



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
Enterprise type:	Product information knowledge	Merchandise:
	Brand options	Fasteners/adhesives
	Safety features/toxicity	Hand tools
	Manufacturing process	Power tools
	Environmental considerations	Timber supplies/products
Job role:		Paint/finishes
		Other:
	Service expertise	
	General public only	
Records (please specify)	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**

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What will be assessed?

The elements of competence to be assessed are:

- 1 Research store product range
- 2 Recommend home and home improvement products
- 3 Advise on product warranties
- 4 Estimate quantities and order product
- 5 Negotiate price and payment options
- 6 Advise on and arrange product services and repairs

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
- Home and home improvement products to recommend
- Product information
- Measuring tools and equipment
- 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 hardware product knowledge to advise customers and other sales staff with regard to design, technical features and uses of products, small machinery and equipment, home handyman advice, complimentary products, prices and warranties.

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"/>	Continually update and apply product knowledge to provide comprehensive advice to customers and other sales team members.
<input type="checkbox"/>	<input type="checkbox"/>	Understand and apply available product information when providing advice to customers
<input type="checkbox"/>	<input type="checkbox"/>	Consistently apply store 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 other sales team members on store home and home improvement products in the store merchandise range. Advise customers and other sales team members on store merchandise range warranties and store pricing and payment options.

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"/>	Element 1: Research store product range		
1.1	<input type="checkbox"/>	Develop product knowledge by accessing relevant sources of information PRODUCT KNOWLEDGE (MAY INCLUDE) <table style="width: 100%; border: 1px solid black; margin-top: 5px;"> <tr> <td style="width: 50%; vertical-align: top;"> <input type="checkbox"/> FUNCTION <input type="checkbox"/> WARRANTIES <input type="checkbox"/> ACCESSORIES </td> <td style="width: 50%; vertical-align: top;"> <input type="checkbox"/> BRAND AND PRODUCT OPTIONS <input type="checkbox"/> QUALITY <input type="checkbox"/> COMPONENT PARTS </td> </tr> </table>	<input type="checkbox"/> FUNCTION <input type="checkbox"/> WARRANTIES <input type="checkbox"/> ACCESSORIES	<input type="checkbox"/> BRAND AND PRODUCT OPTIONS <input type="checkbox"/> QUALITY <input type="checkbox"/> COMPONENT PARTS
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<input type="checkbox"/>	<input type="checkbox"/>	Element 2: Recommend home and home improvement products																		

C	NYC																							
2.1	<input type="checkbox"/>	<p>Identify relevant products to meet expressed customer requirements to assist their buying decisions.</p> <p>CUSTOMER REQUIREMENTS (MAY INCLUDE)</p> <table border="1" data-bbox="379 383 1445 555"> <tr> <td><input type="checkbox"/> USAGE REQUIREMENTS</td> <td><input type="checkbox"/> LIFESTYLE</td> </tr> <tr> <td><input type="checkbox"/> PRICE RANGE</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"/> USAGE REQUIREMENTS	<input type="checkbox"/> LIFESTYLE	<input type="checkbox"/> PRICE RANGE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																
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2.2	<input type="checkbox"/>	<p>Demonstrate features and benefits of products to customers to create a buying environment</p> <p>FEATURES AND BENEFITS OF PRODUCTS (MAY INCLUDE)</p> <table border="1" data-bbox="379 707 1445 1319"> <tr> <td><input type="checkbox"/> PRODUCT TYPE</td> <td><input type="checkbox"/> PRODUCT PERFORMANCE FEATURES</td> </tr> <tr> <td><input type="checkbox"/> PRODUCT DURABILITY</td> <td><input type="checkbox"/> FUNCTION</td> </tr> <tr> <td><input type="checkbox"/> WARRANTIES</td> <td><input type="checkbox"/> QUALITY</td> </tr> <tr> <td><input type="checkbox"/> DESIGN ASPECTS OF COLOUR AND TEXTURE FEEL</td> <td><input type="checkbox"/> THICKNESS AND WEIGHT OF FURNISHING FABRICS</td> </tr> <tr> <td><input type="checkbox"/> ACCOUSTIC AND THERMAL INSULATION PROPERTIES OF MATERIALS</td> <td><input type="checkbox"/> MANUFACTURING PROCESS</td> </tr> <tr> <td><input type="checkbox"/> PRICE</td> <td><input type="checkbox"/> COUNTRY OF MANUFACTURE</td> </tr> <tr> <td><input type="checkbox"/> ENERGY EFFICIENCY</td> <td><input type="checkbox"/> ENVIROMENTAL CONSIDERATIONS</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </table> <p>CUSTOMERS (MAY INCLUDE)</p> <table border="1" data-bbox="379 1435 1445 1760"> <tr> <td><input type="checkbox"/> NEW AND EXISTING CUSTOMERS</td> <td><input type="checkbox"/> PEOPLE FROM A RANGE OF SOCIAL, CULTURAL AND ETHNIC BACKGROUNDS AND WITH VARYING PHYSICAL AND MENTAL ABILITIES</td> </tr> <tr> <td><input type="checkbox"/> CUSTOMER WITH ROUTINE OR SPECIAL NEEDS</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"/> PRODUCT TYPE	<input type="checkbox"/> PRODUCT PERFORMANCE FEATURES	<input type="checkbox"/> PRODUCT DURABILITY	<input type="checkbox"/> FUNCTION	<input type="checkbox"/> WARRANTIES	<input type="checkbox"/> QUALITY	<input type="checkbox"/> DESIGN ASPECTS OF COLOUR AND TEXTURE FEEL	<input type="checkbox"/> THICKNESS AND WEIGHT OF FURNISHING FABRICS	<input type="checkbox"/> ACCOUSTIC AND THERMAL INSULATION PROPERTIES OF MATERIALS	<input type="checkbox"/> MANUFACTURING PROCESS	<input type="checkbox"/> PRICE	<input type="checkbox"/> COUNTRY OF MANUFACTURE	<input type="checkbox"/> ENERGY EFFICIENCY	<input type="checkbox"/> ENVIROMENTAL CONSIDERATIONS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> NEW AND EXISTING CUSTOMERS	<input type="checkbox"/> PEOPLE FROM A RANGE OF SOCIAL, CULTURAL AND ETHNIC BACKGROUNDS AND WITH VARYING PHYSICAL AND MENTAL ABILITIES	<input type="checkbox"/> CUSTOMER WITH ROUTINE OR SPECIAL NEEDS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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2.3	<input type="checkbox"/>	<p>Convey technical features and benefits as outlined in manufacturer specifications. The candidate should explain why there is a need to convey the technical features and benefits of products to customers to assist buying decisions</p>																						

C	NYC											
<input type="checkbox"/>	<input type="checkbox"/>	Element 3: Advise on product warranties										
3.1	<input type="checkbox"/>	<p>Clearly explain comparisons between product and manufacturer’s warranty terms to customers</p> <p>The candidate should compare two products and the terms of each manufacturer’s warranty.</p>										
3.2	<input type="checkbox"/>	<p>Confirm individual product warranty terms and by accessing relevant sources of information and accurately conveying to customers</p> <p>The candidate should provide evidence of sourcing the correct information to convey the individual warranty terms and conditions for two products or services</p>										
3.3	<input type="checkbox"/>	<p>Provide customer with written information regarding individual product warranty terms and conditions, especially extended or promotional warranties, according to store policies and procedures</p> <p>The candidate should demonstrate providing a customer with written information regarding individual warranty terms and conditions.</p>										
C	NYC											
<input type="checkbox"/>	<input type="checkbox"/>	Element 4: Estimate quantities and order product										
4.1	<input type="checkbox"/>	<p>Estimate area and product quantities, where required, based on manufacturer specifications, plan provided or customer needs.</p> <p>ESTIMATE AREA AND PRODUCT QUANTITIES (MAY INCLUDE)</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td><input type="checkbox"/> USING MEASURING TOOLS</td> <td><input type="checkbox"/> USING A CALCULATOR</td> </tr> <tr> <td><input type="checkbox"/> ESTIMATING FROM BUILDERS’ AND ARCHITECTS’ PLANS</td> <td><input type="checkbox"/> ON-SITE MEASURING</td> </tr> <tr> <td><input type="checkbox"/> ESTIMATING BASED ON MEASUREMENTS PROVIDED BY CUSTOMER</td> <td><input type="checkbox"/> MAKING ALLOWANCES FOR PATTERN MATCHING</td> </tr> <tr> <td><input type="checkbox"/> ESTIMATING LINEAR OR VOLUME-BASED QUANTITIES</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"/> USING MEASURING TOOLS	<input type="checkbox"/> USING A CALCULATOR	<input type="checkbox"/> ESTIMATING FROM BUILDERS’ AND ARCHITECTS’ PLANS	<input type="checkbox"/> ON-SITE MEASURING	<input type="checkbox"/> ESTIMATING BASED ON MEASUREMENTS PROVIDED BY CUSTOMER	<input type="checkbox"/> MAKING ALLOWANCES FOR PATTERN MATCHING	<input type="checkbox"/> ESTIMATING LINEAR OR VOLUME-BASED QUANTITIES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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<input type="checkbox"/>	<input type="checkbox"/>											
4.2	<input type="checkbox"/>	<p>Arrange for area measurement where indicated by product type and according to store procedures.</p> <p>The candidate should demonstrate how to arrange for an area measurement to take place.</p>										
4.3	<input type="checkbox"/>	<p>Calculate cost to customers and prepare quotes according to store policies and procedures.</p> <p>STORE POLICIES AND PROCEDURES (MAY INCLUDE)</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td><input type="checkbox"/> POLICY AND PROCEDURES RELATING TO SALES, PAYMENT AND CREDIT OPTIONS, STORE REWARD SCHEMES AND CUSTOMER SERVICE</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"/> POLICY AND PROCEDURES RELATING TO SALES, PAYMENT AND CREDIT OPTIONS, STORE REWARD SCHEMES AND CUSTOMER SERVICE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
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<input type="checkbox"/>	<input type="checkbox"/>											

4.4	<input type="checkbox"/>	Order product and arrange customer pick-up and delivery or installation where required. The candidate should demonstrate how to order products and arrange for delivery or installation.												
4.5	<input type="checkbox"/>	Provide customers with accurate information regarding product availability, delivery and installation procedures as required. The candidate should demonstrate how to provide customers with accurate information regarding product availability, delivery and installation procedures as required.												
4.6	<input type="checkbox"/>	Notify customers promptly of any undue delays regarding completion, supply or installation of products. The candidate should demonstrate how to notify customers promptly of any undue delays regarding completion, supply or installation of products.												
C	NYC													
<input type="checkbox"/>	<input type="checkbox"/>	Element 5: Negotiate price and payment options												
5.1	<input type="checkbox"/>	<p>Convey store recommended retail pricing for various brand options to customers according to legislative requirements</p> <p>LEGISLATIVE REQUIREMENTS (MAY INCLUDE)</p> <table border="1"> <tr> <td><input type="checkbox"/> CONSUMER LAW</td> <td><input type="checkbox"/> OCCUPATIONAL HEALTH AND SAFETY</td> </tr> <tr> <td><input type="checkbox"/> TRADE PRACTICES AND FAIR TRADING ACTS</td> <td><input type="checkbox"/> PRICING PROCEDURES INCLUDING GOODS AND SERVICES (GST) REQUIREMENTS</td> </tr> <tr> <td><input type="checkbox"/> TRANSPORT, HANDLING AND STORAGE OF GOODS</td> <td><input type="checkbox"/> INDUSTRY CODES OF PRACTICE</td> </tr> <tr> <td><input type="checkbox"/> ENVIRONMENTAL PROTECTION</td> <td><input type="checkbox"/> HAZARDOUS SUBSTANCES AND DANGEROUS GOODS</td> </tr> <tr> <td><input type="checkbox"/> PROVISION OF QUOTATIONS</td> <td><input type="checkbox"/> PROTECTIVE/SAFETY CLOTHING AND EQUIPMENT</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </table> <p>Candidate should demonstrate how to convey store recommended retail pricing for three brand options to customers</p>	<input type="checkbox"/> CONSUMER LAW	<input type="checkbox"/> OCCUPATIONAL HEALTH AND SAFETY	<input type="checkbox"/> TRADE PRACTICES AND FAIR TRADING ACTS	<input type="checkbox"/> PRICING PROCEDURES INCLUDING GOODS AND SERVICES (GST) REQUIREMENTS	<input type="checkbox"/> TRANSPORT, HANDLING AND STORAGE OF GOODS	<input type="checkbox"/> INDUSTRY CODES OF PRACTICE	<input type="checkbox"/> ENVIRONMENTAL PROTECTION	<input type="checkbox"/> HAZARDOUS SUBSTANCES AND DANGEROUS GOODS	<input type="checkbox"/> PROVISION OF QUOTATIONS	<input type="checkbox"/> PROTECTIVE/SAFETY CLOTHING AND EQUIPMENT	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> CONSUMER LAW	<input type="checkbox"/> OCCUPATIONAL HEALTH AND SAFETY													
<input type="checkbox"/> TRADE PRACTICES AND FAIR TRADING ACTS	<input type="checkbox"/> PRICING PROCEDURES INCLUDING GOODS AND SERVICES (GST) REQUIREMENTS													
<input type="checkbox"/> TRANSPORT, HANDLING AND STORAGE OF GOODS	<input type="checkbox"/> INDUSTRY CODES OF PRACTICE													
<input type="checkbox"/> ENVIRONMENTAL PROTECTION	<input type="checkbox"/> HAZARDOUS SUBSTANCES AND DANGEROUS GOODS													
<input type="checkbox"/> PROVISION OF QUOTATIONS	<input type="checkbox"/> PROTECTIVE/SAFETY CLOTHING AND EQUIPMENT													
<input type="checkbox"/>	<input type="checkbox"/>													
5.2	<input type="checkbox"/>	<p>Negotiate individual product prices according to store policy where necessary to achieve sales</p> <table border="1"> <tr> <td><input type="checkbox"/> PRICE MATCHING</td> <td><input type="checkbox"/> TRADE DISCOUNTS</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </table> <p>The candidate should demonstrate how to negotiate two individual product prices.</p>	<input type="checkbox"/> PRICE MATCHING	<input type="checkbox"/> TRADE DISCOUNTS	<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/> PRICE MATCHING	<input type="checkbox"/> TRADE DISCOUNTS													
<input type="checkbox"/>	<input type="checkbox"/>													
5.3	<input type="checkbox"/>	<p>Convey store payment options to customers and negotiate a preferred option following store procedures</p> <table border="1"> <tr> <td><input type="checkbox"/> ACCOUNT</td> <td><input type="checkbox"/> CASH</td> </tr> <tr> <td><input type="checkbox"/> CREDIT CARD</td> <td><input type="checkbox"/> CHEQUE</td> </tr> </table> <p>The candidate should demonstrate how to convey payment and credit options to customers and negotiate a preferred option</p>	<input type="checkbox"/> ACCOUNT	<input type="checkbox"/> CASH	<input type="checkbox"/> CREDIT CARD	<input type="checkbox"/> CHEQUE								
<input type="checkbox"/> ACCOUNT	<input type="checkbox"/> CASH													
<input type="checkbox"/> CREDIT CARD	<input type="checkbox"/> CHEQUE													
C	NYC													
<input type="checkbox"/>	<input type="checkbox"/>	Element 6: Advise on and arrange product services and repairs												

6.1	<input type="checkbox"/>	<p>Diagnose problem in terms of operator and equipment faults by observation, customer questioning and accessing manufacturer information.</p> <p>DIAGNOSIS OF PROBLEMS (MAY INCLUDE)</p> <table border="1" data-bbox="383 291 1444 414"> <tr> <td><input type="checkbox"/> FACE TO FACE</td> <td><input type="checkbox"/> TELEPHONE</td> </tr> <tr> <td><input type="checkbox"/> CORRESPONDENCE</td> <td><input type="checkbox"/></td> </tr> </table> <p>all appropriate must be ticked</p>	<input type="checkbox"/> FACE TO FACE	<input type="checkbox"/> TELEPHONE	<input type="checkbox"/> CORRESPONDENCE	<input type="checkbox"/>
<input type="checkbox"/> FACE TO FACE	<input type="checkbox"/> TELEPHONE					
<input type="checkbox"/> CORRESPONDENCE	<input type="checkbox"/>					
6.2	<input type="checkbox"/>	<p>Offer solutions according to nature of problem, available product and store policy. The candidate should provide possible solutions for at least two product or service problems Record details and dates (where applicable)</p> <p>.....</p> <p>.....</p>				
6.3	<input type="checkbox"/>	<p>Identify and accurately describe service and repair process to customer as required, according to store policy Record details and dates (where applicable)</p> <p>.....</p> <p>.....</p> <p>The candidate should identify the service and repair process for two different problems.</p>				
6.4	<input type="checkbox"/>	<p>Prepare and supply quotations and timelines to customers for basic service and repairs, including price and timelines. The candidate should demonstrate how to identify prepare and timelines for basic service and repairs and quote to customer Record details and dates (where applicable)</p> <p>.....</p> <p>.....</p>				
6.5	<input type="checkbox"/>	<p>Identify and accurately transcribe customer details to repair form according to store procedures. The candidate should demonstrate how to identify customer details and accurately transcribe them to service report</p>				
6.7	<input type="checkbox"/>	<p>Label and securely store items for repair according to store policy The candidate should demonstrate how to label and securely store an item for repair</p>				
6.8	<input type="checkbox"/>	<p>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</p>				

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 where information could be accessed to develop product knowledge	1.1
<input type="checkbox"/>	<input type="checkbox"/>	2. Describe the methods of measuring or sizing used for the products you sell	KB 4.1
<input type="checkbox"/>	<input type="checkbox"/>	3. Explain how you identify the customers "true needs" to ensure suitability of products/materials	2.1
<input type="checkbox"/>	<input type="checkbox"/>	4. Explain what legislative requirements or acts apply to implied warranties	3.2
<input type="checkbox"/>	<input type="checkbox"/>	5. Describe the difference between a feature and a benefit	2.2
<input type="checkbox"/>	<input type="checkbox"/>	6. Describe how you estimate required quantities of a hardware product you sell	4.1
<input type="checkbox"/>	<input type="checkbox"/>	7. List the measuring tools used for specific products	KB 4.1
<input type="checkbox"/>	<input type="checkbox"/>	8. Explain how the consequences of making a mathematical error in a quotation can affect the sale	4.3
<input type="checkbox"/>	<input type="checkbox"/>	9. Describe the two types of warranties manufacturers may have to honour, and provide a definition of each	3.1
<input type="checkbox"/>	<input type="checkbox"/>	10. Explain how you convey legislative requirements to customers	3.3
<input type="checkbox"/>	<input type="checkbox"/>	11. Describe what might be discussed with customers when negotiating pricing	5.2
<input type="checkbox"/>	<input type="checkbox"/>	12. Describe the company/enterprise policies and procedures for credit accounts	5.3
<input type="checkbox"/>	<input type="checkbox"/>	13. Describe the questioning technique used to establish and fully understand the true nature of problems	6.1
<input type="checkbox"/>	<input type="checkbox"/>	14. Describe what manufacturer's information could be used to diagnose problems	6.1
<input type="checkbox"/>	<input type="checkbox"/>	15. Describe what solutions you could offer if you diagnose the problem to be operator error or fault	6.2
<input type="checkbox"/>	<input type="checkbox"/>	16. Describe how you notify customers of completed service or repair work	6.8

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

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 store product range
- Element 2:** Recommend home and home improvement products
- Element 3:** Advise on product warranties
- Element 4:** Estimate quantities and order product
- Element 5:** Negotiate price and payment options
- Element 6:** 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:

Name	Ph No.
Signature	Date
Organisation	Position

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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"> • Training sessions or trade shows • Online research • Phone suppliers direct or product information line • Consult with experienced colleagues, mentors or customers • Consult with product representatives • Supplier product leaflets • Manufacturer’s brochures and specifications • Catalogues • Customer feedback
2	<p>Answer relevant to worksite should include two or more of the following:</p> <ul style="list-style-type: none"> • Tape measure or other length measuring tools • Length by increment • Nominal sizing • Computerised measuring devices • Scales • Estimation
3	<p>Answer should include:</p> <ul style="list-style-type: none"> • Ask initial range of closed questions • Use active listening methods • Use feedback from initial questioning to compose closing questions which may be of an open or a closed nature • Use active listening methods • Restate your understanding of the customers “true needs” • Clarify any remaining misunderstanding
4	<p>Answer should include the following:</p> <ul style="list-style-type: none"> • <i>Fair Trading Act</i> • <i>Trade Practices Act</i>
5	<p>Answer may include:</p> <ul style="list-style-type: none"> • A feature is a distinguishing product characteristic such as colour, size, identifying mark, construction or look • 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,
6	<p>Answer relevant to workplace may include the following:</p> <ul style="list-style-type: none"> • Read architects or builders plans or estimates • Gather required information from customer and calculate accordingly • Consult with estimator detailer • Use product brochures or other product information • Consult product manufacturer’s website • Record product details.....

7	<p>Answer relevant to workplace may include the following:</p> <ul style="list-style-type: none"> • Tape measure • Measuring sticks • Scales • Electronic measuring devices • Measuring jugs or decanters • Gauges
8	<p>Answer should include at least three of the following:</p> <ul style="list-style-type: none"> • Inaccurate estimates • Incorrect orders • Affect budgets through loss of profit • Affect chances of winning the job • Demonstrate poor customer services levels • Upset customer • Affect tradesman or other installers • Waste time and or products
9	<p>Answer must indicate the difference between different types of warranties: 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. 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>
10	<p>Answer may include:</p> <ul style="list-style-type: none"> • A feature is a distinguishing product characteristic such as colour, size, identifying mark, construction or look • 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
11	<p>Answer should include reference to two or more of:</p> <ul style="list-style-type: none"> • Consider sale volume, sale dollar value and product profit levels • Established customer purchase or account arrangements • Budgeted gross and net profits required by organisational policy and procedures • Payments can include cash, cheques, direct transfer, credit or other financial cards, account customers
12	<p>Answer relevant to the workplace, however must include detail the following:</p> <ul style="list-style-type: none"> • Relevant application forms to complete • Dollar limit of account • Terms of trade eg. 7 days, 14 days, 30 days, etc. • Means of payment • Credit control procedures
13	<p>Answer should include: Questioning technique – active listening</p> <ul style="list-style-type: none"> • Ask initial range of closed questions • Use active listening method • Use feedback from initial questioning to compose closing questions which may be of an open or a closed nature • Use active listening method • Restate your understanding of the customers “true needs” • Clarify any remaining misunderstanding
14	<p>Answer will vary with worksite. Answer can include:</p> <ul style="list-style-type: none"> • Owners manual

	<ul style="list-style-type: none"> • User guide • Product brochure • Manufacturer's website • Trouble shooting manual
15	<p>Answer should refer to:</p> <ul style="list-style-type: none"> • Lack of knowledge –provide or point out suitable sources of information • Incorrect training – retrain operator • Lack of care – point out cost of carelessness • Fatigue – inform operator of the possible safety and financial effects of fatigue • Offer an alternative method or tool for completing the task
16	<p>Answer relevant to workplace and position however must specify the variety of methods used:</p> <ul style="list-style-type: none"> • Face to face • Phone call • SMS • Email • Letter

On (insert date)

From (list company)

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

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