



-YOUNG ENTREPRENEUR HOSTING ACADEMY-

National Certificate: New Venture Creation
(SMME)

SAQA ID 49648 Level 2

LEARNER SUMMATIVE ASSESSMENT GUIDE & PoE

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



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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.

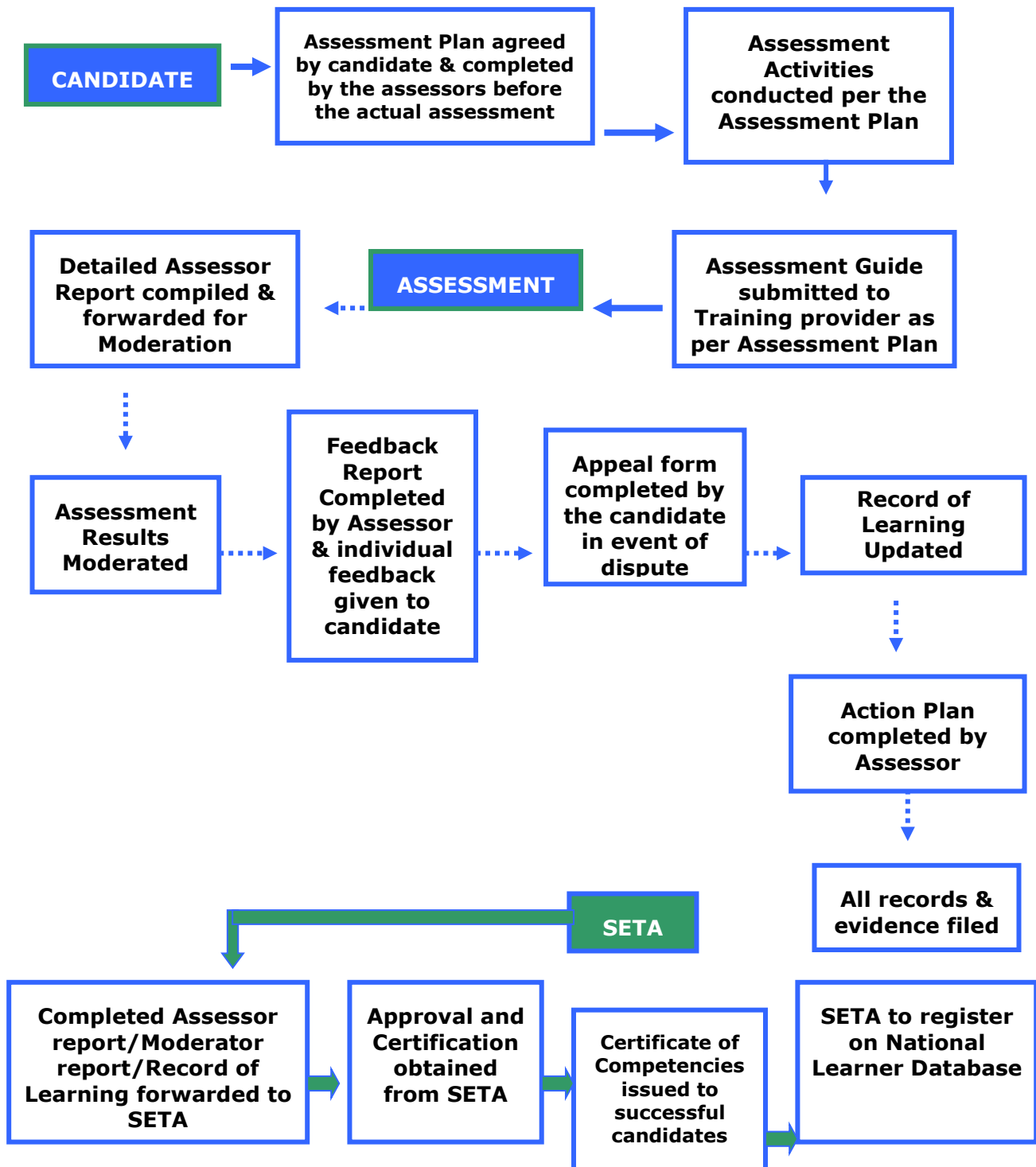
Abbreviations used in this guide:

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. The 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



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 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)

2. Explain a small business. (2)

3. Explain your own business idea. (2)

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

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

.

Characteristic	Explanation	Give an example of an entrepreneur that you think has this characteristic
----------------	-------------	---

Entrepreneurs take risks

Anyone can become an entrepreneur

Entrepreneurs have to ensure sustainability of their enterprises.

Entrepreneurs have to take the initiative

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)

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	
S05, 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		
<p>Candidate's reason for disagreeing with the assessment decision</p>		
<p>Assessor's rationale for the assessment decision</p>		
<p>Candidate's signature</p>		



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

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 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)
2. Promotion: how would you let customers know where you are? List at least two methods (2)
3. Product: which products would you stock? Or which services would you sell? List at least three. (3)
4. Price: would you sell your products or services for less than the competition? Give a reason for your answer. (1)
5. Explain supply and demand. (4)
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)
7. Explain why market research will be important before you start your business. (2)
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)
9. Give two reasons why you should develop a marketing plan. (2)
10. List two characteristics of the growth phase of the product life cycle. (2)
11. List two characteristics of the maturity phase of the product life cycle. (2)

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:	
<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 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	
S05, AC2 Growth opportunities for new venture are identified and explained with typical examples of how this can be achieved	Knowledge Questionnaire Assignment 10			
S05, AC3 Trends and developments in relation to product/service are monitored and product/service life cycle is determined accordingly	Knowledge Questionnaire Assignment 10			
S05, 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		
<p>Candidate's reason for disagreeing with the assessment decision</p>		
<p>Assessor's rationale for the assessment decision</p>		
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

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 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)
2. What is the purpose of advertising? (1)
3. Name one advantage of personal selling. (2)
4. Explain what cold-calling is (2)
5. Why is it important to do research about your customer? (1)
6. List seven things that you have to take into account before issuing a quote. (7)
7. List eleven things that must be noted when an order is taken: (11)
8. When would a launch be an appropriate promotional tool? (1)

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:	
<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 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		
<p>Candidate's reason for disagreeing with the assessment decision</p>		
<p>Assessor's rationale for the assessment decision</p>		
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)

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

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

How many people will an unhappy customer tell?

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

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

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

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

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

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

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)

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

Tone

Pitch

Pace

Volume

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

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

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

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

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)

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		
<p>Candidate's reason for disagreeing with the assessment decision</p>		
<p>Assessor's rationale for the assessment decision</p>		
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 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

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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.

Activity 1.2

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

Activity 1.3

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

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.

Activity 1.5

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

Activity 1.6

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

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.



Assignment 2: Strengths and Weaknesses

Activity 2.1

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

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:

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.

Activity 2.4

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

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

Anyone can become an entrepreneur

Entrepreneurs have to ensure sustainability of their enterprises.

Entrepreneurs have to take the initiative

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.

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?	
Your interests: are you interested in this type of business?	
Do you think this idea suits you?	

Activity 4.2

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

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.



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

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.

Activity 5.3

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

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?	

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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?

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.

Activity 6.3

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

- ❖ 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).

Activity 6.5

What competition will there be for your business?

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.

Activity 7.2

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

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.

Assessment Activity 7.4

Explain how you will select your sample.

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.



Assessment Activity 7.6

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

Assignment 8: Identify Market Segments

Activity 8.1

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

Activity 8.2

List strengths that you think your business will have.

List weaknesses that you think your business will have.

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.

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.

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 you market research and findings as well as the segments into the marketing plan

Activity 9.1

Develop an action plan for your marketing plan.



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?

Assessment Activity 10.2

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



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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.

Activity 11.2

Draw up an action plan to implement your marketing plan.

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.

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.

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.

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

Assignment 13: Processes and Principles for Completing Basic Quotes

Activity 13.1

Prepare a quote for the presentation from activity 2.1

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.

Activity 13.3

Explain how you arrived at the price of the quote.

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Assignment 14: Explain Customer Service

Activity 14.1

1. What types of customers does a bank have?
2. Explain when a call or a query should be escalated.
3. If you are a bank clerk and you have to escalate a query, who would you escalate the query to?
4. Who has actual ownership of the problem?
5. Who has perceived ownership of the problem?
6. Complete the following table regarding customer service

Where we were	Where we want to be
Customers are merely using our services	
Sometimes they are wasting our time	
We know what they want	
We have a captive market	

7. List seven barriers to communication. (7)

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?

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?

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?



Logbook 119673				
Date	Assignment No	Start	Finish	Total Hours
e.g. 12/9/2014	1	10:00	14:00	4
Date	Learner Signature	Date	Mentor/Supervisor Signature	

Logbook 119669				
Date	Assignment No	Start	Finish	Total Hours
e.g. 12/9/2014	1	10:00	14:00	4
Date	Learner Signature	Date	Mentor/Supervisor Signature	

Logbook 119672				
Date	Assignment No	Start	Finish	Total Hours
e.g. 12/9/2014	1	10:00	14:00	4
Date	Learner Signature	Date	Mentor/Supervisor Signature	

Logbook 114974

Date	Assignment No	Start	Finish	Total Hours
e.g. 12/9/2014	1	10:00	14:00	4
Date	Learner Signature	Date	Mentor/Supervisor Signature	

