials and Surname)	
ID No:	
<p>declare/certify that the learning activities completed in the Learner Activity Workbook in its entirety is my own original and authentic work (interpreter declaration to be completed where necessary) I acknowledge that should it come to the attention/reported to the Training Provider/SETA or relevant authorities, and there is sufficient evidence to prove that there is an irregularity regarding the authenticity of this submission the necessary steps will be taken against me which can result in one or more of the following decisions being taken:</p>	
<ul style="list-style-type: none">❖ A criminal case being opened,❖ Learner achievement certificate cancelled, withdrawn❖ Non processing of Learner Achievement submissions to the SETA pending the outcome of an investigation❖ De-registration as an Assessor/Moderator (where unauthorised assistance is provided by the Assessor/Facilitator)❖ Investigation into the accreditation status of the Training Provider if there is an irregularity on the part of the Training Provider	
<p>I know and understand the contents of this declaration: I have no objection to signing the prescribed declaration. The declaration was also explained to me by the Training Provider/Facilitator</p>	
Signature of Learner:	Date
Signature of Facilitator/Assessor:	Date

Evidence Locator & Sign-off 119673

Evidence required (Evidence required to support the practical components of the specific outcomes & assessment criteria, expressed in the context of the assessment) U/S 119673	Sources of evidence (where/how the assessor can find the evidence)			Assessor's comments in support of judgement (where required)
		✓	X	
SO1, AC1 An understanding of what makes up a business is demonstrated and explained in terms of proposed business context	Knowledge Questionnaire Assignment 1			
SO1, AC2 Entrepreneurship is discussed in terms of employment opportunities	Knowledge Questionnaire Assignment 1			
SO1, AC3 Advantages and disadvantages of entrepreneurship are explained with examples	Knowledge Questionnaire Assignment 1			
SO1, AC4 Typical examples of entrepreneurship are presented and explained in terms of the proposed business context	Knowledge Questionnaire Assignment 1			
SO1, AC5 Reasons for business failure and successes are identified and discussed with examples	Knowledge Questionnaire Assignment 1			
SO1, AC6 Cultural, gender and social barriers that relate to entrepreneurship are identified and ideas raised on how to overcome them	Knowledge Questionnaire Assignment 1			

Evidence required (Evidence required to support the practical components of the specific outcomes & assessment criteria, expressed in the context of the assessment) U/S 119673	Sources of evidence (where/how the assessor can find the evidence)			Assessor's comments in support of judgement (where required)
		✓	X	
SO1, AC7 The importance of a workable business plan is identified and explained in terms of proposed business context	Knowledge Questionnaire Assignment 1			
SO2, AC1 An entrepreneurial profile test is completed and strengths and weaknesses are identified according to profile benchmarks RANGE An entrepreneurial profile includes but is not limited to credit worthiness, entrepreneurial skills and abilities	Knowledge Questionnaire Assignment 2			
SO2, AC2 The profile is matched to a suitable business opportunity	Knowledge Questionnaire Assignment 2			
SO2, AC3 A plan of action to address weaknesses is compiled according to results of profile	Knowledge Questionnaire Assignment 2			
SO2, AC4 Programmes to address skills weaknesses are identified and attended within given time frames	Knowledge Questionnaire Assignment 2			
SO2, AC5 Ongoing measurement and evaluation tools to maximise strengths and reduce weaknesses are understood and used to measure skills growth	Knowledge Questionnaire Assignment 2			

Evidence required (Evidence required to support the practical components of the specific outcomes & assessment criteria, expressed in the context of the assessment) U/S 119673	Sources of evidence (where/how the assessor can find the evidence)			Assessor's comments in support of judgement (where required)
		✓	X	
SO2, AC6 Entrepreneurial skills are improved according to skills plans and programmes	Knowledge Questionnaire Assignment 2			
SO2, AC7 Entrepreneurial progress is monitored on an ongoing basis	Knowledge Questionnaire Assignment 2			
SO3, AC1 The characteristics of a typically successful entrepreneur are identified and discussed with examples RANGE Characteristics include but are not limited to the ability to take calculated risks, taking initiative, ensuring sustainability	Knowledge Questionnaire Assignment 3			
SO3, AC2 Typical entrepreneurial skills, personality traits and values of entrepreneurial behaviour are clearly differentiated with examples	Knowledge Questionnaire Assignment 3			
SO3, AC3 The importance of each characteristic is analysed in the context of a specific new venture	Knowledge Questionnaire Assignment 3			
SO3, AC4 The technical, business, managerial and personal traits and characteristics required for establishing a successful venture are explained with examples	Knowledge Questionnaire Assignment 3			

Evidence required (Evidence required to support the practical components of the specific outcomes & assessment criteria, expressed in the context of the assessment) U/S 119673	Sources of evidence (where/how the assessor can find the evidence)			Assessor's comments in support of judgement (where required)
		✓	X	
SO4, AC1 Entrepreneurial opportunities are identified and described in relation to own context RANGE Own context includes but is not limited to family, community, wider economic trends and development, credit worthiness, entrepreneurial profile	Knowledge Questionnaire Assignment 4			
SO4, AC2 Entrepreneurial opportunities are identified and described in relation to the talents, interests and profile of the learner	Knowledge Questionnaire Assignment 4			
SO4, AC3 Problem-solving and critical thinking techniques in relation to entrepreneurial opportunities are utilised to match opportunity and own talents and interests to proposed new business venture	Knowledge Questionnaire Assignment 4			
SO4, AC4 Possible problems and limitations of identified opportunity are identified and ways to overcome them are described within scope of opportunity	Knowledge Questionnaire Assignment 4			

Evidence required (Evidence required to support the practical components of the specific outcomes & assessment criteria, expressed in the context of the assessment) U/S 119673	Sources of evidence (where/how the assessor can find the evidence)			Assessor's comments in support of judgement (where required)
		✓	X	
SO4, AC5 A range of risks associated with the new venture are analysed in relation to own context and a decision whether to proceed with business is made according to results of analyses RANGE The analysis of risks include but is not limited to technical, performance, time, community, environmental and cultural contexts	Knowledge Questionnaire Assignment 4			
SO5, AC1 Short, medium and long-term goals are planned in relation to entrepreneurial goals	Knowledge Questionnaire Assignment 5			
SO5, AC2 Short-term goals for self in entrepreneurial context are clearly described and discussed in relation to personal growth and entrepreneurial goals	Knowledge Questionnaire Assignment 5			
SO5, AC3 A plan of action to develop technical, business, managerial and personal skills in relation to entrepreneurial opportunity is compiled and implemented according to plan	Knowledge Questionnaire Assignment 5			
SO5, AC4 Suitable mentors and coaches to assist in implementation of plan are identified based on availability and capacity	Knowledge Questionnaire Assignment 5			

Evidence required (Evidence required to support the practical components of the specific outcomes & assessment criteria, expressed in the context of the assessment) U/S 119673	Sources of evidence (where/how the assessor can find the evidence)			Assessor's comments in support of judgement (where required)
		✓	X	
SO5, AC5 Resources to ensure successful implementation of plan are identified and utilised on an ongoing basis	Knowledge Questionnaire Assignment 5			

Record Of Learning

Candidate's Name:		ID No			
Assessor's Name:		Ass. Reg. No			
Moderator's Name:		Mod. Reg. No			
Date:					
UNIT STANDARD	NQF LEVEL	CREDITS	DATE OF COMPLETION	SIGNATURE OF ASSESSOR	SIGNATURE OF MODERATOR
119673	2	7			

ASSESSMENT REVIEW

NAME of LEARNER		NAME of ASSESSOR	
VENUE		DATE of REVIEW	
UNIT STANDARD	119673 Identify and demonstrate entrepreneurial ideas and opportunities		
Review Dimension	ASSESSOR	LEARNER/CANDIDATE	ACTION
The principles/criteria for good assessment were achieved?	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
The assessment related to the registered unit standard?	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
The assessment was practical?	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
It was time efficient and cost-effective and did not interfere with my normal responsibilities?	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
The assessment instruments were fair, clear and understandable	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
The assessment judgements was made against set requirements	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
The venue and equipment was functional?	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
Special needs were identified and the assessment plan was adjusted	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
Feedback was constructive against the evidence required	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
An opportunity to appeal was given	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
The evidence was recorded	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
LEARNER'S DECLARATION OF UNDERSTANDING			
I am aware of the moderation process and understand that the moderator could declare the assessment decision invalid			
Learner	Date	Assessor	Date
Moderator	Date		

Assessor Review

Assessors must review the assessment process by completing this document. Please attach any additional information if required.

Evaluation Criteria	YES	NO
Was the assessment preparation adequate?		
Was the learner informed of the assessment and policies?		
Design/prepare the assessment tools & - documentation according to ETQA and company QMS correct?		
Integration into work or learning: Was the assessment as unobtrusive as possible?		
Was maximum use made of naturally occurring events & readily available evidence?		
Systematic Process: Was the assessment process properly planned & structured?		
Involvement of the learner: Was the learner involved throughout the assessment process?		
Did the learners contribute to the planning of assessment & the collection of evidence?		
Open: Did the learners understand the assessment process and the criteria, which apply?		
Environment: A supportive, non-threatening environment is created for assessment.		
Was the assessment Valid?		
Was the assessment Reliable?		
Was the assessment Consistent?		
Was the assessment Authentic?		
Was the assessment Sufficient?		
Was the assessment Current?		
Was the feedback given?		
Completed the result of the assessment according to the requirements of the organization and/or employer, as well as the relevant ETQA.		
Records & assessment instruments have to be kept for quality assurance purposes, as well as possible appeals.		
What did you as assessor do well?		

What did you as assessor not do well?

Did you identify any weaknesses in the design of the assessment? If so, suggest improvements

Quality of the unit standard: is it fit for the purpose it was designed for? If not, please make suggestions for improvements

Additional comments

Assessor signature

Date



Candidate Feedback Report

Candidate's Name			ID No.	
Assessor's Name			Reg. No.	
Unit Standard Title	119673 Identify and demonstrate entrepreneurial ideas and opportunities			
Assessment Decision				
Source of Evidence	C	NYC	Comments	
Assessments				
Product				
Indirect Evidence				
Overall Assessment Decision				
Additional Notes				
Date				
Signature of Assessor			Signature of Candidate	



Candidate Appeal Form

Candidate's Name:		ID No.	
Assessor's Name:		Reg. No.	
Unit Standard Title:	119673 Identify and demonstrate entrepreneurial ideas and opportunities		
Date:			
SECTION 1			
Candidate's reason for disagreeing with the assessment decision			
Assessor's rationale for the assessment decision			
Candidate's signature			



Assessor's signature	
SECTION 2	
Internal Moderator's reconsidered decision and rationale	
Internal Moderator's Signature	
Advising Assessor's Signature	
Decision and rationale of the investigatory panel	
Learner Declaration	The above decisions have been explained to me and I accept the assessment decision
Learner's Signature	
Date	

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Please send this form to: The Training Provider

Assessor's Report 119673

Candidate's Name			ID No.	
Assessor's Name			Reg. No.	
Unit Standard Title	119673 Identify and demonstrate entrepreneurial ideas and opportunities			
ASSESSMENT DECISION				
Specific Outcome	C	NYC	Comments	
Describe and discuss entrepreneurship				
Identify own entrepreneurial strengths and weaknesses in relation to opportunity identified				
Identify the characteristics of a typical entrepreneur				
Identify entrepreneurial opportunities in own context				
Compile entrepreneurial goals and personal growth plan				
Overall Assessment Decision				
Comments				
Date				
Signature of Assessor		Signature of Candidate		



Moderator's Report 119673

Moderator's Name		Reg. No.	
Assessor's Name		Reg. No.	
Candidate's Name		ID No.	
Unit Standard Title	119673 Identify and demonstrate entrepreneurial ideas and opportunities		
MODERATION DECISION			
Specific Outcome	C	NYC	Comments
Describe and discuss entrepreneurship			
Identify own entrepreneurial strengths and weaknesses in relation to opportunity identified			
Identify the characteristics of a typical entrepreneur			
Identify entrepreneurial opportunities in own context			
Compile entrepreneurial goals and personal growth plan			
Overall Moderation Decision			
Feedback to Assessor			
Action Required			
Date of Moderation			
Signature of Moderator			
Signature of Assessor			
Signature of Candidate			



Agreed Assessment Plan 119669

Candidate's Name:			
Assessor's Name:			
Unit Standard Title:	119669 Match new venture opportunity to market needs		
Special Assessment Requirements			
Event	Date, time and location	Resources required	Evidence to be generated
Attend Training		Training material, Facilitator	Attendance Register
Complete assessments		Assessments	Completed Assessments
Complete Portfolio of Evidence		Portfolio of Evidence guide	Completed Portfolio of Evidence
Submit Portfolio of Evidence to Training provider			Acknowledgement of receipt from Training provider
Assessor roles and responsibility			
Roles	<ul style="list-style-type: none"> ❖ Assessor ❖ Guide ❖ Feedback Agent ❖ Reviewer 		
Responsibilities	<ul style="list-style-type: none"> ❖ Consult candidate re assessment, assessment process and plan ❖ Agree assessment process and plan with candidate ❖ Forward documentation to candidate: plan, guide and assessment instruments ❖ Assess candidate with the use of different instruments ❖ Provide feedback on assessment findings ❖ Support candidate through assessment process ❖ Source feedback from candidate on assessment process ❖ Review assessment process and outcome ❖ Use assessment process as opportunity to transform assessment activities and outcomes 		

Candidate roles and responsibility	
Roles	<ul style="list-style-type: none"> ❖ Candidate ❖ Feedback agent ❖ Reviewer
Responsibilities	<ul style="list-style-type: none"> ❖ Be available for assessment ❖ Be actively involved in the consultative process ❖ Learn from the assessment process ❖ Provide feedback to the assessor in terms of the assessment as learning activity ❖ Provide feedback to the assessor on the efficacy of the assessment process ❖ Review own role and assessor role in the assessment process
Assessment Instruments	<ul style="list-style-type: none"> ❖ Portfolio of evidence ❖ Work sample ❖ Observation
Assessment Process	
Step	Date
<ul style="list-style-type: none"> ❖ Evaluation of POE addressing Essential Embedded Knowledge in unit standards ❖ Evaluation of Research Projects and other evidence address specific unit standards ❖ Consultation: assessment plan and assessment activities and instruments. Pre-assessment moderation and interviews conducted at this stage ❖ Observation: feedback on assessment against specific outcomes, critical outcomes and constructs in unit standards ❖ Feedback: to candidate regarding sufficiency of evidence and possible interview to gain supplementary evidence ❖ Feedback to candidate regarding assessment findings as well as review process 	
Feedback	Written feedback to be given to all stakeholders at the end of the assessment process, as well as verbal feedback to the candidate during assessment activities
Recording Process	Process and findings to be recorded and submitted for record keeping purposes as well as moderation and verification
Review Process	The review process is the responsibility of the assessor and the candidate. Joint reviewing will take place after feedback has been given to the candidate
Right to appeal	The candidate must be advised of the right to appeal

	Step	Date
Accessibility and safety of environment	<ul style="list-style-type: none"> ❖ Site inspection conducted ❖ Pre-assessment moderation conducted 	
Resources Required	<ul style="list-style-type: none"> ❖ Assignments ❖ POE ❖ Assessments 	

I confirm that:

- ❖ I have been consulted on and have agreed to the training and assessment process as detailed in the assessment guide
- ❖ I have been advised of my right to appeal against any assessment that is unfair, unreliable, invalid or impracticable
- ❖ I have read and understood the appeal procedure
- ❖ I know that assessments may be moderated or verified by an external party
- ❖ The purpose of the assessment has been clearly explained to me
- ❖ The criteria have been discussed with me, and I know I will be assessed against these criteria
- ❖ I know when and where I will be assessed, and I was given fair notice
- ❖ I know how the assessment will be done, and any other requirements related to the assessment
- ❖ I am ready to be assessed

Signed: _____

Date: _____

Overall Assessment Decision	Competent	Not yet competent	
Candidate's Signature		Date	
Assessor's Signature		Date	
Moderator's Signature		Date	

UNIT STANDARD 119669

Unit Standard Title

Match new venture opportunity to market needs

NQF Level

2

Credits

6

Purpose Of The Unit Standard

Learners working towards this standard will be learning towards the full qualification, or will be working within a SMME (Small, Medium, Micro Enterprise) environment, specialising in New Venture Ownership and Management, where the acquisition of competence against this standard will add value to one's job. This standard will also add value to entrepreneurs who are seeking to develop their entrepreneurial skills so that they can become more marketable for bigger contracts, including commercial and public sector contracts, for example the Department of Public Works programmes.

The qualifying learner is capable of:

- ❖ Identifying and describing what marketing is in relation to new venture opportunities.
- ❖ Conducting market research.
- ❖ Identifying market segments in relation to own venture opportunity.
- ❖ Incorporating market research into a marketing plan.
- ❖ Exploring product/service life cycle.

Learning Assumed To Be In Place and Recognition Of Prior Learning

All learners accessing this qualification must be in possession of a GETC or equivalent qualification. The learner must be competent in communication literacy at NQF level 1.

Unit Standard Range

N/A

Specific Outcomes and Assessment Criteria:

Specific Outcome 1

Identify and describe what marketing is in relation to new venture opportunities.

Assessment Criteria

- ❖ The concept of a market is described, including the four P's of marketing.
 - **RANGE** The four P's of marketing include Price, Promotion, Place and Product.
- ❖ A market is described in relation to supply, demand and pricing, utilising examples.
- ❖ The importance of the value addition of a proposed business in relation is explained in relation to the market.
- ❖ Factors that influence markets are explained in the context of proposed business venture.

- **RANGE** Factors that influence markets include but are not limited to the South African economy, trends and developments within the particular new venture industrial context, competition, location, timing.
- ❖ Differentiations between product and service marketing are identified and explained with examples.
 - **RANGE** Market segmentation includes but is not limited to specific projects, geographical location, income brackets, age, gender, ethnic, community.
- ❖ The concept of market segmentation is explained with examples.
- ❖ The concept of competition is explained in relation to the marketing function.

Specific Outcome 2

Conduct market research.

Assessment Criteria

- ❖ The importance of market research is explained in relation to proposed new venture.
- ❖ Market research techniques are identified and explained in context of proposed new venture.
 - **RANGE** Market research techniques include but are not limited to formal and informal research including basic questionnaires, community research, intelligence gathering exercises.
- ❖ Market research tools are identified and utilised to determine viability of new venture.
- ❖ Market research is conducted and factual information is gathered and interpreted in relation to own business.
- ❖ Viability of new venture is determined according to market research findings.

Specific Outcome 3

Identify market segments in relation to own new venture opportunity.

Assessment Criteria

- ❖ Own product/service requirements are analysed in relation to the identified target market.
- ❖ Customers are segmented according to business goals.
- ❖ The competition to new venture opportunity is identified and analysed to determine the threats they may present.
- ❖ The changes that may be required to increase competitiveness of new venture are identified and explained in accordance with competitor analysis and market research.

Specific Outcome 4

Incorporate market research into a marketing plan.

Assessment Criteria

- ❖ The elements of a marketing plan are outlined and described according to own business context.
- ❖ New venture opportunity is analysed and marketing plan compiled in accordance with the Four P's of marketing.
- ❖ Measurement tools to evaluate success of marketing plan are identified and included in plan.
- ❖ Action goals are outlined and implemented, with timeframes.

- ❖ Reasons and methods for evaluating and modifying marketing plan are explained and implemented in the context of market research results.
- ❖ Marketing plan is integrated into business.

Specific Outcome 5

Explore product/service life cycle.

Assessment Criteria

- ❖ The concept of a product/service life cycle is explained with examples.
- ❖ Growth opportunities for new venture are identified and explained with typical examples of how this can be achieved.
- ❖ Trends and developments in relation to product/service are monitored and product/service life cycle is determined accordingly.
- ❖ Plans are made to ensure that business venture is aligned to product/service life cycle.

Unit Standard Accreditation And Moderation Options

- ❖ Any individual wishing to be assessed (including through RPL) against this unit standard may apply to an assessment agency, assessor or provider institution accredited by the relevant ETQA, or an ETQA that has a Memorandum of Understanding with the relevant ETQA.
- ❖ Anyone assessing a learner against this unit standard must be registered as an assessor with the relevant ETQA, or an ETQA that has a Memorandum of Understanding with the relevant ETQA.
- ❖ Any institution offering learning that will enable achievement of this unit standard or assessing this unit standard must be accredited as a provider with the relevant ETQA, or an ETQA that has a Memorandum of Understanding with the relevant ETQA.
- ❖ Moderation of assessment will be conducted by the relevant ETQA at its discretion.

Unit Standard Essential Embedded Knowledge

The learner must demonstrate an understanding of:

- ❖ The principles and skills of marketing.
- ❖ The product/service life cycle.
- ❖ Basic principles and techniques for conducting market research.
- ❖ The four P's of marketing as they relate to new ventures.
- ❖ The basic principles for compiling a marketing plan and how this forms part of an overall business plan.

Critical Cross-field Outcomes (CCFO):

Identifying

Identify and solve problems using critical and creative thinking processes to conduct market research, compile marketing plan and explore the product/service life cycle of a potential new venture.

Working

Work effectively with others as a member of a team, group, organisation or community to identify and compile a marketing plan based on community/industrial needs.



Organising

Organise and manage oneself and one's activities responsibly and effectively in order to gather data, compile and develop a marketing plan.

Collecting

Collect, analyse, organise and critically evaluate marketing information in order to put a sound marketing plan together.

Communicating

Communicate effectively using visual, mathematical and/or language in the modes of oral and/or written persuasion to compile marketing plan.

Science

Use science and technology effectively and critically, showing responsibility to the environment and health of others in ensuring all marketing and product/service life cycle data is effectively incorporated into marketing plan.

Demonstrating

Demonstrate an understanding of the world as a set of interrelated systems by recognising that marketing problem-solving contexts do not exist in isolation.

Contributing

Participating as responsible citizens in the life of local, national and global communities by analysing all aspects of market segments in relation to own new venture opportunity.

Formative Assessments

During your training, you were required to complete a number of activities within each Lesson in your Learner Study Guide. You need to complete these activities and attach the evidence of each in this section of your PoE.



Summative Assessment Readiness Statement

Note: **R = Ready** for summative assessment. **NYR = Not Yet Ready** for summative assessment

Candidate's Name			ID No.	
Assessor's Name			Reg. No.	
Unit Standard Title	119669 Match new venture opportunity to market needs			
ASSESSMENT DECISION				
Specific Outcome	R	NYR	Comments	
Identify and describe what marketing is in relation to new venture opportunities				
Conduct market research				
Identify market segments in relation to own new venture opportunity				
Incorporate market research into a marketing plan				
Explore product/service life cycle				

Assessor's / Facilitator's Declaration:

I hereby declare that I have assessed the learner's formative assessment and find the learner ready / not yet ready for the summative assessment

Assessor / Facilitator Name	Signature

SUMMATIVE ASSESSMENTS

Knowledge Questionnaire 119669

1. Answer the following questions about your own business: Place: where would you open your business? (1)

Any place that sounds good and viable is correct.

2. Promotion: how would you let customers know where you are? List at least two methods (2)

Any two of: Advertising Personal selling Sales promotion Publicity

3. Product: which products would you stock? Or which services would you sell? List at least three. (3)

Any three products or services that would feasibly be found in a business of this kind.

4. Price: would you sell your products or services for less than the competition? Give a reason for your answer. (1)

The answer could be yes or no as long as the motivation makes sense.

5. Explain supply and demand. (4)

Supply is the amount of a product or services that a business provides to the customers at a certain time and a given price

Demand Is the amount of a product or service that customers want to buy and have money for at a given time at a given price.

6. Explain how marketing products differs from marketing services in terms of your business. If you had a spaza shop where you sold products, how would you market your products? Now compare this with marketing services such as hairdressing, a taxi service, etc. (4)

Any explanation is worth two points and any comparison is worth two points.

7. Explain why market research will be important before you start your business. (2)

if you don't do it, it can lead to the following negative results: A poor location for your business, Stocking product lines that the customers don't buy, The pricing of your products is incorrect, either too much or too little

Any one is correct, or any one of the following:

positive results can come from doing market research: You know where the best place is to locate your business, You know which products your customers will buy, You will know how much to charge for the products so that they are not too expensive or too cheap, You will know who your customers are – your target market, You can make good and informed decisions that will benefit your business, because you have good information to base your decisions on

8. Explain why it is important to make your marketing plan an important part of your business (integrate the marketing plan into your business.) (1)

To ensure that your marketing plan is implemented and to enable you to take corrective action if the marketing plan is not giving you the results you want.

9. Give two reasons why you should develop a marketing plan. (2)

Any two of the following: Forces you to follow an organised approach to marketing, Helps to establish specific directions for your business, Ensures that the business is constant in its actions, Sets objectives and direction for the business

10. List two characteristics of the growth phase of the product life cycle. (2)

Any one of: Sales increase fast, Direct competition increases, Improvement in the production process, Improvements in the product, High profits, Competition for outlets:

11. List two characteristics of the maturity phase of the product life cycle. (2)

The sales growth rate decreases, Profit margins decrease

TOTAL: 24

Practical Workplace Logbook

Attach the completed workplace logbook and workbook behind this page

Acknowledgment of Receipt

I _____

(Learner) acknowledge receipt of my Workplace assignment workbook on this the

_____ day of _____ 20_____

The process of on-the-job training has been explained to me.

Signature of Learner

Name of Facilitator/Mentor/Supervisor:

Signature of Facilitator/Mentor/Supervisor



Indirect Evidence

Indirect Evidence is evidence produced about the learner from another source. This is usually in the form of reports of third party sources, i.e. sources other than the assessor.

Indirect evidence can be used to verify the authenticity of other forms of evidence. In addition, it may be necessary to corroborate these forms of evidence.

Sources of indirect evidence include:

- ❖ Team outputs
- ❖ Work completed at an earlier stage
- ❖ Performance appraisals
- ❖ Training records
- ❖ Testimonials
- ❖ Reviews and commendations
- ❖ Certificates and qualifications
- ❖ Medals, prizes and trophies
- ❖ Customer / client ratings

Please attach any indirect evidence you may have on the required outcomes within the PoE behind this page.



Declaration Of Authenticity Of Evidence

I (Initials and Surname)	
ID No:	
declare/certify that the learning activities completed in the Learner Activity Workbook in its entirety is my own original and authentic work (interpreter declaration to be completed where necessary) I acknowledge that should it come to the attention/reported to the Training Provider/SETA or relevant authorities, and there is sufficient evidence to prove that there is an irregularity regarding the authenticity of this submission the necessary steps will be taken against me which can result in one or more of the following decisions being taken:	
<ul style="list-style-type: none">❖ A criminal case being opened,❖ Learner achievement certificate cancelled, withdrawn❖ Non processing of Learner Achievement submissions to the SETA pending the outcome of an investigation❖ De-registration as an Assessor/Moderator (where unauthorised assistance is provided by the Assessor/Facilitator)❖ Investigation into the accreditation status of the Training Provider if there is an irregularity on the part of the Training Provider	
I know and understand the contents of this declaration: I have no objection to signing the prescribed declaration. The declaration was also explained to me by the Training Provider/Facilitator	
Signature of Learner:	Date
Signature of Facilitator/Assessor:	Date

Evidence Locator & Sign-off 119669

Evidence required (Evidence required to support the practical components of the specific outcomes & assessment criteria, expressed in the context of the assessment) U/S 119669	Sources of evidence (where/how the assessor can find the evidence)			Assessor's comments in support of judgement (where required)
		✓	X	
SO1, AC1 The concept of a market is described, including the four P's of marketing RANGE The four P's of marketing include Price, Promotion, Place and Product	Knowledge Questionnaire Assignment 6			
SO1, AC2 A market is described in relation to supply, demand and pricing, utilising examples	Knowledge Questionnaire Assignment 6			
SO1, AC3 The importance of the value addition of a proposed business in relation is explained in relation to the market	Knowledge Questionnaire Assignment 6			
SO1, AC4 Factors that influence markets are explained in the context of proposed business venture RANGE Factors that influence markets include but are not limited to the South African economy, trends and developments within the particular new venture industrial context, competition, location, timing	Knowledge Questionnaire Assignment 6			

Evidence required (Evidence required to support the practical components of the specific outcomes & assessment criteria, expressed in the context of the assessment) U/S 119669	Sources of evidence (where/how the assessor can find the evidence)			Assessor's comments in support of judgement (where required)
		✓	X	
SO1, AC5 Differentiations between product and service marketing are identified and explained with examples RANGE Market segmentation includes but is not limited to specific projects, geographical location, income brackets, age, gender, ethnic, community	Knowledge Questionnaire Assignment 6			
SO1, AC6 The concept of market segmentation is explained with examples	Knowledge Questionnaire Assignment 6			
SO1, AC7 The concept of competition is explained in relation to the marketing function	Knowledge Questionnaire Assignment 6			
SO2, AC1 The importance of market research is explained in relation to proposed new venture	Knowledge Questionnaire Assignment 7			
SO2, AC2 Market research techniques are identified and explained in context of proposed new venture RANGE Market research techniques include but are not limited to formal and informal research including basic questionnaires, community research, intelligence gathering exercises	Knowledge Questionnaire Assignment 7			

Evidence required (Evidence required to support the practical components of the specific outcomes & assessment criteria, expressed in the context of the assessment) U/S 119669	Sources of evidence (where/how the assessor can find the evidence)			Assessor's comments in support of judgement (where required)
		✓	X	
SO2, AC3 Market research tools are identified and utilised to determine viability of new venture	Knowledge Questionnaire Assignment 7			
SO2, AC4 Market research is conducted and factual information is gathered and interpreted in relation to own business	Knowledge Questionnaire Assignment 7			
SO2, AC5 Viability of new venture is determined according to market research findings	Knowledge Questionnaire Assignment 7			
SO3, AC1 Own product/service requirements are analysed in relation to the identified target market	Knowledge Questionnaire Assignment 8			
SO3, AC2 Customers are segmented according to business goals	Knowledge Questionnaire Assignment 8			
SO3, AC3 The competition to new venture opportunity is identified and analysed to determine the threats they may present	Knowledge Questionnaire Assignment 8			
SO3, AC4 The changes that may be required to increase competitiveness of new venture are identified and explained in accordance with competitor analysis and market research	Knowledge Questionnaire Assignment 8			

Evidence required (Evidence required to support the practical components of the specific outcomes & assessment criteria, expressed in the context of the assessment) U/S 119669	Sources of evidence (where/how the assessor can find the evidence)			Assessor's comments in support of judgement (where required)
		✓	X	
SO4, AC1 The elements of a marketing plan are outlined and described according to own business context	Knowledge Questionnaire Assignment 9			
SO4, AC2 New venture opportunity is analysed and marketing plan compiled in accordance with the Four P's of marketing	Knowledge Questionnaire Assignment 9			
SO4, AC3 Measurement tools to evaluate success of marketing plan are identified and included in plan	Knowledge Questionnaire Assignment 9			
SO4, AC4 Action goals are outlined and implemented, with timeframes	Knowledge Questionnaire Assignment 9			
SO4, AC5 Reasons and methods for evaluating and modifying marketing plan are explained and implemented in the context of market research results	Knowledge Questionnaire Assignment 9			
SO4, AC6 Marketing plan is integrated into business	Knowledge Questionnaire Assignment 9			
SO5, AC1 The concept of a product/service life cycle is explained with examples	Knowledge Questionnaire Assignment 10			

Evidence required (Evidence required to support the practical components of the specific outcomes & assessment criteria, expressed in the context of the assessment) U/S 119669	Sources of evidence (where/how the assessor can find the evidence)			Assessor's comments in support of judgement (where required)
		✓	X	
SO5, AC2 Growth opportunities for new venture are identified and explained with typical examples of how this can be achieved	Knowledge Questionnaire Assignment 10			
SO5, AC3 Trends and developments in relation to product/service are monitored and product/service life cycle is determined accordingly	Knowledge Questionnaire Assignment 10			
SO5, AC4 Plans are made to ensure that business venture is aligned to product/service life cycle	Knowledge Questionnaire Assignment 10			

Record Of Learning

Candidate's Name:		ID No			
Assessor's Name:		Ass. Reg. No			
Moderator's Name:		Mod. Reg. No			
Date:					
UNIT STANDARD	NQF LEVEL	CREDITS	DATE OF COMPLETION	SIGNATURE OF ASSESSOR	SIGNATURE OF MODERATOR
119669	2	6			

ASSESSMENT REVIEW

NAME of LEARNER		NAME of ASSESSOR	
VENUE		DATE of REVIEW	
UNIT STANDARD	119669 Match new venture opportunity to market needs		
Review Dimension	ASSESSOR	LEARNER/CANDIDATE	ACTION
The principles/criteria for good assessment were achieved?	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
The assessment related to the registered unit standard?	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
The assessment was practical?	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
It was time efficient and cost-effective and did not interfere with my normal responsibilities?	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
The assessment instruments were fair, clear and understandable	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
The assessment judgements was made against set requirements	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
The venue and equipment was functional?	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
Special needs were identified and the assessment plan was adjusted	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
Feedback was constructive against the evidence required	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
An opportunity to appeal was given	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
The evidence was recorded	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
LEARNER'S DECLARATION OF UNDERSTANDING			
I am aware of the moderation process and understand that the moderator could declare the assessment decision invalid			
Learner	Date	Assessor	Date
Moderator	Date		

Assessor Review

Assessors must review the assessment process by completing this document. Please attach any additional information if required.

Evaluation Criteria	YES	NO
Was the assessment preparation adequate?		
Was the learner informed of the assessment and policies?		
Design/prepare the assessment tools & - documentation according to ETQA and company QMS correct?		
Integration into work or learning: Was the assessment as unobtrusive as possible?		
Was maximum use made of naturally occurring events & readily available evidence?		
Systematic Process: Was the assessment process properly planned & structured?		
Involvement of the learner: Was the learner involved throughout the assessment process?		
Did the learners contribute to the planning of assessment & the collection of evidence?		
Open: Did the learners understand the assessment process and the criteria, which apply?		
Environment: A supportive, non-threatening environment is created for assessment.		
Was the assessment Valid?		
Was the assessment Reliable?		
Was the assessment Consistent?		
Was the assessment Authentic?		
Was the assessment Sufficient?		
Was the assessment Current?		
Was the feedback given?		
Completed the result of the assessment according to the requirements of the organization and/or employer, as well as the relevant ETQA.		
Records & assessment instruments have to be kept for quality assurance purposes, as well as possible appeals.		
What did you as assessor do well?		

What did you as assessor not do well?

Did you identify any weaknesses in the design of the assessment? If so, suggest improvements

Quality of the unit standard: is it fit for the purpose it was designed for? If not, please make suggestions for improvements

Additional comments

Assessor signature

Date



Candidate Feedback Report

Candidate's Name			ID No.	
Assessor's Name			Reg. No.	
Unit Standard Title	119669 Match new venture opportunity to market needs			
Assessment Decision				
Source of Evidence	C	NYC	Comments	
Assessments				
Product				
Indirect Evidence				
Overall Assessment Decision				
Additional Notes				
Date				
Signature of Assessor			Signature of Candidate	



Candidate Appeal Form

Candidate's Name:		ID No.	
Assessor's Name:		Reg. No.	
Unit Standard Title:	119669 Match new venture opportunity to market needs		
Date:			
SECTION 1			
Candidate's reason for disagreeing with the assessment decision			
Assessor's rationale for the assessment decision			
Candidate's signature			
Assessor's signature			



SECTION 2

Internal Moderator's reconsidered decision and rationale	
Internal Moderator's Signature	
Advising Assessor's Signature	
Decision and rationale of the investigatory panel	
Learner Declaration	The above decisions have been explained to me and I accept the assessment decision
Learner's Signature	
Date	

Please send this form to: The Training Provider



Assessor's Report 119669

Candidate's Name			ID No.	
Assessor's Name			Reg. No.	
Unit Standard Title	119669 Match new venture opportunity to market needs			
ASSESSMENT DECISION				
Specific Outcome	C	NYC	Comments	
Identify and describe what marketing is in relation to new venture opportunities				
Conduct market research				
Identify market segments in relation to own new venture opportunity				
Incorporate market research into a marketing plan				
Explore product/service life cycle				
Overall Assessment Decision				
Comments				
Date				
Signature of Assessor	Signature of Candidate			



Moderator's Report 119669

Moderator's Name			Reg. No.	
Assessor's Name			Reg. No.	
Candidate's Name			ID No.	
Unit Standard Title	119669 Match new venture opportunity to market needs			
MODERATION DECISION				
Specific Outcome	C	NYC	Comments	
Identify and describe what marketing is in relation to new venture opportunities				
Conduct market research				
Identify market segments in relation to own new venture opportunity				
Incorporate market research into a marketing plan				
Explore product/service life cycle				
Overall Moderation Decision				
Feedback to Assessor				
Action Required				
Date of Moderation				
Signature of Moderator				
Signature of Assessor				
Signature of Candidate				

Agreed Assessment Plan 119672

Candidate's Name:			
Assessor's Name:			
Unit Standard Title:	119672 Manage marketing and selling processes of a new venture		
Special Assessment Requirements			
Event	Date, time and location	Resources required	Evidence to be generated
Attend Training		Training material, Facilitator	Attendance Register
Complete assessments		Assessments	Completed Assessments
Complete Portfolio of Evidence		Portfolio of Evidence guide	Completed Portfolio of Evidence
Submit Portfolio of Evidence to Training provider			Acknowledgement of receipt from Training provider
Assessor roles and responsibility			
Roles	<ul style="list-style-type: none"> ❖ Assessor ❖ Guide ❖ Feedback Agent ❖ Reviewer 		
Responsibilities	<ul style="list-style-type: none"> ❖ Consult candidate re assessment, assessment process and plan ❖ Agree assessment process and plan with candidate ❖ Forward documentation to candidate: plan, guide and assessment instruments ❖ Assess candidate with the use of different instruments ❖ Provide feedback on assessment findings ❖ Support candidate through assessment process ❖ Source feedback from candidate on assessment process ❖ Review assessment process and outcome ❖ Use assessment process as opportunity to transform assessment activities and outcomes 		

Candidate roles and responsibility	
Roles	<ul style="list-style-type: none"> ❖ Candidate ❖ Feedback agent ❖ Reviewer
Responsibilities	<ul style="list-style-type: none"> ❖ Be available for assessment ❖ Be actively involved in the consultative process ❖ Learn from the assessment process ❖ Provide feedback to the assessor in terms of the assessment as learning activity ❖ Provide feedback to the assessor on the efficacy of the assessment process ❖ Review own role and assessor role in the assessment process
Assessment Instruments	<ul style="list-style-type: none"> ❖ Portfolio of evidence ❖ Work sample ❖ Observation
Assessment Process	
Step	Date
<ul style="list-style-type: none"> ❖ Evaluation of POE addressing Essential Embedded Knowledge in unit standards ❖ Evaluation of Research Projects and other evidence address specific unit standards ❖ Consultation: assessment plan and assessment activities and instruments. Pre-assessment moderation and interviews conducted at this stage ❖ Observation: feedback on assessment against specific outcomes, critical outcomes and constructs in unit standards ❖ Feedback: to candidate regarding sufficiency of evidence and possible interview to gain supplementary evidence ❖ Feedback to candidate regarding assessment findings as well as review process 	
Feedback	Written feedback to be given to all stakeholders at the end of the assessment process, as well as verbal feedback to the candidate during assessment activities
Recording Process	Process and findings to be recorded and submitted for record keeping purposes as well as moderation and verification
Review Process	The review process is the responsibility of the assessor and the candidate. Joint reviewing will take place after feedback has been given to the candidate
Right to appeal	The candidate must be advised of the right to appeal

	Step	Date
Accessibility and safety of environment	<ul style="list-style-type: none"> ❖ Site inspection conducted ❖ Pre-assessment moderation conducted 	
Resources Required	<ul style="list-style-type: none"> ❖ Assignments ❖ POE ❖ Assessments 	

I confirm that:

- ❖ I have been consulted on and have agreed to the training and assessment process as detailed in the assessment guide
- ❖ I have been advised of my right to appeal against any assessment that is unfair, unreliable, invalid or impracticable
- ❖ I have read and understood the appeal procedure
- ❖ I know that assessments may be moderated or verified by an external party
- ❖ The purpose of the assessment has been clearly explained to me
- ❖ The criteria have been discussed with me, and I know I will be assessed against these criteria
- ❖ I know when and where I will be assessed, and I was given fair notice
- ❖ I know how the assessment will be done, and any other requirements related to the assessment
- ❖ I am ready to be assessed

Signed: _____

Date: _____

Overall Assessment Decision	Competent	Not yet competent	
Candidate's Signature		Date	
Assessor's Signature		Date	
Moderator's Signature		Date	

UNIT STANDARD 119672

Unit Standard Title

Manage marketing and selling processes of a new venture

NQF Level

2

Credits

7

Purpose Of The Unit Standard

Learners working towards this standard will be learning towards the full qualification, or will be working within a SMME (Small, Medium, Micro Enterprise) environment, specialising in New Venture Ownership and Management, where the acquisition of competence against this standard will add value to one's job. This standard will also add value to entrepreneurs who are seeking to develop their entrepreneurial skills so that they can become more marketable for bigger contracts, including commercial and public sector contracts, for example the Department of Public Works programmes.

The qualifying learner is capable of:

- ❖ Implementing marketing plan
- ❖ Negotiating a deal with a customer
- ❖ Outlining processes and principles for completing basic quotes
- ❖ Outlining processes and principles for completing tender documents

Learning Assumed To Be In Place And Recognition Of Prior Learning

All learners accessing this qualification must be in possession of a GETC or equivalent qualification. The learner must be competent in mathematical and communications literacy at NQF level 1.

Unit Standard Range

N/A

Specific Outcomes and Assessment Criteria:

Specific Outcome 1

Implement marketing plan.

Assessment Criteria

- ❖ Marketing concepts outlined in business plan are integrated into business activities and tasks and activities drawn up accordingly.
- ❖ Suitable ways in which to promote product/service of new venture are determined and implemented according to marketing plan.
 - **RANGE** Promotion of a product/service includes but is not limited to advertising, launches, informal selling, formal selling, and the various activities undertaken to make customers aware of a product/service.
- ❖ Selling techniques are utilised to promote product/service.



- **RANGE** Selling techniques include but are not limited to establishing selling networks, the AIDA principle (Attention, Interest, Desire, Acceptance), direct selling, cold calling, principles of negotiation.
- ❖ Customer relations practices are implemented to ensure customer satisfaction.
 - **RANGE** Customer relations practices include but are not limited to after-sales service, customer surveys to determine levels of customer satisfaction.

Specific Outcome 2

Negotiate a deal with a customer.

Assessment Criteria

- ❖ Basic principles of negotiation that are utilised to secure new business are outlined and explained with examples.
- ❖ The principles of planning for negotiations are explained and implemented according to own business context and market research.
- ❖ Appropriate negotiation techniques are applied to own venture and business contexts.

Specific Outcome 3

Outline processes and principles for completing basic quotes.

Assessment Criteria

- ❖ The different types of offers are explained in relation to securing business transactions.
- ❖ Principles and procedures for compiling quotes are identified and explained in relation to own business context.
 - **RANGE** Principles and procedures for compiling quotes include but are not limited to costing and pricing calculations, terms and conditions (including payment terms), legal implications of quotes, an outline of a typical quotation, basic marketing and financial principles incorporated into quotes.
- ❖ Support in compiling quotes is sought where necessary in order to ensure full understanding of the criteria that apply.
- ❖ The common pitfalls in quoting and order taking are explained with examples in relation to own business venture.

Specific Outcome 4

Outline processes and principles for completing tender documents.

Assessment Criteria

- ❖ Tendering principles pertaining to commercial and public tenders are explained with examples.
- ❖ The risks associated with tendering are identified and basic risk management procedures are implemented according to own business context.
 - **RANGE** Risks pertaining to tendering include but are not limited to cash flow, funding requirements, compliance requirements, performance requirements, technical requirements.
- ❖ The financial advantages and disadvantages of a tender are analysed to determine if it would make business sense to submit the tender.
- ❖ Support is sought to complete tender documents where relevant in order to ensure full understanding of tendering conditions and criteria.

Unit Standard Accreditation And Moderation Options

- ❖ Any individual wishing to be assessed (including through RPL) against this unit standard may apply to an assessment agency, assessor or provider institution accredited by the relevant ETQA, or an ETQA that has a Memorandum of Understanding with the relevant ETQA.
- ❖ Anyone assessing a learner against this unit standard must be registered as an assessor with the relevant ETQA, or an ETQA that has a Memorandum of Understanding with the relevant ETQA.
- ❖ Any institution offering learning that will enable achievement of this unit standard or assessing this unit standard must be accredited as a provider with the relevant ETQA, or an ETQA that has a Memorandum of Understanding with the relevant ETQA.
- ❖ Moderation of assessment will be conducted by the relevant ETQA at its discretion.

Unit Standard Essential Embedded Knowledge

The learner must demonstrate an understanding of:

- ❖ Basic techniques for implementing a marketing plan
- ❖ Basic selling skills
- ❖ Basic principles of customer care and after-sales service
- ❖ Basic negotiating techniques
- ❖ Basic principles and procedures for compiling quotes
- ❖ Basic principles and procedures for interpreting and completing tender documents
- ❖ Basic risk management principles pertaining to quotes and tenders for new venture
- ❖ Interpersonal and communication skills within marketing and selling context

Critical Cross-field Outcomes (CCFO):

Identifying

Identify and solve problems using critical and creative thinking processes to determine best approaches for marketing and selling business products/services

Working

Work effectively with others as a member of a team, group, organisation or community to implement marketing action plan

Organising

Organise and manage oneself and one's activities responsibly and effectively to that sufficient time is set aside for marketing and selling activities

Collecting

Collect, analyse, organise and critically evaluate financial and related information in order to prepare for negotiations, quotations, and tenders

Communicating

Communicate effectively using visual, mathematical and/or language in the modes of oral and/or written persuasion to compile quotes, tenders, marketing and selling plans

Science

Use science and technology effectively and critically, showing responsibility to the environment and health of others to gather necessary data to for input to negotiations, quotations and tenders

Demonstrating

Demonstrate an understanding of the world as a set of interrelated systems by recognising that factors influencing the marketing and sales of a new venture business operations do not exist in isolation and that wider economic issues, supplier and community issues can

Contributing

Participating as responsible citizens in the life of local, national and global communities by ensuring that sales and marketing practices are proactively approached within the context of economic, socio-political and community trends and developments to ensure greater sales success

Formative Assessments

During your training, you were required to complete a number of activities within each Lesson in your Learner Study Guide. You need to complete these activities and attach the evidence of each in this section of your PoE.



Summative Assessment Readiness Statement

Note: **R = Ready** for summative assessment. **NYR = Not Yet Ready** for summative assessment

Candidate's Name			ID No.	
Assessor's Name			Reg. No.	
Unit Standard Title	119672 Manage marketing and selling processes of a new venture			
ASSESSMENT DECISION				
Specific Outcome	R	NYR	Comments	
Implement marketing plan				
Negotiate a deal with a customer				
Outline processes and principles for completing basic quotes				
Outline processes and principles for completing tender documents				

Assessor's / Facilitator's Declaration:

I hereby declare that I have assessed the learner's formative assessment and find the learner ready / not yet ready for the summative assessment

Assessor / Facilitator Name	Signature

SUMMATIVE ASSESSMENTS

Knowledge Questionnaire 119672

1. Explain the AIDA selling technique (5)

A - Attention (Awareness): attract the attention of the customer – do something or say something or show something that will catch the person's attention

I - Interest: raise the interest of the customer interest by demonstrating features, advantages, and benefits.

D - Desire: convince customers that they want and desire the product or service and that it will satisfy their needs.

A - Action: lead customers towards taking action and/or purchasing – close the sale

2. What is the purpose of advertising? (1)

The purpose of advertising is to inform consumers where they may buy a product or service and at what price

3. Name one advantage of personal selling. (2)

any one of:

Flexibility: you as the sales person can adapt your sales presentation to suit the needs and behaviour of the individual customer.

Your focus is on potential customers so there is little wasted effort

Person-to-person selling usually results in an actual sale

4. Explain what cold-calling is (2)

Cold calling is when you approach a prospective customer or client, by telephone, (1) where the customer was not expecting such an interaction (1)

5. Why is it important to do research about your customer? (1)

You need information so that you can clarify where a common ground can exist

6. List seven things that you have to take into account before issuing a quote. (7)

Your costing and pricing calculations

Payment terms and conditions

Delivery terms and conditions

Are you including or excluding VAT in your price.

Specific details of the quantity and quality of the goods or service

The period that the quote is valid for

Anything that is excluded from the quote, such as collection of guests from the airport or station if you are starting a guest house; or supper or even room service.

7. List eleven things that must be noted when an order is taken: (11)

The order number of the customer

The exact number and quality of the products or service

The delivery date required by the customer

The price

The payment terms and conditions

Delivery terms and conditions

Special conditions

VAT inclusive or exclusive

The person who places the order

The contact details of the customer: address, telephone and fax number

Delivery address

8. When would a launch be an appropriate promotional tool? (1)

When launching a new product or service, or any other valid answer

TOTAL: 30

Practical Workplace Logbook

Attach the completed workplace logbook and workbook behind this page

Acknowledgment of Receipt

I _____

(Learner) acknowledge receipt of my Workplace assignment workbook on this the

_____ day of _____ 20_____

The process of on-the-job training has been explained to me.

Signature of Learner

Name of Facilitator/Mentor/Supervisor:

Signature of Facilitator/Mentor/Supervisor



Indirect Evidence

Indirect Evidence is evidence produced about the learner from another source. This is usually in the form of reports of third party sources, i.e. sources other than the assessor.

Indirect evidence can be used to verify the authenticity of other forms of evidence. In addition, it may be necessary to corroborate these forms of evidence.

Sources of indirect evidence include:

- ❖ Team outputs
- ❖ Work completed at an earlier stage
- ❖ Performance appraisals
- ❖ Training records
- ❖ Testimonials
- ❖ Reviews and commendations
- ❖ Certificates and qualifications
- ❖ Medals, prizes and trophies
- ❖ Customer / client ratings

Please attach any indirect evidence you may have on the required outcomes within the PoE behind this page.

Declaration Of Authenticity Of Evidence

I (Initials and Surname)	
ID No:	
declare/certify that the learning activities completed in the Learner Activity Workbook in its entirety is my own original and authentic work (interpreter declaration to be completed where necessary) I acknowledge that should it come to the attention/reported to the Training Provider/SETA or relevant authorities, and there is sufficient evidence to prove that there is an irregularity regarding the authenticity of this submission the necessary steps will be taken against me which can result in one or more of the following decisions being taken:	
<ul style="list-style-type: none">❖ A criminal case being opened,❖ Learner achievement certificate cancelled, withdrawn❖ Non processing of Learner Achievement submissions to the SETA pending the outcome of an investigation❖ De-registration as an Assessor/Moderator (where unauthorised assistance is provided by the Assessor/Facilitator)❖ Investigation into the accreditation status of the Training Provider if there is an irregularity on the part of the Training Provider	
I know and understand the contents of this declaration: I have no objection to signing the prescribed declaration. The declaration was also explained to me by the Training Provider/Facilitator	
Signature of Learner:	Date
Signature of Facilitator/Assessor:	Date

Evidence Locator & Sign-off 119672

Evidence required (Evidence required to support the practical components of the specific outcomes & assessment criteria, expressed in the context of the assessment) U/S 119672	Sources of evidence (where/how the assessor can find the evidence)			Assessor's comments in support of judgement (where required)
		✓	X	
SO1, AC1 Marketing concepts outlined in business plan are integrated into business activities and tasks and activities drawn up accordingly	Knowledge Questionnaire Assignment 11			
SO1, AC2 Suitable ways in which to promote product/service of new venture are determined and implemented according to marketing plan RANGE Promotion of a product/service includes but is not limited to advertising, launches, informal selling, formal selling, and the various activities undertaken to make customers aware of a product/service	Knowledge Questionnaire Assignment 11			
SO1, AC3 Selling techniques are utilised to promote product/service RANGE Selling techniques include but are not limited to establishing selling networks, the AIDA principle (Attention, Interest, Desire, Acceptance), direct selling, cold calling, principles of negotiation	Knowledge Questionnaire Assignment 11			

Evidence required (Evidence required to support the practical components of the specific outcomes & assessment criteria, expressed in the context of the assessment) U/S 119672	Sources of evidence (where/how the assessor can find the evidence)			Assessor's comments in support of judgement (where required)
		✓	X	
SO1, AC4 Customer relations practices are implemented to ensure customer satisfaction RANGE Customer relations practices include but are not limited to after-sales service, customer surveys to determine levels of customer satisfaction	Knowledge Questionnaire Assignment 11			
SO2, AC1 Basic principles of negotiation that are utilised to secure new business are outlined and explained with examples	Knowledge Questionnaire Assignment 12			
SO2, AC2 The principles of planning for negotiations are explained and implemented according to own business context and market research	Knowledge Questionnaire Assignment 12			
SO2, AC3 Appropriate negotiation techniques are applied to own venture and business contexts	Knowledge Questionnaire Assignment 12			
SO3, AC1 The different types of offers are explained in relation to securing business transactions	Knowledge Questionnaire Assignment 13			

Evidence required (Evidence required to support the practical components of the specific outcomes & assessment criteria, expressed in the context of the assessment) U/S 119672	Sources of evidence (where/how the assessor can find the evidence)			Assessor's comments in support of judgement (where required)
		✓	X	
SO3, AC2 Principles and procedures for compiling quotes are identified and explained in relation to own business context RANGE Principles and procedures for compiling quotes include but are not limited to costing and pricing calculations, terms and conditions (including payment terms), legal implications of quotes, an outline of a typical quotation, basic marketing and financial principles incorporated into quotes	Knowledge Questionnaire Assignment 13			
SO3, AC3 Support in compiling quotes is sought where necessary in order to ensure full understanding of the criteria that apply	Knowledge Questionnaire Assignment 13			
SO3, AC4 The common pitfalls in quoting and order taking are explained with examples in relation to own business venture	Knowledge Questionnaire Assignment 13			
SO4, AC1 Tendering principles pertaining to commercial and public tenders are explained with examples	Knowledge Questionnaire Assignment 13			

Evidence required (Evidence required to support the practical components of the specific outcomes & assessment criteria, expressed in the context of the assessment) U/S 119672	Sources of evidence (where/how the assessor can find the evidence)			Assessor's comments in support of judgement (where required)
		✓	X	
SO4, AC2 The risks associated with tendering are identified and basic risk management procedures are implemented according to own business context RANGE Risks pertaining to tendering include but are not limited to cash flow, funding requirements, compliance requirements, performance requirements, technical requirements	Knowledge Questionnaire Assignment 13			
SO4, AC3 The financial advantages and disadvantages of a tender are analysed to determine if it would make business sense to submit the tender	Knowledge Questionnaire Assignment 13			
SO4, AC4 Support is sought to complete tender documents where relevant in order to ensure full understanding of tendering conditions and criteria	Knowledge Questionnaire Assignment 13			

Record Of Learning

Candidate's Name:		ID No			
Assessor's Name:		Ass. Reg. No			
Moderator's Name:		Mod. Reg. No			
Date:					
UNIT STANDARD	NQF LEVEL	CREDITS	DATE OF COMPLETION	SIGNATURE OF ASSESSOR	SIGNATURE OF MODERATOR
119672	2	7			

ASSESSMENT REVIEW

NAME of LEARNER		NAME of ASSESSOR	
VENUE		DATE of REVIEW	
UNIT STANDARD	119672 Manage marketing and selling processes of a new venture		
Review Dimension	ASSESSOR	LEARNER/CANDIDATE	ACTION
The principles/criteria for good assessment were achieved?	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
The assessment related to the registered unit standard?	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
The assessment was practical?	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
It was time efficient and cost-effective and did not interfere with my normal responsibilities?	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
The assessment instruments were fair, clear and understandable	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
The assessment judgements was made against set requirements	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
The venue and equipment was functional?	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
Special needs were identified and the assessment plan was adjusted	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
Feedback was constructive against the evidence required	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
An opportunity to appeal was given	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
The evidence was recorded	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
LEARNER'S DECLARATION OF UNDERSTANDING			
I am aware of the moderation process and understand that the moderator could declare the assessment decision invalid			
Learner	Date	Assessor	Date
Moderator	Date		



Assessor Review

Assessors must review the assessment process by completing this document. Please attach any additional information if required.

Evaluation Criteria	YES	NO
Was the assessment preparation adequate?		
Was the learner informed of the assessment and policies?		
Design/prepare the assessment tools & - documentation according to ETQA and company QMS correct?		
Integration into work or learning: Was the assessment as unobtrusive as possible?		
Was maximum use made of naturally occurring events & readily available evidence?		
Systematic Process: Was the assessment process properly planned & structured?		
Involvement of the learner: Was the learner involved throughout the assessment process?		
Did the learners contribute to the planning of assessment & the collection of evidence?		
Open: Did the learners understand the assessment process and the criteria, which apply?		
Environment: A supportive, non-threatening environment is created for assessment.		
Was the assessment Valid?		
Was the assessment Reliable?		
Was the assessment Consistent?		
Was the assessment Authentic?		
Was the assessment Sufficient?		
Was the assessment Current?		
Was the feedback given?		
Completed the result of the assessment according to the requirements of the organization and/or employer, as well as the relevant ETQA.		
Records & assessment instruments have to be kept for quality assurance purposes, as well as possible appeals.		
What did you as assessor do well?		

What did you as assessor not do well?

Did you identify any weaknesses in the design of the assessment? If so, suggest improvements

Quality of the unit standard: is it fit for the purpose it was designed for? If not, please make suggestions for improvements

Additional comments

Assessor signature

Date



Candidate Feedback Report

Candidate's Name			ID No.	
Assessor's Name			Reg. No.	
Unit Standard Title	119672 Manage marketing and selling processes of a new venture			
Assessment Decision				
Source of Evidence	C	NYC	Comments	
Assessments				
Product				
Indirect Evidence				
Overall Assessment Decision				
Additional Notes				
Date				
Signature of Assessor			Signature of Candidate	



Candidate Appeal Form

Candidate's Name:		ID No.	
Assessor's Name:		Reg. No.	
Unit Standard Title:	119672 Manage marketing and selling processes of a new venture		
Date:			
SECTION 1			
Candidate's reason for disagreeing with the assessment decision			
Assessor's rationale for the assessment decision			
Candidate's signature			
Assessor's signature			



SECTION 2

Internal Moderator's reconsidered decision and rationale	
Internal Moderator's Signature	
Advising Assessor's Signature	
Decision and rationale of the investigatory panel	
Learner Declaration	The above decisions have been explained to me and I accept the assessment decision
Learner's Signature	
Date	

Please send this form to: The Training Provider



Assessor's Report 119672

Candidate's Name			ID No.	
Assessor's Name			Reg. No.	
Unit Standard Title	119672 Manage marketing and selling processes of a new venture			
ASSESSMENT DECISION				
Specific Outcome	C	NYC	Comments	
Implement marketing plan				
Negotiate a deal with a customer				
Outline processes and principles for completing basic quotes				
Outline processes and principles for completing tender documents				
Overall Assessment Decision				
Comments				
Date				
Signature of Assessor	Signature of Candidate			

Moderator's Report 119672

Moderator's Name			Reg. No.	
Assessor's Name			Reg. No.	
Candidate's Name			ID No.	
Unit Standard Title	119672 Manage marketing and selling processes of a new venture			
MODERATION DECISION				
Specific Outcome	C	NYC	Comments	
Implement marketing plan				
Negotiate a deal with a customer				
Outline processes and principles for completing basic quotes				
Outline processes and principles for completing tender documents				
Overall Moderation Decision				
Feedback to Assessor				
Action Required				
Date of Moderation				
Signature of Moderator				
Signature of Assessor				
Signature of Candidate				



Agreed Assessment Plan 114974

Candidate's Name:			
Assessor's Name:			
Unit Standard Title:	114974 Apply the basic skills of customer service		
Special Assessment Requirements			
Event	Date, time and location	Resources required	Evidence to be generated
Attend Training		Training material, Facilitator	Attendance Register
Complete assessments		Assessments	Completed Assessments
Complete Portfolio of Evidence		Portfolio of Evidence guide	Completed Portfolio of Evidence
Submit Portfolio of Evidence to Training provider			Acknowledgement of receipt from Training provider
Assessor roles and responsibility			
Roles	<ul style="list-style-type: none"> ❖ Assessor ❖ Guide ❖ Feedback Agent ❖ Reviewer 		
Responsibilities	<ul style="list-style-type: none"> ❖ Consult candidate re assessment, assessment process and plan ❖ Agree assessment process and plan with candidate ❖ Forward documentation to candidate: plan, guide and assessment instruments ❖ Assess candidate with the use of different instruments ❖ Provide feedback on assessment findings ❖ Support candidate through assessment process ❖ Source feedback from candidate on assessment process ❖ Review assessment process and outcome ❖ Use assessment process as opportunity to transform assessment activities and outcomes 		

Candidate roles and responsibility	
Roles	<ul style="list-style-type: none"> ❖ Candidate ❖ Feedback agent ❖ Reviewer
Responsibilities	<ul style="list-style-type: none"> ❖ Be available for assessment ❖ Be actively involved in the consultative process ❖ Learn from the assessment process ❖ Provide feedback to the assessor in terms of the assessment as learning activity ❖ Provide feedback to the assessor on the efficacy of the assessment process ❖ Review own role and assessor role in the assessment process
Assessment Instruments	<ul style="list-style-type: none"> ❖ Portfolio of evidence ❖ Work sample ❖ Observation
Assessment Process	
Step	Date
<ul style="list-style-type: none"> ❖ Evaluation of POE addressing Essential Embedded Knowledge in unit standards ❖ Evaluation of Research Projects and other evidence address specific unit standards ❖ Consultation: assessment plan and assessment activities and instruments. Pre-assessment moderation and interviews conducted at this stage ❖ Observation: feedback on assessment against specific outcomes, critical outcomes and constructs in unit standards ❖ Feedback: to candidate regarding sufficiency of evidence and possible interview to gain supplementary evidence ❖ Feedback to candidate regarding assessment findings as well as review process 	
Feedback	Written feedback to be given to all stakeholders at the end of the assessment process, as well as verbal feedback to the candidate during assessment activities
Recording Process	Process and findings to be recorded and submitted for record keeping purposes as well as moderation and verification
Review Process	The review process is the responsibility of the assessor and the candidate. Joint reviewing will take place after feedback has been given to the candidate
Right to appeal	The candidate must be advised of the right to appeal

Accessibility and safety of environment	Step	Date
	<ul style="list-style-type: none"> ❖ Site inspection conducted ❖ Pre-assessment moderation conducted 	
Resources Required	<ul style="list-style-type: none"> ❖ Assignments ❖ POE ❖ Assessments 	

I confirm that:

- ❖ I have been consulted on and have agreed to the training and assessment process as detailed in the assessment guide
- ❖ I have been advised of my right to appeal against any assessment that is unfair, unreliable, invalid or impracticable
- ❖ I have read and understood the appeal procedure
- ❖ I know that assessments may be moderated or verified by an external party
- ❖ The purpose of the assessment has been clearly explained to me
- ❖ The criteria have been discussed with me, and I know I will be assessed against these criteria
- ❖ I know when and where I will be assessed, and I was given fair notice
- ❖ I know how the assessment will be done, and any other requirements related to the assessment
- ❖ I am ready to be assessed

Signed: _____

Date: _____

Overall Assessment Decision	Competent	Not yet competent	
Candidate's Signature		Date	
Assessor's Signature		Date	
Moderator's Signature		Date	

UNIT STANDARD 114974

Unit Standard Title

Apply the basic skills of customer service

NQF Level

2

Credits

2

Purpose of the Unit Standard

This Unit Standard provides a broad introduction to customer services and includes both internal and external customers. The focus is knowledge, skills, values and attitudes in relation to the learner's own context and experience of the world of work.

The qualifying learner is capable of:

- ❖ Explaining customer service.
- ❖ Engaging in an interaction with a customer.
- ❖ Demonstrating communication skills in responding to a customer.
- ❖ Processing a query in order to respond to a customer need.

Learning Assumed To Be In Place and Recognition of Prior Learning

Learners should:

- ❖ Hold a GETC or equivalent qualification.
- ❖ Be competent in communication and mathematical literacy NQF level 1.

Unit Standard Range

The typical scope of this Unit Standard is:

- ❖ Customer enquiries from internal and external customers including, but not limited to, needs, problems, complaints, requests for specific information and enquiries of a general nature.
- ❖ Customer interaction may be face to face and/or on the telephone.
- ❖ An approach to a customer includes, but is not limited to resolving conflict, dealing with aggression, empathy and awareness of issues of diversity.

Specific Outcomes and Assessment Criteria:

Specific Outcome 1

Explain customer service in a financial services environment.

Assessment Criteria

- ❖ The concept of good customer service is explained with reference to a business sector and an organisation's competitive edge.
- ❖ Different types of customer are identified within a specific organisation.

- ❖ The consequences of poor service are identified with reference to the customer, the employee and the organisation.
- ❖ The procedure for escalating queries is explained with reference to own limit of authority.

Specific Outcome 2

Engage in an interaction with a customer.

Assessment Criteria

- ❖ An interaction with a customer is opened with reference to an organisation's internal standards.
- ❖ Information is requested to clarify the need.
- ❖ The customer's needs are identified and reflected back to the customer to confirm understanding.
- ❖ Non-verbal communication clues are used to determine an approach to the interaction.
- ❖ An interaction is closed with reference to an organisation's internal standards.

Specific Outcome 3

Demonstrate communication skills in order to respond to a customer need.

Assessment Criteria

- ❖ Active listening skills are demonstrated in three different customer service interactions.
- ❖ Keywords are identified in a customer dialogue and used to formulate an appropriate response.
- ❖ The main details of the customer's needs, request, query or complaint are recorded and the entry is checked for accuracy with the customer.

Specific Outcome 4

Process a query in order to respond to a customer need.

Assessment Criteria

- ❖ Information about the customer and the need is used to formulate an appropriate response.
- ❖ The response is communicated to the customer using appropriate language.
- ❖ Enquiries outside own level of authority are escalated to the appropriate party.
- ❖ An agreement on follow up actions is reached with the customer.
- ❖ Feedback on the progress of a query is given to the customer.

Unit Standard Accreditation and Moderation Options

This Unit Standard will be internally assessed by the provider and moderated by a moderator registered by a relevant accredited ETQA or an ETQA that has a Memorandum of Understanding with the relevant accredited ETQA.

Unit Standard Essential Embedded Knowledge

N/A

Critical Cross-field Outcomes (CCFO):

Identifying

The learner is able to identify and solve problems in responding to and processing a customer query.

Working

The learner is able to work effectively with others as a member of a team or organisation in responding to customer queries and escalating enquiries that are outside the level of own authority.

Organising

The learner is able to organise and manage him/herself and his/her own activities responsibly and effectively in dealing with queries and knowing when to escalate the problem to another authority.

Collecting

The learner is able to collect, organise and critically evaluate information in providing customer service.

Communicating

The learner is able to communicate effectively in responding to customer queries.

Demonstrating

The learner is able to demonstrate an understanding of the world as a set of related systems by recognising the consequences of poor customer service.

Contributing

The learner is able to be culturally sensitive in engaging in interactions with customers in a business environment.

Formative Assessments

During your training, you were required to complete a number of activities within each Lesson in your Learner Study Guide. You need to complete these activities and attach the evidence of each in this section of your PoE.

Summative Assessment Readiness Statement

Note: **R = Ready** for summative assessment. **NYR = Not Yet Ready** for summative assessment

Candidate's Name			ID No.	
Assessor's Name			Reg. No.	
Unit Standard Title	114974 Apply the basic skills of customer service			
ASSESSMENT DECISION				
Specific Outcome	R	NYR	Comments	
Explain customer service in a financial services environment				
Engage in an interaction with a customer				
Demonstrate communication skills in order to respond to a customer need				
Process a query in order to respond to a customer need				

Assessor's / Facilitator's Declaration:

I hereby declare that I have assessed the learner's formative assessment and find the learner ready / not yet ready for the summative assessment

Assessor / Facilitator Name	Signature

SUMMATIVE ASSESSMENTS

Knowledge Questionnaire 114974

1. In your own words, explain why customer service is important. (2)

The customer is the only one who brings money into the business or customers vote with their money or any valid explanation in worth two points

2. Explain the cost of poor service according to the following guidelines: (4)

For every customer who bothers to complain, how many remain silent?

26

How many people will an unhappy customer tell?

between 11 and 15 other people

What percentage of unhappy customers will never buy from you again?

91%

Do more customers switch to other suppliers due to poor service or poor products?

Poor service

3. List eight things that customers want from you and your organisation: (8)

Fast service

Courteous service

Consistent service

Someone who will listen

A knowledgeable Customer Service Agent

Expert advice

Smooth transactions

A specific commitment

4. List and explain the two steps to earning customer loyalty. (2)

Provide the service or product the customer wants when they want it and the way they want it.

Then we have to go a step further we have to exceed their expectations by doing something they don't expect.

5. List five things that customers hate. (5)

Any five of:

It's not my job.



I only work here, or I am not paid to do that.

Come back tomorrow.

Please stand in the complaints queue.

Dealing with more than one person.

Put your queries on paper or fill in a form.

Broken promises.

Eating while dealing with customers is a sign of disrespect and should be avoided at all times.

Chewing gum is also a sign of disrespect.

A private call while dealing with a customer may give the impression that the customer is not important.

Smoking while dealing with customers and the public is also a sign of disrespect.

When a job is not done properly.

Queues.

Prejudice kills trust and faith.

Untidiness is a sure source of customer dissatisfaction.

Lack of punctuality.

Excuses tend to break down the customer relationship.

Red tape is also detrimental to the customer relationship.

Lies and false promises destroy faith and trust

Arguments and rudeness.

People don't want to wait.

6. List and explain the seven main steps to follow when interacting with customers. (7)

Extract the main idea from client's verbal communication

Ask questions

Clarify appropriate information in plain language.

Check the client's interpretation of the information

Describe and explain a range of relevant options.

Reach consensus on the most viable option

Outline the proper procedure to be followed



7. In order to reach consensus on the most viable option, you and the customer have to develop an action plan. What should be included in the action plan? (7)

Date of the discussion with the client

State the problem/s or issue

State the action plan: who will do what

Follow up dates: when will follow up be done.

Follow up procedures: what will the procedure for following up be: will you phone or write the client, when will the client do this or that, when will your organisation do this or that.

Who in your organisation will be responsible for the follow up

And any other relevant information

8. Explain the following regarding non-verbal communication: (4)

Tone

is the sound of your voice e.g. bright or deep, and expresses your feeling or mood

Pitch

is determined by the tension on your vocal cords, i.e. how high or low your voice sounds

Pace

Is the speed at which you speak

Volume

How loud or soft your voice is when talking to someone

9. What does direct eye contact indicate to the recipient of your message? (1)

openness and honesty

10. What do restless hands or shaking of the legs indicate? (1)

can be a sign of agitation or nervousness

11. List and explain three things to do in order to deal with an irate customer. (6)

Acknowledge the conflict (1) speak in a neutral tone and pitch and beware not to be drawn into a shouting match as this will only serve to aggravate the situation (1)

Listen actively: (1) be aware of verbal and nonverbal cues as to the emotional state of the client. (1)

Reply with empathy (1) Let the client experience your empathy by speaking calmly even if he is excited. Allow him to voice all his frustration and be ready with suggestions for a workable solution to the problem. (1)

12. What information should be recorded in your file notes for follow-up with the customer? (8)

Date

Problem/s

Action plan

Follow up dates

Follow up procedures

Who is responsible for the follow up

Feedback to and from the client

And any other relevant information

13. You are the first contact with the customer, so it remains your problem. List five actions you must take to make sure that the matter is resolved to the customer's satisfaction. (5)

Ensure that the action plan is followed,

Ensure that the dates are diarised,

Ensure that the follow up procedures are followed correctly

Ensure that the responsible people actually do what is required of them

Ensure that feedback is given to the client.

TOTAL: 60

Practical Workplace Logbook

Attach the completed workplace logbook and workbook behind this page

Acknowledgment of Receipt

I _____

(Learner) acknowledge receipt of my Workplace assignment workbook on this the

_____ day of _____ 20_____

The process of on-the-job training has been explained to me.

Signature of Learner

Name of Facilitator/Mentor/Supervisor:

Signature of Facilitator/Mentor/Supervisor



Indirect Evidence

Indirect Evidence is evidence produced about the learner from another source. This is usually in the form of reports of third party sources, i.e. sources other than the assessor.

Indirect evidence can be used to verify the authenticity of other forms of evidence. In addition, it may be necessary to corroborate these forms of evidence.

Sources of indirect evidence include:

- ❖ Team outputs
- ❖ Work completed at an earlier stage
- ❖ Performance appraisals
- ❖ Training records
- ❖ Testimonials
- ❖ Reviews and commendations
- ❖ Certificates and qualifications
- ❖ Medals, prizes and trophies
- ❖ Customer / client ratings

Please attach any indirect evidence you may have on the required outcomes within the PoE behind this page.

Declaration Of Authenticity Of Evidence

I (Initials and Surname)	
ID No:	
<p>declare/certify that the learning activities completed in the Learner Activity Workbook in its entirety is my own original and authentic work (interpreter declaration to be completed where necessary) I acknowledge that should it come to the attention/reported to the Training Provider/SETA or relevant authorities, and there is sufficient evidence to prove that there is an irregularity regarding the authenticity of this submission the necessary steps will be taken against me which can result in one or more of the following decisions being taken:</p>	
<ul style="list-style-type: none">❖ A criminal case being opened,❖ Learner achievement certificate cancelled, withdrawn❖ Non processing of Learner Achievement submissions to the SETA pending the outcome of an investigation❖ De-registration as an Assessor/Moderator (where unauthorised assistance is provided by the Assessor/Facilitator)❖ Investigation into the accreditation status of the Training Provider if there is an irregularity on the part of the Training Provider	
<p>I know and understand the contents of this declaration: I have no objection to signing the prescribed declaration. The declaration was also explained to me by the Training Provider/Facilitator</p>	
Signature of Learner:	Date
Signature of Facilitator/Assessor:	Date

Evidence Locator & Sign-off 114974

Evidence required (Evidence required to support the practical components of the specific outcomes & assessment criteria, expressed in the context of the assessment) U/S 114974	Sources of evidence (where/how the assessor can find the evidence)			Assessor's comments in support of judgement (where required)
		✓	X	
SO1, AC1 The concept of good customer service is explained with reference to a business sector and an organisation's competitive edge	Knowledge Questionnaire Assignment 14			
SO1, AC2 Different types of customer are identified within a specific organisation	Knowledge Questionnaire Assignment 14			
SO1, AC3 The consequences of poor service are identified with reference to the customer, the employee and the organisation	Knowledge Questionnaire Assignment 14			
SO1, AC4 The procedure for escalating queries is explained with reference to own limit of authority	Knowledge Questionnaire Assignment 14			
SO2, AC1 An interaction with a customer is opened with reference to an organisation's internal standards	Knowledge Questionnaire Assignment 15			
SO2, AC2 Information is requested to clarify the need	Knowledge Questionnaire Assignment 15			
SO2, AC3 The customer's needs are identified and reflected back to the customer to confirm understanding	Knowledge Questionnaire Assignment 15			

Evidence required (Evidence required to support the practical components of the specific outcomes & assessment criteria, expressed in the context of the assessment) U/S 114974	Sources of evidence (where/how the assessor can find the evidence)			Assessor's comments in support of judgement (where required)
		✓	X	
SO2, AC4 Non-verbal communication clues are used to determine an approach to the interaction	Knowledge Questionnaire Assignment 15			
SO2, AC5 An interaction is closed with reference to an organisation's internal standards	Knowledge Questionnaire Assignment 15			
SO3, AC1 Active listening skills are demonstrated in three different customer service interactions	Knowledge Questionnaire Assignment 15			
SO3, AC2 Keywords are identified in a customer dialogue and used to formulate an appropriate response	Knowledge Questionnaire Assignment 15			
SO3, AC3 The main details of the customer's needs, request, query or complaint are recorded and the entry is checked for accuracy with the customer	Knowledge Questionnaire Assignment 15			
SO4, AC1 Information about the customer and the need is used to formulate an appropriate response	Knowledge Questionnaire Assignment 15			
SO4, AC2 The response is communicated to the customer using appropriate language	Knowledge Questionnaire Assignment 15			

Evidence required (Evidence required to support the practical components of the specific outcomes & assessment criteria, expressed in the context of the assessment) U/S 114974	Sources of evidence (where/how the assessor can find the evidence)			Assessor's comments in support of judgement (where required)
		✓	X	
SO4, AC3 Enquiries outside own level of authority are escalated to the appropriate party	Knowledge Questionnaire Assignment 15			
SO4, AC4 An agreement on follow up actions is reached with the customer	Knowledge Questionnaire Assignment 15			
SO4, AC5 Feedback on the progress of a query is given to the customer	Knowledge Questionnaire Assignment 15			

Record Of Learning

Candidate's Name:		ID No			
Assessor's Name:		Ass. Reg. No			
Moderator's Name:		Mod. Reg. No			
Date:					
UNIT STANDARD	NQF LEVEL	CREDITS	DATE OF COMPLETION	SIGNATURE OF ASSESSOR	SIGNATURE OF MODERATOR
114974	2	2			

ASSESSMENT REVIEW

NAME of LEARNER		NAME of ASSESSOR	
VENUE		DATE of REVIEW	
UNIT STANDARD	114974 Apply the basic skills of customer service		
Review Dimension	ASSESSOR	LEARNER/CANDIDATE	ACTION
The principles/criteria for good assessment were achieved?	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
The assessment related to the registered unit standard?	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
The assessment was practical?	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
It was time efficient and cost-effective and did not interfere with my normal responsibilities?	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
The assessment instruments were fair, clear and understandable	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
The assessment judgements was made against set requirements	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
The venue and equipment was functional?	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
Special needs were identified and the assessment plan was adjusted	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
Feedback was constructive against the evidence required	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
An opportunity to appeal was given	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
The evidence was recorded	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	<input type="checkbox"/> Agree <input type="checkbox"/> Disagree	
LEARNER'S DECLARATION OF UNDERSTANDING			
I am aware of the moderation process and understand that the moderator could declare the assessment decision invalid			
Learner	Date	Assessor	Date
Moderator	Date		

Assessor Review

Assessors must review the assessment process by completing this document. Please attach any additional information if required.

Evaluation Criteria	YES	NO
Was the assessment preparation adequate?		
Was the learner informed of the assessment and policies?		
Design/prepare the assessment tools & - documentation according to ETQA and company QMS correct?		
Integration into work or learning: Was the assessment as unobtrusive as possible?		
Was maximum use made of naturally occurring events & readily available evidence?		
Systematic Process: Was the assessment process properly planned & structured?		
Involvement of the learner: Was the learner involved throughout the assessment process?		
Did the learners contribute to the planning of assessment & the collection of evidence?		
Open: Did the learners understand the assessment process and the criteria, which apply?		
Environment: A supportive, non-threatening environment is created for assessment.		
Was the assessment Valid?		
Was the assessment Reliable?		
Was the assessment Consistent?		
Was the assessment Authentic?		
Was the assessment Sufficient?		
Was the assessment Current?		
Was the feedback given?		
Completed the result of the assessment according to the requirements of the organization and/or employer, as well as the relevant ETQA.		
Records & assessment instruments have to be kept for quality assurance purposes, as well as possible appeals.		
What did you as assessor do well?		

What did you as assessor not do well?

Did you identify any weaknesses in the design of the assessment? If so, suggest improvements

Quality of the unit standard: is it fit for the purpose it was designed for? If not, please make suggestions for improvements

Additional comments

Assessor signature

Date



Candidate Feedback Report

Candidate's Name			ID No.	
Assessor's Name			Reg. No.	
Unit Standard Title	114974 Apply the basic skills of customer service			
Assessment Decision				
Source of Evidence	C	NYC	Comments	
Assessments				
Product				
Indirect Evidence				
Overall Assessment Decision				
Additional Notes				
Date				
Signature of Assessor			Signature of Candidate	



Candidate Appeal Form

Candidate's Name:		ID No.	
Assessor's Name:		Reg. No.	
Unit Standard Title:	114974 Apply the basic skills of customer service		
Date:			
SECTION 1			
Candidate's reason for disagreeing with the assessment decision			
Assessor's rationale for the assessment decision			
Candidate's signature			
Assessor's signature			



SECTION 2

Internal Moderator's reconsidered decision and rationale	
Internal Moderator's Signature	
Advising Assessor's Signature	
Decision and rationale of the investigatory panel	
Learner Declaration	The above decisions have been explained to me and I accept the assessment decision
Learner's Signature	
Date	

Please send this form to: The Training Provider



Assessor's Report 114974

Candidate's Name			ID No.	
Assessor's Name			Reg. No.	
Unit Standard Title	114974 Apply the basic skills of customer service			
ASSESSMENT DECISION				
Specific Outcome	C	NYC	Comments	
Explain customer service in a financial services environment				
Engage in an interaction with a customer				
Demonstrate communication skills in order to respond to a customer need				
Process a query in order to respond to a customer need				
Overall Assessment Decision				
Comments				
Date				
Signature of Assessor	Signature of Candidate			



Moderator's Report 114974

Moderator's Name			Reg. No.	
Assessor's Name			Reg. No.	
Candidate's Name			ID No.	
Unit Standard Title	114974 Apply the basic skills of customer service			
MODERATION DECISION				
Specific Outcome		C	NYC	Comments
Explain customer service in a financial services environment				
Engage in an interaction with a customer				
Demonstrate communication skills in order to respond to a customer need				
Process a query in order to respond to a customer need				
Overall Moderation Decision				
Feedback to Assessor				
Action Required				
Date of Moderation				
Signature of Moderator				
Signature of Assessor				
Signature of Candidate				

MODERATION

Moderation Of Assessments Must Be Planned In Order To:

- ❖ Identify the outcomes as per unit standards
- ❖ Identify the evidence to be collected
- ❖ Identify steps of a logical process
- ❖ Design an appropriate assessment (criteria and tool)
- ❖ Review success or adjustments to be made to the assessments
- ❖ Provide appropriate feedback and set targets and action plans

Pre-Assessment Moderation

This occurs prior to assessment taking place and includes moderation of:

- ❖ Assessor suitability/qualifications
- ❖ Assessment guidelines which are explained to all assessors in bi-weekly meetings
- ❖ Standardised assessment tools which are reviewed in assessor meetings
- ❖ Guidelines for organising evidence (see Portfolio of Evidence guidelines)
- ❖ Assessor/candidate appeals process
- ❖ The assessor must consult with the moderator to ensure that the assessment instrument is valid, reliable and practicable. The moderation model will be the assessor moderator comparison, so as to ensure that the assessment instrument is fit for purpose and that the assessment plan is adequate in order to achieve the outcomes of the assessment process.

Post Assessment Moderation

Post-assessment moderation must take place at the end of the assessment process, once feedback has been given to the candidate.

Post-assessment moderation must check specifically that the evidence on which the decision of competence is based is valid, authentic, current and sufficient. Until post-assessment moderation has taken place, the assessment process is incomplete, as there is a chance that the moderator may disagree with the assessor regarding the decision reached in terms of competence.

Even so, the candidate needs to be cautioned that external moderation/verification needs to take place prior to candidate achievement being confirmed and recorded on the National Candidate Record Database.

The focus in post-assessment moderation is also to address continuous improvement of assessment activities and tools. The moderator needs to critically evaluate the review process and ensure that candidate consultation in the review process was both meaningful and constructive i.e. avoid simplistic yes/no questions which give little qualitative data.

25% of all assessment sampling across the board is moderated. The samples are representative of assessments conducted by each assessor and for each project

WORKPLACE ASSIGNMENT WORKBOOK

NAME	
CONTACT ADDRESS	
Code	
Telephone (H)	
Telephone (W)	
Cellular	
Learner Number	
Identity Number	

EMPLOYER	
EMPLOYER CONTACT ADDRESS	
Code	
Supervisor Name	
Supervisor Contact Address	
Code	
Telephone (H)	
Telephone (W)	
Cellular	



Introduction to the Practical Workplace Logbook

Congratulations completing the program. As part of your training you are required to keep a logbook of all practical on the job training and exposure you receive during the learning process.

You will now be assigned to a mentor who will oversee your off-site training, usually referred to as on-the-job training.

The mentor will assist and advise you on the practical aspects of the job, how to fit into the company, what is expected of you as an employee and as a future supervisor.

This Practical Workplace Logbook must be used as a guide to enable learners to achieve the specific outcomes, including the critical cross-field outcomes of the unit standard for this Learning Programme.

The purpose of the Logbook is to indicate to learners and their workplace coaches / mentors / assessors the practical skills to be developed and to be demonstrated by them in the workplace in order for them to meet the requirements of the specific outcomes and critical cross-field outcomes listed in the unit standard.

Learners must be able to prove their competence at the prescribed skills by being given the opportunity to participate in and perform the tasks / responsibilities that will expose them to the specific outcomes and critical cross-field outcomes and associated skills.

Workplace coaches / mentors / assessors must assess competence in the workplace by looking for evidence in a learner to perform the different tasks in a manner that meets the requirements of the unit standard.

Workplace coaches / mentors / assessor must also ensure that the workplace:

- ❖ Is conducive to fair and objective assessments
- ❖ Enables the learner to apply and demonstrate skill and knowledge
- ❖ Allows the learners to feel comfortable to learn and to be assessed
- ❖ Is supportive of the learning interventions

Organisation Name	
Programme Coordinator	
Coordinator Contact Details	
Training Provider	
Provider Role: <ul style="list-style-type: none"> • Manage delivery • Manage assessment • Manage full provision 	
Programme Nature and Name <ul style="list-style-type: none"> • Qualification • Learnership • Learning Programme • Skills Programme 	
Programme Duration (Notional Hours)	
Workplace Component (Notional Hours)	

Criteria	Met	Not Yet Met
The learner is familiar with all required workplace exposure for this learning programme, and has access to the logbook requirements		
The employer / organisation is familiar with all required workplace exposure for this learning programme and has access to the logbook requirements		
All required assessment instruments and resources are available in advance to the employer to carry out workplace assessments		

Responsibilities

Responsibilities of the learner

include:

- ❖ One hundred percent commitment to the learning process. Learners are encouraged to study any additional source of information relevant to this learning process.
- ❖ Doing all assignments contained in this logbook as well any tasks and assignments received from your mentor or supervisor to whom you have been assigned.
- ❖ Although the mentor is responsible to sign off all sections completed, it is the learner's responsibility to ensure that all paperwork is completed and handed in for filing on his/her record of learning. It should be clearly stated to learners that a 100% complete record of learning, as prescribed by this logbook, is their sole responsibility. Any document missing from the record may result in your not being declared competent.
- ❖ Discuss any problems that you may have with your mentor.

Mentor

Congratulations on your appointment as a mentor to the learner. This is a very responsible assignment because you have been tasked with the responsibility of rounding off the learner's practical exposure.

You must ensure that you are familiar with all aspects of the work covered in this logbook because you must keep a daily account of the learner's performance.

You are also required to report to the skills development facilitator, or as agreed between yourself, the coordinator and the learner regarding the learner's progress. Your responsibilities as mentor are as follows:

- ❖ Attend the mentoring course
- ❖ Study the logbook and acquaint yourself with its content and format
- ❖ Remember this logbook is the learner's full record of learning and workplace exposure. All activities which the learner participates in must be recorded, and all documents produced in relation to this learnership must form part of the record of learning
- ❖ Get all the learners together and explain its purpose to them and also what is required of them
- ❖ Remember the mentor is the creator of learning and exposure opportunities. You should therefore not confine the learner's exposure to this logbook alone
- ❖ Continuously guide them in doing the assignments and arranging the planned exposure with the relevant departments
- ❖ File all duplicate records of learning on a file for each learner
- ❖ Send all original records to the training provider at the end of each month. The Seta also requires that copies be held at the companies
- ❖ This logbook need not be followed chronologically, but please note that the learner is required to work through the entire logbook by the end of the learning period

Responsibilities of the Employer

- ❖ Creating an atmosphere conducive to learning
- ❖ Giving learners ample access to the working environment. Remember that learners should be productive employees to get practical exposure to all aspects of the transport operation as required by the learnership
- ❖ Ensure that learners, mentors and assessors attend all training required and arrange and pay travelling and accommodation costs
- ❖ Ensure availability of sufficient mentors and workplace assessors

Training Provider Responsibility

- ❖ Provide all practical learning material in electronic and/or hard copy, depending on the circumstances
- ❖ Provide training for mentors and workplace assessors if required and provide the learning material
- ❖ Visit employers to monitor progress and provide guidance and feedback.
- ❖ Provide an online and telephonic support system to all mentors and learners

SUMMATIVE WORKPLACE ASSESSMENTS

Workplace Assignments 119673

Assignment 1: Entrepreneurship

Activity 1.1

Explain how your business will provide employment (how many workers will you need, what will they do) including yourself.

At least two employees (including the owner) with details of what work they will be doing

Activity 1.2

Describe the advantages of being an entrepreneur in the type of business you want to start.

At least two advantages, as long as the description is clear and understandable

Activity 1.3

Describe the disadvantages of being an entrepreneur, using your planned business as an example.

At least two disadvantages, as long as the description is clear and understandable

Activity 1.4

Describe at least two entrepreneurs that you are aware of in the industry you want to start your business in:

- ❖ name them
- ❖ describe what do they do
- ❖ explain why do you think they are successful.

Make sure that the learner completes all the questions and that the answers are neat and understandable

Activity 1.5

Discuss the reasons why businesses fail and what you will do to prevent your business failing.

At least three reasons must be given and the learner's explanation must be understandable and valid

Activity 1.6

Describe the reasons why businesses succeed and how you will use this to ensure the success of your business.

At least two reasons must be given and the learner's explanation must be clear and understandable

Activity 1.7

Identify at the cultural, gender or social barriers that will influence the success of your business and explain how you will overcome them.

At least two barriers must be identified and explained

Assignment 2: Strengths and Weaknesses

Activity 2.1

Describe your idea for a new business venture. Do a self-analysis based on the following:

Learner must describe himself/herself in all the categories

Characteristics required	Describe yourself
Do you have the technical knowledge and skills	
Identify possible training needs in order to compensate for lack of knowledge and skills	
Temperament: are you able to work with employees and customers?	
Work ethic: are you willing to work hard?	
Do you have a desire to take responsibility and be in control?	
Do you have a preference for moderate risk?	
Do you have a steady confidence in your ability to succeed?	
Do you have a high level of energy?	

Do you have an orientation toward the future?	
Do you have a skill in organising?	
Do you have a love of achievement?	
Are you good at selling? This is necessary for most businesses, trading, manufacturing or services	
Do you have a good credit record or do you have a lot of bad debt?	

Activity 2.2

On the basis of your analysis, do an analysis of your strengths and weaknesses:

At least three weaknesses and four strengths must be noted by the learner

Strengths	
Weaknesses	

Activity 2.3

You have selected a business idea. Compare your strengths and weaknesses to the business idea:

- ❖ Which strengths do you think you need to succeed in this business?
- ❖ List at least five abilities that are required for your business idea.
- ❖ Which of these abilities do you have? Motivate your answer by explaining how your abilities will benefit the business
- ❖ Which abilities do you need to develop? Explain why you think it is necessary to develop these abilities.

Any strengths, such as : getting up very early in order to sell food and drinks to people going to work, knowledge of prices of food and how to prepare, knowledge of sales, etc. are valid

Learner must list at least 5 abilities that will be required by the business idea and explain how this will benefit the business.

Learner must list at least 3 abilities that have to be developed and explain why s/he thinks these abilities are needed for the business idea.

Activity 2.4

Develop an action plan to address your weaknesses. Use the following example to guide you.

Make sure that learner completes all the categories and that the targets and dates are achievable. It is also important that learner states how progress will be monitored. This assignment should only be handed in after about 3 to 6 months, to give learner the opportunity to show that s/he monitors the action plan and actually does what is required.

What knowledge/skills do you need?	How will you acquire the knowledge/skills?	What will this cost?	How will you pay for this?	By when will you do it?	How will you monitor your progress?	Date completed

Assignment 3: Characteristics

Activity 3.1

Explain why the following characteristics are important for your business.

One point for each explanation

Characteristic	Explanation
Taking calculated risks	Calculated risks are part of every business, and learners have to realise that they will have to take risks from time to time, especially when expanding or introducing new products or services. make sure that learners can explain why it will be important to take risks
Anyone can become an entrepreneur	Learners who want to start their own businesses may face opposition from friends and family and it is important that they understand that anyone can become an entrepreneur so that they do not become discouraged. make sure that learners can explain than anyone can become an entrepreneur
Entrepreneurs have to ensure sustainability of their enterprises.	Learners have to understand and therefore be able to explain why a business must be sustainable.
Entrepreneurs have to take the initiative	The owner of the business must make a success of the business by taking the initiative – learners have to understand this and be able to explain the concept

Activity 3.2

For your own business idea, explain what characteristics are needed to make a success of the business, using the table below to guide you. List at least two items for each characteristic.

Check learner's understanding of the concepts against their business idea – do they know what is required?

Technical knowledge and skills	
--------------------------------	--

Managerial abilities	
Business knowledge and skills	

Assignment 4: Entrepreneurial Opportunities

Activity 4.1

Describe your own business idea by comparing the idea to your talents, interests and profile.

Business idea	
Your talents: how will you use your talents to make a success of this business?	The explanation of personal talents against what is required by the type of business is very important – make sure that learner can motivate this.
Your interests: are you interested in this type of business?	Starting a business that is not in line with your interests will be very difficult – learner must be able to motivate that his/her interests are aligned to the type of business.
Do you think this idea suits you?	Learner must be able to motivate why s/he thinks the business idea will suit him/her

Activity 4.2

Do a risk analysis exercise. Assess the risks involved in your business idea.

Learner must be able to identify at least two uncertainties or risks for each category. Then learner must be able to analyse and prioritise these risks.

Risks associated with technical knowledge and skills
Identify uncertainties
Analyse risks
Prioritise risks
Risks associated with time
Identify uncertainties
Analyse risks
Prioritise risks

Risks associated with the environment
Identify uncertainties
Analyse risks
Prioritise risks
Risks associated with the community
Identify uncertainties
Analyse risks
Prioritise risks

Activity 4.3

After the risk assessment, do you still think your business idea is good and will work? Motivate your answer.

The learner's motivation is very important. make sure that the learner's view makes sense in the light of his/her self-analysis, risk assessment, and strengths and weaknesses

Assignment 5: Goals and personal growth

Activity 5.1

Set goals for your business and your personal growth for the following periods:

- ❖ short-term (3 to 6 months)
- ❖ medium term (6 – 12 months)
- ❖ long term (12 months and longer)

Use the examples in the learner guide to assist you

Check that learner sets business and personal goals for all three periods.

Activity 5.2

Draw up an action plan to develop your technical, business, managerial and personal skills. Use the examples in the learner guide to assist you. Make sure that your action plan states what, who, when, how. This action plan will be discussed between you and your mentor or facilitator regularly to check on your implementation of the plan.

Check the action plan and discuss the plan with the learner regularly as the learnership is rolled out to check the learner's implementation of the action plan. Remember that all the goals and activities will not be achieved, but that corrective action will be required for some of the activities and goals. This is fine, as long as corrections are made and implemented by the learner.

Activity 5.3

What resources will you need in order to start and run your business?

Learner has to find out what will be needed and where to get it. Check that the resources make sense in terms of the learner's business idea.

What professional help will you need?	
Where will you get it?	
What equipment will you need?	
Where will you get it?	
How many employees will you need?	
Where will you get it?	
Will you need financing assistance?	

Where will you get it?	
What information will you need?	
Where will you get it?	

Workplace Assignments 119669

Assignment 6: Marketing In Relation To New Venture

Activity 6.1

When you start your business, how do you think will you add value to the products or services?

This can be any of the following: (learners must list at least 2 things)

Locating the business close to the customers

Stocking products that they require

Selling at a competitive price

Making deliveries to their homes

Or any other original ideas that the learners can think of

Activity 6.2

What can you do that will make your business better than someone else's; this is also called gaining the competitive edge.

Learners must list at least two things.

There are many answers to this question. Some examples are:

Locating the shop close to the customers

Stocking products that the customers want

Doing deliveries at home for the customers

Selling at competitive prices

Giving customers personal service

Or any other original idea that the learners can think of

Activity 6.3

Explain how the following factors in the market place will influence your business venture.

Check that learner's explanation shows understanding of the concept and the influence it will have on his/her business.

- ❖ Competition
- ❖ Location of your business
- ❖ Age
- ❖ Gender

Activity 6.4

Who do you think will make use of your products or services? Give examples that will include the age of the customers and where the customers live (market segmentation).

Any two customer segments

at least two examples must be given and checked against business idea

Activity 6.5

What competition will there be for your business?

For example, are there other shops close by, etc. Learner must list at least one competitor.



Assignment 7: Conduct Market Research

Activity 7.1

You have decided to do market research before you start your business. Choose market research techniques (tools) that you will use to do your market research and explain why you are choosing this technique.

At least one technique must be noted and explained. Observation, Personal Interviews, Personal Interviews, Telephone, Mail surveys,

Activity 7.2

Draw up a list of ten questions that you will ask your customers.

Any ten questions that are relevant to the specific business

Assessment Activity 7.3

Conduct a real market research exercise in your neighbourhood. Conduct a real market research exercise in your neighbourhood. You have to include at least 20 people in your sample. Use the questions from the previous exercise to do market research.

Learners must be able to prove that they did conduct the market research by attaching blank and completed questionnaires to the assignment.

Assessment Activity 7.4

Explain how you will select your sample.

Any valid and clear explanation

Assessment Activity 7.5

Analyse and interpret the information you have gathered. Quote the results and your interpretation of them in your assessment. Attach copies of your questionnaires to the assessment.

Check that the actual results of the research was used in the interpretation

Assessment Activity 7.6

Determine whether your proposed new business venture will be viable. Motivate your answer. (4)

Check that the answer is based on the analysis of the market survey

Assignment 8: Identify Market Segments

Activity 8.1

Identify market segments for the customers who will be interested in your products or services.

Learner must identify at least 3 market segments

Activity 8.2

List strengths that you think your business will have.

At least two of: Close to customers, Products that the customers require, Personal service, Competitive prices, Or any other strengths that the learners can think of.

List weaknesses that you think your business will have.

At least two of: Not a big variety of products, Untrained staff, Small shop, Shop not laid out like a supermarket; or any other weaknesses that the learners can think of.

Assessment Activity 8.3

During a previous activity you were requested to identify a competitor. Analyse the strengths and weaknesses of the competitor to determine the threat they may pose.

At least two strengths and two weaknesses

Assessment Activity 8.4

Now that you have done market research, analysed your business's strengths and weaknesses and analysed your competitors, what changes should you make to your strategy, products/services, marketing ideas, etc. in order to increase your competitiveness.

Learner must list at least two things that can be done to increase your competitiveness.



Assignment 9: Incorporate Market Research

Assessment Activity 9.1

Develop your marketing plan by looking at

- ❖ product:: what products/services will you sell
- ❖ price: what will your pricing policy be
- ❖ promotion: how will you promote your product/service
- ❖ place: where will your business be located.

Remember to incorporate your market research and findings as well as the segments into the marketing plan

Make sure learner mentions the four P's and examine the marketing plan for neatness and clarity of thought – will the plan make sense to a bank clerk, for example.

Also make sure that the learner incorporates market research and findings as well as the segments into the marketing plan

Activity 9.1

Develop an action plan for your marketing plan.

Make sure the action plan includes:

Goals and objectives

Resources required

Target dates

How you will make sure that your marketing plan is working

How you will measure your actual sales against what you projected

How regularly you will measure actual sales against projected sales

What steps you will take if the sales are not what they should be

Assignment 10: Explore Product/Service Life Cycle

Activity 10.1

What trends and new developments are present in the industry in which your proposed venture falls? How will you use this information to determine the product or service life cycle?

At least two trends or developments and two explanations of how to use this information to determine the life cycle

Assessment Activity 10.2

What actions will you take when your products/services move from the maturity phase to the decline phase?

Learner must describe at least two actions.

Workplace Assignments 119672

Assignment 11: Implement Marketing Plan

Activity 11.1

Describe the promotional mix you will use for your business. Explain why you have decided on this mix.

Learner must describe at least two promotional activities

Activity 11.2

Draw up an action plan to implement your marketing plan.

Learner must include the following:

What has to be done

By when must it be done

Who will do it?

How much will it cost?

How will you monitor the activities?

How will you know when an action is completed – in other words how will you measure performance?

Activity 11.3

What sales strategies will you employ? List two advantages of one sales strategy and explain how this will help you to generate sales.

Make sure that learner describes the sales strategies and advantages.

Activity 11.4

Describe the customer relations practice you will implement in order to make sure that your customers are happy and satisfied. Also describe how you will implement this practice.

Make sure that learner describes the practice and lists at least four activities to implement this practice.

Practices include after sales service and customer surveys to determine levels of customer satisfaction

Assignment 12: Negotiate A Deal With A Customer

Activity 12.1

You are preparing for a meeting with a big, corporate customer. Select one of your products or services and prepare for the meeting, taking into account the process of negotiation. Attach your presentation to the assessment.

Learner must include the following:

Opening: At least five of:

Name of business and owners

What type of business is it?

Why this type of business was chosen?

Where will the business operate from?

Why will the business succeed

What are the advantages of the products?

What are the advantages to the prospective customer in buying from you or making use of your services?

Body – ensure that learner includes details of minimum and maximum prices as notes, how much discount learner can give, what payment terms are acceptable and how and when delivery can take place.

Summary of sales pitch

Minimum and maximum prices

How much discount learner can give

What payment terms are acceptable

And when and how you learner can deliver the products or services

Ending

Why the business will be a success

Ask for what is required

Activity 12.2

Identify a customer that you would like to do business with. Or you can contact the appropriate manager where one of your family member or friends work, or even another small business owner.

Make an appointment to discuss your products or services. Prepare for the presentation and on the day, negotiate with the customer to buy your products or services.

Write a report about the negotiation.

Make sure that you include the following in your report:

- ❖ name of customer
- ❖ date, time and place of appointment
- ❖ describe the meeting and the negotiation process
- ❖ was the negotiation successful? motivate your answer
- ❖ what will you do differently next time

Check the learner's report for validity and that it is the learner's own work. If necessary, phone the customer to confirm that the appointment did take place. Make sure that the learner discusses all the topics in the report as required. Learners will be



tempted to use each other's appointments so make sure that the work is not copied from someone else.



Assignment 13: Processes and Principles for Completing Basic Quotes

Activity 13.1

Prepare a quote for the presentation from activity 2.1

The quote must have the following information:

Date

Price

Details of product/service

Quantity of product/service

Delivery details

Payment terms

Period that the quote is valid for

Some sort of marketing device such as a special offer

Activity 13.2

By now you have identified your customers, done market research and drawn up a marketing plan. You should know what offers to make to your customers. Name and explain at least two offers.

any of the following:

Cross-selling

Up-selling

Offering Discounts

Samples

consignment

RTF

Activity 13.3

Explain how you arrived at the price of the quote.

Make sure that learner did a basic cost calculation

Workplace Assignments 114974

Assignment 14: Explain Customer Service

Activity 14.1

1. What types of customers does a bank have?

Learner must list at least 3 types: private people such as bus passengers, big corporate customers such as mining houses and banks, customers who pay cash or customers who buy on credit

2. Explain when a call or a query should be escalated.

Customer requests it or wants to speak to a manager

The problem impacts the business

It is a personnel issue (for example a Senior Level Manager or Executive is affected)

No apparent solution

More than one person is affected

More than one department is affected

3. If you are a bank clerk and you have to escalate a query, who would you escalate the query to?

The next level, called supervisory or accountant level

4. Who has actual ownership of the problem?

The person the query was escalated to

5. Who has perceived ownership of the problem?

The person who first handled the problem

6. Complete the following table regarding customer service

Where we were	Where we want to be
Customers are merely using our services	Customers pay our salaries
Sometimes they are wasting our time	Customers are kings
We know what they want	We must find out exactly what they want and try our best to exceed their expectations
We have a captive market	We must outperform the competition

7. List seven barriers to communication. (7)

Poor interpersonal skills

Failure to identify the needs of the receiver.

Different cultural backgrounds.

Lack of intercultural understanding.



Messages with too much/little information.

Irritating mannerisms that prevent people from listening.

Use of insensitive or abusive language by the sender or receiver.

Assignment 15: Interact With Customers; Communication Skills and Process Queries

Activity 15.1

Make an appointment with a bank manager or accountant to discuss the requirements of a loan to start your business. Develop a form that the bank employee must sign as proof that the interview took place. Write a report about the following:

- ❖ How did the bank employee open the interaction with you as the customer? (The greeting, etc.) What conclusion do you make about the internal standards of the organisation regarding opening an interaction with a customer?
- ❖ How did the manager request information to clarify your needs?
- ❖ Did the manager identify your needs and reflect them back to you to confirm his/her understanding of your needs?
- ❖ What non-verbal clues did the manager exhibit and how did these non-verbal clues make you feel?
- ❖ Did the manager demonstrate active listening skills? Describe the active listening skills.
- ❖ Did the manager identify keywords from your conversation? Name the keywords.
- ❖ What active listening skills did you use to understand what the other person was saying and how did this help you?
- ❖ What was the manager's response to you after identifying the keywords?
- ❖ Did the manager record the main details of your needs, either in paper or on a computer?
- ❖ What follow up action did the manager suggest?
- ❖ How did the manager close the interaction with you, the customer? What conclusion did you make about the internal standards of the bank regarding closing interactions with customers?
- ❖ What lessons did you learn from this meeting with the bank that you can apply when dealing with your own customers?

Make sure that all the aspects are covered in the report and that the learner can prove that the meeting really took place. If necessary, phone the bank employee to confirm.

Activity 15.2

1. Identify a customer that you would want to do business with. Make an appointment with this customer to discuss his/her needs and how you could satisfy these needs. Draw up a plan to do the following:
 - ❖ develop the procedure for your business on how to open an interaction with a customer
 - ❖ how you will request information to clarify the need of the customer
 - ❖ how you will reflect the need back to the customer once you have clarified the need, in order to confirm understanding
 - ❖ develop the procedure for your business on how to close an interaction with a customer
2. Practice this procedure before the meeting with the customer
3. Prepare a document for the customer to sign as proof that the meeting took place, that his/her needs were identified and addressed. If possible, arrange for your mentor to accompany you to this meeting, in which case s/he must confirm your report.
4. Attend the meeting with the customer and write a report about the meeting. Include the following in your report:
 - ❖ The procedure for opening and closing interactions with customers
 - ❖ How you requested information to clarify the need and how you reflected the need back to the customer to confirm understanding
 - ❖ What non-verbal clues from the customer helped you to identify his/her needs
 - ❖ What keywords did you identify that helped you to clarify the need
 - ❖ How you applied active listening skills
 - ❖ Did you record the main details of the customer's needs? Attach proof to this assignment.

- ❖ What follow up actions did you and the customer agree on?
- ❖ What feedback can you give the customer? Attach proof to this assignment.
- ❖ What lessons did you learn from this meeting with the customer that you can apply in future when dealing with your customers?

Make sure that all the aspects are covered in the report and that the learner can prove that the meeting really took place. If necessary, phone the prospective customer to confirm.

Activity 15.3

Contact a supplier that you will probably do business with. Make an appointment with the supplier to discuss needs relating to your business. Develop a form that the supplier must sign as proof that the interview took place. Write a report about the following:

- ❖ How did the supplier open the interaction with you as the customer? (The greeting, etc.) What conclusion do you make about the internal standards of the organisation regarding opening an interaction with a customer?
- ❖ How did the supplier request information to clarify your needs?
- ❖ Did the supplier identify your needs and reflect them back to you to confirm his/her understanding of your needs?
- ❖ What non-verbal clues did the supplier exhibit and how did these non-verbal clues make you feel?
- ❖ Did the supplier demonstrate active listening skills? Describe the active listening skills.
- ❖ What active listening skills did you use to understand what the other person was saying and how did this help you?
- ❖ Did the supplier identify keywords from your conversation? Name the keywords.
- ❖ What was the supplier's response to you after identifying the keywords?
- ❖ Did the supplier record the main details of your needs, either in paper or on a computer?
- ❖ What follow up action did the supplier suggest?
- ❖ How did the supplier close the interaction with you, the customer? What conclusion did you make about the internal standards of the organisation regarding closing interactions with customers?
- ❖ What lessons did you learn from this meeting with the supplier that you can apply when dealing with your own customers?

Make sure that all the aspects are covered in the report and that the learner can prove that the meeting really took place. If necessary, phone the prospective supplier to confirm.

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