



**Forest Industry Assessment Plan System**  
**SIRRRPK014A Recommend specialised products and services**



**ASSESSMENT PLAN AND RECORD SHEET**

**A. Candidate details**

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ DOB \_\_\_\_\_  
 Telephone \_\_\_\_\_ Mobile \_\_\_\_\_ Email \_\_\_\_\_  
 Address \_\_\_\_\_ State \_\_\_\_\_ P/C \_\_\_\_\_

**B. Employer details**

Company \_\_\_\_\_ Address \_\_\_\_\_  
 Contact \_\_\_\_\_ Ph No. \_\_\_\_\_

**C. Assessor details**

Name \_\_\_\_\_ Organisation \_\_\_\_\_

**D. Assessment Context (tick the appropriate boxes or add details as required)**

Setting/Conditions	Setting/Conditions	Materials
<i>Enterprise type:</i>	<i>Product information knowledge</i>	<i>Types of products/services:</i>
	Brand options	
	Safety features/toxicity	
	Manufacturing process	
	Environmental considerations	
<i>Job role:</i>	Repair/warranty	
	Storage and care	
<i>Records (please specify)</i>	<i>Service expertise</i>	
	General public only	
	General public and tradespeople	
	Tradespeople only	

**E. Assessment Results**

Assessment Start Date \_\_\_\_\_ Assessment Finish Date \_\_\_\_\_

Outcome of Assessment (Tick)  **COMPETENT**  **NOT YET COMPETENT**

Comments/feedback to clarify assessment process and result, including further skill development if required:

**F. Candidate Agreement**

I agree that I was ready for assessment, and that the assessment process as explained to me has been followed. I have received a copy of this recording tool and I accept the decision of the assessor. I also agree that this tool can be used by the Industry or RTO as evidence of competence.

Candidate signature \_\_\_\_\_ Date \_\_\_\_\_

Assessor signature \_\_\_\_\_ Date \_\_\_\_\_

## STANDARD ASSESSOR GUIDELINES

### General Instructions

- Candidate information and preparation  
Assessors must confirm that the candidate is ready for assessment prior to commencing the process. The assessment process (including the purpose of the assessment, evidence collection, right to appeal and any special needs) must be explained to the candidate, who should sign in acknowledgement.
- Complete all relevant details in the Assessment Plan and Record Cover Sheet
- Conduct the assessment using **the Recording Tools provided**

### 1. Pre-Assessment

- Confirm assessment arrangements with candidate and employer/supervisor.
- Assist the candidate to gather evidence for all elements/performance criteria prior to sign-off.
- Arrange with the candidate/employer a suitable location with all required materials and equipment and confirm prior to assessment. Equipment must be safe, well-maintained and meet Australian Standards.

### 2. Safety Instructions

- Candidates must use all required PPE and observe safety procedures at all times.



**The assessment should cease if, in the opinion of the assessor, the candidate's actions or changing circumstances or conditions on site, put themselves or co-workers at risk of injury or are likely to damage equipment/materials.**

### 3. Legislative/Enterprise Requirements

- Ensure that all relevant health, safety and environment practices are followed, that any site-specific requirements are met and that relevant regulations and/or standards are adhered to.

### 4. Gathering Evidence

- **Gather at least three (3) types of evidence to confirm competence.**  
Assess whether candidate performance and evidence supplied against each criteria is **COMPETENT (C)** or **NOT YET COMPETENT (NYC)**. **All elements and critical aspects of evidence from the unit of competence must be assessed, even if not applicable to the candidate's current workplace or job role.**
- **Demonstration/observation Assessment Tool:** use this tool to assess competence in skills and task performance. The assessment should take place in the workplace under normal operating conditions or under conditions that accurately simulate a realistic workplace. Assessors must ensure these requirements are met. One observation may not be sufficient to confirm competence.
- **Questions Assessment Tool:** use this tool to provide a framework for developing questions to test required knowledge. Develop questions to meet the individual work context requirements of the candidate. Retain a copy of questions asked and candidate answers with this assessment plan.
- **Confirmation of Consistent Competence Assessment Tool:** use this tool to record the source(s) of additional evidence gathered to **confirm the candidate's ability to consistently perform the task to the required standard.** Verification by a third party expert is the preferred third form of evidence, however assessors may also be guided by workplace documents, log books or other records that provide evidence of competence over time. Include copies of additional evidence documents where appropriate.

### 5. Recording the Decision

- Complete the assessment tool to indicate whether the candidate is **COMPETENT or NOT YET COMPETENT**. If the candidate is judged to be *Not Yet Competent* clearly indicate the reasons why, and identify any training or further practise needs if relevant.

## ASSESSMENT PLAN SUMMARY

### Suggested pre-requisites/co-requisites for this unit of competency:

Assessors should confirm that there is evidence of competency in any mandatory pre-requisites.

Verified as  
completed (✓)

Code & Unit

	Code & Unit

### What will be assessed?

*The elements of competence to be assessed are:*

- 1 Research product range
- 2 Recommend specialised products and services
- 3 Advise on product warranties
- 4 Quote on price and payment options
- 5 Advise on and arrange product service and repair

### What assessment methods will be used?

- Demonstration/observation to determine competence against critical and specific aspects, elements and required skills as listed.
- Questions to check required knowledge.
- Use of additional evidence to confirm consistent competence, such as a third party report or alternatively a log book, site production records or similar work records, or product samples or a portfolio of the candidate's work.

### What resources may be required?

- Retail work environment
- Specialised products or services to recommend
- Product information
- Customers
- Site documents, policies and procedures
- Personal protective equipment

### Are there any special conditions for the assessment?

None

**NOTE:** This assessment plan outlines the **minimum standard** endorsed by industry. The plan can be modified to meet local needs and/or needs of the candidate, including where assessment is part of on-going training, as long as the integrity of the assessment is maintained.

**ASSESSMENT TOOL: Demonstration/Observation Record**

**Instructions:**

Use normal work routines, case studies or simulations that require the candidate to demonstrate the application of specialised product knowledge to advise customers and other sales staff with regard to specific product features, technical characteristics, warranties and prices. Competency also includes the provision of information on company/enterprise services and repairs.

**Critical and Specific Evidence Requirements:**

Indicate whether the candidate's performance was competent (C) or not yet competent (NYC) by ticking the appropriate box.

C	NYC	Candidate demonstrates the ability to:
<input type="checkbox"/>	<input type="checkbox"/>	Consistently update and apply product knowledge to provide comprehensive advice to customers and staff, including technical information and advice on warranties and insurance policies where applicable.
<input type="checkbox"/>	<input type="checkbox"/>	Consistently apply company/enterprise policies and procedures and industry codes of practice in regard to sales and customer service procedures.
<input type="checkbox"/>	<input type="checkbox"/>	Advise customers and inform sales team members of organisation range of products, their features and benefits, performance, complementary products, product availability and warranties.
<input type="checkbox"/>	<input type="checkbox"/>	Advise customers and sales team members on operation, storage and use of products.
<input type="checkbox"/>	<input type="checkbox"/>	Estimate and quote on quantities of product required, as relevant to the product and customer requirements.
<input type="checkbox"/>	<input type="checkbox"/>	Successfully negotiate and administer price and payment options with customers as per organisational policy and procedures.
<input type="checkbox"/>	<input type="checkbox"/>	Advise on and arrange for organisation services, internal and external, including repairs, in line with organisation policy and procedures.

**Performance Task(s)**

**Assessors; briefly describe the performance task(s) set for the candidate on this occasion:**

**Unit Performance Criteria:**

Indicate whether the candidate's overall performance for each element was competent (C) or not yet competent (NYC) and tick the appropriate box for each performance criteria observed.

C	NYC									
<input type="checkbox"/>	<input type="checkbox"/>	<b>Element 1: Research product range</b>								
1.1	<input type="checkbox"/>	<p>Identify product and service range</p> <p><b>SERVICE RANGE (MAY INCLUDE)</b></p> <table border="1"> <tr> <td><input type="checkbox"/> PRODUCT SERVICE AND REPAIRS</td> <td><input type="checkbox"/> DELIVERY</td> </tr> <tr> <td><input type="checkbox"/> MATERIAL MEASURING AND CUTTING</td> <td><input type="checkbox"/> INSTALLATION</td> </tr> <tr> <td><input type="checkbox"/> INSURANCE FACILITIES</td> <td><input type="checkbox"/> FINANCE OPTIONS</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </table> <p>The candidate should describe the product range, where relevant, by category and variety. The candidate should describe the service range by the tasks involved and the complexity levels of carrying out those tasks.</p>	<input type="checkbox"/> PRODUCT SERVICE AND REPAIRS	<input type="checkbox"/> DELIVERY	<input type="checkbox"/> MATERIAL MEASURING AND CUTTING	<input type="checkbox"/> INSTALLATION	<input type="checkbox"/> INSURANCE FACILITIES	<input type="checkbox"/> FINANCE OPTIONS	<input type="checkbox"/>	<input type="checkbox"/>
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<input type="checkbox"/> INSURANCE FACILITIES	<input type="checkbox"/> FINANCE OPTIONS									
<input type="checkbox"/>	<input type="checkbox"/>									
1.2	<input type="checkbox"/>	<p>Demonstrate knowledge of the location of product range</p> <p>The candidate should demonstrate the location of a wide variety of stock, where relevant.</p>								
1.3	<input type="checkbox"/>	<p>Demonstrate operation of inventory system</p> <p><b>INVENTORY SYSTEM (MAY INCLUDE)</b></p> <table border="1"> <tr> <td><input type="checkbox"/> MANUAL</td> <td><input type="checkbox"/> ELECTRONIC</td> </tr> <tr> <td><input type="checkbox"/> CENTRALISED</td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </table> <p>The candidate should demonstrate operation of the inventory system by counting three stock lines on the shelf and cross checking them in the organisation stock inventory system</p>	<input type="checkbox"/> MANUAL	<input type="checkbox"/> ELECTRONIC	<input type="checkbox"/> CENTRALISED	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
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<input type="checkbox"/>	<input type="checkbox"/>									
1.4	<input type="checkbox"/>	<p>Develop product knowledge by accessing relevant sources of information</p> <p>The candidate should provide information on sources of information which could be utilised to develop product knowledge</p>								
1.5	<input type="checkbox"/>	<p>Develop knowledge and application of manufacturer technical information and specifications of product range</p> <p>The candidate must provide at least two examples of manufacturers' technical information used to pass on information to customers.</p>								
1.6	<input type="checkbox"/>	<p>Demonstrate use and operation of products accurately according to company/enterprise policy.</p> <p>The candidate should demonstrate operation of at least two products.</p>								
1.7	<input type="checkbox"/>	<p>Research comparisons between products and services and accurately apply according to product information</p> <p>The candidate must provide examples of demonstrating how to compare different products that are designed to complete the same task.</p>								

C	NYC															
1.8	<input type="checkbox"/>	<p>Demonstrate knowledge of relevant legislative requirements.</p> <p><b>RELEVANT LEGISLATIVE REQUIREMENTS (MAY INCLUDE)</b></p> <table border="1" data-bbox="379 315 1442 748"> <tr> <td><input type="checkbox"/> PRICING PROCEDURES, INCLUDING GST REQUIREMENTS</td> <td><input type="checkbox"/> CUSTOMS REGULATIONS</td> </tr> <tr> <td><input type="checkbox"/> CONSUMER LAW</td> <td><input type="checkbox"/> OHS</td> </tr> <tr> <td><input type="checkbox"/> TRADE PRACTICES AND FAIR TRADING ACTS</td> <td></td> </tr> <tr> <td><input type="checkbox"/> SALE OF SECOND-HAND GOODS</td> <td></td> </tr> <tr> <td><input type="checkbox"/> CONSUMER LAW</td> <td><input type="checkbox"/> PRIVACY LAWS</td> </tr> <tr> <td><input type="checkbox"/> INDUSTRY CODES OF PRACTICE</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td></td> </tr> </table> <p>The candidate should describe at least three relevant legislative requirements</p>	<input type="checkbox"/> PRICING PROCEDURES, INCLUDING GST REQUIREMENTS	<input type="checkbox"/> CUSTOMS REGULATIONS	<input type="checkbox"/> CONSUMER LAW	<input type="checkbox"/> OHS	<input type="checkbox"/> TRADE PRACTICES AND FAIR TRADING ACTS		<input type="checkbox"/> SALE OF SECOND-HAND GOODS		<input type="checkbox"/> CONSUMER LAW	<input type="checkbox"/> PRIVACY LAWS	<input type="checkbox"/> INDUSTRY CODES OF PRACTICE		<input type="checkbox"/>	
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1.9	<input type="checkbox"/>	<p>Convey product information to customers and other staff members as required</p> <p><b>CUSTOMERS (MAY INCLUDE)</b></p> <table border="1" data-bbox="379 909 1442 1173"> <tr> <td><input type="checkbox"/> PEOPLE WITH ROUTINE OR SPECIAL REQUESTS</td> </tr> <tr> <td><input type="checkbox"/> PEOPLE WITH SPECIAL NEEDS</td> </tr> <tr> <td><input type="checkbox"/> REGULAR AND NEW CUSTOMERS</td> </tr> <tr> <td><input type="checkbox"/> PEOPLE FROM A RANGE OF SOCIAL, CULTURAL AND ETHNIC BACKGROUNDS AND VARYING PHYSICAL AND MENTAL ABILITIES</td> </tr> <tr> <td><input type="checkbox"/> INDIVIDUALS OR ORGANISATIONS</td> </tr> </table> <p><b>STAFF MEMBERS (MAY INCLUDE)</b></p> <table border="1" data-bbox="379 1252 1442 1424"> <tr> <td><input type="checkbox"/> NEW OR EXISTING STAFF</td> </tr> <tr> <td><input type="checkbox"/> PEOPLE WITH VARYING LEVELS OF LANGUAGE AND LITERACY</td> </tr> <tr> <td><input type="checkbox"/> PEOPLE FROM A RANGE OF CULTURAL, SOCIAL AND ETHNIC BACKGROUNDS</td> </tr> </table> <p>The candidate should demonstrate conveying product information to at least two customers and staff members.</p>	<input type="checkbox"/> PEOPLE WITH ROUTINE OR SPECIAL REQUESTS	<input type="checkbox"/> PEOPLE WITH SPECIAL NEEDS	<input type="checkbox"/> REGULAR AND NEW CUSTOMERS	<input type="checkbox"/> PEOPLE FROM A RANGE OF SOCIAL, CULTURAL AND ETHNIC BACKGROUNDS AND VARYING PHYSICAL AND MENTAL ABILITIES	<input type="checkbox"/> INDIVIDUALS OR ORGANISATIONS	<input type="checkbox"/> NEW OR EXISTING STAFF	<input type="checkbox"/> PEOPLE WITH VARYING LEVELS OF LANGUAGE AND LITERACY	<input type="checkbox"/> PEOPLE FROM A RANGE OF CULTURAL, SOCIAL AND ETHNIC BACKGROUNDS						
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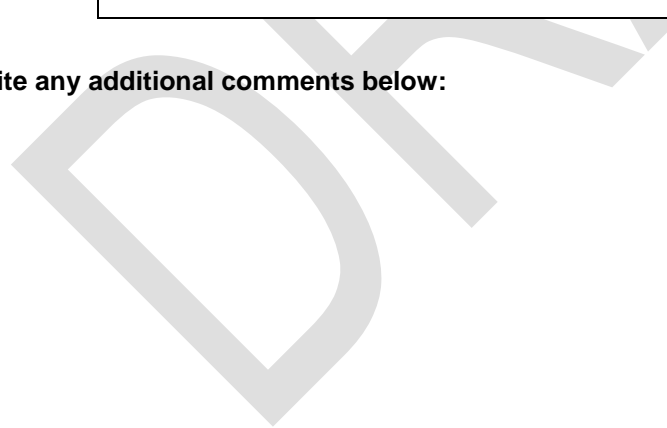
C	NYC																	
<input type="checkbox"/>	<input type="checkbox"/>	<b>Element 2: Recommend specialised products and services</b>																
	2.1	<p><input type="checkbox"/> Identify and evaluate customer needs to provide advice on product suitability to assist buying decisions</p> <p><b>CUSTOMER REQUIREMENTS (MAY INCLUDE)</b></p> <table border="1" data-bbox="379 461 1442 1111"> <tr> <td><input type="checkbox"/> USAGE REQUIREMENTS</td> <td><input type="checkbox"/> HEALTH FACTORS</td> </tr> <tr> <td><input type="checkbox"/> EXISTING SKILLS AND KNOWLEDGE</td> <td><input type="checkbox"/> LIFESTYLE</td> </tr> <tr> <td><input type="checkbox"/> EXPERIENCE AND PROFESSIONAL AND HOBBY NEEDS</td> <td><input type="checkbox"/> AGE SUITABILITY</td> </tr> <tr> <td><input type="checkbox"/> COLOUR PREFERENCE AND STYLE</td> <td><input type="checkbox"/> PRICE</td> </tr> <tr> <td><input type="checkbox"/> DURABILITY, FUNCTION AND USAGE</td> <td><input type="checkbox"/> SIZE</td> </tr> <tr> <td><input type="checkbox"/> CULTURE AND ETHNICITY</td> <td><input type="checkbox"/> INTERESTS</td> </tr> <tr> <td><input type="checkbox"/> AGE SUITABILITY</td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </table> <p><b>all appropriate must be ticked</b></p>	<input type="checkbox"/> USAGE REQUIREMENTS	<input type="checkbox"/> HEALTH FACTORS	<input type="checkbox"/> EXISTING SKILLS AND KNOWLEDGE	<input type="checkbox"/> LIFESTYLE	<input type="checkbox"/> EXPERIENCE AND PROFESSIONAL AND HOBBY NEEDS	<input type="checkbox"/> AGE SUITABILITY	<input type="checkbox"/> COLOUR PREFERENCE AND STYLE	<input type="checkbox"/> PRICE	<input type="checkbox"/> DURABILITY, FUNCTION AND USAGE	<input type="checkbox"/> SIZE	<input type="checkbox"/> CULTURE AND ETHNICITY	<input type="checkbox"/> INTERESTS	<input type="checkbox"/> AGE SUITABILITY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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<input type="checkbox"/> AGE SUITABILITY	<input type="checkbox"/>																	
<input type="checkbox"/>	<input type="checkbox"/>																	
	2.2	<p><input type="checkbox"/> Determine suitability of products and materials according to customer requirements and manufacturer specifications</p> <p>The candidate should explain how to determine which products and materials suit customer needs and manufacturer specifications</p>																
	2.3	<p><input type="checkbox"/> Provide accurate advice on product specifications to meet customer requirements according to legislative requirements</p> <p>The candidate should provide accurate advice to customers about product specifications on at least three occasions.</p>																
	2.4	<p><input type="checkbox"/> Convey features and benefits of products to customers to assist buying decisions</p> <p>The candidate should explain why there is a need to convey features and benefits of products to customers to assist buying decisions</p>																
	2.5	<p><input type="checkbox"/> Demonstrate or explain use and operation of products to customers in a systematic manner as required to create a buying environment</p> <p>The candidate should explain why it is necessary to use and operate products to customers in a systematic manner</p>																
	2.6	<p><input type="checkbox"/> Apply correct measuring, fitting or sizing procedures as relevant to the product.</p> <p>The candidate must demonstrate how to correctly measure, fit or size three different types of products.</p>																
	2.7	<p><input type="checkbox"/> Maintenance and care requirements of product accurately explained to customer as relevant to the product</p> <p>The candidate should explain why it is necessary to accurately explain the maintenance and care requirements of a product accurately to a customer.</p>																
	2.8	<p><input type="checkbox"/> Clearly explain safety features and safe usage of product to customer relevant to the product</p>																

		The candidate should outline the safety features and safe usage of at two products or services								
2.9	<input type="checkbox"/>	Maximise sales opportunities by use of add-on and complementary sales techniques The candidate should provide examples of add-on sales for a product and complimentary sales techniques								
2.10	<input type="checkbox"/>	Estimate quantities of product required The candidate should demonstrate how to estimate product quantities for two requirements								
<b>C</b>	<b>NYC</b>									
<input type="checkbox"/>	<input type="checkbox"/>	<b>Element 3: Advise on product warranties</b>								
3.1	<input type="checkbox"/>	Clearly explain to customer comparisons between products and manufacturer warranty terms <b>COMPARISONS (MAY INCLUDE)</b> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td><input type="checkbox"/> FEATURES</td> <td><input type="checkbox"/> BENEFITS</td> </tr> <tr> <td><input type="checkbox"/> LIMITATIONS</td> <td><input type="checkbox"/> DURATION</td> </tr> <tr> <td><input type="checkbox"/> PRICE, WHERE APPLICABLE</td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </table> all appropriate must be ticked	<input type="checkbox"/> FEATURES	<input type="checkbox"/> BENEFITS	<input type="checkbox"/> LIMITATIONS	<input type="checkbox"/> DURATION	<input type="checkbox"/> PRICE, WHERE APPLICABLE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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<input type="checkbox"/> PRICE, WHERE APPLICABLE	<input type="checkbox"/>									
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3.2	<input type="checkbox"/>	Confirm and accurately convey Individual product warranty terms and conditions to customers by accessing relevant sources of information The candidate should provide evidence of sourcing the correct information to convey the individual warranty terms and conditions for two products or services								
3.3	<input type="checkbox"/>	Provide customer with written information regarding individual product warranty terms and conditions, especially extended or promotional warranties, according to legislative requirements and organisation policies and procedures <b>ORGANISATION POLICY AND PROCEDURES (MAY INCLUDE)</b> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td><input type="checkbox"/> SELLING SPECIALISED PRODUCTS AND SERVICES</td> </tr> <tr> <td><input type="checkbox"/> INTERACTION WITH CUSTOMERS</td> </tr> <tr> <td><input type="checkbox"/> PROCESSING ITEMS FOR SERVICE AND REPAIR</td> </tr> </table> all appropriate must be ticked	<input type="checkbox"/> SELLING SPECIALISED PRODUCTS AND SERVICES	<input type="checkbox"/> INTERACTION WITH CUSTOMERS	<input type="checkbox"/> PROCESSING ITEMS FOR SERVICE AND REPAIR					
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<b>C</b>	<b>NYC</b>									
<input type="checkbox"/>	<input type="checkbox"/>	<b>Element 4: Quote on price and payment options</b>								
4.1	<input type="checkbox"/>	Calculate organisation recommended pricing for various product and service options and convey to customer according to legislative requirements  The candidate should demonstrate how to calculate pricing for different products or services and convey those to customers.								

4.2	<input type="checkbox"/>	<p>Perform negotiation of individual product prices where appropriate according to pricing determinants and company/enterprise policy</p> <table border="1" style="width: 100%;"> <tr> <td><input type="checkbox"/> PRICE MATCHING</td> <td><input type="checkbox"/> INDIVIDUAL DISCOUNTS</td> </tr> <tr> <td><input type="checkbox"/> ADDING VALUE TO PURCHASE</td> <td><input type="checkbox"/> BULK DISCOUNTS</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </table> <p>all appropriate must be ticked</p>	<input type="checkbox"/> PRICE MATCHING	<input type="checkbox"/> INDIVIDUAL DISCOUNTS	<input type="checkbox"/> ADDING VALUE TO PURCHASE	<input type="checkbox"/> BULK DISCOUNTS	<input type="checkbox"/>	<input type="checkbox"/>
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<input type="checkbox"/>	<input type="checkbox"/>							
4.3	<input type="checkbox"/>	<p>Convey payment and credit options to customers and negotiate a preferred option following organisation procedures</p> <p>The candidate should demonstrate how to convey payment and credit options to customers and negotiate a preferred option</p>						
<b>C</b>	<b>NYC</b>							
<input type="checkbox"/>	<input type="checkbox"/>	<b>Element 5: Advise on and arrange product service and repair</b>						
5.1	<input type="checkbox"/>	<p>Advise customer on organisation range of services and repairs according to organisation policy and procedures</p> <p>The candidate should demonstrate advising customers on the organisation range of service and repairs.</p>						
5.2	<input type="checkbox"/>	<p>Question and actively listen to customer to determine nature of problem</p> <p>The candidate should demonstrate how to question and actively listen to a customer to determine the nature of a problem.</p>						
5.3	<input type="checkbox"/>	<p>Complete diagnosis of problem in terms of operator and equipment faults</p> <p><b>DIAGNOSIS OF PROBLEM (MAY INCLUDE)</b></p> <table border="1" style="width: 100%;"> <tr> <td><input type="checkbox"/> FACE TO FACE</td> <td><input type="checkbox"/> BY TELEPHONE</td> </tr> <tr> <td><input type="checkbox"/> BY CORRESPONDENCE (ELECTRONIC OR POSTAL)</td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </table> <p>all appropriate must be ticked</p>	<input type="checkbox"/> FACE TO FACE	<input type="checkbox"/> BY TELEPHONE	<input type="checkbox"/> BY CORRESPONDENCE (ELECTRONIC OR POSTAL)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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<input type="checkbox"/> BY CORRESPONDENCE (ELECTRONIC OR POSTAL)	<input type="checkbox"/>							
<input type="checkbox"/>	<input type="checkbox"/>							
5.4	<input type="checkbox"/>	<p>Offer solutions according to nature of problem, available product information and company and enterprise policy</p> <p><input type="checkbox"/> Problem 1 –</p> <p><input type="checkbox"/> Problem 2 –</p> <p><input type="checkbox"/> Problem 3 –</p> <p>all appropriate must be ticked</p>						
5.5	<input type="checkbox"/>	<p>Identify service and repair process and accurately describe to customer as required, according to company and enterprise policy</p> <p>The candidate should identify the service and repair process for two different problems.</p> <p><input type="checkbox"/> Problem 1 –</p> <p><input type="checkbox"/> Problem 2 –</p>						

5.6	<input type="checkbox"/> Identify price and timelines for basic service and repairs and quote to customer where applicable The candidate should demonstrate how to identify price and timelines for basic service and repairs and quote to customer								
5.7	<input type="checkbox"/> Identify customer details and accurately transcribed to service report, according to company and enterprise procedures and legal requirements The candidate should demonstrate how to identify customer details and accurately transcribe them to service report								
5.8	<input type="checkbox"/> Label and securely store item for repair according to company and enterprise policy The candidate should demonstrate how to label and securely store item for repair								
5.9	<input type="checkbox"/> Organise service according to availability, customer requirements and legislative requirements The candidate should demonstrate how to organise service.								
5.10	<input type="checkbox"/> Notify customer without undue delay on completion of service and repair The candidate should explain why there is a need to notify customer without undue delay on completion of service and repair								
5.11	<input type="checkbox"/> Take follow up action as necessary to ensure customer satisfaction <b>FOLLOW UP ACTION (MAY INCLUDE)</b> <table border="1" data-bbox="379 918 1436 1198"> <tr> <td><input type="checkbox"/> FORMALLY OR INFORMALLY</td> <td><input type="checkbox"/> FACE TO FACE</td> </tr> <tr> <td><input type="checkbox"/> BY TELEPHONE</td> <td><input type="checkbox"/> BY APPOINTMENT</td> </tr> <tr> <td><input type="checkbox"/> BY CORRESPONDENCE (ELECTRONIC OR POSTAL)</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </table> all appropriate must be ticked	<input type="checkbox"/> FORMALLY OR INFORMALLY	<input type="checkbox"/> FACE TO FACE	<input type="checkbox"/> BY TELEPHONE	<input type="checkbox"/> BY APPOINTMENT	<input type="checkbox"/> BY CORRESPONDENCE (ELECTRONIC OR POSTAL)		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> FORMALLY OR INFORMALLY	<input type="checkbox"/> FACE TO FACE								
<input type="checkbox"/> BY TELEPHONE	<input type="checkbox"/> BY APPOINTMENT								
<input type="checkbox"/> BY CORRESPONDENCE (ELECTRONIC OR POSTAL)									
<input type="checkbox"/>	<input type="checkbox"/>								

Write any additional comments below:



## ASSESSMENT TOOL: Question Guide

### Instructions

- a. Modify or add to (but do not remove) the questions below as required to suit the particular workplace and assessment context.
- b. **Document any additional questions that you will ask and attach to this assessment record.**
- c. Questions can be asked during the demonstration of skills or at a separate time as appropriate.
- d. Answers by the candidate should reflect the level of the unit in scope and detail.

### Unit specific questions

Indicate whether the candidate's performance was competent (C), not yet competent (NYC) by ticking the appropriate box.

C	NYC	Questions to ascertain required knowledge	PC
<input type="checkbox"/>	<input type="checkbox"/>	1. Describe how to consistently update and apply product knowledge to provide comprehensive advice to customers and staff	1.4
<input type="checkbox"/>	<input type="checkbox"/>	2. Accurately provide estimates and quotes on quantities on the following: a) How many lineal metres of hardwood flooring with 85mm cover are needed to cover a room measuring 3.6wide x 4.2 m long? b) If the flooring is \$4.82 per lineal metre ex GST and the delivery cost is \$35, what is the total price?	2.6 2.10 4.1
<input type="checkbox"/>	<input type="checkbox"/>	3. Describe how to successfully negotiate and administer price and payment options with customers	4.2
<input type="checkbox"/>	<input type="checkbox"/>	4. Describe product or service you provide, and itemise the range available	1.1 1.5
<input type="checkbox"/>	<input type="checkbox"/>	5. Describe the information a customer may require about the product manufacturer	1.9
<input type="checkbox"/>	<input type="checkbox"/>	6. Describe a situation where you would make comparisons between products or services	2.2 2.4
<input type="checkbox"/>	<input type="checkbox"/>	7. Describe when it might be necessary to convey product information to other staff members	2.4
<input type="checkbox"/>	<input type="checkbox"/>	8. Describe how you might identify the customers "true needs" to ensure suitability of products and materials	5.2 5.4
<input type="checkbox"/>	<input type="checkbox"/>	9. Describe the difference between a feature and a benefit	2.4
<input type="checkbox"/>	<input type="checkbox"/>	10. Explain when and how you can use or operate products to create a buying environment	2.5
<input type="checkbox"/>	<input type="checkbox"/>	11. Describe the add on and complementary sales techniques you could use when selling a product	2.9
<input type="checkbox"/>	<input type="checkbox"/>	12. Describe the two types of warranties manufacturers may have to honour, and provide a definition of each	3.1 3.2 3.3
<input type="checkbox"/>	<input type="checkbox"/>	13. Explain what needs to be considered when pricing individual products	4.1
<input type="checkbox"/>	<input type="checkbox"/>	14. Describe what might be discussed with customers when negotiating pricing	4.2
<input type="checkbox"/>	<input type="checkbox"/>	15. Describe the policies and procedures regarding product servicing or repairs	5.1
<input type="checkbox"/>	<input type="checkbox"/>	16. List solutions you could offer if you diagnose the problem to be operator error or fault	5.3

**Write any additional comments below:**

### ASSESSMENT TOOL: Confirmation of Consistent Competence

Evidence confirming consistent competence may be gathered from a variety of suitable sources. This can include work records and examples of the candidate's work during or prior to the training period, and/or a report provided by a third party who has knowledge about the candidate's work over a reasonable period of time. This person could be a workplace skill expert, supervisor or team leader.

Indicate below the type of supplementary evidence used in this assessment, and where applicable attach copies of documents or photos/descriptions of finished products to this assessment plan.

✓	Type of evidence	✓	Type of evidence
	<ul style="list-style-type: none"> <li>• log book or record book</li> </ul>		<ul style="list-style-type: none"> <li>• site training records</li> </ul>
	<ul style="list-style-type: none"> <li>• site production records or similar work records</li> </ul>		<ul style="list-style-type: none"> <li>• completed assignment work</li> </ul>
	<ul style="list-style-type: none"> <li>• product samples or a portfolio of work</li> </ul>		<ul style="list-style-type: none"> <li>• attendance at training courses, workshops</li> </ul>
	<ul style="list-style-type: none"> <li>• third party report (see below)</li> </ul>		<ul style="list-style-type: none"> <li>• Other (please specify)</li> </ul>

## ASSESSMENT TOOL: MODEL ANSWER GUIDE

The guide below contains acceptable minimum answers for each of the questions asked in the Question Guide. The answers below are intended as examples of minimum acceptable answers from the candidates. It is expected that assessors will conduct their own assessment of the workplace in order to verify that the answers given match the workplace practice:

1	<p>Answer should include at least two of the following:</p> <ul style="list-style-type: none"> <li>• Training sessions or trade shows</li> <li>• Online research</li> <li>• Phone suppliers direct or product information line</li> <li>• Consult with experienced colleagues, mentors or customers</li> <li>• Consult with product representatives</li> <li>• Supplier product leaflets</li> <li>• Manufacturer's brochures and specifications</li> <li>• Catalogues</li> <li>• Customer feedback</li> </ul>
2	<p>Answer relevant to worksite should include two or more of the following:</p> <p style="margin-left: 20px;">a) 180.6 lineal metres</p> <p style="margin-left: 20px;">b) \$992.54</p>
3	<p>Answer should include reference to two or more of:</p> <ul style="list-style-type: none"> <li>• Consider sale volume, sale dollar value and product profit levels</li> <li>• Established customer purchase or account arrangements</li> <li>• Budgeted gross and net profits required by organisational policy and procedures</li> <li>• Payments can include cash, cheques, direct transfer, credit or other financial cards, account customers</li> </ul>
4	<p>Answer relevant to the workplace describing the type of product or service provided and itemising the major categories of the range available.</p>
5	<p>Answer may include:</p> <ul style="list-style-type: none"> <li>• Is the product made in Australia or imported?</li> <li>• The product manufacturer's contact details including web address</li> <li>• Is the manufacturer an established brand name?</li> <li>• The product manufacturer's history</li> <li>• The product manufacturer's ethical or environmental policies</li> <li>• The product manufacturer's product or service quality policy or systems</li> </ul>
6	<p>Answer may include:</p> <ul style="list-style-type: none"> <li>• Different price levels</li> <li>• Different usage</li> <li>• Providing options for customers to considers</li> <li>• Different needs</li> <li>• Different budgets</li> <li>• Professional or hobby needs</li> </ul>

7	<p>Answer may include:</p> <ul style="list-style-type: none"> <li>• Lack of experience or knowledge</li> <li>• Different job role</li> <li>• At a training session</li> <li>• Part of a mentoring or buddy program</li> <li>• Team support program</li> </ul>
8	<p>Answer should include:</p> <ul style="list-style-type: none"> <li>• Ask initial range of closed questions</li> <li>• Use active listening methods</li> <li>• Use feedback from initial questioning to compose closing questions which may be of an open or a closed nature</li> <li>• Use active listening methods</li> <li>• Restate your understanding of the customers “true needs”</li> <li>• Clarify any remaining misunderstanding</li> </ul>
9	<p>Answer may include:</p> <ul style="list-style-type: none"> <li>• A feature is a distinguishing product characteristic such as colour, size, identifying mark, construction or look</li> <li>• A benefit is the gain or advantage by using the product or service eg. aesthetics, productivity level, financial benefit, accuracy, service life, ease of installation, cost-effective option, durability, strength,</li> </ul>
10	<p>Answer may include:</p> <ul style="list-style-type: none"> <li>• Tool demonstration</li> <li>• Tactile interaction</li> <li>• Provide in-hand instant solution to a problem</li> <li>• Demonstrate to enhance benefits of product purchase</li> <li>• Counter buyer hesitancy</li> </ul>
11	<p>Answer should include:</p> <ul style="list-style-type: none"> <li>• On-sell – sell additional products or services that may be of a complimentary nature.</li> <li>• Co-sell – sell like products or services that go hand-in-hand</li> <li>• Solution-sell – sell a solution to an established problem</li> <li>• Value-sell – sell a product or service that offers better value than another product</li> <li>• Up-sell – sell a product of a higher price</li> <li>• Product or service trial</li> <li>• Provide samples and information</li> </ul>
12	<p>Answer must indicate the difference between different types of warranties:</p> <p>Express warranty is a written guarantee for a product or service that provides for time-related repair or replacement in the event of product breakdown or performance short-coming.</p> <p>Implied warranty is based on the understanding of the buyer that a product or service is merchantable (able to conform to an ordinary buyer’s expectations)</p>
13	<p>Answer can include:</p> <ul style="list-style-type: none"> <li>• Dollar value of sale</li> <li>• Organisational sales and profit budgets</li> <li>• Market pressures</li> <li>• Product quality</li> <li>• Customer status</li> </ul>

14	<p>Answer will vary with worksite. Answer can include:</p> <ul style="list-style-type: none"> <li>• Dollar value of sale</li> <li>• Product availability</li> <li>• Competitor’s product comparison</li> <li>• Value adding to purchase</li> <li>• Market pressures</li> <li>• Price matching - evidence of competitor’s price</li> <li>• Sale volume – bulk discounts</li> <li>• Company policy</li> </ul>
15	<p>Answer should include:</p> <ul style="list-style-type: none"> <li>• Product problem diagnosis</li> <li>• Product labelling procedures</li> <li>• Documenting product service or defect details</li> <li>• Procedure for establishing and communicating timelines and cost for service and repair</li> <li>• Product storage procedure</li> <li>• Taking follow-up action</li> </ul>
16	<p>Answer should refer to:</p> <ul style="list-style-type: none"> <li>• Lack of knowledge –provide or point out suitable sources of information</li> <li>• Incorrect training – retrain operator</li> <li>• Lack of care – point out cost of carelessness</li> <li>• Fatigue – inform operator of the possible safety and financial effects of fatigue</li> <li>• Offer an alternative method or tool for completing the task</li> </ul>

On (insert date)

From (list company)

These answers were last reviewed and moderated as effective by assessors including: (list initials)

### Third Party Report

The purpose of this report is to confirm that the assessment candidate can consistently apply the skills and knowledge of this unit to the required standard.

In order to complete this report, the third party will need to have direct knowledge of:

- the job function and the candidate’s application of skills and knowledge to that function
- any relevant legislation, regulations or industry standards
- the candidate’s ability to repeatedly perform to the required standard.

*Note: This report is used as one form of supporting evidence to be considered in the total assessment process and does not represent a final judgement on the competence of the candidate.*

#### PERFORMANCE CRITERIA

- Element 1:** Research product range
- Element 2:** Recommend specialised products and services
- Element 3:** Advise on product warranties
- Element 4:** Quote on price and payment options
- Element 5:** Advise on and arrange product service and repair

**In the view of the third party making this report, the candidate consistently..... (tick appropriate)**

YES	NO	
<input type="checkbox"/>	<input type="checkbox"/>	Follows OHS regulations, codes and site policies/procedures
<input type="checkbox"/>	<input type="checkbox"/>	Follows site procedures for using/maintaining personal protective equipment and clothing
<input type="checkbox"/>	<input type="checkbox"/>	Follows site environmental care policies/procedures
<input type="checkbox"/>	<input type="checkbox"/>	Communicates effectively and efficiently with others in the work area
<input type="checkbox"/>	<input type="checkbox"/>	Identifies and follows organisational policies and procedures and work orders
<input type="checkbox"/>	<input type="checkbox"/>	Safely and correctly uses any relevant tools, machinery, and equipment
<input type="checkbox"/>	<input type="checkbox"/>	Responds appropriately to tool, machinery, or equipment problems
<input type="checkbox"/>	<input type="checkbox"/>	Performs to the required quality and/or production standards

**Additional comments:**

<b>Name</b> .....	<b>Ph No.</b> .....
<b>Signature</b> .....	<b>Date</b> .....
<b>Organisation</b> .....	<b>Position</b> .....