

Instruction Sheet for the Candidate

Qualification	National Vocational Certificate in Metal Forming & Processing Level 5
Competency Standard	Conduct research for customer needs and satisfaction
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. Assist customer to articulate needs • CU2. Satisfy complex customer needs • CU3. Manage networks to ensure customer needs are addressed • CU4. Convert customer enquiries into sales
Time: 04 Hrs.	During a practical assessment, under observation by an assessor, you are required to
Minimum Evidence Required	<p>CU1. Assist customer to articulate needs P1. Ensure customer needs are fully explored, understood and agreed P2. Explain and match available services and products to customer needs P3. Identify and communicate rights and responsibilities of customers to the customer as appropriate</p> <p>CU2. Satisfy complex customer needs P1. Explain possibilities for meeting customer needs P2. Assist customers to evaluate service and/or product options to satisfy their needs P3. Determine and prioritize preferred actions P4. Identify potential areas of difficulty in customer service delivery and take appropriate actions in a positive manner</p> <p>CU3. Manage networks to ensure customer needs are addressed P1. Establish effective regular communication with customers P2. Establish, maintain and expand relevant networks to ensure appropriate referral of customers to products and services from within and outside the organization P3. Ensure procedures are in place to ensure that decisions about targeting of customer services are based on up-to-date information about the customer and the products and services available P4. Ensure procedures are put in place to ensure that referrals are based on the matching of the assessment of customer needs and availability of products and services P5. Maintain records of customer interaction in accordance with</p>

	<p>organizational procedures</p> <p>CU4. Convert customer enquiries into sales</p> <p>P1. Use information provided by customers or accessed from the customer relationship management (CRM) system to identify any needs</p> <p>P2. Identify suitable products/services to meet needs</p> <p>P3. Make convincing sales pitches to customers following standard scripts</p> <p>P4. Handle customer queries, objections and rebuttals following standard scripts</p> <p>P5. Adapt your approach and style to customer preferences, within the limits of your competence and authority</p> <p>P6. Refer issues outside your area of competence and authority to appropriate people, following your organization's procedures</p> <p>P7. Identify and act on opportunities to up-sell or cross-sell other products/services to customers</p> <p>P8. Confirm customer wishes and needs in order to close sales</p> <p>P9. Obtain required financial information from customers, following your organization's procedures</p> <p>P10. Complete your organization's post-sales procedures in order to complete/ fulfill sales</p> <p>P11. Comply with relevant standards, policies, procedures and guidelines when converting customer enquiries into sales</p>
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Self-Assessment Checklist

Candidate Name	
Registration No.	
Qualification	National Vocational Certificate in Metal Forming & Processing Level 5
Competency Standard	Conduct research for customer needs and satisfaction
Purpose of Assessment	Formative Assessment
Assessment Task	<ul style="list-style-type: none"> • CU1. Assist customer to articulate needs • CU2. Satisfy complex customer needs • CU3. Manage networks to ensure customer needs are addressed • CU4. Convert customer enquiries into sales

I can.....

Performance Criteria	Yes	No
P1. Ensure customer needs are fully explored, understood and agreed	<input type="checkbox"/>	<input type="checkbox"/>
P2. Explain and match available services and products to customer needs	<input type="checkbox"/>	<input type="checkbox"/>
P3. Identify and communicate rights and responsibilities of customers to the customer as appropriate	<input type="checkbox"/>	<input type="checkbox"/>
P4. Explain possibilities for meeting customer needs	<input type="checkbox"/>	<input type="checkbox"/>
P5. Assist customers to evaluate service and/or product options to satisfy their needs	<input type="checkbox"/>	<input type="checkbox"/>
P6. Determine and prioritize preferred actions	<input type="checkbox"/>	<input type="checkbox"/>
P7. Identify potential areas of difficulty in customer service delivery and take appropriate actions in a positive manner	<input type="checkbox"/>	<input type="checkbox"/>
P8. Establish effective regular communication with customers	<input type="checkbox"/>	<input type="checkbox"/>
P9. Establish, maintain and expand relevant networks to ensure appropriate referral of customers to products and services from within and outside the organization	<input type="checkbox"/>	<input type="checkbox"/>
P10. Ensure procedures are in place to ensure that decisions about targeting of customer services are based on up-to-date information about the customer and the products and services available	<input type="checkbox"/>	<input type="checkbox"/>
P11. Ensure procedures are put in place to ensure that referrals are based on the matching of the assessment of customer needs and availability of products and services	<input type="checkbox"/>	<input type="checkbox"/>

P12. Maintain records of customer interaction in accordance with organizational procedures	<input type="text"/>	<input type="text"/>
P13. Use information provided by customers or accessed from the customer relationship management (CRM) system to identify any needs	<input type="text"/>	<input type="text"/>
P14. Identify suitable products/services to meet needs	<input type="text"/>	<input type="text"/>
P15. Make convincing sales pitches to customers following standard scripts	<input type="text"/>	<input type="text"/>
P16. Handle customer queries, objections and rebuttals following standard scripts	<input type="text"/>	<input type="text"/>
P17. Adapt your approach and style to customer preferences, within the limits of your competence and authority	<input type="text"/>	<input type="text"/>
P18. Refer issues outside your area of competence and authority to appropriate people, following your organization's procedures	<input type="text"/>	<input type="text"/>
P19. Identify and act on opportunities to up-sell or cross-sell other products/services to customers	<input type="text"/>	<input type="text"/>
P20. Confirm customer wishes and needs in order to close sales	<input type="text"/>	<input type="text"/>
P21. Obtain required financial information from customers, following your organization's procedures	<input type="text"/>	<input type="text"/>
P22. Complete your organization's post-sales procedures in order to complete/ fulfill sales	<input type="text"/>	<input type="text"/>
P23. Comply with relevant standards, policies, procedures and guidelines when converting customer enquiries into sales	<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	Conduct research for customer needs and satisfaction
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. Assist customer to articulate needs• CU2. Satisfy complex customer needs• CU3. Manage networks to ensure customer needs are addressed• CU4. Convert customer enquiries into sales		
During the practical assessment, candidate demonstrated the following:		Yes	No	Remarks
1.	Ensure customer needs are fully explored, understood and agreed			
2.	Explain and match available services and products to customer needs			
3.	Identify and communicate rights and responsibilities of customers to the customer as appropriate			
4.	Explain possibilities for meeting customer needs			
5.	Assist customers to evaluate service and/or product options to satisfy their needs			
6.	Determine and prioritize preferred actions			
7.	Identify potential areas of difficulty in customer service delivery and take appropriate actions in a positive manner			
8.	Establish effective regular communication with customers			
9.	Establish, maintain and expand relevant networks to ensure appropriate referral of customers to products and services from within and outside the organization			
10.	Ensure procedures are in place to ensure that decisions about targeting of customer services are based on up-to-date information about the customer and the products and services available			
11.	Ensure procedures are put in place to ensure that referrals are based on the matching of the assessment of customer needs and availability of products and services			
12.	Maintain records of customer interaction in accordance with organizational procedures			
13.	Use information provided by customers or accessed from the customer relationship management (CRM) system to identify any			

	needs			
14.	Identify suitable products/services to meet needs			
15.	Make convincing sales pitches to customers following standard scripts			
16.	Handle customer queries, objections and rebuttals following standard scripts			
17.	Adapt your approach and style to customer preferences, within the limits of your competence and authority			
18.	Refer issues outside your area of competence and authority to appropriate people, following your organization's procedures			
19.	Identify and act on opportunities to up-sell or cross-sell other products/services to customers			
20.	Confirm customer wishes and needs in order to close sales			
21.	Obtain required financial information from customers, following your organization's procedures			
22.	Complete your organization's post-sales procedures in order to complete/ fulfill sales			
23.	Comply with relevant standards, policies, procedures and guidelines when converting customer enquiries into sales			
Competent <input type="checkbox"/>		Not Yet Competent <input type="checkbox"/>		

Knowledge Assessment

Qualification	National Vocational Certificate in Metal Forming & Processing Level 5
Competency Standard	Conduct research for customer needs and satisfaction
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.	How do you conduct customer needs research?		
2.	What is customer satisfaction, state with example?		

3.	State Consumer rights and responsibilities		

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