

## Recommended process for assessment

### On-job Assessment – Can be conducted in a simulated classroom environment

**Visit by Sales Agent to consumer accompanied by Experienced Sales Agent. The Sales Agent must clearly understand the standards he/she is to be assessed against and the way in which he/she is going to be informally assessed.**

Experienced Sales Agent to:

- ensure Agent understands the requirements under the on-job Assessment.
- ensure the Agent understands how accreditation status works and how it may be changed.
- ensure the Agent is aware of the Standards and how they are going to be assessed in the future
- conduct an on-job assessment on the Agent to determine if ready to be formally assessed.

### Formal competency assessment - Can be conducted in a simulated classroom environment

**Stage 1  
Prepare for the Assessment (Sales Agent and Assessor). The Sales Agent must clearly understand the standards he/she is to be assessed against and the way in which he/she is going to be Formally assessed.**

Sample Questions that may be asked

- Are you aware of the purpose of this assessment?
- Can you explain the various levels of accreditation status and under what circumstances can the accreditation status be changed to Deregistration?
- Have you read the Sales Agent Guideline and do you understand it?
- Can you describe some of the Standards and how you can be in breach of them?
- Have you received any other feedback about your performance, e.g. from sales complaints, trainer etc...
- What have you learnt from previous feedback and what have you changed?
- Have you been informed about the disciplinary procedures that apply to you if you breach the SAL Standards and do you understand your rights of appeal, if a change in accreditation status to Deregistration?

**Stage 2  
Complete the template overleaf**

Responsibilities:

- Assessor to ensure he/she understands the competency assessment.
- Assessor to gather any supplementary documentary evidence before the assessment (this will vary dependent on tenure of the Sales Agent).
- Assessor to gather information as a result of the competency assessment.
- Assessor to gather results of off-job assessment and on-job assessment of Agent.
- Sales agent to introduce the Assessor to consumers, but assure that the Assessor is simply there as an observer.

**Stage 3**

- Assessor to take into account achievements noted during observation.
- Assessor to identify evidence that does not meet the requirements of the Standards and to discuss the identified evidence with the Sales Agent and give feedback
- Assessor to agree an action plan if necessary, to undertake further training and record the agreed upon actions in writing
- Assessor to provide a written recommendation as to the Agent's competence. Members are to ensure that they provide Agents with a guide as to how this is to be determined. Assessor to inform the Sales Agent of the recommendation, inclusive of change in status if warranted; and that if he/she disagrees with the assessment decision, he/she has a right to appeal under the Member's Dispute Resolution Process
- Sales Agent to enter his/her comments in the appropriate section inclusive of how they felt with the process or the decision

**Stage 4  
Agent Accreditation Process**

- Member to ensure assessments have been appropriately and consistently carried out by the Assessors
- Member to authorise any change in accreditation status in the Register as an outcome of the assessment

Sales Agent	Name	Sales Assured ID Number	
	Date of Assessment	Date of previous Assessment	

Assessor	Name	Sales Assured ID Number	
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Personal Preparation	Appearance	PASS	FAIL
	ID card visible and in good condition	PASS	FAIL
	Sales presenter up to date and complete	PASS	FAIL
	Walk sheet understood and current	PASS	FAIL
Out in the field	Uses walk sheet (or equivalent) accurately	PASS	FAIL
	Respects "no sales callers" signs	PASS	FAIL
	Respects property and OH&S obligations	PASS	FAIL
Approach to consumer	States name	PASS	FAIL
	Presents ID	PASS	FAIL
	States purpose of visit	PASS	FAIL
	States name of Company (Member) they represent	PASS	FAIL
	Established consumer is authorised to sign up	PASS	FAIL
Presentation	Uses presenter during sales pitch	PASS	FAIL
	Carries out accurate price comparisons	PASS	FAIL
	Correct feature of the product is given (inclusive of eligibility for concessions, rebates or grants)	PASS	FAIL
	Does not use cooling off as a sales pitch	PASS	FAIL
	Does not provide false, derogatory or misleading statements	PASS	FAIL
	Recognises when to end visit	PASS	FAIL
Sales Agent behaviours	Courteous & Professional	PASS	FAIL
	Does not exaggerate or use high pressure techniques	PASS	FAIL
	Takes into account consumer ethnicity/diversity	PASS	FAIL
	Recognises and respects a vulnerable customer situation	PASS	FAIL
	Ensure consumer understands that they are switching retailers	PASS	FAIL
Contract	Leaves a copy of the contract	PASS	FAIL
	Leaves welcome pack inclusive of complaints procedure	PASS	FAIL
	Leaves pricing form	PASS	FAIL
	Leaves consumer written acknowledgement & price fact sheet where required	PASS	FAIL
	Leaves contact details	PASS	FAIL
Contract administration	All boxes filled in correctly	PASS	FAIL
	Signed and dated by consumer	PASS	FAIL
	Signed by agent with ID number easily displayed	PASS	FAIL
Other	Understands complaints & levels raised against them	PASS	FAIL
	Displays behaviours that addresses the complaint	PASS	FAIL
	Sales Agent Cancellation Rate within average benchmark	PASS	FAIL
	Other KPI's	PASS	FAIL