

Instruction Sheet for the Candidate

Qualification	National Vocational Certificate in Metal Forming & Processing Level 5
Competency Standard	Develop sales plan
Purpose of Assessment	Formative Assessment
Candidate Details	Name _____ Registration/Roll Number _____
Guidance for Candidate	<p>To meet this standard, you are required to complete the following within 04 Hrs. time frame (for practical demonstration & assessment):</p> <ul style="list-style-type: none"> • CU1. Identify organizational strategic direction • CU2. Establish performance targets • CU3. Develop a sales plan for a product • CU4. Identify support requirements • CU5. Monitor and review sales plan
Time: 04 Hrs.	During a practical assessment, under observation by an assessor, you are required to
Minimum Evidence Required	<p>CU1. Identify organizational strategic direction P1. Obtain and analyze assessment of market needs and strategic planning documents P2. Review previous sales performance and successful approaches to identify factors affecting performance P3. Analyze information on market needs, new opportunities, customer profiles and requirements as a basis for decision making P4. Carry out competitor analysis for rate structure</p> <p>CU2. Establish performance targets P1. Determine practical and achievable sales targets P2. Establish realistic timelines for achieving targets P3. Determine measures to allow for monitoring of performance P4. Ensure objectives of the sales plan and style of the campaign are consistent with organizational strategic objectives and corporate image</p> <p>CU3. Develop a sales plan for a product P1. Determine approaches to be used to meet sales objectives P2. Identify additional expertise requirements and allocate budgetary resources accordingly P3. Identify risks and develop risk controls P4. Develop advertising and promotional strategy for product P5. Identify appropriate distribution channels for product P6. Prepare a budget for the sales plan P7. Present documented sales plan to appropriate personnel for approval</p>

	<p>CU4. Identify support requirements</p> <p>P1. Identify and acquire staff resources to implement sales plan</p> <p>P2. Develop an appropriate selling approach</p> <p>P3. Train staff in the selling approach selected</p> <p>P4. Develop and assess staff knowledge of product to be sold</p> <p>CU5. Monitor and review sales plan</p> <p>P1. Monitor implementation of the sales plan</p> <p>P2. Record data measuring performance versus sales targets</p> <p>P3. Make adjustments to sales plan as required to ensure required results are obtained</p>
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Self-Assessment Checklist

Candidate Name	
Registration No.	
Qualification	National Vocational Certificate in Metal Forming & Processing Level 5
Competency Standard	Develop sales plan
Purpose of Assessment	Formative Assessment
Assessment Task	<ul style="list-style-type: none"> CU1. Identify organizational strategic direction CU2. Establish performance targets CU3. Develop a sales plan for a product CU4. Identify support requirements CU5. Monitor and review sales plan

I can.....

Performance Criteria	Yes	No
P1. Obtain and analyze assessment of market needs and strategic planning documents	<input type="checkbox"/>	<input type="checkbox"/>
P2. Review previous sales performance and successful approaches to identify factors affecting performance	<input type="checkbox"/>	<input type="checkbox"/>
P3. Analyze information on market needs, new opportunities, customer profiles and requirements as a basis for decision making	<input type="checkbox"/>	<input type="checkbox"/>
P4. Carry out competitor analysis for rate structure	<input type="checkbox"/>	<input type="checkbox"/>
P5. Determine practical and achievable sales targets	<input type="checkbox"/>	<input type="checkbox"/>
P6. Establish realistic timelines for achieving targets	<input type="checkbox"/>	<input type="checkbox"/>
P7. Determine measures to allow for monitoring of performance	<input type="checkbox"/>	<input type="checkbox"/>
P8. Ensure objectives of the sales plan and style of the campaign are consistent with organizational strategic objectives and corporate image	<input type="checkbox"/>	<input type="checkbox"/>
P9. Determine approaches to be used to meet sales objectives	<input type="checkbox"/>	<input type="checkbox"/>
P10. Identify additional expertise requirements and allocate budgetary resources accordingly	<input type="checkbox"/>	<input type="checkbox"/>
P11. Identify risks and develop risk controls	<input type="checkbox"/>	<input type="checkbox"/>
P12. Develop advertising and promotional strategy for product	<input type="checkbox"/>	<input type="checkbox"/>
P13. Identify appropriate distribution channels for product	<input type="checkbox"/>	<input type="checkbox"/>
P14. Prepare a budget for the sales plan	<input type="checkbox"/>	<input type="checkbox"/>
P15. Present documented sales plan to appropriate personnel for approval	<input type="checkbox"/>	<input type="checkbox"/>

P16. Identify and acquire staff resources to implement sales plan	<input type="text"/>	<input type="text"/>
P17. Develop an appropriate selling approach	<input type="text"/>	<input type="text"/>
P18. Train staff in the selling approach selected	<input type="text"/>	<input type="text"/>
P19. Develop and assess staff knowledge of product to be sold	<input type="text"/>	<input type="text"/>
P20. Monitor implementation of the sales plan	<input type="text"/>	<input type="text"/>
P21. Record data measuring performance versus sales targets	<input type="text"/>	<input type="text"/>
P22. Make adjustments to sales plan as required to ensure required results are obtained	<input type="text"/>	<input type="text"/>

Candidate's Signature _____ Assessor's Signature _____

Date: _____

Assessors Judgment Guide

Qualification	National Vocational Certificate in Metal Forming & Processing Level 5
Competency Standard	Develop sales plan
Purpose of Assessment	Formative Assessment
Candidate Details	Name: _____ Registration/Roll Number: _____ Signature: _____
Assessment Outcome	COMPETENT <input type="checkbox"/> NOT YET COMPETENT <input type="checkbox"/> Name of the Assessor _____ Assessor's code: _____ Signature: _____

Assessment Summary (to be filled by the assessor)							
Activity	Method					Result	
Nature of Activity	Written	Oral	Observation	Portfolio	Role Play	Competent	Not Yet Competent
Practical Skill Demonstration			✓				
Knowledge Assessment		✓					
Other Requirement							

Observation Checklist

Assessment Task		<ul style="list-style-type: none"> • CU1. Identify organizational strategic direction • CU2. Establish performance targets • CU3. Develop a sales plan for a product • CU4. Identify support requirements • CU5. Monitor and review sales plan 		
During the practical assessment, candidate demonstrated the following:		Yes	No	Remarks
1.	Obtain and analyze assessment of market needs and strategic planning documents			
2.	Review previous sales performance and successful approaches to identify factors affecting performance			
3.	Analyze information on market needs, new opportunities, customer profiles and requirements as a basis for decision making			
4.	Carry out competitor analysis for rate structure			
5.	Determine practical and achievable sales targets			
6.	Establish realistic timelines for achieving targets			
7.	Determine measures to allow for monitoring of performance			
8.	Ensure objectives of the sales plan and style of the campaign are consistent with organizational strategic objectives and corporate image			
9.	Determine approaches to be used to meet sales objectives			
10.	Identify additional expertise requirements and allocate budgetary resources accordingly			
11.	Identify risks and develop risk controls			
12.	Develop advertising and promotional strategy for product			
13.	Identify appropriate distribution channels for product			
14.	Prepare a budget for the sales plan			
15.	Present documented sales plan to appropriate personnel for approval			
16.	Identify and acquire staff resources to implement sales plan			

17.	Develop an appropriate selling approach			
18.	Train staff in the selling approach selected			
19.	Develop and assess staff knowledge of product to be sold			
20.	Monitor implementation of the sales plan			
21.	Record data measuring performance versus sales targets			
22.	Make adjustments to sales plan as required to ensure required results are obtained			
Competent <input type="checkbox"/>		Not Yet Competent <input type="checkbox"/>		

Knowledge Assessment

Qualification	National Vocational Certificate in Metal Forming & Processing Level 5
Competency Standard	Develop sales plan
Purpose of Assessment	Formative Assessment
Candidate Details	Name: _____ Registration/Roll Number: _____ Candidate Signature: _____
Assessment Outcome	<div style="display: flex; justify-content: space-around; align-items: center;"> COMPETENT <input type="checkbox"/> NOT YET COMPETENT <input type="checkbox"/> </div> Name of the Assessor: _____ Assessor's code: _____ Signature of the Assessor: _____

Candidate's response is not required to be identical, but similar concepts and/or keywords must be used. Oral questioning may be used to clarify candidate understanding of topic and its application.

Questions (Candidate confidently answered questions correctly and demonstrated understanding of the topics and their application)		Satisfactory	Not Satisfactory
1.	What does a sales plan consist of?		
2.	What are different selling strategies?		

3.	What is the 7 P's of marketing?		

Feedback to the Candidate	
Candidate's Signature _____	Assessor's Signature _____