

NATIONAL CERTIFICATE: GENERIC MANAGEMENT

Skills Programme 5 – Performance Management



Practical Assessment

1. Introduction

As part of this training programme, you are required to complete this logbook to record practical evidence and workplace or simulated workplace experience. The logbook forms part of your practical assessment and serves as evidence of your applied competence.

You will be assigned a mentor / supervisor who will guide and observe you while you perform workplace tasks. Assessment will be based on your ability to apply workplace skills, follow organisational rules and standards, carry out instructions responsibly, and demonstrate professional behaviour.

Assessment may include written responses and workplace observation.

2. Acknowledgement of receipt

I, _____ (name and surname), ID _____, acknowledge receipt of this logbook and confirm that the on-the-job training process has been explained to me.

I declare that the work contained in this logbook is my own and reflects my actual workplace experience. Any assistance, advice, or external sources used have been acknowledged. I understand that plagiarism is a punishable offence.

Learner

signature: _____

Date: _____

Mentor / supervisor

signature: _____

Name: _____

Section A: Scope and requirements

This practical assessment is designed to give learners the opportunity to demonstrate applied competence in performance management within the workplace, in simulated workplace situations, and through supported practical tasks. Evidence must show that the learner can apply knowledge and skills from the learner guide to workplace objectives, performance requirements, organisational context, ethical standards, and management responsibilities at the required NQF level. Assessment must focus on practical application, sound judgement, and the learner's ability to perform workplace management tasks in a real or simulated environment.

The practical activities in this assessment are based on the outcomes of the following SAQA unit standards included in this skills programme:

SKILLS PROGRAMME DETAILS		
US 11473	NQF 4	8 Credits
Unit 1: Manage individual and team performance		
US 242814	NQF 3	6 Credits
Unit 2: Identify and explain the core and support functions of an organisation		
US 242822	NQF 4	10 Credits
Unit 3: Employ a systematic approach to achieving objectives		
US 242815	NQF 4	5 Credits
Unit 4: Apply the organisation's code of conduct in a work environment		

Evidence may be gathered through written responses, short practical tasks, structured workplace observation, oral questioning, role-play, simulations, document analysis, and video evidence, where appropriate. Some activities may be completed before workplace placement through simulation or document-based evidence, while others must be completed after workplace induction or during workplace exposure. Assessment may therefore take place in phases.

To be found competent, the learner must show that he or she can:

- Identify needs and develop objectives
- Formulate and implement a plan to achieve the objective
- Monitor activities and take corrective action where necessary
- Identify and explain the core business and core activities of an organisation
- Explain the role of a selected work unit in relation to the core business
- Identify and explain the difference between line and support functions
- Explain the concept of ethics in relation to the moral compass
- Describe the role of a code of conduct in a work environment according to ethical principles
- Uphold the code of conduct within the work team
- Set performance goals and measures
- Formulate development plans
- Monitor and evaluate individual and team performance

The mentor, supervisor, or assessor must assess the learner against the activities and rubrics in this document and record clear comments where support or correction is needed. Judgements must be based mainly on observable behaviour and practical application, not theory recall alone. Written responses may be supported by workplace observation or verbal confirmation where relevant. Feedback must state what was observed, whether competence was shown consistently, and what improvement is needed where applicable.

Section B: Mentor/supervisor guidance

This practical component assesses whether the learner can apply performance management knowledge and skills in workplace or simulated workplace situations. Assessment must focus on practical application, not theory alone. The learner must be able to:

1. Identify needs, gaps, or problem areas
2. Set objectives and develop practical plans
3. Implement plans and use resources correctly
4. Monitor progress and take corrective action
5. Explain core business, work units, and line/support functions
6. Apply ethics and the code of conduct in workplace situations
7. Set performance goals, formulate development plans, and evaluate performance

!! Written answers may be supported by workplace observation or other practical evidence. Direct performance evidence must be considered together with written responses, with practical application given more weight than theory alone.

NQF level note for assessors

For unit **242814 (NQF 3)**, assess basic understanding and simple explanation in a defined workplace context. For units **11473, 242822 and 242815 (NQF 4)**, also assess practical application, justified decisions, and greater responsibility in familiar workplace situations.

Competent judgement guidance

A learner should be marked **Competent (C)** if they:

1. Complete the task with limited guidance
2. Show understanding of the scenario, task, and expected outcome
3. Apply workplace knowledge appropriately
4. Provide clear and sufficient evidence
5. Demonstrate sound judgement, responsibility, and professionalism
6. Follow instructions and workplace requirements consistently
7. Show practical application, not theory only

A learner should be marked **Not Yet Competent (NYC)** if they:

1. Do not complete the task adequately
2. Require continuous prompting or support
3. Show limited understanding of the task or workplace context
4. Provide insufficient or inappropriate evidence
5. Apply incorrect, unsafe, unrealistic, or unprofessional actions
6. Fail to show basic understanding of objectives, accountability, ethics, or performance requirements

Comments should clearly indicate:

1. What evidence was reviewed or observed
2. What the learner did well against the outcome being assessed
3. What errors, gaps, or weaknesses were identified
4. What support, correction, or follow-up is required, if applicable
5. Whether the learner demonstrated competence consistently across the activity

UNIT 1 (11473) - Manage individual and team performance

This unit develops practical management skills by requiring learners to set clear performance goals, formulate structured development plans, and monitor and evaluate individual and team performance against agreed targets. Through realistic workplace scenarios, the assessments test the learner's ability to align performance expectations to organisational objectives, identify performance gaps, and take appropriate action to improve results.

Criteria 1: Set performance goals and measures

Scenario:

You are the Team Leader in the Customer Support Department at Bright Wave Services. The company's objective for the next quarter is: "Improve customer satisfaction by reducing response time to customer queries."

Currently:

- Customer queries are responded to within 48 hours.
- Customer complaints about slow responses have increased.
- There are 6 customer support consultants in your team.
- No individual performance goals are currently set.
- Performance is reviewed quarterly.
- Some team members have indicated that targets are sometimes unrealistic when workloads increase.
- In previous quarters, goals were set by management without team consultation, and staff motivation declined.
- Management requires that all new performance goals must be discussed and agreed with team members before being included in performance contracts.

1. Formulate a clear goal for the team that aligns with the company's objective.

2. Identify **two measurable performance indicators** that can assess whether the goal is being achieved.

3. State **two reasons** why it is **important to agree** on goals with team members before finalising them.

Criteria 2: Formulate development plans

Scenario:

You are the Team Leader in the Customer Support Department at Bright Wave Services. During the recent performance review, the following was identified:

- Two team members struggle to meet the 24-hour response target.
- One team member has strong technical skills but poor written communication.
- One team member has expressed interest in becoming a senior team leader within the next year.
- Customer complaints often relate to incomplete or unclear responses.
- The department must improve service levels over the next six months.

Company policy requires that development plans:

- Focus on improving competencies linked to performance goals
- Include clear improvement actions
- Include measurable outcomes
- Include a time frame
- Specify accountability
- Be agreed upon by the employee and the Team Leader

1. Identify **two development needs** and explain how each need is linked to performance improvement.

2. Choose **one team member** and write a development plan that shows:
 - What skill or competency must improve
 - What action must be taken
 - How improvement will be measured
 - The time frame
 - Who is responsible

UNIT 1 (11473) – Rubric

Criteria activity number	C	NYC	Comments / Action required
<p>1 Set performance goals and measures</p> <p>Q1 Formulates a clear, specific and measurable goal aligned to reducing response time and improving customer satisfaction.</p> <p>Q2 Identifies two relevant, measurable indicators that allow performance to be quantified.</p> <p>Q3 Provides a clear explanation of the importance of reaching mutual agreement on performance goals prior to finalisation.</p>			
<p>2 Formulate development plans</p> <p>Q1 Identifies two relevant development needs from the scenario and clearly links each to improved service levels or performance goals.</p> <p>Q2 Develops one complete plan that includes a clear competency, specific action, measurable outcome, realistic time frame and identified accountability, aligned to performance needs.</p> <p>Q3 States two valid reasons for agreement.</p>			
<p>3 Monitor and evaluate performance</p> <p>Q1 Correctly identifies two evaluation techniques and clearly explains how each measures performance against goals.</p> <p>Q2 Accurately compares actual results with targets and clearly identifies one specific gap.</p> <p>Q3 States one realistic corrective action that directly addresses the identified underperformance.</p>			

Criteria 2: Explain the types of work done within the various core activities of an organisation

Scenario:

You work at Fresh Bite Foods (Pty) Ltd, a company that produces packaged ready-to-eat meals for retail stores. The company's core activities include:

- Marketing: Research customer preferences and market trends
- Product development: Designs new meal recipes and packaging
- Sales: Secures contracts with supermarkets and negotiates pricing
- Production: Prepares, cooks and packages meals
- Quality control: Inspects food safety, hygiene and product standards
- Distribution: Delivers products to retail stores.

Each activity has specific responsibilities that contribute to delivering the final product to customers.

1. Identify **four core activities** and explain the type of work performed in each activity.

2. Explain how the work done in product development **differs** from the work done in production.

3. Describe how the work done in sales and distribution **supports** the delivery to customers.

Criteria 3: Explain the role of a selected work unit in an organisation in relation to the core business

Scenario:

You work at Fresh Bite Foods (Pty) Ltd, a company that produces packaged ready-to-eat meals for retail stores. The core business of the organisation is to produce and supply high-quality ready-to-eat meals to supermarkets. The organisation includes the following work units:

- Marketing: Research customer needs and market trends
- Product development: Designs new meal recipes and packaging
- Production: Prepares, cooks and packages meals
- Quality control: Ensures food safety and hygiene standards are met
- Sales: Secures retail contracts and manages customer relationships
- Accounting: Processes invoices and manages payments.

Each unit performs specific work that contributes to delivering the final product to customers.

1. Select a work unit and describe the type of work it performs.

2. Explain how the selected work unit contributes to the core business of the organisation.

3. Describe what could happen if this work unit does not perform its role effectively.

Criteria 4: Identify and explain the difference between the line and support functions within a selected organisation

Scenario:

You work at Fresh Bite Foods (Pty) Ltd, a company that produces packaged ready-to-eat meals for retail stores. The core business of Fresh Bite is to produce and supply ready-to-eat meals to supermarkets. The organisation has the following work units:

- Production: Prepares and packages meals for retail stores
- Sales: Secures contracts with supermarkets and manages customer relationships
- Quality control: Ensures food safety and product standards
- Marketing: Research customer needs and market trends
- Accounting: Manages invoices, payroll and financial reporting
- Human resources: Recruits and trains employees
- Information technology: Maintains the ordering and inventory systems.

Some of these units are directly involved in producing and delivering the final product, while others provide services that support the organisation's operations.

1. Identify **two line functions** and **two support functions**.

2. State the main difference between line functions and support functions.

3. Describe how **one support function contributes** to the success of a line function in the organisation.

UNIT 2 (242814) – Rubric

Criteria activity number	C	NYC	Comments / Action required
<p>1 Identify and explain the core business of an organisation</p> <p>Q1 Correctly identifies the core business.</p> <p>Q2 Describes how three core activities are linked and explains why coordination is important for efficiency and customer satisfaction.</p> <p>Q3 Explains how inputs are transformed into outputs and identifies one high value-adding activity with a clear reason.</p>			
<p>2 Explain the types of work done within the various core activities of an organisation</p> <p>Q1 Correctly identifies four core activities and briefly explains the type of work performed in each, showing clear understanding of their roles.</p> <p>Q2 Clearly distinguishes between product development and production, showing understanding of different work functions.</p> <p>Q3 Explains how sales and distribution support effective delivery to customers.</p>			
<p>3 Explain the role of a selected work unit in an organisation in relation to the core business</p> <p>Q1 Clearly selects one relevant work unit from the scenario and accurately describes the type of work it performs.</p> <p>Q2 Clearly explains how the selected work unit contributes to producing and supplying ready-to- eat meals, showing a direct link to the core business.</p> <p>Q3 Describes realistic consequences if the work unit fails to perform effectively.</p>			
<p>4 Identify and explain the difference between the line and support functions within a selected organisation</p> <p>Q1 Correctly identifies two line functions based on whether they directly generate income or support operations.</p> <p>Q2 Clearly states the difference between line functions and support functions.</p> <p>Q3 Selects one support function and clearly explains how it supports a specific line function, showing understanding of their relationship.</p>			

UNIT 3 (242822) – Employ a systematic approach to achieving objectives

This unit develops practical planning and problem-solving skills by requiring learners to identify workplace needs, set objectives, develop action plans, implement tasks, and monitor progress against targets. Through realistic workplace scenarios, the assessments test the learner's ability to organise resources, assign responsibility, track performance, and take corrective action to achieve organisational objectives.

Criteria 1: Identify and develop objectives

Scenario:

You are the Team Leader at Bright Wave Services, a customer support company. An internal review identified the following:

- Customer complaints increased by 22% over the last 6 months
- Customer queries are currently answered within 48 hours
- Company policy requires responses within 24 hours
- Staff members report that they are unclear about their performance expectations
- No monthly performance targets are currently set
- Team meetings are irregular
- The department consists of 6 customer support staff members
- Management requires performance to improve within the next 3 months

Top management has instructed you to develop clear objectives to improve performance in your department.

1. Identify **four needs** that must be addressed in the department.

2. Formulate a statement of **general intent** for the department.

3. Develop three objectives to address the identified needs.

Objective	Measurable parameter	Time	Responsible person

Criteria 2: Formulate a Plan to Meet the Objective

Scenario:

You are the Team Leader at Bright Wave Services. The following objective has been agreed: Respond to all customer queries within 24 hours to reduce customer complaints.

Current situation:

- The department receives approximately 60 customer queries per day.
- Only 40% of queries are currently responded to within 24 hours.
- Customer complaints increased by 22%, mostly due to slow responses.
- Queries are checked only twice per day.
- There is no tracking system to monitor response times.
- No staff member is assigned to monitor incoming queries.
- There are 6 customer support staff members.
- The department has computers, email, and a shared drive.
- No additional budget is available.
- Progress must be reviewed weekly by management.
- The target must be achieved within three months.

You must now develop a practical action plan to achieve this objective.

1. Identify **four** key pieces of information that will affect your planning.

Criteria 3: Implement the plan

Scenario:

You are the Team Leader at Bright Tech Solutions, a small IT support company with four technicians. The company wants to reduce the average response time to customer emails from 48 hours to 24 hours within one month. An action plan has already been approved and communicated to the team.

The plan includes the following tasks:

- All support emails must be checked every two hours during working hours
- One technician per day is assigned as Email Monitor to oversee incoming emails
- The Email Monitor allocates emails to technicians
- Each technician must respond to allocated emails within 24 hours

Monitoring and reporting measures:

- A shared tracking spreadsheet records the time each email is received and responded to
- The Team Leader reviews the tracking spreadsheet every afternoon
- A weekly compliance report is submitted to management every Friday
- If response times fall below the 24-hour target, the Team Leader meets with the technician concerned and provides guidance

Authority levels:

- Technicians may respond directly to customers
- Technicians may not approve refunds or change service agreements without Team Leader approval
- The Email Monitor may allocate emails but may not change deadlines
- The Team Leader retains overall accountability for meeting the response-time target

Available resources:

- Computers
- Company email
- The shared drive
- The tracking spreadsheet

Technicians may use their preferred work methods, such as task lists or calendar reminders, if the 24-hour response time is achieved.

1. Describe how tasks and authority are **delegated** in this plan.

UNIT 3 (242822) – Rubric

Criteria activity number	C	NYC	Comments / Action required
<p>1 Identify and develop objectives</p> <p>Q1 Identifies four clear performance gaps, demonstrating understanding of the department's needs.</p> <p>Q2 Provides one clear, broad statement of general intent aligned to improving departmental performance.</p> <p>Q3 Develops three specific objectives, each including a measurable parameter, time frame, and responsible person, aligned to the scenario and 3-month requirement.</p>			
<p>2 Formulate a plan to meet the objective</p> <p>Q1 Identifies four relevant planning factors directly from the scenario (e.g., workload, current performance gap, resource constraints, time frame, reporting requirements).</p> <p>Q2 Lists five practical tasks clearly aligned to achieving the 24-hour response objective and addressing the identified gaps.</p> <p>Q3 Completes the table logically, assigning each task a responsible person, appropriate resources (within existing constraints), and a realistic time frame aligned to the three-month target.</p>			
<p>3 Implement the plan</p> <p>Q1 Explains how tasks are allocated (Email Monitor, technicians) and clearly outlines authority limits for each role, including the Team Leader.</p> <p>Q2 Identifies the listed resources and explains how they support email allocation, tracking, communication and time management.</p> <p>Q3 Identifies the monitoring measures (tracking sheet, reviews, reports, corrective meetings) and explains how they ensure oversight and accountability for the 24- hour target.</p>			
<p>4 Monitor activities</p> <p>Q1 Compares the 82% compliance rate with the 100% target and recognises that the target has not yet been met.</p> <p>Q2 Identifies two monitoring activities from the scenario, such as the daily tracking spreadsheet and weekly compliance report review.</p> <p>Q3 Identifies two valid problem areas and suggests practical corrective actions linked to improving performance.</p>			

UNIT 4 (242815) – Rubric

Criteria activity number	C	NYC	Comments / Action required
<p>1</p> <p>Explain the concept of ethics in relation to the 'moral compass'</p> <p>Q1 Provides a clear explanation of ethics in a workplace environment, describing the principles and guidelines that influence decision- making and behaviour at work.</p> <p>Q2 Explains a moral compass and links it to one relevant incident from the scenario.</p> <p>Q3 Identifies two ethical and two unethical behaviours and briefly justifies each with reference to company values or policy.</p>			
<p>2</p> <p>Describe the role of a code of conduct in a work environment according to ethical principles</p> <p>Q1 Explains the purpose of the Code of Conduct.</p> <p>Q2 Uses a relevant example from the scenario to show how the Code directs behaviour and reinforces ethical principles.</p> <p>Q3 Provides a clear explanation demonstrating understanding of the expectations set by the Code of Conduct and the implications of not adhering to workplace requirements.</p>			
<p>3</p> <p>Uphold the code of conduct within the work team</p> <p>Q1 Identifies any two valid deviations and correctly states the required SOP actions.</p> <p>Q2 Outlines the full SOP sequence.</p> <p>Q3 Uses a relevant example from the scenario to demonstrate how reporting misconduct supports adherence to workplace standards and reinforces accountability within the team.</p>			

Section C: Assessment conclusion

<p>General comments of mentor / supervisor (comment on clarity, appropriateness, structure, tone, oral / signed interaction, and overall competence):</p>		
Empty space for general comments		
<p>Mentor/supervisor name:</p>	<p><input type="checkbox"/></p> <p>Learner is Competent</p>	<p><input type="checkbox"/></p> <p>Learner is Not Yet Competent</p>
<p>Learner declaration</p>		
<p>I, _____, declare that I am satisfied / unsatisfied (cross out the appropriate option) with the feedback provided by the mentor/supervisor, as it was relevant, sufficient, and constructive. I accept the assessment decision and have no further questions regarding this assessment instrument.</p> <p>Additional learner comments:</p> 		
<p>Date:</p>	<p>Mentor/supervisor signature:</p>	<p>Learner signature:</p>