

Third Party Reports

The Third Party Report should be completed by a senior member of staff i.e. a supervisor or manager, where possible. The report should cover the points below, with a description to show that the tasks have been witnessed over time, while working with the learner. Examples, times, dates etc. should be included, if possible.

As this unit is about recommending products and services, you will need to have witnessed the learner within a working or training environment:

1. Developing and maintaining knowledge of products and services
2. Recommending products and services
3. Advising on promotional activities.

Ticking yes/no next to the tasks is required, as well as an accompanying report.

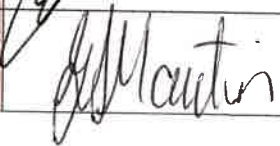
Third Party Checklist

Candidate's Name	Gemma Martin	
Assessor or Observer's Name	Grace Martin	
Unit of Competence (Code and Title)	BSBPRO301-Recommend Products and Services	
Date of Assessment		
Location		
Demonstration Tasks		
Materials and Equipment		
Tasks to be simulated if not witnessed over time:	Yes	No
1. Did the learner actively and regularly research knowledge and understanding of industry products and services using authoritative sources?	✓	
2. Did the learner use available product and service documentation to identify and understand characteristics of products and services, and to make comparisons with other products and services?	✓	
3. Did the learner accurately document and maintain information on products and services in a format consistent with organisational requirements?	✓	
4. Did the learner apply acquired knowledge to improve quality within personal work areas?	✓	
5. Did the learner ensure that recommendations on products and services are in line with organisational requirements?	✓	
6. Did the learner provide recommendations that emphasise product and service issues relevant to client needs?	✓	
7. Did the learner ensure that evidence in support of recommendations is verifiable and presented in a suitable format?	✓	
8. Did the learner structure recommendations to identify clear benefits to clients and the organisation?	✓	
9. Did the learner provide advice that is clear, is supported by verifiable evidence and is compatible with organisational requirements?	✓	
10. Did the learner ensure that promotional documentation and materials are appropriate to presentation of the organisation's products and services?	✓	

11. Did the learner ensure that costs of promotional activities conform to budget resources?	✓	
12. Did the learner estimate impact of promotional activities from verifiable customer feedback sources?	✓	
13. Did the learner evaluate the benefits of promotional activities and incorporate in plans for future promotional activities?	✓	

The candidate's performance was:	Not Satisfactory	Satisfactory ✓
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Further comments: Gemma, connects with all stakeholders & if she is unable to give an answer to a question, will sort an answer from someone that can. Gemma has a base knowledge of our varied products & is building on this knowledge. Gemma is able to align promotional information with current products.

Candidate's Signature	
Assessor/Observer's Signature	

Third Party Evidence

Name of Candidate	Gemma Martin	Confidential Information
RTO:		
Unit(s) of Competence		

As part of the assessment for the units of competency, we are seeking evidence to support a judgment about the candidate's competence. As part of the evidence of competence we are seeking reports from the supervisor and other people who work closely with the candidate.

Name of the supervisor:	Grace Martin
Workplace:	RHM Building Innovations
Address:	117 Mt Lindesay Hwy
Phone:	0423 267 868 Gleneagle

Do you understand which evidence/tasks the candidate has provided/performed that you are required to comment on?

☒ Yes

☐ No

As the assessor explains the purpose of the candidates assessment?

☐ Yes

☒ No

Are you aware that the candidate will see a copy of this form?

☒ Yes

☐ No

Are you willing to be contacted should further verification of this statement be required?

☒ Yes

☐ No

What is your relationship to the candidate?	Employer-supervisor
How long have you worked with the person being assessed?	3 years
How closely do you work with the candidate in the area being assessed?	Directly
What is your technical experience and/or qualification (s) in the area being assessed? (Include any assessment or training qualifications.)	Business Manager

Does the candidate:

Perform tasks to the industry standards?	☒ Yes	No
Managed job tasks effectively?	☒ Yes	No
Implement safe working practices?	☒ Yes	No
Solve problems on the job?	☒ Yes	No
Work well with others?	☒ Yes	No
Add that to new tasks?	☒ Yes	No
With unusual or non-routine situations?	☒ Yes	No

Overall do you believe the candidate conforms to the standard required by the unit of competency on a consistent basis?

Yes, Gemma is constantly learning & improving her knowledge.

Identify any training needs for the candidate:

Ongoing on the job training.

Any other comments: