

STATEMENT OF WORK EXPERIENCE/LOGBOOK

Instructional Programme Code:	50904415 National N Diploma: Business Management
SAQA Qualification ID:	90674: National N Diploma, NQF Level 6, 360 credits
SAQA Learning Programme ID:	67036: National N Diploma: Business Management NQF Level 6, 360 credits

Learner Details	
Name & Surname:	
ID Number:	

Employer Details	
Company Name:	
Address:	
Supervisor Name:	
Work Telephone:	
E-Mail:	

Employer Details	
Company Name:	
Address:	
Supervisor Name:	
Work Telephone:	
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Business Management Compulsory subjects:
<ul style="list-style-type: none"> • Entrepreneurship & Business Management N6
Additional:
<ul style="list-style-type: none"> • Sales Management N6 • Financial Accounting • Workplace Competencies

Entrepreneurship & Business Management

WM-01	Strategic Planning & Implementation :Mission statements & objectives		
	Scope Work Experience	Date	Signature
WA0101	Observing/participating in drafting a mission statement		
WA0102	Observing/participating in the process of merging, acquisition, partnering with another company and its success.		
WA0103	Identify and understand the purpose of MoU's		
	Supporting Evidence	Date	Signature
S0101	Mission statement		
S0102	Compile Minutes of meetings		
S0103	MOU agreements		
WM-02	Franchising		
	Scope Work Experience	Date	Signature
WA0201	Present a guideline document which explains the transformation into a franchise business		
WA0202	Research the different franchise options that are currently available		
WA0203	Marketing the franchise -Assist in compiling of: Advertisements, sales letters, notices for bill boards, pamphlets, online- marketing, social and digital media		

WA0204	Attend business forums, shows and other marketing platforms		
WA0205	Complete a business plan for presentation to interested parties		
	Supporting Evidence	Date	Signature
SE0201	Guideline documents		
SE0202	Advertisements, sales letters, notices for bill boards, pamphlets		
SE0203	Presentations on franchising opportunities and legal implications, advantages and disadvantages		
WM-03	Buying an existing business		
	Scope Work Experience	Date	Signature
WA0301	Assist with research for possible business opportunities		
WA0302	Do research on various business's for sale and note the following: <ul style="list-style-type: none"> • Know why the business is for sale • Customer concentration where the bulk of the revenue comes from. • Talk with the current business owner to identify key employees before you close the sale • Government regulatory constraints 		
WA0303	Research determining the selling price by evaluating the following: <ul style="list-style-type: none"> • Expectations of future profits and return on investment. • The appraised value of the assets at the time of negotiation. 		
	Supporting Evidence		
SE0301	Research feedback report		
SE0302	Research documentation and evidence		
WM04	Expansion Internationally (Export)		

	Scope Work Experience	Date	Signature
WA0401	Identify the political, legal and cultural risks involved		
SE0402	Research various countries to export products/services		
SE0403	Research possible financial support from government to support the company.		
	Supporting Evidence	Date	Signature
SE0401	Research report on risks		
SE0402	Research report on countries considered tot export to		
SE0403	Research on government funding possibilities		
WM-05	Drafting Strategies		
	Scope Work Experience	Date	Signature
WA0501	Drafting and recommend strategies to remain competitive in the industry.		
WA0502	Observe and determine SWOT analysis on competitors		
	Supporting Evidence		
SE0501	Presentation/report/memo/guideline on Strategies to remain competitive in the industry.		
SE0502	Report on identification of competitors – weak and strong points		
WM-06	Conflict in the business		
	Scope Work Experience	Date	Signature
WA0601	Bring others together to reconcile differences.		
WA0602	Handle conflicts maturely by exercising “give and take” to achieve positive results for all		

WA0603	Reach formal or informal agreements that promote mutual goals and interests, and obtain commitment to those agreements from individuals or groups.		
WA0604	Demonstrate respect for co-workers, colleagues, and customers.		
WA0605	Interact respectfully and cooperatively with others who are of a different race, culture, or age, or have different abilities, gender, or sexual orientation.		
WA0606	Demonstrate sensitivity, flexibility, and open-mindedness when dealing with different values, beliefs, perspectives, customs, or opinions.		
	Supporting Evidence	Date	Signature
SE0601	Practical examples on how conflict was dealt with		
SE0602	Recommendations on how to avoid conflict		

Sales Management N6

WM-01	Organising of sales staff		
	Scope Work Experience	Date	Signature
WA0101	Display understanding of the nature and extent of sales management		
WA0102	Design a guideline document which outlines the following: <ul style="list-style-type: none"> o Hierarchy of authority o Unity of command o Span of control o Centralisation and decentralisation 		
WA0103	Prioritize projects to allocate staff.		
WA0104	Link tasks to allocated resources		

WA0105	Match the employee's skillset to allocated project.		
WA0106	Schedule enough time between tasks.		
	Supporting Evidence	Date	Signature
S0101	Organogram of Sales team employees		
S0102	Project plan for salespersons		
S0103	Guideline/process/policy documents		
WM-02	Training of sales staff		
	Scope Work Experience	Date	Signature
WA0201	Assess training needs of sales staff		
WA0202	Design a training programme for sales staff		
WA0203	Assist with compilation and preparation of the presentation of content for the training process		
WA0204	Provide hands-on product knowledge training.		
WA0205	Update sales staff periodically on the industry on new offerings by the competition and brief talking points about what makes your company stand out.		
WA0206	Team new sales staff with experienced sellers		
WA0207	Create a sales reference library. (Books and videos, DVD's etc about different sales techniques and give sales reps access to them.		
WA0208	Research financial and non-financial methods to motivate sales staff		
	Supporting Evidence	Date	Signature

SE0201	Training plan		
SE0202	Newsletters		
SE0203	Reference media		
SE0204	Training software or materials		
SE0205	Reports		
WM-03	Compensation of sales force		
	Scope Work Experience	Date	Signature
WA0301	Compile a guideline on the various methods of compensation used within the organisation for sales staff		
WA0302	Explain compensation packages to sales staff		
	Supporting Evidence		
SE0301	Presentation		
SE0302	Guideline documents		
WM-05	Performance analysis – Evaluation of sales staff achievement		
	Scope Work Experience	Date	Signature
WA0501	Apply sales performance appraisals on staff reporting to you		
WA0502	Apply the performance appraisal process fairly and without bias		
WA0503	Evaluate the analysis of all marketing costs and the sources applicable		
	Supporting Evidence		

SE0501	Performance evaluations		
SE0502	Sales reports and analysis		
WM-06	Customer service and sales		
	Scope Work Experience	Date	Signature
WA0601	Interact with different types of customers and present a positive image		
WA0602	Handle customer queries and complaints		
WA0603	Provide customer service and build customer relationships		
WA0604	Sell products to customers using the sales cycle		
WA0605	Use advanced selling techniques		
	Supporting Evidence	Date	Signature
SE0601	Customer feedback		
SE0602	Emails		

Financial Accounting

WM-01	Cash Payments		
	Scope Work Experience	Date	Signature
WA0101	Receiving and sorting source documents for payments made		
WA0102	Capture payments onto accounting system		
WA0103	File source documents		
	Supporting Evidence	Date	Signature

SE0101	Financial source documents		
SE0102	Reports on deviations		
SE0103	Emails to clients, customers and suppliers		
WM-02	Cash Receipts		
	Scope Work Experience	Date	Signature
WA0201	Receiving and sorting source documents from money received (invoices, receipts)		
WA0202	Capture payments onto accounting system		
WA0203	File source documents		
	Supporting Evidence	Date	Signature
SE0201	Financial source documents		
SE0202	Reports on deviations		
SE0203	Emails to clients, customers and suppliers		
WM-03	Bank Reconciliation		
	Scope Work Experience	Date	Signature
WA0301	Retrieve the bank statement		
WA0302	Enter closing bank balance into accounting system		
WA0303	Verify all payments on bank state to payments in the cashbook		
WA0304	Verify all receipts on bank statement is reflected in cashbook		
WA0305	Verify all outstanding cheques are accounted for in the accounting records - Document reconciling items (cheques not cashed) in the bank reconciliation		

WA0306	Total the cashbook receipts and cashbook payments, and post to the bank account in the general ledger;		
WA0307	Clear any remaining amounts from the previous month's reconciliation statement and carry forward any unresolved amounts to the current month's reconciliation statement		
WA0308	Present completed Bank Reconciliation with Bank Statement at the end of the month to your Supervisor		
	Supporting Evidence	Date	Signature
SE0301	Financial source documents		
SE0302	Reports on deviations		
SE0303	Emails to clients, customers and suppliers		
WM-04	Processing payments made to Creditors & Reconciling Creditors		
	Scope Work Experience	Date	Signature
WA0401	Match invoices with purchase order		
WA0402	Capture invoice on system		
WA0403	Filing of invoices		
WA0404	Prepare a full creditors reconciliation per supplier between system and supplier statement		
WA0405	Prepare a payment proposal with supporting documents; and print out Age Analysis for Supervisor		
	Supporting Evidence	Date	Signature
SE0401	Financial source documents		
SE0402	Reports on deviations		
SE0403	Emails to clients, customers and suppliers		

WM-05	Managing Petty Cash		
	Scope Work Experience	Date	Signature
WA0501	Keep record of petty cash – who requested petty cash, what was requested and what for.		
WA0502	Weekly balancing of petty cash register		
WA0503	Monthly entry of petty cash into system		
WA0504	Detailed monthly report of individual petty cash transactions and balances		
	Supporting Evidence	Date	Signature
SE0501	Financial source documents		
SE0502	Reports on deviations		
SE0503	Emails to clients, customers and suppliers		
WM-06	Stock Taking/asset management		
	Scope Work Experience	Date	Signature
WA0601	Manage the asset register		
WA0602	Maintain records relating to capital acquisition and disposal		
WA0603	Disclose property, plant and equipment in the financial statements at year-end.		
WA0604	Report any differences between stock on file (on hand) and stock in the warehouse to Supervisor		
	Supporting Evidence	Date	Signature
SE0601	Asset register		
SE0602	Reports on deviations		

SE0603	Stock control register		
WM-07	Reconcile supplier statements		
	Scope Work Experience	Date	Signature
WA0701	Process receipts and payments		
WA0702	Enter records in an analysed cash book for both cash and bank entries		
WA0703	Check invoices received against orders		
WA0704	Record debtors and creditors		
WA0705	Prepare a bank reconciliation statement		
WM0706	Reconcile supplier statements.		
	Supporting Evidence	Date	Signature
SE0701	Financial source documents		
SE0702	Reports on deviations		
SE0703	Emails to clients, customers and suppliers		
WM-08	VAT calculations and returns		
	Scope Work Experience	Date	Signature
WA0801	Apply the rules and rates of VAT to the transactions of a small business		
WA0802	Calculate VAT amounts as well as VAT inclusive and VAT exclusive amounts for various transactions;		
WA0803	Set up and maintain VAT records		
WA0804	Complete VAT returns for both cash and credit transactions		
	Supporting Evidence	Date	Signature

SE0801	VAT Control Account		
SE0802	VAT Calculation		
SE0803	Completed VAT 201		
WM-09	Assisting in the preparation for an internal audit		
	Scope Work Experience	Date	Signature
WA0901	Tests, as specified in the audit plan, are correctly conducted, the results properly recorded and conclusions validly drawn		
WA0902	Clear concise draft reports relating to the audit assignment are prepared and submitted for review and approval in accordance with organisational procedures		
WA0903	Confidentiality and security procedures are followed		
	Supporting Evidence	Date	Signature
SE0901	Audit plan		
SE0902	Checklists		
SE0903	Report on audit		
WM-10	Prepare Financial Statements for applicable company/ies		
	Scope Work Experience	Date	Signature
WA1001	Cash flow statement		
WA1002	Statement of Comprehensive income		
WA1003	Statement of financial position		
WA1004	Statement of changes in equity		
	Supporting Evidence	Date	Signature

SE1001	Financial statements		
SE1002	Reports		

Public Relations

WM-01	Printing materials and publications		
	Scope Work Experience	Date	Signature
WA0101	Compile a portfolio of different publications, pamphlets and brochures, programmes and other marketing materials to use as reference points for new publications		
WA0102	Exposure to and participation in (and where possible assisting with and designing): <ul style="list-style-type: none"> • Selection of the type of media to use in specific situations • Publications used by the company (house journals, pamphlets, brochures, annual reports, posters, display advertisements, etc.) 		
WA0103	Compile a list of suppliers and collect samples of different types of paper to be used in publications		
WA0104	Utilise social media (Facebook, twitter, Instagram) as public relations tools		
WA0105	Prepare and supervise the production of publicity brochures, handouts, direct mail leaflets, promotional videos, photographs, films and multimedia programmes of the organisation		
	Supporting Evidence	Date	Signature
S0101	Presentations and Reports		
S0102	Diary, Planner & Reports		

S0103	Portfolio of evidence		
WM-02	Organisational media		
	Scope Work Experience	Date	Signature
WA0201	Plan for various organisational media publications and distribution to stakeholders		
WA0202	Identify, obtain agreement on and document publication objectives and central message consistent with messages in other organisational publications		
WA0203	Develop and obtain agreement on budgets and schedules with relevant stakeholders		
WA0204	Identify appropriate suppliers of goods and services and obtain quotations as required		
WA0205	Develop criteria to test and evaluate the success of the publication		
WA0206	Design and write publication text in accordance with communication objectives and house style		
WA0207	Check readability of material to ensure it is aligned to the target audience's reading levels		
WA0208	Test document with relevant stakeholders and incorporate findings in the final publication		
WA0209	Ensure publications, including any changes, comply with legal and ethical requirements		
WA0210	Select and contract suppliers to complete publication production processes		
WA0211	Distribute publication according to public relations plan		

WA0212	Evaluate aspects of the publication in line with stakeholder feedback and against evaluation criteria		
	Supporting Evidence	Date	Signature
SE0201	Media analysis Spreadsheet		
SE0202	Examples of publications		
SE0203	Submission documents		
WM-03	Advertisements		
	Scope Work Experience	Date	Signature
WA0301	Analyse various advertisements of the organisation and determine whether an advertisement meets the public relations requirements as per the policy and procedures		
WA0302	Answer enquiries in relation to advertisements		
WA0303	Compile a classified advertisement using given information		
	Supporting Evidence		
SE0301	Media analysis Spreadsheet		
SE0302	Advertisements designed		
SE0303	Queries answered		
WM-04	Exhibitions		
	Scope Work Experience	Date	Signature
WA0401	Compile a list and guideline to assist with preparing for an exhibition		

WA0402	Organise an exhibition on a relevant topic at the workplace		
WA0403	Draw the layout of the exhibition to assist with the set-up of the exhibition		
WA0404	Take responsibility for the exhibition and train support staff to man the exhibition		
	Supporting Evidence	Date	Signature
SE0401	Diary/Planner and Event Report		
SE0402	Photographs of exhibition		
SE0403	Feedback form participants		
WM-05	Conferences and seminars		
	Scope Work Experience	Date	Signature
WA0501	Plan and organize a simple conference and seminar which includes but is not limited to the following: press conferences, exhibitions, open days and press tours		
WA0502	Draw up a programme for the conference/seminar		
WA0503	Compile a conference file with supportive material which includes but is not limited to the following: Presentations, Copies of CV's of speakers, name tags, attendance registers, any other related materials		
	Supporting Evidence		
SE0501	Project Plans		
SE0502	Reports		

	Conference/seminar pack		
WM-06	Special Occasions		
	Scope Work Experience	Date	Signature
WA0601	Plan and organize simple occasions that will promote the image of the company (social outings for staff, year-end functions, tours of the premises, ceremonial events, etc.)		
WA0602	Compile a programme which outlines the proceedings during the course of the occasion		
	Supporting Evidence	Date	Signature
S0601	Programme of event		
S0602	Reports		
WM-07	Checklists for campaigns		
	Scope Work Experience	Date	Signature
WA0701	Design a general checklist for any event		
WA0702	Design a master checklist		
WA0703	Design a crisis management checklist		
WA0704	Compile a checklist for organising conferences and exhibitions		
WA0705	Design a checklist for facilities, equipment and apparatus required		
	Supporting Evidence	Date	Signature
SE0701	Various checklists		
WM-08	Sponsorships		

	Scope Work Experience	Date	Signature
WA0801	Identify available sources of funding or sponsorship including criteria, conditions or constraints related to funding		
WA0802	Examine and agree upon budgets with senior management		
WA0803	Conduct research to identify the most appropriate target public for fundraising or sponsorship activities in accordance with organisation profile and requirements		
WA0804	Identify and consider legal and ethical requirements in relation to fundraising or sponsorship		
WA0805	Make recommendations for fundraising, sponsorship campaigns or activities based on research findings		
WA0806	Prepare and obtain agreement on a campaign plan for fundraising or sponsorship activities that meets organisational, ethical and legal requirements		
	Supporting Evidence		
SE0801	Campaign plan		
SE0802	Report		
WM-09	Social responsibility		
	Scope Work Experience	Date	Signature
WA0901	Exposure to and participation in an elementary social responsibility programme of the company. This will include involvement in the following possible projects:		

	<ul style="list-style-type: none"> • Possible community projects • Fund-raising 		
	Supporting Evidence	Date	Signature
SE0901	Project plans		
SE0902	Reports		
WM-10	Public Relations and Research		
	Scope Work Experience	Date	Signature
WA1001	<p>Understand the basic principles of research and be exposed to and participate in the following:</p> <ul style="list-style-type: none"> • Collecting information from internet, magazines, newspapers • Summarizing the main points 		
WA1002	Compiling a simple questionnaire to test opinion		
WA1003	Report on findings		
	Supporting Evidence		
SE1001	Reports		

Marketing Communication N6

WM-01	Compile a media plan		
	Scope Work Experience	Date	Signature
WA0101	Plan and prepare advertising and promotional material to increase sales of products or services, working with customers, company officials, sales departments, and advertising agencies.		
WA0102	Inspect layouts and advertising copy and edit scripts, audio and video tapes, and other promotional material for adherence to specifications		
WA0103	Gather and organise information to plan advertising campaigns		
WA0104	Meet with department heads or staff to discuss topics such as contracts, selection of advertising media, or product to be advertised.		
WA0105	Submit estimates for program costs as part of campaign plan development.		
WA0106	Coordinate with the media to disseminate advertising.		
	Supporting Evidence	Date	Signature
S0101	Advertisements		
S0102	Advertising campaign plan		
S0103	Submission documents		
S0104	Any relevant media campaign documentation		
WM-02	Create an advertisement for a specific medium		
	Scope Work Experience	Date	Signature
WA0201	Write advertising or promotional material.		

WA0202	Adapt writing to suit style, techniques, word length, word choice, etc. of writing of the given brief		
WA0203	Assess available media/channels for advertisement		
WA0204	Evaluate in terms of strengths and weaknesses for creative/visual application of advertisement.		
WA0205	Fit the elements of the advertisement into the space allowed by the media so all the components form a unit		
	Supporting Evidence	Date	Signature
SE0201	Advertisements		
SE0202	Layout and editing materials used		
SE0203	Related material for advertisement and preparation		
WM-03	Participate in a campaign for a sales promotion/advertising/public relations		
	Scope Work Experience	Date	Signature
WA0301	Collaborate with others in marketing activities.		
WA0302	Provide educational information to the public		
WA0303	Inform viewers, listeners, or audiences on sales promotion/advertising/public relations periodically		
WA0304	Coordinate logistics for productions or events.		
WA0305	Promote products, activities, or organizations.		
WA0306	Respond to requests for information from the media or designate an appropriate spokesperson or information source.		
WA0307	Plan or direct communication of programs to maintain favourable public or stockholder		

	perceptions of an organisation's accomplishments, agenda, or environmental/social responsibility.		
WA0308	Arrange public appearances, lectures, contests, or exhibits for clients to increase product or service awareness or to promote goodwill.		
WA0309	Represent company at trade association meetings to promote products.		
WA0310	Manage special events, such as sponsorship of races, parties introducing new products, or other activities the firm supports, to gain public attention through the media without advertising directly.		
	Supporting Evidence		
SE0301	Submission documents		
SE0302	Promotional materials		
SE0303	Programme/ relevant materials for events		
SE0304	Exhibition materials		
SE0305	Customer feedback		

Labour Relations

WM-01	Collective bargaining		
	Scope Work Experience	Date	Signature
WA0101	Deal with union(s) database		
WA0102	Work with bargaining structures and units		
WA0103	Assist with preparation for negotiation meetings		
WA0104	Be present in negotiations meetings		
WA0105	Handle grievances		
WA0106	Be present to observe disciplinary process in disciplinary hearings		
WA0107	Assist in the administration of collective agreements		
	Supporting Evidence	Date	Signature
SE0101	Membership records and recognition agreements		
SE0102	Documented members and roles, records of attendance		
SE0103	Meeting documentation packs		
SE0104	Attendance records and representative lists		
SE0105	Records of grievances, followed procedure and outcomes		
SE0106	Record of charges, handling of evidence, representations and/ or outcomes		

SE0107	Implementation dates and/or records of parties to ensure implementation and administrative process records where there is measurable changes		
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Workplace Competencies

WM01	Establish professional relationships and partnerships		
	Scope Work Experience		
WA0101	Seek opportunities to make contacts through organizational events, social events, external organizations, and professional activities	Date	Signature
WA0102	Exhibit trustworthy behaviour to build successful business relationships		
WA0103	Establish strong and lasting partnerships with business contacts		
WA0104	Propose innovative business deals to customers, suppliers, and business partners		
WM02	Apply knowledge of basic business principles, trends, and economics to work activities		
WA0201	Demonstrate respect for colleagues, co-workers, and customers		
WA0202	Act in the best interest of the company, the community, and the environment		
WA0203	Comply with applicable laws and rules governing work		
WA0204	Recognize relevant, ethical issues in business		
WM03	Leadership & Team Building		
WA0301	Exhibit passion for goal attainment		

WA0302	Lead others using positive statements		
WA0303	Encourage creative thinking and innovation		
WA0304	Determine the roles and responsibilities that leaders and members bring to an organization		
WA0305	Enlist others in working toward a shared vision		
WA0306	Recognize others' efforts		
WM04	Knowledge of the documents associated with measuring a business' financial information.		
WA0301	Review financial information to develop account statements.		
WA0302	Analyse and interpret financial data to produce accurate reports		
WA0303	Compile business transaction data to report financial information		
WA0304	Prepare and interpret balance sheets, income statements, cash flow statements, and statements of retained earnings		
WA0305	Adhere to record keeping requirements associated with financial statements		