

**SUPERVISE SALES PERFORMANCE**

**WORKPLACE LOGBOOK**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**U/S 118037**



|  |  |
| --- | --- |
| **LEARNER NAME AND SURNAME:** |  |
| **LEARNER ID NUMBER:** |  |
| **EMPLOYER CONTACT NAME:** |  |
| **EMPLOYER CONTACT NUMBER:** |  |
| **DATE OF SUBMISSION TO ASSESSOR:** |  |
| **ASSESSOR EVALUATION OUTCOME (RM/RNYM)** |  |



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# WORKPLACE ACTIVITIES GUIDELINES

This WORKPLACE LOGBOOK contains activities that the learner needs to **do in your own workplace**.

The activities require the learner to **insert or create evidence** that will show that they completed the activity in their own workplace.

The learner needs to do **ALL** the Workplace Activities successfully to be deemed competent for the unit standard.

Learners may request assistance from the Workplace Supervisor/Manager/Coach

The Workplace Coach/Manager/Supervisor **must sign off the activities** in the

WORKPLACE LOGSHEET as satisfactory when the learner is done with them. It should be signed off on a daily/weekly basis.

The **Assessor** will sign acknowledgement of receipt of this Workplace Logbook. A Desktop evaluation will be done of the evidence by the Assessor

The learner will not be allowed to proceed to the SUMMATIVE ASSESSMENT unless ALL the WORKPLACE ACTIVITIES meet the necessary requirements.

**WORKPLACE RESOURCES NEEDED:**

* Access to sales teams and their supervisors in own store
* Workplace System printouts of sales figures per department – 5/7 day Sales Report
* Office or meeting room
* Paper and stationery
* Possible resources that may be needed for the execution of the specific selected activities
* Computer with MS-Word where possible
* Time to observe in the Sales department and meet with the sales team

# WORKPLACE ACTIVITY 1 (SO 2 AC1-3)

You are required to observe a sales team in your workplace.

# SUPERVISE SALES PERFORMANCE ACTIVITY

|  |  |
| --- | --- |
| **RATING CODE** | **RATING** |
| 3 | Outstanding: ALL components submitted |
| 2 | Requirements Met: Acceptable, most components for an acceptable investigation and outcome was submitted |
| 1 | Requirements Not Yet Met: Not all the important and required components were submitted |

**NOTE TO THE WORKPLACE COACH:**

The Coach should spend enough time with the learner in order to ensure that the learner retrieves all the required sales information as requested in the Guideline hereunder; The Workplace Coach signs the checklist in this Workplace Logbook.

The Coach MUST write related comments such as product types that were sold, statements that were made by learner, questions that were asked etc. in the relevant comment areas.

You will be scored and then evaluated as:

* Requirements met (RM)
* Requirements Not Yet Met (RNYM)

You **cannot receive more than two scores lower than a 1** to meet the requirements. If so, you will have to arrange another observation time or continue for another 30 min to rectify the problem areas.

**ACTIVITY GUIDELINES:**

You are expected to start with the investigation of a sales team in your own workplace.

You have one month to complete this investigation.

# SALES TEAM INVESTIGATION & APPLICATION

1. Select a Sales Team in your store
2. Monitor the sales of the team for the period of a week – you can make a printout of the sales team off your store’s system if your store’s system shows departmental sales figures
3. Record and consolidate the team’s actual sales in the form of a table against their target – you can highlight the actual sales on the printout if you can print such a report off your store’s system.
4. Draft a graph to depict the week’s results – you can use Excel to create your table and graph or hand draw the graph neatly
5. Write a brief report of your findings – make sure your Report reflects the following:
   * heading
   * your name
   * clear purpose
   * method used to investigate the sales team
   * specific and/or interesting observations that were made during the week
   * outcome of the sales investigation

1. Insert all the evidence into your provided folder – ensure that you mark (headings and labels) all evidence clearly so that the Assessor can identify each component of this task clearly

***Use the checklist below to ensure that all the required evidence is collected and collated. The Assessor will use the same checklist to evaluate your submission.***

**NOTE TO THE ASSESSOR:**

Some stores have electronic systems. In most cases they will have printed from this system a **five- or seven days SALES REPORT** that will show the sales staff’s performance for those days.

Learner can then use these figures to draw a graph or to draft a graph in EXCEL.

Some learners choose to write their brief report on this printout – this can be accepted

If their store’s sales cycle works on less than five or seven days – this can also be accepted

Learners MUST have completed ALL the components as per the table and description above.

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**NVESTIGATION CHECKLIST**

|  |  |  |  |
| --- | --- | --- | --- |
| Outcomes | Score | Comment | Completed  RM or  RNYM |
| Identify a sales staff team, in the case where you are not part of a sales team with set targets for yourself  (Example Cell phones or High Tech team) |  |  |  |
| **Record their sales** at the end of each day for the indicated period: Monday  Tuesday  Wednesday  Thursday  Friday    If your store’s sales cycle work on more or less than five days, that will also be accepted  This can be a printout off the store’s system  Tabulate this information even if you do have a store printout |  |  |  |
| Enquire what the sales staff **members target** is for each day  This can be highlighted and labelled on the store’s system printout and tabulated |  |  |  |
| Draw up a **table to display the actual sales results** against the targeted sales  Even if the store has a print out, it must be clearly labelled on the system printout as the printout will have headings at the top and then inserted into the information table |  |  |  |
| Draw a **graph** displaying the results of the above report table  Can be hand drawn or done in Excel |  |  |  |
| Write a **Report i**n written format on the outcome of your investigation  Write a report on your findings from the week’s sales figures |  |  |  |

**ROLE PLAYERS DETAILS AND SIGNATURES:**

|  |  |  |
| --- | --- | --- |
|  | Name and Surname | Signature |
| Sales Team Member 1: |  |  |
| Sales Team Member 2: |  |  |
| Sales Team Member 3: |  |  |
| Sales Team Member 4: |  |  |
| Sales Team Member 5: |  |  |
| Sales Team  Supervisor/Coach: |  |  |
| Learner: |  |  |
| Assessor: |  |  |

**WORKPLACE ACTIVITY 2**

## (SO 3 AC1-3)

You are required to propose actions to improve the sales performance of the team that you have analyzed in Activity 1.

2.1 Refer to the sales team that you investigated in Activity 1.

List at least three methods that could be used to improve sales in this designated sales area

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**|** W o r k p l a c e L o g b o o k : 1 1 8 0 3 7

2.2. Propose the listed methods to improve sales in designated areas in the following table to

management

|  |  |  |
| --- | --- | --- |
| Method | Explanation of method (How would it be implemented) | Purpose of the method |
| 1. |  |  |
| 2. |  |  |
| 3. |  |  |
| Workplace Coach/Sales Manager:  Name and Surname: |  |  |
| Manager’s Signature: |  |  |
| Learner’s Signature: |  |  |

**|** W o r k p l a c e L o g b o o k : 1 1 8 0 3 7

2.3 After you have proposed the methods to management, communicate the agreed upon methods to improve sales to the team. Management should agree to at least two of the methods if not all three

|  |  |  |
| --- | --- | --- |
| Method | Explanation of method (How would it be implemented) | Purpose of the method |
| 1. |  |  |
| 2. |  |  |
| 3. |  |  |
| Workplace Coach/Sales Manager:  Name and Surname: |  |  |
| Manager’s Signature: |  |  |
| Learner’s Signature: |  |  |

**|** W o r k p l a c e L o g b o o k : 1 1 8 0 3 7

|  |  |  |
| --- | --- | --- |
|  | **Name and Surname** | **Signature** |
| Sales Team Member 1: |  |  |
| Sales Team Member 2: |  |  |
| Sales Team Member 3: |  |  |
| Sales Team Member 4: |  |  |
| Sales Team Member 5: |  |  |
| Assessor: |  |  |

**|** W o r k p l a c e L o g b o o k : 1 1 8 0 3 7

## WORKPLACE LOGBOOK FOR 118037: Supervise Sales Performance

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **WORKPLACE TASK NUMBER** | **WORKPLACE**  **Activity and/or**  **TASK COMPLETED**  **Yes No** | | **DATE OF**  **COMPLETION** | **APPROXIMATE TIME**  **SPENT IN WORKPLACE**  **IN AREA OF OUTCOME** | **Evidence inserted** |  | **LEARNER SIGNATURE** |
| **EXAMPLE:** |  |  | **12/07/2014** | **2,35** (indicating 2 hrs. and  35 min) |  |  | **Joe Soap** |
| **Workplace Activity 1:**  **Workplace Investigation:**  Observation of a Sales Team for a designated period |  |  |  |  | Completed checklists  Review Form  Evidence as per evidence checklist  Signed off and dated |  |  |
| **Workplace Activity 2:**  You are required to propose actions to improve the sales performance of the team that you have analyzed in Activity 1 |  |  |  |  | Listed methods  Completed tables and signatures of all role players |  |  |
| **WORKPLACE COACH/DEPARTMENT**  **MANAGER OR SUPERVISOR NAME AND**  **SURNAME** |  | | | **WORKPLACE**  **COACH/DEPARTMENT**  **MANAGER OR**  **SUPERVISOR**  **SIGNATURE** |  |  |  |
| **DATE OF SIGINING OFF:** |  | | |  |  |  |  |
| **ASSESSOR NAME AND SURNAME:** |  | | | **ASSESSOR SIGNATURE:** |  |  |  |

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# *PARTICIPANTS*

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**|**

Workplace Logbook: 118037

