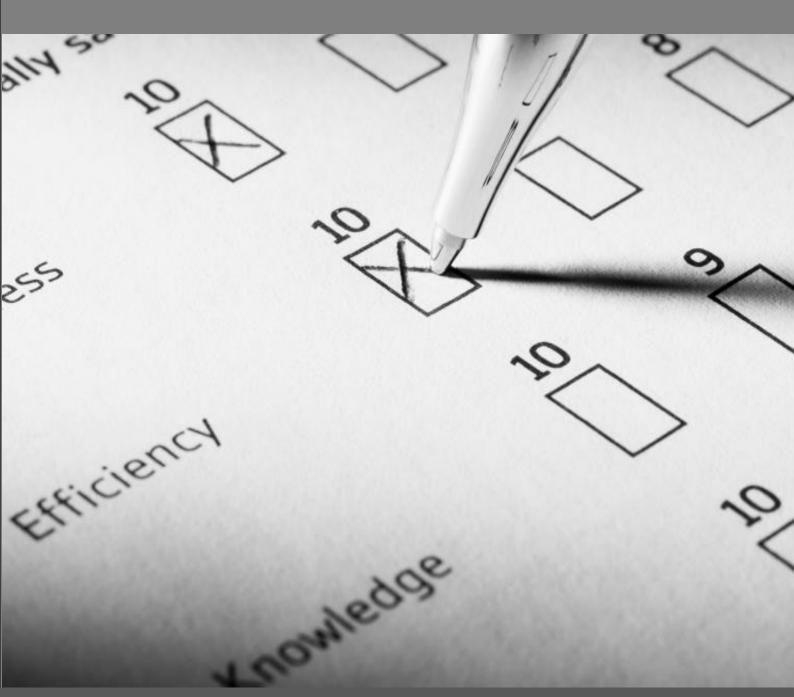# Promote products and services to customers

D2.TCC.CL1.08

Assessor Manual

Promote products and services to customers

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Assessor Manual

Project Base

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Competency Based Assessment (CBA) – An introduction for assessors

Assessment is the process of identifying a participant's current knowledge, skills and attitudes sets against all elements of competency within a unit of competency.

Suggested assessment methods

For each unit of competency a number of assessment tools have been identified including:

- Work Projects
- Oral Questions
- Written Questions
- Third Party Statements
- Observation Checklists.

Instructions and Evidence Recording Sheets have been identified in this Assessment Manual for use by Assessors.

Alternative assessment methods

Whilst the above mentioned assessment methods are suggested assessment methods, the assessor may use an alternate method of assessment taking into account:

a) The nature of the unit

b) The strengths of participants

c) The number of participants in the class

d) Time required to complete assessments

e) Time dedicated to assessment

f) Equipment and resources required.

Alternate assessment methods include:

- Practical demonstrations
- Practical demonstrations in simulated work conditions
- Problem solving
- Portfolios of evidence
- Critical incident reports
- Journals
- Oral presentations
- Interviews
- Videos
- Visuals/slides/audiotapes
- Log books
- Projects and Role plays

- Group projects
- Recognition of Prior Learning.

Whilst there is no specific instruction or evidence collection documents for all the alternative assessment methods, assessors can record competency in the 'Other' section within the 'Competency Recording Sheet'.

Selection of assessment methods

Each assessor will determine the combination of Assessment Methods to be used to determine Competency for each Competency Unit on a student by student basis.

'Sufficient' evidence to support the 'Pass Competent'/'Not Yet Competent' decision must be captured.

In practice this means a minimum of 2 – 3 Assessment Methods for each candidate for each Competency Element is suggested.

At least one method should provide evidence of practical demonstration of competence.

The following assessment methods deemed to provide evidence of practical demonstration of competence include:

- Practical Work Projects
- Third Party Statement
- Observation Checklist.

Assessing competency

Competency based assessment does not award grades, but simply identifies if the participant has the knowledge, skills and attitudes to undertake the required task to the specified standard.

Therefore, when assessing competency, an assessor has two possible results that can be awarded:

- 'Pass Competent' (PC)
- 'Not Yet Competent' (NYC).

Pass Competent (PC)

If the participant is able to successfully answer or demonstrate what is required, to the expected standards of the performance criteria, they will be deemed as 'Pass Competent' (PC).

The assessor will award a 'Pass Competent' (PC) if they feel the participant has the necessary knowledge, skills and attitudes in all assessment tasks for a unit.

Not Yet Competent' (NYC)

If the participant is unable to answer or demonstrate competency to the desired standard, they will be deemed to be 'Not Yet Competent' (NYC).

This does not mean the participant will need to complete all the assessment tasks again. The focus will be on the specific assessment tasks that were not performed to the expected standards.

The participant may be required to:

a) Undertake further training or instruction

b) Undertake the assessment task again until they are deemed to be 'Pass Competent'.

Regional Qualifications Framework and Skills Recognition System

The 'Regional Qualifications Framework and Skills Recognition System', also known as the 'RQFSRS' is the overriding educational framework for the ASEAN region.

The purpose of this framework is to provide:

- A standardised teaching and assessment framework

- Mutual recognition of participant achievement across the ASEAN region. This includes achievement in individual Units of Competency or qualifications as a whole.

The role of the 'RQFSRS' is to provide, ensure and maintain 'quality assurance' across all countries and educational providers across the ASEAN region.

Recognition of Prior Learning (RPL)

Recognition of Prior Learning is the process that gives current industry professionals who do not have a formal qualification, the opportunity to benchmark their extensive skills and experience against the standards set out in each unit of competency/subject.

This process is a learning and assessment pathway which encompasses:

- Recognition of Current Competencies (RCC)

- Skills auditing

- Gap analysis and training

- Credit transfer.

Code of practice for assessors

This Code of Practice provides:

- Assessors with direction on the standard of practice expected of them

- Candidates with assurance of the standards of practice expected of assessors

- Employers with assurance of the standards maintained in the conduct of assessment.

The Code detailed below is based on the International Code of Ethics and Practice (The National Council for Measurement in Education [NCME]):

- The differing needs and requirements of the person being assessed, the local enterprise and/or industry are identified and handled with sensitivity

- Potential forms of conflict of interest in the assessment process and/or outcomes are identified and appropriate referrals are made, if necessary

- All forms of harassment are avoided throughout the planning, conducting, reviewing and reporting of the assessment outcomes

- The rights of the candidate are protected during and after the assessment

- Personal and interpersonal factors that are not relevant to the assessment of competency must not influence the assessment outcomes

- The candidate is made aware of rights and process of appeal

- Evidence that is gathered during the assessment is verified for validity, reliability, authenticity, sufficiency and currency

- Assessment decisions are based on available evidence that can be produced and verified by another assessor

- Assessments are conducted within the boundaries of the assessment system policies and procedures
- Formal agreement is obtained from both the candidate and the assessor that the assessment was carried out in accordance with agreed procedures
- The candidate is informed of all assessment reporting processes prior to the assessment
- The candidate is informed of all known potential consequences of decisions arising from an assessment, prior to the assessment
- Confidentiality is maintained regarding assessment results
- The assessment results are used consistently with the purposes explained to the candidate
- Opportunities are created for technical assistance in planning, conducting and reviewing assessment procedures and outcomes.

Instructions and checklist for assessors

Instructions

General instructions for the assessment:

- Assessment should be conducted at a scheduled time that has been notified to the candidate
- Facilitators must ensure participants are made aware of the need to complete assessments and attend assessment sessions
- If a participant is unable to attend a scheduled session, they must make arrangements with the Assessor to undertake the assessment at an alternative time
- At the end of the assessment the Assessor must give feedback and advise the participant on their PC/NYC status
- Complete the relevant documentation and submit to the appropriate department.

Preparation

- Gain familiarity with the Unit of Competency, Elements of Competency and the Performance Criteria expected
- Study details assessment documentation and requirements
- Brief candidate regarding all assessment criteria and requirements.

Briefing checklist

- Begin the assessment by implementing the following checklist and then invite the candidate to proceed with assessment.

Checklist for Assessors

	Tick (✓)	Remarks
Prior to the assessment I have:		
Ensured the candidate is informed about the venue and schedule of assessment.		
Received current copies of the performance criteria to be assessed, assessment plan, evidence gathering plan, assessment checklist, appeal form and the company's standard operating procedures (SOP).		
Reviewed the performance criteria and evidence plan to ensure I clearly understood the instructions and the requirements of the assessment process.		
Identified and accommodated any special needs of the candidate.		
Checked the set-up and resources for the assessment.		
During the assessment I have:		
Introduced myself and confirmed identities of candidates.		
Put candidates at ease by being friendly and helpful.		
Explained to candidates the purpose, context and benefits of the assessment.		
Ensured candidates understood the assessment process and all attendant procedures.		
Provided candidates with an overview of performance criteria to be assessed.		
Explained the results reporting procedure.		
Encouraged candidates to seek clarifications if in doubt.		
Asked candidates for feedback on the assessment.		
Explained legal, safety and ethical issues, if applicable.		
After the assessment I have:		
Ensured candidate is given constructive feedback.		
Completed and signed the assessment record.		
Thanked candidate for participating in the assessment.		

Instructions for recording competency

Specifications for recording competency

The following specifications apply to the preparation of Evidence Gathering Plans:

- A Competency Recording Sheet must be prepared for each candidate to ensure and demonstrate all Performance Criteria and Competency Elements are appropriately assessed. This Sheet indicates how the Assessor will gather evidence during their assessment of each candidate

- This Competency Recording Sheet is located at the end of the Assessment Plan

- It is the overriding document to record competency

- The Assessor may vary the Competency Recording Sheet to accommodate practical and individual candidate and/or workplace needs

- Assessor must place a tick (✓) in the 'Assessment Method' columns to identify the methods of assessment to be used for each candidate

- Multiple Competency Elements/Performance Criteria may be assessed at the one time, where appropriate

- The assessor and participant should sign and date the Competency Recording Sheet, when all forms of evidence and assessment have been completed

- The assessor may provide and feedback or clarify questions which the participant may have in regards to the assessment grade or findings

- All documents used to capture evidence must be retained, and attached to the Competency Recording Sheet for each candidate for each Competency Unit.

Instructions for different assessment methods

Specifications for work project assessment

These guidelines concern the use of work projects.

The work projects identified in the Training Manuals involve a range of tasks, to be performed at the discretion of the Assessor.

Work project tasks can be completed through any form of assessment as identified in the Trainer and Trainee Manuals and stated at the start of this section.

Assessors should follow these guidelines:

- Review the Work Projects at the end of each 'Element of Competency' in the Trainee Manual to ensure you understand the content and what is expected

- Prepare sufficient resources for the completion of work activities including:

  - Time – whether in scheduled delivery hours or suggested time participants to spend outside of class hours

  - Resources – this may involve technical equipment, computer, internet access, stationery and other supplementary materials and documents

- Prepare assessment location (if done in class) making it conducive to assessment

- Explain Work Projects assessment to candidate, at the start of each Element of Competency. This ensures that participants are aware of what is expected and can collate information as delivery takes place

- Assessors can use the following phrase as a guide (where an 'X' is identified, please input appropriate information):

  "At the end of each Element of Competency there are Work Projects which must be completed. These projects require different tasks that must be completed.

  These work projects are part of the formal assessment for the unit of competency titled X:

    - You are required to complete these activities:

        a) *Using the 'X' method of assessment*

        b) *At 'X' location*

        c) *You will have 'X time period' for this assessment*

    - You are required to compile information in a format that you feel is appropriate to the assessment

    - Do you have any questions about this assessment?"

- Commence Work Project assessment:

    - The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions

    - Participants complete work projects in the most appropriate format

    - Participants must submit Work Project evidence to the assessor before the scheduled due date

- Assessor must assess the participant's evidence against the competency standards specified in each Element of Competency and their own understanding. The assessor can determine if the participant has provided evidence to a 'competent' standard

- Transcribe results/details to Competency Recording Sheet

- Forward/file assessment record.

Specifications for Oral Question Assessment

These guidelines concern the use of oral questioning.

Assessors should follow these guidelines.

- Prepare Assessment Record for Oral Questioning. One record for each candidate:

    - Enter Student name

    - Enter Assessor name

    - Enter Location

- Familiarise self with Questions to be asked

- Prepare assessment location (table and chairs) making it conducive to assessment

- Explain Oral Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

  "These oral questions are part of the formal assessment for the unit of competency titled X.

  There are X questions and you are required to answer all of them to the best of your ability and I will record whether or not you have answered correctly.

We have 60 minutes for this assessment.

- ▪ I will give you feedback at the end of the assessment
- ▪ Do you have any questions about this assessment?"

- Commence Oral Questioning assessment:
  - ▪ Complete Assessment Record for the Oral Questioning by:
    a) Ticking PC or NYC, as appropriate
    b) Entering 'Remarks' as required
    c) Completing Oral Questioning within 60 minutes
- Complete Oral Questioning and provide feedback to candidate
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Written Question Assessment

These guidelines concern the use of written questioning.

Assessors should follow these guidelines:

- Familiarise self with Questions and Answers provided
- Print and distribute copies of 'Written Questions' for participants. Ideally this should take place with adequate time for participants to answer all questions before the expected due date
- Explain Written Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

"These written questions are part of the formal assessment for the unit of competency titled X.

There are X questions and you are required to answer all of them to the best of your ability.

You may refer to your subject materials, however where possible try to utilise your existing knowledge when answering questions.

Where you are unsure of questions, please ask the Assessor for further instruction. This may be answering the question orally or asking the assessor to redefine the question.

We have X time for this assessment:

- ▪ The due date for completion of this assessment is X
- ▪ On this date you must forward the completed questions to the assessor by X time on the date of X
- ▪ Do you have any questions about this assessment?"

- The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
- Participants may record written answers (where possible)
- Participants must submit the written answers to the assessor before the scheduled due date

- Assessor must assess the participant's written answers against the model answers provided as a guide, or their own understanding. The assessor can determine if the participant has answered the questions to a 'competent' standard

- Transcribe results/details to Competency Recording Sheet

- Forward/file assessment record.

Specifications for Observation Checklist

These specifications apply to the use of the Observation Checklist in determining competency for candidates.

Only an approved assessor is authorised to complete the Observation Checklist.

The assessor is required to observe the participant, ideally in a simulated environment or their practical workplace setting and record their performance (or otherwise) of the competencies listed on the Observation Checklist for the Competency Unit.

To complete the Observation Checklist the Assessor must:

- Insert name of candidate

- Insert assessor name

- Insert identify of location where observations are being undertaken

- Insert date/s of observations – may be single date or multiple dates

- Place a tick in either the 'Yes' or 'No' box for each listed Performance Criteria to indicate the candidate has demonstrated/not demonstrated that skill

- Provide written (and verbal) feedback to candidate – as/if appropriate

- Sign and date the form

- Present form to candidate for them to sign and date

- Transcribe results/details to Competency Recording Sheet for candidate

- Forward/file Observation Checklist.

This source of evidence combines with other forms of assessment to assist in determining the 'Pass Competent' or 'Not Yet Competent' decision for the participant.

Specifications for Third Party Statement

These specifications relate to the use of a relevant workplace person to assist in determining competency for candidates.

The Third Party Statement is to be supplied by the assessor to a person in the workplace who supervises and/or works closely with the participant.

This may be their Supervisor, the venue manager, the Department Manager or similar.

The Third Party Statement asks the Supervisor to record what they believe to be the competencies of the participant based on their workplace experience of the participant. This experience may be gained through observation of their workplace performance, feedback from others, inspection of candidate's work etc.

A meeting must take place between the Assessor and the Third Party to explain and demonstrate the use of the Third Party Statement.

To complete the Third Party Verification Statement the Assessor must:

- Insert candidate name

- Insert name and contact details of the Third Party
- Tick the box to indicate the relationship of the Third Party to the candidate
- Present the partially completed form to the Third Party for them to finalise
- Collect the completed form from the Third Party
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Third Party Statement.

The Third Party must:

- Record their belief regarding candidate ability/competency as either:
  - Pass Competent = Yes
  - Not Yet Competent = No
  - Unsure about whether candidate is competent or not = Not Sure
- Meet briefly with the assessor to discuss and/or clarify the form.

This source of evidence combines with other forms of assessment to assist in determining the 'Pass Competent' or 'Not Yet Competent' decision for the candidate.

A separate Third Party Statement is required for each Competency Unit undertaken by the candidate.

Competency Standard

UNIT TITLE: PROMOTE PRODUCTS AND SERVICES TO CUSTOMERS	NOMINAL HOURS: 25

UNIT NUMBER: D2.TCC.CL1.08

UNIT DESCRIPTOR: This unit deals with skills and knowledge required to enable the development of product and service knowledge and selling skills, and the use of these skills to encourage customers to make purchases that meet identified need within the hotel and travel industries workplace context.

ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLE AND ASSESSMENT GUIDE
Element 1: Develop product and service knowledge **1.1** Identify *opportunities to develop product and service knowledge* **1.2** Describe the *benefits* of staff having high levels of *product and service knowledge* **1.3** Apply *formal and informal research techniques* to gain product and service knowledge **1.4** Seek *customer feedback* to supplement product and service knowledge **1.5** *Share product and service knowledge* with other relevant internal personnel **1.6** *Initiate action to identify changes* in customer preferences, needs, wants and expectations **1.7** *Contribute to changes to products, services and service standards* to meet	**Unit Variables** The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. This unit applies to all industry sectors that promote products and services to customers within the labour divisions of the hotel and travel industries and may include: 1. Front Office 2. Housekeeping 3. Food and Beverage Service 4. Food Production 5. Travel Agencies 6. Tour Operation *Opportunities to develop product and service knowledge* may be related to: • Personal experience • Reading informational brochures and other materials provided by suppliers and manufacturers • Reading product labels

identified customer needs

Element 2: Develop market knowledge

2.1 Explain the *concept of target markets*

2.2 Define the *concept of niche markets*

2.3 *Describe how promotions and offers may vary* to suit differing target markets

2.4 Identify *sources of information about enterprise-specific target markets*

2.5 Describe the *demographic characteristics* of enterprise target markets

2.6 Explain the *benefits of using target markets* within an organisation

Element 3: Promote products and services

3.1 Describe *promotional initiatives* that may be used to promote products

3.2 Demonstrate how to develop and produce a *static in-house promotion*

3.3 *Verbally promote products and/or services* to customers

3.4 *Demonstrate products and/or services* to customers

Element 4: Apply selling skills

4.1 *Approach the customer* in a sales environment

4.2 *Gather information* about customer needs, wants and preferences

- Attending product launches
- Visiting suppliers, distributors and manufacturers
- Talking to sales representatives.

Benefits of sales staff having high levels of product and service knowledge will include:

- Being able to provide professional assistance to customers
- Being able to distinguish between alternatives
- Meeting customer expectations
- Maximizing selling opportunities
- Being better able to meet and overcome buying objections.

Product and service knowledge may relate to:

- Tours and transport
- Conferences and conventions
- Function and entertainment facilities
- Shopping and restaurant facilities
- Food and beverage
- Retail shops in properties, such as bottle shops, gift shops, foyer shops, souvenir shops.

Formal and informal research techniques may include:

- Discussions with colleagues, management and customers
- Reading internal enterprise material about products and services
- Becoming familiar with customer comments, including complaints
- Reading and researching product data and information provided by suppliers
- Conducting internal testing to determine quality and differentials
- General media research
- Developing, distributing and analysing the responses to questionnaires
- Reading surveys and ratings undertaken by third parties.

4.3 Demonstrate *selling skills*	*Customer feedback* should include:
4.4 Overcome *buying objections*	• Developing, distributing and analysing the responses to questionnaires
4.5 *Maximize sales opportunities* within a buying situation	• Talking to customers and actively seeking their opinion and thoughts on products and services
4.6 Close the sale	• Checking internal buying patterns and trends.
	Share product and service knowledge should relate to:
	• Conducting internal staff meetings to share information
	• Developing paper-based information and data sheets for staff to use
	• Conducting internal product and service demonstrations
	• Conducting taste testing of food and beverages
	• Allowing staff to experience services provided by the organization.
	Initiate action to identify consumer changes may include:
	• Undertaking market research activities
	• Engaging the services of an external market research company
	• Tracking trends and changes in internal sales patterns within the enterprise, with reference to customer databases and/or sales histories, stock usage figures
	• Initiating customer focus groups or similar
	• Participating in industry-wide surveys
	• Obtaining, reading and understanding wider industry market research on changes in customer preferences.
	Contribute to changes to products, services and service standards may involve:
	• Suggesting evidence-based reasons for change
	• Preparing presentations to support personal recommendations for change
	• Ensuring all suggestions for change are supported by a formal rationale and are fully costed
	• Developing an action plan for implementation of recommended changes
	• Participating in group activities designed to identify and develop relevant changes
	• Critiquing suggestions made by others.

Concept of target markets may relate to:

- Identification of the target markets used by the host enterprise
- Identifying points of differentiation between established target markets
- Describing why the established target markets were chosen
- Explaining how the host enterprise tailors its products and/or services to meet the identified needs of its target markets
- Identifying relevant products and/or services as they apply to each of the host enterprise's designated target markets
- Analysing market research that was used as the basis for target market development.

Concept of niche markets should include:

- Definition of niche markets
- Benefits of identifying and establishing niche markets
- Identifying the niche markets that the host enterprise has created and/or established
- Identifying how the host enterprise meets the identified needs of their niche markets explaining how these offerings differ from what is offered to other target markets.

Describe how promotions and offers may vary may relate to:

- Consideration of the marketing mix, such as price, place, product, promotion
- Identifying the development and research process that underpins offers made to different target markets
- Identifying the monitoring process, and relevant key performance indicators, that determines whether or not promotions are being effective or not.

Sources of information about enterprise-specific target markets may include:

- Internal, historic records, such as sales records, purchase histories, customer databases, stock records, customer accounts
- Customer market research
- Information from support businesses, such as suppliers, distributors, agents, associates, head office, manufacturers, the wholesale sector, marketing companies

	• Customer feedback, including paper-based, electronic/online, verbal feedback, customer complaints and comments.
	Demographic characteristics may relate to:
	• Age
	• Gender
	• Marital status, including details of family
	• Identification of the nature and size of the buying unit, such as company, individual, agent, wholesale, retail, government, domestic, international
	• Earning level and/or level of disposable income
	• Access to credit
	• Ethnicity, language spoken
	• Geographic location
	• Employment, such as type, status
	• Transport used
	• Media used
	• Preferred buying/payment option.
	Benefits of using target markets may relate to:
	• Being better able to meet identified need
	• Faster and more profitable sales
	• More satisfied customers
	• Less waste
	• Ability to become established as a specialist supplier
	• Being able to get to know the target better as the level of interaction with them builds
	• Reducing the likelihood of competitors entering into the marketplace.

	Promotional initiatives may relate to: • Media campaigns • Internal promotions, including static displays, demonstrations, tastings, videos, competitions, celebrity appearances, 'specials', packages, events. *Static in-house promotions* may include: • Window displays • Table and counter displays • Advertising material that promotes nominated products and/or services • Pricing tickets • Informational and other print-based materials • Use of actual product • Use of appropriate props to support, extend and highlight the product/service being promoted • Integration with external media and other campaigns. *Verbally promoting products and/or services* must include: • Honesty and accuracy in descriptions • Adherence to enterprise policies and procedures governing selling • Using appropriate questioning and listening techniques • Using descriptive phrases • Selling the benefits and not the features • Comparison of products and services • Making suggestions and recommendations • Meeting identified customer need. *Demonstrate products and/or services* may involve: • Showing the customer • Involving the customer

	• Being active maintaining security and safety throughout the demonstration
	• Adhering to relevant enterprise policies and procedures
	• Complying with any relevant host-country legislation.

Approach the customer may include:

- Determining and applying appropriate timing of the approach
- Greeting and welcoming the customer
- Identifying self and making an offer of assistance
- Identifying and applying the preferred sales approach, given the factors that apply at the time
- Creating and conveying a positive impression to arouse and/or sustain customer interest
- Responding to observed customer buying behaviour.

Gather information relevant to the sale may include:

- Applying questioning techniques to determine customer buying motives
- Using listening skills to determine customer requirements
- Interpreting and clarifying nonverbal customer communication cues
- Identifying customers by name where possible and appropriate
- Directing customer to specific merchandise.

Selling skills may relate to:

- Matching customer needs to appropriate products and services
- Communicating knowledge of products' features and benefits clearly to customers
- Describing product and/or service use and safety requirements to customers
- Involving product or service specialist as required
- Answering routine customer questions about products and services accurately and honestly, or refer to more experienced sales staff.

Buying objections may involve:

- Identifying and accepting customer objections
- Categorizing objections into price, time and product/service characteristics
- Offering solutions according to enterprise policies
- Applying problem-solving to overcome customer objections
- Using the 'feel-felt-found' approach.

Maximizing sales opportunities must include:

- Recognizing opportunities for making additional sales
- Advising customer of complementary products or services, according to customer's identified need
- Demonstrating the ability to make 'add on' sales, to 'up-sell', to use 'suggestive selling' techniques and to use the 'ABC' approach to maximizing sales
- Demonstrating the ability to be an order maker and not just an order taker
- Complying with enterprise policies in relation to selling.

Close the sale must include:

- Monitoring, identifying and responding appropriately to customer buying signals
- Encouraging customer to make purchase decisions through the use of appropriate and acceptable verbal and non-verbal prompts
- Congratulating the customer on their selection
- Thanking the customer for their business
- Encouraging the customer to return to make further purchases.

Assessment Guide

The following skills and knowledge must be assessed as part of this unit:

- Knowledge of the enterprise's policies and procedures in regard to promoting and selling products and/or services
- Knowledge of the principles of promotion and selling

	• Ability to research
	• Knowledge of communication, negotiation, inter-personal and rapport building skills
	• Knowledge of product and service knowledge
	• Knowledge of target markets for the host enterprise
	• Knowledge of compliance with legal issues of the host country in relation to the promotion and sale of products and services
	• Knowledge of differing customer preferences, needs and wants
	• Ability to meet and overcome buying objections
	• Ability to make suggestions and recommendations in-line with identified customer wants, needs and preferences
	• Ability to apply a variety of acceptable sales techniques that will achieve a win-win situation without putting pressure on the customer.
	Linkages To Other Units
	• Access and retrieve computer-based data
	• Develop and update local knowledge
	• Maintain hospitality industry knowledge
	• Manage and resolve conflict situations
	• Promote hospitality products and services
	• Receive and resolve customer complaints
	• Provide advice to patrons on food and beverage services
	• Gather and present product information
	• Maintain a paper-based filing and retrieval system
	• Process a financial transaction for services rendered
	• Process transactions for purchase of goods and services
	• Process financial transactions
	• Plan and implement sales activities or campaigns
	• Prepare and deliver a presentation
	• Create promotional display stand

- Maintain product information inventory
- Plan and implement sales activities
- Source and present information.

Critical Aspects of Assessment

Evidence of the following is essential:

- Demonstrated ability to develop product and/or service knowledge for a nominated range of items and be able to apply such knowledge in a sales situation
- Demonstrated ability to develop knowledge about the target markets established by the host enterprise and apply that knowledge in a nominated sales or promotion situation
- Demonstrated ability to promote a nominated product and/or service internally within the host enterprise
- Demonstrated ability to promote a nominated product and/or service externally using a designated medium and within a given budget
- Demonstrated ability to effectively sell a nominated range of products and/or services to a specified target group.

Context of Assessment

This unit may be assessed on or off the job

- Assessment should include practical demonstration either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge
- Assessment must relate to the individual's work area or area of responsibility.

Resource Implications

Training and assessment to include access to a real or simulated workplace; and access to workplace standards, procedures, policies, guidelines, tools and equipment.

Assessment Methods

The following methods may be used to assess competency for this unit:

- Case studies
- Observation of practical candidate performance

- Oral and written questions
- Portfolio evidence
- Problem solving
- Role plays
- Third party reports completed by a supervisor
- Project and assignment work.

Key Competencies in this Unit

Level 1 = competence to undertake tasks effectively

Level 2 = competence to manage tasks

Level 3 = competence to use concepts for evaluating

Key Competencies	Level	Examples
Collecting, organizing and analysing information	1	Research, gather and assimilate product and service information
Communicating ideas and information	2	Provide product and service information to customers
Planning and organizing activities	2	Prepare sales approaches
Working with others and in teams	1	Include sales specialists in the selling process
Using mathematical ideas and techniques	1	Calculate selling prices for customers as part of the selling/negotiation process
Solving problems	2	Overcome buying objections
Using technology	1	Use technology to research and obtain product and service information

Oral Questions

Student name	
Assessor name	
Location/venue	
Unit of competency	Promote products and services to customers D1.HRS.CL1.13 D1.HOT.CL1.10 D2.TCC.CL1.08
Instructions	1. Ask student questions from the attached list to confirm knowledge, as necessary 2. Place tick in boxes to reflect student achievement (Pass Competent 'PC' or Not Yet Competent 'NYC') 3. Write short-form student answer in the space provided for each question.

Questions	Response	
	PC	NYC
1. Tell me about opportunities you have in the workplace to develop product and service knowledge.	❑	❑

Questions	Response	
	PC	**NYC**
2. What are the benefits of staff in a business having comprehensive and accurate product knowledge?	❑	❑
3. What formal and informal research techniques can you use to capture product knowledge?	❑	❑
4. Give me an example of how you might obtain customer feedback to help build your level of product knowledge for the products and services you sell.	❑	❑

Questions	Response	
	PC	**NYC**
5. How can a worker who has discovered important new product knowledge share this with their work colleagues?	❑	❑
6. What might a business do to identify changes in the needs, wants and preferences of their customers?	❑	❑
7. How can a staff member in a workplace contribute to changes to products and/or service levels in order to better meet identified customer needs, wants and preferences?	❑	❑

Questions	Response	
	PC	NYC
8. What is meant in the workplace by the expression 'target market'? Give me an example of a target market in your workplace.	❏	❏
9. What is a 'niche market'?	❏	❏
10. Give me an example of a promotion or offer that has changed in some way to reflect the differing needs of different target markets.	❏	❏

Questions	Response	
	PC	**NYC**
11. What sources of information might you access to find out information about the target markets a workplace has identified?	❏	❏
12. Give me five examples of 'demographic characteristics' of target markets.	❏	❏
13. What are the benefits for a business of identifying and targeting specific target markets as part of its marketing and sales processes?	❏	❏

Questions	Response	
	PC	**NYC**
14. What promotional initiatives might a business use to promote a new product or service it has introduced to its range?	❏	❏
15. What is a 'static in-house promotion'? When and why might one be used?	❏	❏
16. Demonstrate (using a product or service of your choice) how you would verbally promote a product or service to a customer.	❏	❏

Assessor Manual
Promote products and services to customers

Questions	Response	
	PC	**NYC**
17. What factors would you take into account when demonstrating a product or service to a customer?	❏	❏
18. Demonstrate 'an approach' to a customer in a sales and promotion situation: what would you do and say?	❏	❏
19. How can you gather information about a customer's needs, wants and preferences as part of the selling process?	❏	❏

Questions	Response	
	PC	**NYC**
20. What selling skills might you apply to optimise the likelihood of making a sale in a sales situation without putting pressure on the customer?	❑	❑
21. A customer had indicated they like and want the product you are offering them, but they believe it is too expensive: how might you respond to this situation?	❑	❑
22. Describe, using an example of your own choice, the concept of 'add-on sales' when selling to a customer.	❑	❑

Assessor Manual
Promote products and services to customers

Questions	Response	
	PC	**NYC**
23. What is meant by the concept of 'closing a sale' and how might this be done with a person who is undecided about which of two options they should purchase?	❑	❑

Written Questions

Promote products and services to customers – D2.TCC.CL1.08

Student Name: _____

Answer all the following questions and submit to your Trainer.

1. Identify three opportunities for sales staff to capture and maintain product and service knowledge?

    _____

    _____

    _____

    _____

2. List three ways staff in a venue can gain personal experience about their venue/workplace.

    _____

    _____

    _____

    _____

3. Give three reasons why sales staff should have high levels of product and service knowledge.

    _____

    _____

    _____

    _____

4. List three examples of 'formal research techniques' and three examples of 'informal research techniques' staff can use to gain product and service knowledge.

    Formal research techniques:

    _____

    _____

    _____

    _____

Informal research techniques:

_____

_____

_____

_____

5. Answer 'Yes' or 'No' to the following statement: Should sales staff seek feedback from customers to supplement their product and service knowledge?

_____

_____

_____

_____

6. List three techniques that have proved effective in passing on product and service knowledge to other workers within a venue or business.

_____

_____

_____

_____

7. What is identified in the notes as being '… recognised as the best way to obtain information about your customer preferences, needs, wants and expectations'?

_____

_____

_____

_____

8. What are the five elements of the '5Ps'?

_____

_____

_____

_____

9. List three activities staff may engage in at their workplace to contribute to changes to products, services and service standards to meet customer need.

    _____

    _____

    _____

    _____

10. What is a 'target market'?

    _____

    _____

    _____

    _____

11. What is the term used to describe a market that is a sub-set of a target market, is often a market very few, if any, other venues are targeting or catering for, and always has some factor/characteristic (need, want or preference) differentiating it from the rest of the market?

    _____

    _____

    _____

    _____

12. Explain how the 'Marketing Mix' can/should be used to enable promotions and offers to be varied to suit differing target and/or niche markets.

    _____

    _____

    _____

    _____

13. What is the 'Promotional Mix'?

    _____

    _____

    _____

    _____

14. Identify three possible sources of information about enterprise-specific target/niche markets.

_____

_____

_____

_____

15. Why is it important for sales staff to know the demographic characteristics of their target/niche markets?

_____

_____

_____

_____

16. Identify five demographic characteristics of customers.

_____

_____

_____

_____

17. Identify three benefits to venues/businesses of using 'target markets'.

_____

_____

_____

_____

18. List three examples of 'internal promotions' a venue/business may engage in.

_____

_____

_____

_____

19.   Identify three media options a venue/business may use to promote products/services.

_____

_____

_____

_____

20.   Answer 'True' or 'False' to the following statement: 'All displays will benefit from planning'.

21.   What is known as the 'basic display format' for displays/stands?

_____

_____

_____

_____

22.   Should the items on displays/stands be kept 'tight' or 'loose'?

_____

23.   Identify three requirements that must always apply in relation to 'honesty and accuracy' when verbally promoting products and/or services to customers.

_____

_____

_____

_____

24.   Answer 'True' or 'False' to the following statement: "A key strategy in selling is to 'Sell the Benefits'"

25.   What is the last thing a staff member should do after having demonstrated a product or service to a customer?

_____

26. What is the role of the sales approach?

    _____

    _____

    _____

    _____

27. Your approach to a customer has indicated they are already ready to buy – identify three ways you might respond to this observed behaviour.

    _____

    _____

    _____

    _____

28. When gathering information about customer needs, wants and preferences is it best to start by asking 'open' or 'closed' questions?

    _____

29. What are the two factors identified in the notes as being 'keys' in communicating knowledge of features and benefits to customers when selling to them?

    _____

    _____

    _____

    _____

30. List three ways sales staff can deal effectively with a 'Me, Now' customer.

    _____

    _____

    _____

    _____

    _____

    _____

31. Answer 'True' or 'False' to the following statement: 'The first step in overcoming customer buying objections is to acknowledge and accept the legitimacy of the objection'.

32.   List three 'worst things' sales staff can do when meeting a customer objection.

_____

_____

_____

_____

33.   What does the A, the B and the C stand for in the 'ABC approach to selling'?

_____

_____

_____

_____

34.   List three 'ground rules' to keep in mind when closing a sale.

_____

_____

_____

_____

35.   What is the name of the closing technique that allows the prospect decide a step at a time, without pressuring them?

_____

36.   What three things should sales staff do after they have successfully closed a sale?

_____

_____

_____

_____

Answers to Written Questions

Promote products and services to customers – D2.TCC.CL1.08

The following are model answers only – Trainers/Assessors must use discretion when determining whether or not an answer provided by a Student is acceptable or not.

1. **Identify three opportunities for sales staff to capture and maintain product and service knowledge?**

    Any from the following:

    -   Personal experience
    -   Reading
    -   Attending product launches
    -   Attending trade events
    -   Talking to sales representatives
    -   Visiting suppliers, distributors and manufacturers
    -   Talking to others.

2. **List three ways staff in a venue can gain personal experience about their venue/workplace.**

    Any from the following:

    -   Tasting venue food
    -   Tasting venue beverages
    -   Visiting/staying in accommodation/rooms
    -   Walking around the venue
    -   Viewing venue activities
    -   Being a customer in the venue.

3. **Give three reasons why sales staff should have high levels of product and service knowledge.**

    Any from the following:

    -   Have confidence in ability to sell and approach customers
    -   Present products and services in an appropriate way meeting identified customer needs, wants and preferences
    -   Establish a rapport with customers based on confidence and demonstrated credibility
    -   Engage with customers and build an ongoing relationship encouraging repeat and return business

- Show, display or present products and services in such a way that demonstrates their best features and highlights their appropriateness for potential purchasers
- Offer (where appropriate) potential customers the opportunity to test, try or sample the products or services being considered or offered for sale.

4. **List three examples of 'formal research techniques' and three examples of 'informal research techniques' staff can use to gain product and service knowledge.**

Formal research techniques

Any from the following:

- Reading surveys and ratings
- Administering questionnaires
- Conducting internal testing
- Evaluating existing external data
- Reading internal documentation
- Reviewing customer feedback.

Informal research techniques

Any from the following:

- Engaging in general discussion
- Reading, watching and listening to the media
- Reading various literature
- Being a tourist in your local area.

5. **Answer 'Yes' or 'No' to the following statement: Should sales staff seek feedback from customers to supplement their product and service knowledge?**

Yes.

6. **List three techniques that have proved effective in passing on product and service knowledge to other workers within a venue or business.**

Any from the following:

- Conducting internal staff meetings
- Mentioning information at briefings
- Developing paper-based information
- Conducting internal product and service activities
- Allowing staff to experience services
- Conducting training sessions.

7. What is identified in the notes as being '… recognised as the best way to obtain information about your customer preferences, needs, wants and expectations'?

Market research.

8. What are the five elements of the '5Ps'?

- Product
- Price
- Place
- Promotion
- People.

9. List three activities staff may engage in at their workplace to contribute to changes to products, services and service standards to meet customer need.

Any from the following:
- Suggesting evidence-based reasons for change
- Preparing presentations to support personal recommendations for change
- Participating in group activities designed to identify the need for change
- Participating in group activities to develop change.

10. What is a 'target market'?

Target markets are groups of people with similar demographic characteristics that a business wants to sell to and/or attract to its premises.

11. What is the term used to describe a market that is a sub-set of a target market, is often a market very few, if any, other venues are targeting or catering for, and always has some factor/characteristic (need, want or preference) differentiating it from the rest of the market?

Niche market.

12. Explain how the 'Marketing Mix' can/should be used to enable promotions and offers to be varied to suit differing target and/or niche markets.

The 4Ps in the Marketing Mix (Price, Product, Place, Promotion) can be altered individually or in combination to produce a product/service more readily/effectively meeting identified customer needs, wants and/or preferences.

13. What is the 'Promotional Mix'?

The Promotional Mix is the range and blend of means selected by a business to communicate with its target and niche markets.

14. **Identify three possible sources of information about enterprise-specific target/niche markets.**

Any from the following:

- Internal documents
- Market research data/findings
- Information from support businesses
- Customer feedback.

15. **Why is it important for sales staff to know the demographic characteristics of their target/niche markets?**

Knowing the demographic characteristics of the target and niche markets helps determine what they want, how to treat/serve them, what to offer them and what not to recommend to them.

16. **Identify five demographic characteristics of customers.**

Any from the following:

- Age
- Gender
- Marital status
- Nature and size of the buying unit
- Earning level
- Access to credit
- Ethnicity
- Geographic location
- Employment
- Transport used
- Media used
- Preferred buying/payment option.

17. **Identify three benefits to venues/businesses of using 'target markets'.**

Any from the following:

- Being better able to meet identified need
- Faster sales
- More profitable sales
- More satisfied customers
- Less waste
- Ability to become established as a specialist supplier
- Being able to get to know the target market better
- Reducing the likelihood of competitors entering into the marketplace.

18. **List three examples of 'internal promotions' a venue/business may engage in.**

Any from the following:
- Static display/stand
- Demonstration
- Tastings
- DVDs or videos
- Competitions
- Celebrity appearances
- Specials
- Packages.

19. **Identify three media options a venue/business may use to promote products/services.**

Any from the following:
- Newspapers
- Radio
- Television
- Workplace website
- Social media.

20. **Answer 'True' or 'False' to the following statement: 'All displays will benefit from planning'.**

True.

21. **What is known as the 'basic display format' for displays/stands?**

To create the display in a triangular shape, also known as the 'pyramid effect'.

22. **Should the items on displays/stands be kept 'tight' or 'loose'?**

Tight.

23. **Identify three requirements that must always apply in relation to 'honesty and accuracy' when verbally promoting products and/or services to customers.**

Any from the following:
- Never lie
- Never tell half-truths
- Never say a products or service is better than it is
- Advice and information supplied must be genuine and not contrived to simply make a sale

- Full disclosure is the preferred approach – tell the customer about the good and the bad

- Be ethical in your dealings with everyone

- Do not promise what you know the venue/product/service cannot deliver.

24. Answer 'True' or 'False' to the following statement: "A key strategy in selling is to 'Sell the Benefits'"

False.

25. What is the last thing a staff member should do after having demonstrated a product or service to a customer?

Thank them – for the opportunity or for purchases.

26. What is the role of the sales approach?

The Sales Approach seeks to identify what the customer wants or needs to buy.

27. Your approach to a customer has indicated they are already ready to buy – identify three ways you might respond to this observed behaviour.

- Convert directly into a 'closing the sale'

- Provide a brief answer to a direct question

- Require the posing of a 'closing' question.

28. When gathering information about customer needs, wants and preferences is it best to start by asking 'open' or 'closed' questions?

Open questions.

29. What are the two factors identified in the notes as being 'keys' in communicating knowledge of features and benefits to customers when selling to them?

- Product knowledge

- Practice.

30. List three ways sales staff can deal effectively with a 'Me, Now' customer.

Any from the following:
- Avoid presenting alternatives

- Avoid making comparisons

- Avoid raising the idea of discounts or Specials deals

- Be direct and clear with any advice or information given – use short sentences, facts and figures

- Stop talking – replace talking with doing.

31. **Answer 'True' or 'False' to the following statement: 'The first step in overcoming customer buying objections is to acknowledge and accept the legitimacy of the objection'.**

    True.

32. **List three 'worst things' sales staff can do when meeting a customer objection.**

    Any from the following:

    - Argue
    - Run away – that is, stop trying to sell
    - Get defensive
    - Display a noticeable change in demeanour
    - Make rash (and dishonest) promises just to make the sale
    - Respond with absurd suggestions
    - Imply that the objections are trite and/or irrelevant.

33. **What does the A, the B and the C stand for in the 'ABC approach to selling'?**

    A = Automatic

    B = Bettered

    C = Created.

34. **List three 'ground rules' to keep in mind when closing a sale.**

    Any from the following:

    - Expect to make the sale
    - Stay focussed
    - Accept it is the customer's decision to buy
    - The sale must be mutually beneficial
    - No-one sells every time
    - Use verbal and non-verbal prompts.

35. **What is the name of the closing technique that allows the prospect decide a step at a time, without pressuring them?**

    The 'If' technique.

36. **What three things should sales staff do after they have successfully closed a sale?**

    - Congratulate the customer
    - Thank the customer
    - Encourage return business.

Observation Checklist

Student name	
Assessor name	
Location/venue	
Unit of competency	Promote products and services to customers D1.HRS.CL1.13 D1.HOT.CL1.10 D2.TCC.CL1.08
Dates of observation	

Instructions	1. Over a period of time observe the student completing each of the following tasks:
	
	   a) Develop product and service knowledge
	
	   b) Develop market knowledge
	
	   c) Promote products and services
	
	   d) Apply selling skills
	
	2. Enter the date on which the tasks were undertaken
	
	3. Place a tick in the box to show they completed each aspect of the task to the standard expected in the enterprise
	
	4. Complete the feedback sections of the form, if required.

Did the candidate	Yes	No
Element 1: Develop product and service knowledge		
Identify opportunities to develop product and service knowledge	❑	❑
Describe the benefits of staff having high levels of product and service knowledge	❑	❑
Apply formal and informal research techniques to gain product and service knowledge	❑	❑
Seek customer feedback to supplement product and service knowledge	❑	❑
Share product and service knowledge with other relevant internal personnel	❑	❑
Initiate action to identify changes in customer preferences, needs, wants and expectations	❑	❑
Contribute to changes to products, services and service standards to meet identified customer needs	❑	❑

Element 2: Develop market knowledge		
Explain the concept of target markets	❑	❑
Define the concept of niche markets	❑	❑
Describe how promotions and offers may vary to suit differing target markets	❑	❑
Identify sources of information about enterprise-specific target markets	❑	❑
Describe the demographic characteristics of enterprise target markets	❑	❑
Explain the benefits of using target markets within an organisation	❑	❑
Element 3: Promote products and services		
Describe promotional initiatives that may be used to promote products	❑	❑
Demonstrate how to develop and produce a static in-house promotion	❑	❑
Verbally promote products and/or services to customers	❑	❑
Demonstrate products and/or services to customers	❑	❑
Element 4: Apply selling skills		
Approach the customer in a sales environment	❑	❑
Gather information about customer needs, wants and preferences	❑	❑
Demonstrate selling skills	❑	❑
Overcome buying objections	❑	❑
Maximize sales opportunities within a buying situation	❑	❑
Close the sale	❑	❑
Did the student's overall performance meet the standard?	❑	❑

Feedback to student and trainer/assessor			
Strengths:			
Improvements needed:			
General comments:			
Candidate signature		**Date**	
Assessor signature		**Date**	

Third Party Statement

Student name:			
Name of third party:		Contact no	
Relationship to student:	❑ Employer ❑ Supervisor ❑ Colleague ❑ Other _Please specify:_____ Please do not complete the form if you are a relative, close friend or have a conflict of interest]_		
Unit of competency:	Promote products and services to customers D1.HRS.CL1.13 D1.HOT.CL1.10 D2.TCC.CL1.08		

The student is being assessed against industry competency standards and we are seeking your support in the judgement of their competence.

Please answer these questions as a record of their performance while working with you. Thank you for your time.

Do you believe the trainee has demonstrated the following skills? _(tick the correct response]_	Yes	No	Not sure
Takes opportunities to develop product and service knowledge using formal and informal research techniques and customer feedback	❑	❑	❑
Shares product and service knowledge with others	❑	❑	❑
Takes action to identify changes in customer preferences, needs, wants and expectations	❑	❑	❑
Contributes to changes to products, services and service standards to meet identified customer needs	❑	❑	❑
Develops knowledge about and describes the demographic characteristics of different workplace target markets	❑	❑	❑
Describes how promotions and offers may vary to suit differing target markets	❑	❑	❑
Realises the benefits of using target markets within the business	❑	❑	❑
Promotes products and services using appropriate promotional initiatives including use of verbal promotion to customers	❑	❑	❑
Develops and produces in-house static promotions	❑	❑	❑
Demonstrate products and/or services to customers	❑	❑	❑
Applies standard and effective selling skills to sell products and services	❑	❑	❑

Comments/feedback from Third Party to Trainer/Assessor:	
Third party signature:	**Date:**
Send to:	

Competency Recording Sheet

Name of Student		
Name of Assessor/s		
Unit of Competency	Promote products and services to customers	D1.HRS.CL1.13 D1.HOT.CL1.10 D2.TCC.CL1.08
Date assessment commenced		
Date assessment finalised		
Assessment decision	Pass Competent / Not Yet Competent (Circle one)	
Follow up action required (Insert additional work and assessment required to achieve competency)		
Comments/observations by assessor/s		

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 1: Develop product and service knowledge						
Identify opportunities to develop product and service knowledge						
Describe the benefits of staff having high levels of product and service knowledge						
Apply formal and informal research techniques to gain product and service knowledge						
Seek customer feedback to supplement product and service knowledge						
Share product and service knowledge with other relevant internal personnel						
Initiate action to identify changes in customer preferences, needs, wants and expectations						
Contribute to changes to products, services and service standards to meet identified customer needs						
Element 2: Develop market knowledge						
Explain the concept of target markets						
Define the concept of niche markets						

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Describe how promotions and offers may vary to suit differing target markets						
Identify sources of information about enterprise-specific target markets						
Describe the demographic characteristics of enterprise target markets						
Explain the benefits of using target markets within an organisation						
Element 3: Promote products and services						
Describe promotional initiatives that may be used to promote products						
Demonstrate how to develop and produce a static in-house promotion						
Verbally promote products and/or services to customers						
Demonstrate products and/or services to customers						
Element 4: Apply selling skills						
Approach the customer in a sales environment						
Gather information about customer needs, wants and preferences						

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Demonstrate selling skills						
Overcome buying objections						
Maximize sales opportunities within a buying situation						
Close the sale						
Candidate signature:			**Date:**			
Assessor signature:			**Date:**			