



# Recognition of Prior Learning (RPL)

## ***EVIDENCE GUIDE FOR BUSINESS CAPACITY***



# **National Certificate in Professional Driving**

## **Qualification ID: 50285**

***Evidence Guide for RPL***

***Document 3***

***Business Capacity***

## UNIT STANDARDS IN THIS VOLUME

Unit Standard Number	Unit Standard Title	NQF Level	Credit Value
123258	Foster and maintain customer relations	3	10
8000	Apply basic business principles	3	9
7997	Managing self-development	4	12

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## INTRODUCTION TO RPL BUSINESS CAPACITY EVIDENCE DOCUMENT 3

### 1. Background

In the Recognition of Prior Learning (RPL) Evidence Document 3, you will be assessed in line with all three Unit Standards in this volume. There will be an Evidence Collector who will submit your assessments to an Assessor. The Assessor will assess your work and will find your evidence either, 'competent' or 'not yet competent' that are based on the evidence you submitted to the Evidence Collector.

#### HOW WILL THE COMPETENCY-BASED ASSESSMENT WORK?

All the instruments developed for this qualification are competency-based followed by the following approaches:

##### a. Criterion based

Each candidate who is assessed is not in competition with their peers, but is assessed against standard criteria or benchmarks. The criteria used are the *National Certificate in Professional Driving* against the specific outcomes and assessment criteria of all unit standards that are made up in this qualification.

##### b. Evidence based

Whether a person is competent is based upon evidence provided by the learner. The evidence may be demonstrated or produced by the candidate or gathered by the assessor.

##### c. Participatory

The candidate is encouraged to be involved in the process of assessment. The candidate and assessors have the scope to negotiate the form and range of assessment activities.

##### d. The Assessment process involves:

- Collection of evidence
- Judgment
- Recording

### 2. Defining REPLY

Recognition of Prior Learning (RPL) is the comparison of the previous learning and experience of a learner howsoever obtained against the learning outcomes of a specific qualification, in addition, the acceptance thereof for purposes of certification.

The above definition holds the following implications:

- a. That a comparison of contextualized competence be done against the unit Standards requirements in a holistic way,
- b. That recognition is done for learning and experience, not one or the other only, and
- c. That the process is focused on the learner and his/her current competence, not historical evidence only.

To understand the process, you need to understand the role of the two role players that are going to help you to become competent:

### 3. The Two Role Players in RPL

There are two role players in this process. They are:

- a. The **Evidence Collection Facilitator (ECF)** is a person familiar with this field, who can help you to gather and organise evidence to prove to the assessor that you are competent.
- b. The **Assessor** is a subject-matter expert who is registered as an assessor and will be able to weigh up the evidence you provide against the outcomes of each unit standard and qualification.

### 4. The Steps of the RPL Process

- a. If you follow the five steps outlined below, you will progressively achieve competence, and at the end of the process be equipped.
- b. You will apply a step-by-step method (see *Steps in the RPL process*) to all three unit standards in this Evidence Guide for RPL.

**Table 1: Steps in the RPL Process**

Step 1	Review the Evidence Guides for each outcome of the unit standard.
Step 2	On each Evidence Guide the assessment criteria are listed. Each of these criteria includes different ways of assessment s for e.g. assignment, direct observation, written test, project etc. This will help you to show evidence of your competence of the specific outcomes.
Step 3	Keep on collecting evidence and put them into your portfolio of evidence. This evidence will include all the work you have completed.
Step 4	You can monitor your progress by initialling and dating the <b>SELF-ASSESSMENT</b> checkboxes for each specific outcome.
Step 5	Once you have initialled all the self-assessment checkboxes on a page, you can ask the 'Evidence Collection Facilitator' to check the evidence, and to initial and date each of the <b>ECF EVALUATION</b> checkboxes.

**Note:**

Complete the above five steps for each RPL Evidence Guide for all the unit standards in this RPL Evidence Guide. Remember to refer to the original unit standard reproduced in this RPL Evidence Guide to cross-check the evidence.

You may discover when you go through this process that you need more training. If a need arises then you should arrange training with the person who is responsible for your training. Ask for a training plan.

Once you have collected all the evidence for this RPL Evidence Guide and the ECF has signed off the evidence, then you are ready to do the Summative Assessment.

## Unit Standard 1 of this Volume

1. Unit Standard ID Title	Foster and maintain customer relations
2. Unit Standard Number	123258
3. NQF Level	3
4. Total Credit Value	10
5. Field	Field 11 - Services
6. Registration date	2006-06-29
7. Registration end date	2009-06-29
8. Purpose of the Unit Standard	<p>The purpose of the learning credited in this unit standard is to ensure that learners are able to interact professionally with customers. Improved customer relations leads to improved customer service, which, in turn, results in business growth and profitability. Professional driving services are improved, thereby improving the image and profitability of the field of transport services. This set of competence is transferable to all other fields where services are provided to customers, and thus improves the employability of credited learners, by enhancing their understanding of the processes and the context of customer service.</p> <p>Credited learners are capable of:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Describing organisational structures and products/services for specific contexts.</li> <li><input type="checkbox"/> Operating within a customer service system according to context requirements.</li> <li><input type="checkbox"/> Identifying customer needs and expectations within specific contexts.</li> <li><input type="checkbox"/> Dealing with customer complaints according to specified procedures.</li> <li><input type="checkbox"/> Choosing interpersonal behaviours appropriate for occupational situations.</li> </ul>
9. Learning assumed to be in place	It is assumed that learners have already attained the competencies of Mathematical Literacy at NQF Level 2, and Communication at NQF Level 2.
10. Unit Standard Range	<p>The typical scope of this unit standard includes:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Controlled office or workshop environments, transport depots, open yard areas, mobile vehicles and/or customer premises.</li> <li><input type="checkbox"/> Pre-transaction, transaction and post transaction customer service.</li> </ul>
11. Specific outcomes and assessment criteria	<p><b>Specific Outcome 1</b> Describe organisational structures and products/services for specific contexts.</p> <p><b>Assessment Criteria</b></p> <ol style="list-style-type: none"> <li>1. A definition and explanation of customer service is given which enhances organisational image and employee morale, and is consistent with company mission, vision and customer service policy.</li> <li>2. The organisational chain of command and reporting structure is described in a manner that is consistent with organisational management hierarchies, including purpose and functions of the respective levels of management.</li> <li>3. Identification of business units within the organisation and description of their functions, activities and products/services are clear and consistent with organisational structure, operational and work flow charts.</li> </ol>



	<p>4. <i>Identification of internal and external suppliers and support service providers conforms to operational and work flow charts, as well as records of external suppliers/support service providers.</i></p> <p><b>Specific Outcome 2</b> Operate within a specific customer service system according to context requirements.</p> <p><b>Assessment Criteria</b></p> <ol style="list-style-type: none"> <li>1. <i>Identification and description of customer service chains are clear and consistent with all organisational customer service activities required to satisfy the changing needs of the customer, as depicted by organisational customer service models.</i></li> <li>2. <i>Identification and fulfilment of the specific responsibilities and activities required within a customer service chain are clear and consistent with specified job descriptions and key performance areas.</i></li> </ol> <p><b>Specific Outcome 3</b> Identify customer needs and expectations within specific contexts.</p> <p><b>Assessment Criteria:</b></p> <ol style="list-style-type: none"> <li>1. <i>Identification of customers is clear and consistent with organisational customer profiles.</i></li> <li>2. <i>Description of service standards rendered, as perceived from customers' viewpoints, is consistent with feedback obtained from internal/external customer service audits.</i></li> <li>3. <i>Identification and analysis of flaws and barriers in the customer service system are clear and consistent with management inspections and customer feedback.</i></li> <li>4. <i>Categorisation of customer personalities/anticipated behaviour is accurate and improves customer relations through pro-active customer service response.</i></li> <li>5. <i>Inclusion of persons with disabilities is facilitated to meet specific needs.</i></li> </ol> <p><b>Specific outcome 4</b> Deal with customer complaints according to specified procedures.</p> <p><b>Assessment Criteria</b></p> <ol style="list-style-type: none"> <li>1. <i>Description of clear customer service complaint processes is consistent with company customer service policy and demonstrates a positive, creative and assertive attitude towards the organisation, as well as the customer, which leads to resolving complaints in a logical and professional manner.</i></li> <li>2. <i>Description of after-sales service is clear and consistent with company policy and regulations.</i></li> <li>3. <i>Identification and articulation of the 'moments of truth' throughout the customer service chain, as perceived by</i></li> </ol>
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	<p><i>the customer, are accurate, leads to the improvement of service standards and are consistent with agreed organisational standards and values.</i></p> <p>4. <i>Actual service standards in a specific environment are compared to organisational customer service policies and recommendations for improvement lead to improved service standards.</i></p> <p><b>Specific outcome 5</b> Choose interpersonal behaviours appropriate for occupational situations.</p> <p><b>Assessment Criteria</b></p> <ol style="list-style-type: none"> <li>1. <i>Identification of conflict situations and application of procedures/steps for resolving disputes/breakdowns in relations are appropriate for specific contexts.</i></li> <li>2. <i>Relationships and communication networks take account of culture, organisational level and type of customers, emphasizing honest, open and respectful dialogue.</i></li> <li>3. <i>Recommended ways of improving/modifying personal interaction techniques within a team/organisational environment are appropriate for specific context requirements.</i></li> </ol>
12. Unit Standard Accreditation and Moderation Options	<p><input type="checkbox"/> Assessment of learner achievements takes place at providers accredited by the relevant ETQA (RSA, 1998b) for the provision of programs that result in the outcomes specified for this unit standard.</p> <p><input type="checkbox"/> Anyone assessing a learner against this unit standard must be registered as an assessor with the relevant ETQA.</p> <p><input type="checkbox"/> Any institution offering learning that will enable achievement of this unit standard must be accredited as a provider with the relevant ETQA.</p> <p><input type="checkbox"/> The relevant ETQA according to the moderation guidelines and the agreed ETQA procedures will oversee moderation of assessment and is responsible for moderation of learner achievements of learners who meet the requirements of this unit standard.</p>
13. Unit Standards Essential Embedded knowledge	<p><input type="checkbox"/> The hierarchy of human needs.</p> <p><input type="checkbox"/> Organisation mission and vision.</p> <p><input type="checkbox"/> Customer service from clients' perspective.</p> <p><input type="checkbox"/> Relationship between customer service and company profitability.</p> <p><input type="checkbox"/> Interface between customer service and product/service provided.</p> <p><input type="checkbox"/> Telephone etiquette.</p> <p><input type="checkbox"/> Business functions.</p> <p><input type="checkbox"/> Customer service elements within the respective business functions.</p> <p><input type="checkbox"/> Customer/service standard analysis.</p> <p><input type="checkbox"/> Phases of customer service.</p> <p><input type="checkbox"/> Moments of truth.</p> <p><input type="checkbox"/> Internal customer service audit.</p> <p><input type="checkbox"/> External customer service audit.</p> <p><input type="checkbox"/> Job descriptions.</p> <p><input type="checkbox"/> Key performance areas.</p> <p><input type="checkbox"/> Activity standards.</p> <p><input type="checkbox"/> General obstacles to effective customer service Weak links in</p>

	<p>the customer service chain.</p> <p><input type="checkbox"/> Customer decision making process during the purchasing phase.</p>
14. Critical Cross-field Outcomes	<p><b>IDENTIFYING</b> Identify and solve problems where responses to problems show that such critical and creative thinking has been used to make responsible decisions for evaluating of customer service performance against set standards and taking corrective action when required.</p> <p><b>WORKING</b> Work effectively with others as a member of a team, group, organisation or community to conduct, communicate and provide a service of excellence from the pre-transaction phase to the post-transaction phase.</p> <p><b>ORGANISING</b> Organise and manage oneself and one's activities responsibly and effectively.</p> <p><b>COLLECTING</b> Collect, analyse, organise and critically evaluate information.</p> <p><b>COMMUNICATING</b> Communicate effectively using visual, mathematic and/or language skills in the modes of oral and/or written presentation for persuasion to effectively communicate with teams and individuals.</p> <p><b>SCIENCE</b> Use science and technology effectively and critically, showing responsibility towards the environment and health of others.</p> <p><b>DEMONSTRATING</b> Demonstrate an understanding of the world as a set of related systems by recognising that problem-solving contexts do not exist in isolation.</p>

## EVIDENCE GUIDE

**Unit Standard ID Title:** Foster and maintain customer relations

Unit Standard number: 123258

### Specific Outcome 1

Describe organisational structures and products/services for specific contexts.

### Assessment Criteria

1. A definition and explanation of customer service is given which enhances organisational image and employee morale, and is consistent with company mission, vision and customer service policy.
2. The organisational chain of command and reporting structure is described in a manner that is consistent with organisational management hierarchies, including purpose and functions of the respective levels of management.
3. Identification of business units within the organisation and description of their functions, activities and products/services are clear and consistent with organisational structure, operational and work flow charts.
4. Identification of internal and external suppliers and support service providers conforms to operational and work flow charts, as well as records of external suppliers/support service providers.

Evidence Required		Evidence sign off	
Written Knowledge Test		Self-assessment	
<p>Answer the following questions:</p> <ol style="list-style-type: none"> <li>1. Define Customer Service.</li> <li>2. Describe the factors enhancing organizational image.</li> <li>3. Knows how employee morale affects other employees in the workplace.</li> <li>4. Identify the purpose of a companies' mission, vision, and customer service policy.</li> <li>5. Describe the organizational chain of command and reporting structure</li> <li>6. Describe the purpose and functions of the following levels: Management, Supervisor en employee levels.</li> <li>7. Recognise the difference between 'products' and 'service'.</li> <li>8. Name the different business units in the organisation.</li> <li>9. Describe the purpose of organizational structures and operational and work flow charts.</li> <li>10. Identify internal and external suppliers in the organisation.</li> <li>11. List the support service providers in the organisation.</li> </ol>		Initial	
		Date	
		ECF evaluation	
		Initials	
		Date	

**Specific Outcome 2**

Operate within a specific customer service system according to context requirements.

**Assessment Criteria**

1. Identification and description of customer service chains are clear and consistent with all organisational customer service activities required to satisfy the changing needs of the customer, as depicted by organisational customer service models.
2. Identification and fulfilment of the specific responsibilities and activities required within a customer service chain are clear and consistent with specified job descriptions and key performance areas.

Evidence Required			Evidence sign off	
Structured Interview with Subject matter expert who works with the customer service system				
<b>Questions</b>	<b>Answer</b>	<b>Signature of SME</b>	<b>Self-assessment</b>	
What is customer service chain?			Initial	
Why is consistency so important for customer service chains?			Date	
Why should I know about the customer service chains?				
Why is it important to satisfy the changing needs of the customer?			<b>ECF evaluation</b>	
Who can provide me with a customer service model? (Include this also in your portfolio of evidence)			Initials	
What is a customer service model?				
Include a copy of your job description.			Date	

### Specific Outcome 3

Identify customer needs and expectations within specific contexts.

#### Assessment Criteria:

1. Identification of customers is clear and consistent with organisational customer profiles.
2. Description of service standards rendered, as perceived from customers' viewpoints, is consistent with feedback obtained from internal/external customer service audits.
3. Identification and analysis of flaws and barriers in the customer service system are clear and consistent with management inspections and customer feedback.
4. Categorisation of customer personalities/anticipated behaviour is accurate and improves customer relations through pro-active customer service response.
5. Inclusion of persons with disabilities is facilitated to meet specific needs.

Evidence Required		Evidence sign off	
Multiple Choice Questions Tick the correct answer			
<p><b>Question 1:</b> An organizational customer profile is defined as ...</p> <p><input type="checkbox"/> a A precise description of the characteristics of buyers for a specific product or service</p> <p><input type="checkbox"/> b A precise description of the customer's personality</p> <p><input type="checkbox"/> c None of the above</p> <p><b>Question 2:</b> The purpose of a customer service audit is for ...</p> <p><input type="checkbox"/> a Customer interrogation</p> <p><input type="checkbox"/> b Customer review on services or products rendered</p> <p><input type="checkbox"/> c Customer inspection</p> <p><b>Question 3:</b> It is important to remove customer barriers and should therefore improve customer relations in one of the following ways:</p> <p><input type="checkbox"/> a Show the customer that your services and products are up to standard</p> <p><input type="checkbox"/> b Proof to the customer that you care for quality</p> <p><input type="checkbox"/> c Invite the customers and make them coffee</p>		<b>Self-assessment</b>	
		Initial	
		Date	
		<b>ECF evaluation</b>	
Initials			
Date			

#### Specific outcome 4

Deal with customer complaints according to specified procedures.

#### Assessment Criteria

1. Description of clear customer service complaint processes is consistent with company customer service policy and demonstrates a positive, creative and assertive attitude towards the organisation, as well as the customer, which leads to resolving complaints in a logical and professional manner.
2. Description of after-sales service is clear and consistent with company policy and regulations.
3. Identification and articulation of the `moments of truth` throughout the customer service chain, as perceived by the customer, are accurate, leads to the improvement of service standards and are consistent with agreed organisational standards and values.
4. Actual service standards in a specific environment are compared to organisational customer service policies and recommendations for improvement lead to improved service standards.

Evidence Required		Evidence sign off		
Include a copy of the customer service policy in your Portfolio of Evidence True or False questions. T = True and F=False				
<p><b>Question 1:</b> A customer service policy may include procedures to deal with customer complaints.</p> <p><input type="checkbox"/> T</p> <p><input type="checkbox"/> F</p> <p><b>Question 2:</b> After-sales services mean that the product or service was rendered, and this is where the service ends.</p> <p><input type="checkbox"/> T</p> <p><input type="checkbox"/> F</p> <p><b>Question 3:</b> The moments of truth means that the customer must be honest and open throughout the service chain.</p> <p><input type="checkbox"/> T</p> <p><input type="checkbox"/> F</p> <p><b>Question 4:</b> Actual service standards are generic standards in line with the organisational customer service policies.</p> <p><input type="checkbox"/> T</p> <p><input type="checkbox"/> F</p>		<b>Self-assessment</b>		
			Initial	
			Date	
			<b>ECF evaluation</b>	
			Initials	
		Date		

### Specific outcome 5

Choose interpersonal behaviours appropriate for occupational situations.

#### Assessment Criteria

1. Identification of conflict situations and application of procedures/steps for resolving disputes/breakdowns in relations are appropriate for specific contexts.
2. Relationships and communication networks take account of culture, organisational level and type of customers, emphasizing honest, open and respectful dialogue.
3. Recommended ways of improving/modifying personal interaction techniques within a team/organisational environment are appropriate for specific context requirement

<b>Evidence Required</b>		<b>Evidence sign off</b>
<b>Peer Evaluation – Tell your fellow colleague how to choose interpersonal behaviors that is appropriate for occupational situations e.g. administration clerk must have interpersonal skills, truck driver must be disciplined etc.</b>		
<ol style="list-style-type: none"><li>1. Identify the reasons why people disagree in the workplace.</li><li>2. Identify how you would resolve the disagreement.</li><li>3. Describe the type of relationship a person of your occupation should have with your peers, managers, and customers.</li><li>4. Outline why a person should consider a fellow person's culture.</li><li>5. Make suggestions on how to improve behavior in order to work together in a team.</li></ol>		<b>Self-assessment</b>
		Initial
		Date
		<b>ECF evaluation</b>
	Initials	
	Date	



## Unit Standard 2 of this Volume

1. Unit Standard ID Title	Apply basic business principles
2. Unit Standard Number	8000
3. NQF Level	3
4. Total Credit Value	9
5. Field	Field 01 - Agriculture and Nature Conservation
6. Registration date	2007-05-15
7. Registration end date	2010-05-15
8. Purpose of the Unit Standard	A learner accredited with this standard will be able to understand and effectively apply basic business principles in order to improve productivity and efficiency of practice within the Freight Handling Environment.
9. Learning assumed to be in place	NQF 1 or General Education and Training Certificate.
10. Unit Standard Range	The applied competence expressed in this standard will enable the learner to select and implement the most effective business solution/s to familiar problems within own operational environment, with partial responsibility for quality under limited guidance.
11. Specific outcomes and assessment criteria	<p><b>Specific outcome 1</b> Utilise machinery, equipment, materials and time. (Utilise machinery, equipment, materials and time allocated to the individual cost effectively and productively)</p> <p><b>Assessment Criteria</b></p> <ol style="list-style-type: none"> <li>1. Demonstrate an understanding of the impact of quality customer service on profitability.</li> <li>2. Generate and consider options and possibilities for improving the profitability of an operation within a simulated environment, making recommendations on new methods and/or technologies which will enhance competitiveness.</li> <li>3. Identify and explain methods for ensuring cost-effective utilisation of allocated resources.</li> <li>4. Suggest methods to be used to combat cost overruns with respect to a given budget.</li> <li>5. Explain how an individual's actions impact on organisational profit and/or loss and cash flow.</li> <li>6. Describe the impact of new technologies on the budget of an organisation.</li> <li>7. Describe relationships between the stakeholders in a business and how that will impact on an organisations' success.</li> </ol> <p><b>Specific outcome 2</b> Identify and apply goals aligned to the work situation which reflect the organisational goals.</p> <p><b>Assessment Criteria</b></p> <ol style="list-style-type: none"> <li>1. Demonstrate an understanding of the impact of quality customer service on profitability.</li> <li>2. Generate and consider options and possibilities for improving the profitability of an operation within a simulated environment, making recommendations on new methods and/or technologies which will enhance</li> </ol>

	<p>competitiveness.</p> <ol style="list-style-type: none"> <li>3. <i>Identify and explain methods for ensuring cost-effective utilisation of allocated resources.</i></li> <li>4. <i>Suggest methods to be used to combat cost overruns with respect to a given budget.</i></li> <li>5. <i>Explain how an individual's actions impact on organisational profit and/or loss and cash flow.</i></li> <li>6. <i>Describe the impact of new technologies on the budget of an organisation.</i></li> <li>7. <i>Describe relationships between the stakeholders in a business and how that will impact on an organisations' success.</i></li> </ol> <p><b>Specific outcome 3</b> Maintain and enhance organisational image and customer service (both internal and external).</p> <p><b>Assessment Criteria</b></p> <ol style="list-style-type: none"> <li>1. <i>Demonstrate an understanding of the impact of quality customer service on profitability.</i></li> <li>2. <i>Generate and consider options and possibilities for improving the profitability of an operation within a simulated environment, making recommendations on new methods and/or technologies which will enhance competitiveness</i></li> <li>3. <i>Identify and explain methods for ensuring cost-effective utilisation of allocated resources.</i></li> <li>4. <i>Suggest methods to be used to combat cost overruns with respect to a given budget.</i></li> <li>5. <i>Explain how an individual's actions impact on organisational profit and/or loss and cash flow.</i></li> <li>6. <i>Describe the impact of new technologies on the budget of an organisation.</i></li> <li>7. <i>Describe relationships between the stakeholders in a business and how that will impact on an organisations' success.</i></li> </ol> <p><b>Specific outcome 4</b> Identify and anticipate customer's requirements. (Identify and anticipate customer's requirements, and meeting those requirements within budget constraints.)</p> <p><b>Assessment Criteria</b></p> <ol style="list-style-type: none"> <li>1. <i>Demonstrate an understanding of the impact of quality customer service on profitability.</i></li> <li>2. <i>Generate and consider options and possibilities for improving the profitability of an operation within a simulated environment, making recommendations on new methods and/or technologies which will enhance competitiveness.</i></li> <li>3. <i>Identify and explain methods for ensuring cost-effective utilisation of allocated resources.</i></li> </ol>
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	<ol style="list-style-type: none"> <li>4. <i>Suggest methods to be used to combat cost overruns with respect to a given budget.</i></li> <li>5. <i>Explain how an individual's actions impact on organisational profit and/or loss and cash flow.</i></li> <li>6. <i>Describe the impact of new technologies on the budget of an organisation.</i></li> <li>7. <i>Describe relationships between the stakeholders in a business and how that will impact on an organisations' success.</i></li> </ol> <p><b>Specific outcome 5</b> Select and implement the most effective business solution. (Select and implement the most effective business solution to problems within his/her own operational environment and level of authority.)</p> <p><b>Assessment Criteria</b></p> <ol style="list-style-type: none"> <li>1. <i>Demonstrate an understanding of the impact of quality customer service on profitability.</i></li> <li>2. <i>Generate and consider options and possibilities for improving the profitability of an operation within a simulated environment, making recommendations on new methods and/or technologies which will enhance competitiveness.</i></li> <li>3. <i>Identify and explain methods for ensuring cost-effective utilisation of allocated resources.</i></li> <li>4. <i>Suggest methods to be used to combat cost overruns with respect to a given budget.</i></li> <li>5. <i>Explain how an individual's actions impact on organisational profit and/or loss and cash flow.</i></li> <li>6. <i>Describe the impact of new technologies on the budget of an organisation.</i></li> <li>7. <i>Describe relationships between the stakeholders in a business and how that will impact on an organisations' success.</i></li> </ol>
<p>8. Unit Standard Accreditation and Moderation Options</p>	<p>Anyone assessing a learner against this unit standard must be registered as an assessor with the relevant ETQA.</p> <p>Any institution offering learning that will enable achievement of this unit standard must be accredited by the Freight Handling Chamber of the Transport SETA and/or relevant ETQA.</p> <p>Moderation of assessment will be done by the relevant ETQA at its discretion.</p>
<p>9. Unit Standards Essential Embedded knowledge</p>	<p>Different business entities and the legal relationships and responsibilities that exist in such entities.</p> <p>2. The principles of supply and demand, and the effect of these principles on an organisation (e.g. remaining globally competitive).</p> <p>3. The relationship between "accountability" and "responsibility" in a corporate environment.</p>

	<p>4. The principles of profit and loss and the factors which impact on this (e.g. interest rates, fixed costs).</p> <p>5. Availability and effectiveness of new technologies on the profitability of an organisation.</p> <p>6. Business ethics, a quality customer service and current labour legislation within an industry context and how this impacts on operations and profitability.</p>
10. Critical Cross-field Outcomes	<p><b>IDENTIFYING</b> Identify and solve problems by taking proactive measures to prevent or eliminate problems that impact on organisation.</p> <p><b>WORKING</b> Demonstrate initiative in developing personal interactions with customers designed to enhance corporate image and quality of service, by working effectively with others and in teams.</p> <p><b>COLLECTING</b> Collect, analyse, organise and critically evaluate information to make suggestions for business improvement.</p> <p><b>DEMONSTRATING</b> Demonstrate initiative in analysing impact of own actions (or lack thereof) on budget, by managing and organising oneself.</p>

## EVIDENCE GUIDE

**Unit Standard ID Title:** Apply basic business principles

**Unit Standard number:** 8000

### **Specific outcome 1**

Utilise machinery, equipment, materials and time. (Utilise machinery, equipment, materials and time allocated to the individual cost effectively and productively)

### **Specific outcome 2**

Identify and apply goals aligned to the work situation which reflect the organisational goals.

### **Specific outcome 3**

Maintain and enhance organisational image and customer service (both internal and external).

### **Specific outcome 4**

Identify and anticipate customer's requirements. (Identify and anticipate customer's requirements, and meeting those requirements within budget constraints.)

### **Specific outcome 5**

Select and implement the most effective business solution. (Select and implement the most effective business solution to problems within his/her own operational environment and level of authority.)

### **Assessment Criteria**

1. *Demonstrate an understanding of the impact of quality customer service on profitability.*
2. *Generate and consider options and possibilities for improving the profitability of an operation within a simulated environment, making recommendations on new methods and/or technologies which will enhance competitiveness.*
3. *Identify and explain methods for ensuring cost-effective utilisation of allocated resources.*
4. *Suggest methods to be used to combat cost overruns with respect to a given budget.*
5. *Explain how an individual's actions impact on organisational profit and/or loss and cash flow.*
6. *Describe the impact of new technologies on the budget of an organisation.*
7. *Describe relationships between the stakeholders in a business and how that will impact on an organisations' success.*

Evidence Required						Evidence sign off	
<b>Logbook for Reflective assessments – The assessor must assess the learner on the job and complete the logbook</b>							
<b>The purpose of this unit standard is:</b> A learner accredited with this standard will be able to understand and effectively apply basic business principles in order to improve productivity and efficiency of <b>practice within the Freight Handling Environment</b> .							
Outcomes	Criterion 1	Criterion 2	Competent	Not yet competent	Signature of Assessor and comments		
<b>Specific outcome 1</b> Utilise machinery, equipment, materials and time. (Utilise machinery, equipment, materials and time allocated to the individual cost effectively and productively	<i>Generate and consider options and possibilities for improving the profitability of an operation within a simulated environment, making recommendations on new methods and/or technologies which will enhance competitiveness.</i>	<i>Explain how an individual's actions impact on organisational profit and/or loss and cash flow.</i>			Comments:	Initial	
					Initial:	Date	
					Date: :		
<b>Specific outcome 2</b> Identify and apply goals aligned to the work situation which reflect the organisational goals.	<i>Identify and explain methods for ensuring cost-effective utilisation of allocated resources</i>	<i>Generate and consider options and possibilities for improving the profitability of an operation within a simulated environment, making recommendations on new methods and/or technologies which will enhance competitiveness.</i>			Comments:	ECF evaluation	
					Initial:	Initial	
					Date: :	Date	
<b>Specific outcome 3</b> Maintain and enhance organisational image and customer service (both internal and external).	<i>Describe relationships between the stakeholders in a business and how that will impact on an organisations' success.</i>	<i>Demonstrate an understanding of the impact of quality customer service on profitability.</i>			Comments:		
					Initial:		
					Date: :		

Evidence Required						Evidence sign off
Logbook for Reflective assessments						
<b>The purpose of this unit standard is:</b> A learner accredited with this standard will be able to understand and effectively apply basic business principles in order to improve productivity and efficiency of practice within the Freight Handling Environment.						
Outcomes	Criterion 1	Criterion 2	Competent	Not yet competent	Signature of Assessor and comments	
<b>Specific outcome 4</b> Identify and anticipate customer's requirements. (Identify and anticipate customer's requirements, and meeting those requirements within budget constraints.	<i>Demonstrate an understanding of the impact of quality customer service on profitability.</i>	<i>Describe the impact of new technologies on the budget of an organisation.</i>			Comments:   Initial:  Date: :	
<b>Specific outcome 5</b> Select and implement the most effective business solution. (Select and implement the most effective business solution to problems within his/her own operational environment and level of authority.)	<i>Suggest methods to be used to combat cost overruns with respect to a given budget.</i>	<i>Demonstrate an understanding of the impact of quality customer service on profitability.</i>			Comments:   Initial:  Date: :	

### Unit Standard 3 of this Volume

1. Unit Standard ID Title	Managing self-development
2. Unit Standard Number	7997
3. NQF Level	4
4. Total Credit Value	12
5. Field	Field 11 - Services
6. Registration date	2007-05-15
7. Registration end date	2010-05-15
8. Purpose of the Unit Standard	A learner accredited with this standard will be able to effectively plan their professional development and implement their personal career plans to improve their functioning in the broader work and social environment.
9. Learning assumed to be in place	NQF 1 or General Education and Training Certificate. Basic Business Principles CFH 04 preferable.
10. Unit Standard Range	The applied competency expressed in this standard cover a variety of familiar and unfamiliar processes requiring a range of innovative responses based on informed judgment and analytical interpretation of information by the learner, who has complete responsibility for the quantity and quality of output.
11. Specific outcomes and assessment criteria	<p><b>Specific outcome 1</b> Identify the skills and knowledge required for the development of his/her career path (Identify the skills and knowledge required for the development of his/her career path, giving cognisance to personal objectives and present and future requirements of the individuals organisational role.)</p> <p><b>Assessment Criteria</b></p> <ol style="list-style-type: none"> <li>1. Understand the concepts associated with the field of self-development (e.g. career path, organisational culture, goals, etc).</li> <li>2. Produce evidence of the process of self-evaluation and self-analysis and demonstrate the utilisation of the information in a self-development plan displaying realistic, challenging and measurable objectives, both in the short and long term.</li> <li>3. At regular intervals, produce evidence of ownership of career plan and of specific steps taken to implement and update the plan.</li> <li>4. Show evidence of researching training and development options with respect to selecting optimal resources.</li> <li>5. Understand internal and external structures (e.g. statutory requirements and human resources development procedures) designed to assist in self-development.</li> </ol> <p><b>Specific outcome 2</b> Make and update his/her personal plans for developing skills.</p> <p><b>Assessment Criteria</b></p> <ol style="list-style-type: none"> <li>1. Understand the concepts associated with the field of self-development (e.g. career path, organisational culture, goals, etc).</li> <li>2. Produce evidence of the process of self-evaluation and self-analysis and demonstrate the utilisation of the information in a self-development plan displaying realistic, challenging and measurable objectives, both in the short and long term.</li> </ol>



	<ol style="list-style-type: none"> <li>3. <i>At regular intervals, produce evidence of ownership of career plan and of specific steps taken to implement and update the plan.</i></li> <li>4. <i>Show evidence of researching training and development options with respect to selecting optimal resources.</i></li> <li>5. <i>Understand internal and external structures (e.g. statutory requirements and human resources development procedures) designed to assist in self-development.</i></li> </ol> <p><b>Specific outcome 3</b>  Prioritise goals and objectives. (Prioritise goals and objectives, taking cognisance of organisational opportunities and constraints, policies, requirements and personal resources (e.g. internal or external)).</p> <p><b>Assessment Criteria</b></p> <ol style="list-style-type: none"> <li>1. <i>Understand the concepts associated with the field of self-development (e.g. career path, organisational culture, goals, etc).</i></li> <li>2. <i>Produce evidence of the process of self-evaluation and self-analysis and demonstrate the utilisation of the information in a self-development plan displaying realistic, challenging and measurable objectives, both in the short and long term.</i></li> <li>3. <i>At regular intervals, produce evidence of ownership of career plan and of specific steps taken to implement and update the plan.</i></li> <li>4. <i>Show evidence of researching training and development options with respect to selecting optimal resources.</i></li> <li>5. <i>Show evidence of researching training and development options with respect to selecting optimal resources.</i></li> </ol> <p><b>Specific outcome 4</b>  Select mechanisms for pursuing feedback. (Select mechanisms for pursuing feedback of current levels of competence and personal growth (e.g. communicate with superiors), and planning the appropriate corrective action to accomplish his/her objectives)</p> <p><b>Assessment Criteria</b></p> <ol style="list-style-type: none"> <li>1. <i>Understand the concepts associated with the field of self-development (e.g. career path, organisational culture, goals, etc).</i></li> <li>2. <i>Produce evidence of the process of self-evaluation and self-analysis and demonstrate the utilisation of the information in a self-development plan displaying realistic, challenging and measurable objectives, both in the short and long term.</i></li> <li>3. <i>At regular intervals, produce evidence of ownership of career plan and of specific steps taken to implement and update the plan.</i></li> <li>4. <i>Show evidence of researching training and development options with respect to selecting optimal resources.</i></li> </ol>
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	<p>5. Show evidence of researching training and development options with respect to selecting optimal resources.</p> <p><b>Specific outcome 5</b> Source, select and utilise the requisite resources. (Source, select and utilise the requisite resources for the successful achievement of planned objectives, drawing on the experience and guidance of senior management.)</p> <p><b>Assessment Criteria</b></p> <ol style="list-style-type: none"> <li>1. Understand the concepts associated with the field of self-development (e.g. career path, organisational culture, goals, etc).</li> <li>2. Produce evidence of the process of self-evaluation and self-analysis and demonstrate the utilisation of the information in a self-development plan displaying realistic, challenging and measurable objectives, both in the short and long term.</li> <li>3. At regular intervals, produce evidence of ownership of career plan and of specific steps taken to implement and update the plan.</li> <li>4. Show evidence of researching training and development options with respect to selecting optimal resources.</li> <li>5. Understand internal and external structures (e.g. statutory requirements and human resources development procedures) designed to assist in self-development.</li> </ol> <p><b>Specific outcome 6</b> Identify ways to minimise digressions or obstacles. (Identify ways to minimise digressions or obstacles for the successful achievement of self-development objectives, making contingency plans if required (e.g. delegate work responsibilities))</p> <p><b>Assessment Criteria</b></p> <ol style="list-style-type: none"> <li>1. Understand the concepts associated with the field of self-development (e.g. career path, organisational culture, goals, etc).</li> <li>2. Produce evidence of the process of self-evaluation and self-analysis and demonstrate the utilisation of the information in a self-development plan displaying realistic, challenging and measurable objectives, both in the short and long term.</li> <li>3. At regular intervals, produce evidence of ownership of career plan and of specific steps taken to implement and update the plan.</li> <li>4. Show evidence of researching training and development options with respect to selecting optimal resources.</li> <li>5. Understand internal and external structures (e.g. statutory requirements and human resources development procedures) designed to assist in self-development.</li> </ol>
<p>12. Unit Standard Accreditation and Moderation Options</p>	<p>Anyone assessing a learner against this unit standard must be registered as an assessor with the relevant ETQA.</p>

	<p>Any institution offering learning that will enable achievement of this unit standard must be accredited by the Freight Handling Chamber of the Transport SETA and/or relevant ETQA.</p> <p>Moderation of assessment will be done by the relevant ETQA at its discretion</p>
13. Unit Standards Essential Embedded knowledge	<p>The learners can understand, explain and apply:</p> <ol style="list-style-type: none"> <li>1. The impact of an "internal locus of control" and understanding of personal motivating and de-motivating factors in one's self-responsibility for current and future personal development, as part of the lifelong learning process</li> <li>2. Techniques of assessing personal potential, strengths and development needs and appreciation of the values of these to organisations.</li> <li>3. National legislation relating to career growth and skills development (e.g. Skills Development Bill) in order to identify opportunities for self-development.</li> <li>4. Resources (e.g. in-house training schemes, Human Resource department, guidance counselling, bursaries etc) available to the learner to assist or support in the planning and execution of his self-development plan.</li> <li>5. Personal motivating and/or demotivating factors (e.g. incorporating principles of Maslow's hierarchy of needs).</li> <li>6. Basic performance management principles (regular feedback on performance) and how to interpret and use such feedback constructively.</li> <li>7. The different skills and knowledge required in order to progress into different organisational levels and career options.</li> <li>8. The need to update, adapt and change developmental plans in response to a dynamic (ongoing learning) environment, including social, economic, political organisational and technological factors (micro, meso, macro).</li> <li>9. The constraints in the business world for immediate recognition for acquired competencies (e.g. career advancement).</li> </ol>
14. Critical Cross-field Outcomes	<p><b>IDENTIFYING</b> Identify and solve problems when encountering obstacles to personal development.</p> <p><b>ORGANISING</b> Manage and organise oneself in adapting existing self-development plans to meeting the requirements of changing work and personal contexts.</p> <p><b>COLLECTING</b> Collect, analyse, organise and critically evaluate information in researching and selecting the most appropriate resources in a dynamic environment for the updating/amending/fulfilment of self-development plan.</p> <p><b>DEMONSTRATING</b> Demonstrate initiative in identifying and utilising opportunities and taking responsibility for self-development within a dynamic environment.</p> <p>Demonstrate ability to create/foster an environment conducive to self-development (e.g. part of study group, self-discipline).</p>

## EVIDENCE GUIDE

**Unit Standard ID Title:** Managing self-development

**Unit Standard number:** 7997

### Specific outcome 1

Identify the skills and knowledge required for the development of his/her career path (Identify the skills and knowledge required for the development of his/her career path, giving cognisance to personal objectives and present and future requirements of the individuals organisational role.)

### Assessment Criteria

1. *Understand the concepts associated with the field of self-development (e.g. career path, organisational culture, goals, etc).*
2. *Produce evidence of the process of self-evaluation and self-analysis and demonstrate the utilisation of the information in a self-development plan displaying realistic, challenging and measurable objectives, both in the short and long term.*
3. *At regular intervals, produce evidence of ownership of career plan and of specific steps taken to implement and update the plan.*
4. *Show evidence of researching training and development options with respect to selecting optimal resources.*
5. *Understand internal and external structures (e.g. statutory requirements and human resources development procedures) designed to assist in self-development.*

Evidence Required					
<b>Self Development Checklist – The learner must take ownership with the support of his/her supervisor/manager to develop himself/herself. Once this checklist is completed hand it in to the ECF. Add supplementary documentations.</b>					<b>Evidence sign off</b>
					<b>Self-assessment</b>
Identify and list the skills you need to develop yourself			Show evidence of researching training and development options		<i>Initial</i>
State your personal objective for self development <i>Read and Include a copy of the HR development procedures</i>			Show evidence of specific steps taken to implement and update the plan.  Include short and long term objectives		<i>Date</i>
State your present requirements for further development			Show evidence of specific steps taken to implement and update the plan.		
State your future requirements for further development			Show evidence of specific steps taken to implement and update the plan.		
					<b>ECF evaluation</b>
					<i>Initials</i>
					<i>Date</i>

**Specific outcome 2**

Make and update his/her personal plans for developing skills.

**Assessment Criteria**

1. Understand the concepts associated with the field of self-development (e.g. career path, organisational culture, goals, etc).
2. Produce evidence of the process of self-evaluation and self-analysis and demonstrate the utilisation of the information in a self-development plan displaying realistic, challenging and measurable objectives, both in the short and long term.
3. At regular intervals, produce evidence of ownership of career plan and of specific steps taken to implement and update the plan.
4. Show evidence of researching training and development options with respect to selecting optimal resources.
5. Understand internal and external structures (e.g. statutory requirements and human resources development procedures) designed to assist in self-development.

Evidence Required				Evidence sign off	
Include supplementary documentation if necessary.					
<b>Criteria</b>	<b>Skills acquired</b>	<b>Skills obtained</b>	<b>Date achieved</b>	<b>Self-assessment</b>	
Make and update of your personal plans for developing skills.				Initial	
				Date	
<b>Criteria</b>	<b>Knowledge acquired</b>	<b>Knowledge obtained</b>	<b>Date achieved</b>	<b>ECF evaluation</b>	
Make and update of your personal plans for developing skills.				Initials	
				Date	

### Specific outcome 3

Prioritise goals and objectives. (Prioritise goals and objectives, taking cognisance of organisational opportunities and constraints, policies, requirements and personal resources (e.g. internal or external)).

#### Assessment Criteria

1. Understand the concepts associated with the field of self-development (e.g. career path, organisational culture, goals, etc).
2. Produce evidence of the process of self-evaluation and self-analysis and demonstrate the utilisation of the information in a self-development plan displaying realistic, challenging and measurable objectives, both in the short and long term.
3. At regular intervals, produce evidence of ownership of career plan and of specific steps taken to implement and update the plan.
4. Show evidence of researching training and development options with respect to selecting optimal resources.
5. Show evidence of researching training and development options with respect to selecting optimal resources.

Evidence Required			Evidence sign off	
Prioritisation checklist				
<b>State the objectives</b>	<b>Priority classification</b>	<b>Describe how you used organisational opportunities to meet the objectives</b>	<b>Self-assessment</b>	
	High Priority		Initial	
			Date	
	Medium Priority		<b>ECF evaluation</b>	
			Initials	
	Low Priority			
			Date	

#### Specific outcome 4

Select mechanisms for pursuing feedback. (Select mechanisms for pursuing feedback of current levels of competence and personal growth (e.g. communicate with superiors), and planning the appropriate corrective action to accomplish his/her objectives)

#### Assessment Criteria

1. Understand the concepts associated with the field of self-development (e.g. career path, organisational culture, goals, etc).
2. Produce evidence of the process of self-evaluation and self-analysis and demonstrate the utilisation of the information in a self-development plan displaying realistic, challenging and measurable objectives, both in the short and long term.
3. At regular intervals, produce evidence of ownership of career plan and of specific steps taken to implement and update the plan.
4. Show evidence of researching training and development options with respect to selecting optimal resources.
5. Show evidence of researching training and development options with respect to selecting optimal resources.

<b>Evidence Required</b> Write down the different mechanisms you will use in order to get feedback on your personal growth e.g. one-on-one feedback, performance appraisals etc. Ask your supervisor what the procedures in place are in order to give you feedback on your personal development.	<b>Evidence sign off</b>
<b>Include proof of your feedback discussions with your immediate supervisor in your Portfolio of Evidence. This can include written feedback, electronic feedback or verbal feedback.</b>	<b>Self-assessment</b>
	Initial
	Date
	<b>ECF evaluation</b>
	Initials
	Date

### Specific outcome 5

Source, select and utilise the requisite resources. (Source, select and utilise the requisite resources for the successful achievement of planned objectives, drawing on the experience and guidance of senior management.)

### Assessment Criteria

1. Understand the concepts associated with the field of self-development (e.g. career path, organisational culture, goals, etc).
2. Produce evidence of the process of self-evaluation and self-analysis and demonstrate the utilisation of the information in a self-development plan displaying realistic, challenging and measurable objectives, both in the short and long term.
3. At regular intervals, produce evidence of ownership of career plan and of specific steps taken to implement and update the plan.
4. Show evidence of researching training and development options with respect to selecting optimal resources.
5. Understand internal and external structures (e.g. statutory requirements and human resources development procedures) designed to assist in self-development.

Evidence Required		Evidence sign off	
<b>Include proof of the Source or resource that assists you in order to achieve your objectives under the guidance of senior management.</b>			
<div>1. List the Sources (e.g. Human Resource Development Policy, internet facilities, library, Subject matter expert interviews etc.)</div> <div></div>		<b>Self-assessment</b>	
		Initial	
		Date	
<div>2. List the name and Surname, designation (Job Title), contact number, Company name, date and a short description on assistance provided.</div> <div></div>		<b>ECF evaluation</b>	
		Initials	
		Date	



### Specific outcome 6

Identify ways to minimise digressions or obstacles. (Identify ways to minimise digressions or obstacles for the successful achievement of self-development objectives, making contingency plans if required (e.g. delegate work responsibilities)

### Assessment Criteria

1. Understand the concepts associated with the field of self-development (e.g. career path, organisational culture, goals, etc).
2. Produce evidence of the process of self-evaluation and self-analysis and demonstrate the utilisation of the information in a self-development plan displaying realistic, challenging and measurable objectives, both in the short and long term.
3. At regular intervals, produce evidence of ownership of career plan and of specific steps taken to implement and update the plan.
4. Show evidence of researching training and development options with respect to selecting optimal resources.
5. Understand internal and external structures (e.g. statutory requirements and human resources development procedures) designed to assist in self-development.

Evidence Required			Evidence sign off
List the barriers that influence your self-development and include the solutions and plan of action to overcome the barriers or obstacles.			
List the barrier	Write down the solution	Write down your plan of action	Self-assessment
			Initial
			Date
			ECF evaluation
			Initials
			Date