



## PROFESSIONAL SALES

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Professional sales youth apprentices carry out sales and sales related activities on behalf of a business. Youth apprentices determine customer needs, communicate product information, and handle sales transactions.

**Length of Apprenticeship:** One year

## REQUIRED COMPETENCIES

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Youth apprentices must become proficient in both general employability and occupation-specific competencies. All of these, and examples of how each can be demonstrated, are found in the following pages. A total of 15 occupational competencies must be learned for this occupation. Employers can substitute up to two competencies with other occupationally appropriate skills. Those skills should be added to the competency list for assessment. Where necessary, skills can be simulated. Youth apprentices must be evaluated on these competencies at least two times each year of their apprenticeship.

Competencies
<ol style="list-style-type: none"><li>1. Facilitate positive customer interactions</li><li>2. Communicate the company's unique brand</li><li>3. Follow company pricing strategies and policies</li><li>4. Use order-fulfillment processes</li><li>5. Carry out promotional activities</li><li>6. Demonstrate product knowledge</li><li>7. Provide customer service</li><li>8. Use Customer Relationship Management (CRM) tools</li><li>9. Participate in sales planning</li><li>10. Perform pre-sale activities</li><li>11. Determine customer needs</li><li>12. Communicate product information to customers</li><li>13. Assist in closing the sale</li><li>14. Handle sale transactions</li><li>15. Conduct post-sales follow-up activities</li></ol>

## POST-SECONDARY PATHWAY OPPORTUNITIES

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There are several post-secondary pathway opportunities in this area. The following is a partial list.

- Digital Marketing
- Marketing/Sales



# Professional Sales

Youth Apprenticeship

## ON-THE-JOB LEARNING PERFORMANCE STANDARDS GUIDE

### YOUTH APPRENTICE INFORMATION

Youth Apprentice Name
YA Coordinator
YA Consortium
School District

### SIGNATURES

The On-the-Job Learning Performance Standards Guide includes a list of competencies youth apprentices learn through mentoring and training at the worksite.

Instructions for the Worksite Employers/Mentors and School-Based or YA coordinators: This document should be reviewed with the employer/mentor, school-based or YA coordinator on a regular basis with the youth apprentice to record progress and plan future steps to ensure completion of the required competencies. Mentors, school-based/YA coordinator, and the apprentice sign below.

#### Employer/Mentor

##### 1<sup>st</sup> Evaluation (Required)

##### 2<sup>nd</sup> Evaluation (Required)

Employer/Mentor Signature	Employer/Mentor Signature
Employer/Mentor	Employer/Mentor
Business/Company	Business/Company
Date Signed	Date Signed

##### 3<sup>rd</sup> Evaluation (Optional)

##### 4<sup>th</sup> Evaluation (Optional)

Employer/Mentor Signature	Employer/Mentor Signature
Employer/Mentor	Employer/Mentor
Business/Company	Business/Company
Date Signed	Date Signed

**School-Based and/or YA Coordinator**

**1<sup>st</sup> Evaluation (Required)**

School-Based and/or YA Coordinator Signature
School-Based and/or YA Coordinator
School District or Organization
Date Signed

**2<sup>nd</sup> Evaluation (Required)**

School-Based and/or YA Coordinator Signature
School-Based and/or YA Coordinator
School District or Organization
Date Signed

**3<sup>rd</sup> Evaluation (Optional)**

School-Based and/or YA Coordinator Signature
School-Based and/or YA Coordinator
School District or Organization
Date Signed

**4<sup>th</sup> Evaluation (Optional)**

School-Based and/or YA Coordinator Signature
School-Based and/or YA Coordinator
School District or Organization
Date Signed

**Youth Apprentice**

**1<sup>st</sup> Evaluation (Required)**

Youth Apprentice Signature
Youth Apprentice
School District / High School
Date Signed

**2<sup>nd</sup> Evaluation (Required)**

Youth Apprentice Signature
Youth Apprentice
School District / High School
Date Signed

**3<sup>rd</sup> Evaluation (Optional)**

Youth Apprentice Signature
Youth Apprentice
School District / High School
Date Signed

**4<sup>th</sup> Evaluation (Optional)**

Youth Apprentice Signature
Youth Apprentice
School District / High School
Date Signed

## EMPLOYABILITY SKILLS (TO BE COMPLETED BY YA EMPLOYER/MENTOR)

All youth apprentices must demonstrate the key employability skills listed below in order to complete the YA program. They do so by earning at least a "Meets Expectation" rating in each. **At least two evaluations are required each year of a youth apprenticeship.** More columns are included below for those who choose to conduct more frequent reviews.

<b>1</b>	<b>Working to Meet Expectations:</b> Needs improvement; requires much assistance and supervision; rarely displays this behavior
<b>2</b>	<b>Meets Expectations:</b> Meets entry-level criteria; requires some supervision; often displays this behavior
<b>3</b>	<b>Exceeds Expectations:</b> Exceeds entry-level criteria; requires minimal supervision; consistently displays this behavior

Employability Skills		Rating			
Competency and Rating Criteria		Initial	Mid Year 1	Mid Year 2	Final
1. Develops positive work relationships with others. <i>Examples of qualities and habits that the employee might exhibit include:</i>	<ul style="list-style-type: none"> <li>Interacts with others with respect and in a non-judgmental manner</li> <li>Responds to others in an appropriate and non-offensive manner</li> <li>Helps co-workers and peers accomplish tasks or goals</li> <li>Applies problem-solving strategies to improve relations with others</li> <li>When managing others, shows traits such as compassion, listening, coaching, team development, and appreciation</li> </ul>	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
2. Communicates effectively with others <i>Examples of qualities and habits that the employee might exhibit include . . .</i>	<ul style="list-style-type: none"> <li>Adjusts the communication approach for the target audience, purpose, and situation to maximize impact</li> <li>Organizes messages/information in a logical and helpful manner</li> <li>Speaks clearly and writes legibly</li> <li>Models behaviors to show active listening</li> <li>Applies what was read to actual practice</li> <li>Asks appropriate questions for clarity</li> </ul>	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
3. Collaborates with others <i>Examples of qualities and habits that the employee might exhibit include . . .</i>	<ul style="list-style-type: none"> <li>Works effectively in teams with people of diverse backgrounds regardless of sex, race, ethnicity, nationality, sexuality, religion, political views, and abilities</li> <li>Shares responsibility for collaborative work and decision making</li> <li>Uses the problem-solving process to work through differences of opinion in a constructive manner to achieve a reasonable compromise</li> <li>Avoids contributing to an unproductive group conflict</li> <li>Shares information and carries out responsibilities in a timely manner</li> </ul>	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3

Employability Skills		Rating			
Competency and Rating Criteria		Initial	Mid Year 1	Mid Year 2	Final
4. Maintains composure under pressure <i>Examples of qualities and habits that the employee might exhibit include . . .</i>	<ul style="list-style-type: none"> <li>• Uses critical thinking to determine the best options or outcomes when faced with a challenging situation</li> <li>• Carries out assigned duties while under pressure</li> <li>• Acts in a respectful, professional, and non-offensive manner while under pressure</li> <li>• Applies stress management techniques to cope under pressure</li> </ul>	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
5. Demonstrates integrity <i>Examples of qualities and habits that the employee might exhibit include . . .</i>	<ul style="list-style-type: none"> <li>• Carries out responsibilities in an ethical, legal and confidential manner</li> <li>• Responds to situations in a timely manner</li> <li>• Takes personal responsibility to correct problems</li> <li>• Models behaviors that demonstrate self-discipline, reliability, and dependability</li> </ul>	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
6. Performs quality work <i>Examples of qualities and habits that the employee might exhibit include . . .</i>	<ul style="list-style-type: none"> <li>• Carries out written and verbal directions accurately</li> <li>• Completes work efficiently and effectively</li> <li>• Performs calculations accurately</li> <li>• Conserves resources, supplies, and materials to minimize costs and environmental impact</li> <li>• Uses equipment, technology, and work strategies to improve workflow</li> <li>• Applies problem-solving strategies to improve productivity</li> <li>• Adheres to worksite regulations and practices</li> <li>• Maintains an organized work area</li> </ul>	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
7. Provides quality goods or services (internal and external) <i>Examples of qualities and habits that the employee might exhibit include . . .</i>	<ul style="list-style-type: none"> <li>• Shows support for the organizational goals and principles by own personal actions</li> <li>• Displays a respectful and professional image to customers</li> <li>• Displays an enthusiastic attitude and desire to take care of customer needs</li> <li>• Seeks out ways to increase customer satisfaction</li> <li>• Produces goods to workplace specifications</li> <li>•</li> </ul>	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
8. Shows initiative and self-direction <i>Examples of qualities and habits that the employee might exhibit include . . .</i>	<ul style="list-style-type: none"> <li>• Prioritizes and carries out responsibilities without being told</li> <li>• Responds with enthusiasm and flexibility to handle tasks that need immediate attention</li> <li>• Reflects on any unsatisfactory outcome as an opportunity to learn</li> <li>• Improves personal performance by doing something different or differently</li> <li>• Analyzes how own actions impact the overall organization</li> <li>• Supports own action with sound reasoning and principles</li> <li>• Balances personal activities to minimize interference with work responsibilities</li> </ul>	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3

Employability Skills		Rating			
Competency and Rating Criteria		Initial	Mid Year 1	Mid Year 2	Final
9. Adapts to change <i>Examples of qualities and habits that the employee might exhibit include . . . Shows flexibility and willingness to learn new skills for various job roles</i>	<ul style="list-style-type: none"> <li>• Uses problem-solving and critical-thinking skills to cope with changing circumstances</li> <li>• Modifies own work behavior based on feedback, unsatisfactory outcomes, efficiency, and effectiveness</li> <li>• Displays a "can do" attitude</li> </ul>	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
10. Demonstrates safety and security regulations and practices <i>Examples of qualities and habits that the employee might exhibit include . . .</i>	<ul style="list-style-type: none"> <li>• Follows personal safety requirements</li> <li>• Maintains a safe work environment</li> <li>• Demonstrates professional role in an emergency</li> <li>• Follows security procedures</li> <li>• Maintains confidentiality</li> </ul>	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
11. Applies job-related technology, information, and media <i>Examples of qualities and habits that the employee might exhibit include . . .</i>	<ul style="list-style-type: none"> <li>• Applies technology effectively in the workplace</li> <li>• Assesses and evaluates information on the job</li> <li>• Assesses training manuals, website, and other media related to the job</li> </ul>	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
12. Fulfills training or certification requirements for employment <i>Examples of this requirement may include . . .</i>	<ul style="list-style-type: none"> <li>• Participation in required career-related training and/or educational programs</li> <li>• Passing certification tests to qualify for licensure and/or certification</li> <li>• Participation in company training or orientation</li> <li>•</li> </ul>	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
13. Sets personal goals for improvement <i>Examples of this requirement may include . . .</i>	<ul style="list-style-type: none"> <li>• Setting goals that are specific and measurable</li> <li>• Setting work-related goals that align with the organization's mission</li> <li>• Identifying strategies to reach goals</li> <li>• Reflecting on goal progress to regularly evaluate and modify goals</li> </ul>	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3

## OCCUPATIONAL COMPETENCIES

### (TO BE COMPLETED BY YA EMPLOYER/MENTOR)

Youth apprentices must earn a rating of at least "MEETS EXPECTATIONS" in each competency by the conclusion of the apprenticeship. A total of 15 competencies, 13 must be from the list below. If necessary, employers can substitute two competencies with other occupationally appropriate skills. That skill should be added to the competency list for assessment. **At least two evaluations are required each year of a youth apprenticeship.** Where necessary, skills can be simulated. More columns are included below for those who choose to conduct more frequent reviews.

1	<b>Working to Meet Expectations:</b> Needs improvement; requires much assistance and supervision; rarely displays this behavior
2	<b>Meets Expectations:</b> Meets entry-level criteria; requires some supervision; often displays this behavior
3	<b>Exceeds Expectations:</b> Exceeds entry-level criteria; requires minimal supervision; consistently displays this behavior

Occupational Competencies	Rating			
	Evaluation			
	Minimum Rating of 2 EACH Check Rating			
Competency and Rating Criteria	Initial	Mid Year 1	Mid Year 2	Final
<b>1. Facilitate positive customer interactions</b> <ul style="list-style-type: none"> <li>display a courteous, professional manner</li> <li>respond to customer questions and comments</li> <li>adapt communication to cultural and social differences among clients</li> <li>use active listening</li> </ul>	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
<b>2. Communicate the company's unique brand</b> <ul style="list-style-type: none"> <li>identify the company's brand standards</li> <li>explain why the company's products are valuable to customers</li> <li>articulate how the company is different from competitors</li> <li>follow the company's customer service policies</li> <li>explain the company's mission and vision</li> </ul>	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
<b>3. Follow company pricing strategies and policies</b> <ul style="list-style-type: none"> <li>calculate sales discounts</li> <li>calculate price changes</li> <li>apply discounts</li> </ul>	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
<b>4. Use order-fulfillment processes</b> <ul style="list-style-type: none"> <li>verify contents in an order</li> <li>compare the packing order with the contents</li> <li>process incoming merchandise</li> <li>resolve problems with incoming shipments</li> </ul>	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3

Occupational Competencies		Rating			
Competency and Rating Criteria		Evaluation			
		Minimum Rating of 2 EACH Check Rating			
		Initial	Mid Year 1	Mid Year 2	Final
<b>5. Carry out promotional activities</b>		<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
<ul style="list-style-type: none"> <li>• execute promotional activities</li> <li>• refer to the promotional calendar</li> <li>• schedule displays and themes</li> <li>• communicate promotions to customers</li> </ul>		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
<b>6. Demonstrate product knowledge</b>		<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
<ul style="list-style-type: none"> <li>• describe company product and service lines</li> <li>• identify benefits to customers</li> <li>• attend company training</li> <li>• review company marketing and promotional materials</li> <li>• identify competitor products and services</li> </ul>		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
<b>7. Provide customer service</b>		<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
<ul style="list-style-type: none"> <li>• follow up with clients</li> <li>• cross-sell additional products and services</li> <li>• follow customer service policies</li> <li>• escalate questions and concerns when necessary</li> <li>• troubleshoot common issues</li> </ul>		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
<b>8. Use Customer Relationship Management (CRM) tools</b>		<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
<ul style="list-style-type: none"> <li>• enter customer contact information</li> <li>• update customer interactions and transactions</li> <li>• locate information in the CRM</li> <li>• generate reports</li> </ul>		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
<b>9. Participate in sales planning</b>		<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
<ul style="list-style-type: none"> <li>• assist in setting personal sales goals and targets</li> <li>• assist in planning strategies for meeting sales goals</li> <li>• participate in team planning to meet sales goals</li> <li>• report on goal progress</li> </ul>		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
<b>10. Perform pre-sale activities</b>		<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
<ul style="list-style-type: none"> <li>• prospect for customers</li> <li>• qualify customers</li> <li>• schedule appointments with prospective clients</li> <li>• select sales strategies and tools</li> <li>• prepare sales presentation</li> </ul>		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
<b>11. Determine customer needs</b>		<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
<ul style="list-style-type: none"> <li>• ask relevant questions</li> <li>• determine how customer plans to use the product or service</li> <li>• tailor sales approach to the customer</li> <li>• determine customer's price considerations</li> <li>• link needs to product features and benefits</li> </ul>		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3



Occupational Competencies		Rating			
Competency and Rating Criteria		Evaluation Minimum Rating of 2 EACH Check Rating			
		Initial	Mid Year 1	Mid Year 2	Final
<b>12. Communicate product information to customers</b>		<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
• apply questioning strategies		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
• provide clear explanations about key features and benefits		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
• use sales and marketing materials					
• negotiate resistance					
• provide accurate pricing information including payment options					
• cross-sell related products					
• answer customer questions and objections					
<b>13. Assist in closing the sale</b>		<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
• determine if the customer is ready to complete the sale		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
• suggest completing the sale		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
• complete necessary paperwork and documentation					
• document specific of sale delivery, installation, warranties, etc.					
<b>14. Handle sale transactions</b>		<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
• complete all components of the transaction including credit, warranty charges, taxes and discounts		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
• explain company policy regarding payment		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
• document transaction					
• provide receipt to customer					
• thank the customer					
• document sale per company policy					
<b>15. Conduct post-sales follow-up activities</b>		<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
• provide post-sales service		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
• process returns/exchanges		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
• conduct self-assessment of sales performance					
<b>Competency Substitute</b> (if you replaced a competency above, note the competency and rating)		<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
<b>Competency Substitute</b> (if you replaced a competency above, note the competency and rating)		<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3

Occupational Competencies		Rating			
Competency and Rating Criteria		Evaluation			
		Minimum Rating of 2 EACH Check Rating			
		Initial	Mid Year 1	Mid Year 2	Final
Comments:					

No part of this document may be altered, duplicated, or extracted without written consent from the Wisconsin Department of Workforce Development (DWD).

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