

Steamfitter Apprenticeship

Green Modules for Steamfitter Apprenticeship

Module 3: Customer Service and Marketing of Green Technologies

Instructor Guide



Wisconsin Department of Workforce Development

Bureau of Apprenticeship Standards

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Wisconsin's Sector Alliance *for the* Green Economy



Module

3

Steamfitter Apprenticeship

Green Modules for Steamfitter Apprenticeship

Introduction & Background

Green jobs are in demand. But most are not new occupations. They are traditional occupations, upgraded with skills training in new technologies that promote renewable energy and energy efficiency. Therefore, providing “green” training is the focus of the Wisconsin Sector Alliance for the Green Economy (SAGE) project, a federal grant implemented by the Wisconsin Bureau of Apprenticeship Standards.

SAGE includes the Steamfitter trade to prepare future steamfitters to install and maintain green technologies and systems. Industry drives apprenticeship, and enhancing the steamfitter apprenticeship was no exception. After skilled steamfitters and WTCS instructors analyzed and determined the training needs, they developed the curriculum.

INDUSTRY FOCUS GROUP

The Steamfitter Industry Focus Group met April 28, 2011 to identify green trends in the steamfitter trade and recommended additions and/or revisions to the apprenticeship curriculum. The meeting outcomes provided the foundation and blueprint for enhancing the apprenticeship curriculum. Step 1 was to analyze the occupation and its “green” trends. Step 2 was to design and develop the new curriculum. Step 3 will be to rollout the curriculum, train instructors, and obtain the necessary approvals needed to implement a green-skills focused curriculum.

The group reached consensus on adding three new green modules to the steamfitter apprenticeship. These modules focus on Green Technologies, Energy Management Systems, and Customer Service and Marketing of Green Technologies.

CURRICULUM DEVELOPMENT

The design team, consisting of industry representatives and instructors, worked through September 2011 to develop student learning plans, teaching plans, learning materials and assessment strategies for use in the apprenticeship related instruction classroom. The three modules can be incorporated into existing apprenticeship programs to meet the needs of local employers. Pending approval, beginning in the fall semester of 2011, the three modules will be available to incorporate into various semesters during the four-year, eight-semester (640 hours) related instruction portion of the apprenticeship programs offered at

Chippewa Valley Technical College, Fox Valley Technical College, Madison College, Mid-state Technical College, Northeast Wisconsin Technical College and Milwaukee Area Technical College. In 2011 – 2012, the new modules will benefit more than 350 Steamfitter Construction and Steamfitter Service apprentices, and be made available to journey workers through special upgrade sessions.

STATE COMMITTEE APPROVAL

The State Apprenticeship Committee will hear a presentation regarding the new curriculum at their October 2011 meeting. A recommendation for approval of the new curriculum to the Wisconsin DWD BAS is anticipated at that meeting. Wisconsin DWD BAS staff will then act on that recommendation by approving the new curriculum with green modules integrated into various semesters of related instruction.

ADDITIONAL INFORMATION

Project documents, resources and information can be found at <http://sage.wisconsin.gov>.

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HOW TO USE THIS GUIDE:

This Instructor Guide is designed to help you teach the learning plans included in this module. A learning plan is designed to guide the student through the learning process, and is provided to the student in the Student Learning Guide for this module. This instructor guide includes the information provided to students in the Student Learning Guide, along with notes and information to help you teach each learning plan.

The learning plans in this instructor guide include the following components:

Overview

The Learning Plan Overview describes what the apprentice will learn and why it is important.

Competency

Each learning plan targets a competency which reflects a skill identified by industry as important to the apprentice's success on the job. A competency is a major skill or ability that the learner will be able to do as a result of completing the learning plan.

Performance Standards

Under each competency, you will find information describing how the apprentice will demonstrate the competency, such as by writing a report or giving a presentation. You will also find the criteria that will be used to evaluate their performance. Encourage students to review this information at the start of each learning plan to help guide their learning.

Learning Objectives

Learning objectives are the supporting knowledge and skills needed to perform the competency and can serve as benchmarks towards mastery of the competency.

Learning Activities

The learning activities describe the activities that the apprentices will do in and out of class to master the learning objectives, and ultimately the competency. You may decide to modify or add additional learning activities to meet the needs of your class.

Teaching Notes

For each learning activity you will find notes and suggestions on how to guide the apprentices as they complete the activity.

Assessment Activities

The assessment activities describe the activities that apprentices will complete to demonstrate mastery of the competency, according to the performance standards defined for the competency.

Learning Materials

In each learning plan, you will find information sheets and activity sheets designed to support the learning activities. You may wish to provide alternative or additional materials as needed.

Performance Assessment Task

At the end of each learning plan you will find a Performance Assessment Task. A Performance Assessment Task includes directions on how to complete the assessment and a scoring guide. Encourage students to review the directions and the criteria detailed in the scoring guide prior to beginning the assessment activity, and to use the scoring guide to self-assess their work prior to submitting it to you. You can then use the Performance Assessment Task to evaluate their work and provide feedback on their performance.



Customer Service and Marketing of Green Technologies

Course Outcome Summary

Course Information

Organization	DWD
Developers	Steamfitter Development Team
Potential Hours of Instruction	10

Description

In this module, steamfitter apprentices and/or journey workers will determine cost savings and return on investment (ROI) for green technologies, and will develop strategies for communicating green technology options to customers.

Target Population

This module is designed to be incorporated into the Apprenticeship curriculum for Steamfitter Service and Construction Apprentices and Journeyworkers.

Prerequisites

Green Technologies module

Competencies

1. Determine cost savings and return on investment (ROI) for green technologies

You will demonstrate your competence:

- 1.a. in response to a case study

- 1.b. in an oral presentation (individual or group)

Your performance will be successful when:

- 1.a. you identify the relevant data and information contained in the case study problem
- 1.b. you estimate cost savings
- 1.c. you determine potential ROI
- 1.d. you explain your recommendation
- 1.e. you use correct terminology

Learning Objectives

- a. Determine the factors that impact ROI
- b. Explain the steps in determining ROI for a particular situation
- c. Explain the steps involved in performing a cost-saving analysis
- d. Define terms related to green technology, cost savings and return on investment

2. Communicate green technology options to customers

You will demonstrate your competence:

- 4.a. in response to a case study
- 4.b. in a role play

Your performance will be successful when:

- 2.a. you communicate options to customer
- 2.b. you use correct terminology
- 2.c. you explain recommendations in terms that the customer will understand
- 2.d. you support your recommendation with data and information

Learning Objectives

- a. Define terms related to green technologies

- b. Determine which technology is most appropriate for a given application
- c. Explain typical customer questions and concerns
- d. Describe different types of customers and their needs and concerns
- e. Demonstrate effective oral communication
- f. Identify potential information resources for customers



Cost Savings and Return on Investment (ROI)

Green Modules for Steamfitter Apprenticeship

Learning Plan 1

Overview

In this learning plan you will learn how to estimate costs savings and potential return on investment (ROI) for green technologies.

Target Competency

Determine cost savings and return on investment (ROI) for green technologies

You will demonstrate your competence:

- in response to a case study
- in an oral presentation (individual or group)

Your performance will be successful when:

- you identify the relevant data and information contained in the case study problem
- you estimate cost savings
- you determine potential ROI

- you explain your recommendation
- you use correct terminology

Learning Objectives

- a. Determine the factors that impact ROI
- b. Explain the steps in determining ROI for a particular situation
- c. Explain the steps involved in performing a cost-saving analysis
- d. Define terms related to green technology, cost-savings, and return on investment

Total Estimated Lesson Time: 3-5 hours. Instructors can modify activities to meet local needs and time available.

Learning Activity		Teaching Notes
1	PREVIEW the overview and performance expectations for this learning plan to see why it is important, what you will learn, and how you will be assessed. Give special attention to the introduction, competency, criteria, conditions, and learning objectives.	TIME: 10 minutes MATERIALS: Student Learning Guide NOTES: Point out the lesson competency and performance standards and explain to learners that these describe what they will know and be able to do upon successful completion of the lesson.
2	LISTEN TO A GUEST SPEAKER share examples of how customers saved money by using green technologies, OR review vendor examples provided by your instructor.	TIME: 30 minutes MATERIALS: Guest Speaker or vendor examples NOTES: Invite a vendor to speak to the class OR provide vendor examples on cost savings and return on investment
3	READ assigned sections in your <i>Green Awareness</i> textbook.	TIME: 30 minutes MATERIALS: NOTES: Assign reading sections that relate to energy management in your region. Select textbook sections that highlight cost savings and return on investment. Review case study from Energy Management Lesson.

Learning Activity		Teaching Notes
4	COMPILE a list of key terms related to cost savings and return on investment (ROI). ADD these terms to your Glossary of Terms worksheet included in this learning plan.	TIME: 20 minutes MATERIALS: Glossary of Terms worksheet NOTES: Have students add to the Glossary of Terms Worksheet, and then discuss key terms as a class.
5	LOCATE articles and conduct Internet research on cost saving and return on investment (ROI). USE the Research Worksheet to compile a list of useful websites. SHARE information about useful websites with your classmates.	TIME: 45 minutes MATERIALS: Research Worksheet NOTES: This could be a small group/team activity with each team looking at a different technology and presenting their findings to the class.
6	PARTICIPATE in a demonstration and discussion on calculating cost savings and return on investments.	TIME: 30 minutes MATERIALS: Case Study examples NOTES: Demonstrate processes for calculating ROI and determining cost savings. Refer to case study examples.
7	COMPLETE a Calculating Return on Investment (ROI) practice activity.	TIME: 30 minutes MATERIALS: Case Study examples, ROI Practice Activity NOTES: This activity could be done in pairs or small groups. Give each group a Case Study example. Have them calculate estimated ROI.
8	REVIEW the Cost Savings and ROI Case Study Performance Assessment Task. Read the directions and review the criteria detailed in the scoring guide.	TIME: 45 minutes MATERIALS: Cost Savings and ROI Case Study Performance Assessment Task NOTES: Review the Performance Assessment Task

Assessment Activity		Teaching Notes
9	Submit your Cost Savings and ROI assessment to your instructor for review and feedback.	

Learning Materials/Objects

Case Studies. **Description:** *Case Studies.* **Description:** Locate case studies and project profiles online:

LEED Project Profiles: <http://www.usgbc.org/DisplayPage.aspx?CMSPageID=1721>

LEED Project Directory: <http://www.usgbc.org/LEED/Project/CertifiedProjectList.aspx?CMSPageID=247>

Glossary of Terms. **Description:** Terms related to cost savings and ROI.

Research Worksheet. **Description:** Research Worksheet.

Vendor Examples. **Description:** Instructors can find examples from vendors or LEED Case Studies.

Calculating ROI Practice Activity. **Description:** List steps in performing calculations. Provide Scenarios for practice.

Glossary of Terms: Cost Savings and ROI

Directions: As you conduct your research, locate definitions for the terms listed below. Add any additional terms that you find related to your research topic.

Term	Definition
Return on Investment (ROI)	
Depreciation	



Cost Savings and ROI Research Worksheet

Directions: As you conduct your research, add the websites that you find most useful to the list below. Write a brief description. Add to the list of keywords.

List of keywords to use in your search:

- Return on Investment (ROI)
- Cost Savings
- Energy Conservation Savings

Customer Service Module

Website Title	Website URL	Description
HCAR The News	http://www.achrnews.com/	
Focus on Energy	http://www.focusonenergy.com/	
eHow Money	http://www.ehow.com/how_1168_calculate-return-investment.html	Calculating ROI

Calculating Return on Investment (ROI) Practice Activity

Directions: Review the steps for calculating potential ROI and estimating cost savings from your research and class discussions

List the steps in calculating potential ROI and estimating cost savings.

Review your case study scenario, and write down the information needed to calculate potential ROI and estimate cost savings.

Perform your calculations and write down your results.

List the Steps in Calculating Potential ROI:

List the Steps in estimating cost savings:

Write down the key information from your case study situation:

Record your calculations and your results:

Performance Assessment Task 1

Cost Savings and ROI Case Study

Target Competency Determine cost savings and return on investment (ROI) for green technologies

Directions:

1. Read through the case study scenario
2. Take note of important information and data
3. Determine the problem to be solved
4. Use Case Study information to solve the problem
5. Summarize your findings in a written report
5. Self-assess your Case Study Response using the scoring guide prior to submitting to your instructor

Scoring Guide

Criteria		Ratings	
1.	you identify the relevant data and information contained in the case study problem	met	not met
2.	you estimate cost savings	met	not met
3.	you determine potential ROI	met	not met
4.	you explain your recommendation	met	not met
5.	you use correct terminology	met	not met

Grade _____

Name _____ **Date** _____

Evaluator's Signature _____ **Date** _____

Comments:



Customer Service

Green Modules for Steamfitter Apprenticeship

Learning Plan 2

Overview

In this learning plan you will practice communicating green technology options to customers.

Target Competency

Communicate green technology options to customers

You will demonstrate your competence:

- in response to a case study
- in a role play

Your performance will be successful when:

- you communicate options to customer
- you use correct terminology
- you explain recommendations in terms that the customer will understand
- you support your recommendation with data and information

Learning Objectives

- a. Define terms related to green technologies
- b. Determine which technology is most appropriate for a given application
- c. Explain typical customer questions and concerns
- d. Describe different types of customers and their needs and concerns
- e. Demonstrate effective oral communication
- f. Identify potential information resources for customers

Total Estimated Lesson Time: 3-5 hours. Instructors can modify activities to meet local needs and time available.

Learning Activity		Teaching Notes
1	PREVIEW the overview and performance expectations for this learning plan to see why it is important, what you will learn, and how you will be assessed. Give special attention to the introduction, competency, criteria, conditions, and learning objectives.	TIME: 10 minutes MATERIALS: Student Learning Guide NOTES: Point out the lesson competency and performance standards and explain to learners that these describe what they will know and be able to do upon successful completion of the lesson.
2	LISTEN TO A GUEST SPEAKER demonstrate strategies for communicating technology options to customers OR view online videos.	TIME: 30 minutes MATERIALS: Guest Speaker or Customer Service Videos NOTES: Invite a vendor to speak to the class, obtain vendor examples, or view online videos.
3	LOCATE articles and conduct Internet research on customer service and communicating with customers. USE the Research Worksheet to compile a list of useful websites. SHARE information about useful websites with your classmates.	TIME: 60 minutes MATERIALS: Research Worksheet NOTES: This could be a small group/team activity with each team looking at a different technology and presenting their findings to the class.
4	SHARE personal experiences of both good and bad customer service. PARTICIPATE in a class discussion on the importance of customer service and communicating effectively with customers.	TIME: 30 minutes MATERIALS: NOTES: Have a journey worker or utility employee with experience serve as a guest speaker.
5	READ the article, "Real-Time Communication Etiquette for Communicating with Customers with Disabilities," by the U.S. Department of Labor.	TIME: 30 minutes MATERIALS: Article NOTES: Discuss the main points of the article.

Learning Activity		Teaching Notes
6	COMPLETE a Customer Service Role Play practice activity. For each scenario, determine the factors that are most important to the customer.	TIME: 60 minutes MATERIALS: Case Study examples NOTES: This activity could be done in pairs or small groups. Use case studies from previous lessons as the basis for the role plays.
7	In small groups, CREATE a list of Customer Service Guidelines. Share your group's list with the class. Compile the lists into a master list of Customer Service Guidelines.	TIME: 30 minutes MATERIALS: White Board or Flip Chart Paper and markers. NOTES: Compile a master list. Encourage students to use this list to prepare for their role play.
8	REVIEW the Customer Service Role Play Performance Assessment Task. Read the directions and review the criteria detailed in the scoring guide.	TIME: 10 minutes MATERIALS: Customer Service Role Plan Performance Assessment Task. NOTES: Review the requirement of the Performance Assessment Task.

Assessment Activity		Teaching Notes
9	Submit your Customer Service Role Play assessment to your instructor for review and feedback.	

Learning Materials/Objects
<i>Case Studies.</i> Description: Use same case studies as used in LP 1 or locate new case studies online or from vendors.
LEED Project Profiles: http://www.usgbc.org/DisplayPage.aspx?CMSPageID=1721
LEED Project Directory: http://www.usgbc.org/LEED/Project/CertifiedProjectList.aspx?CMSPageID=247
<i>Article.</i> Description: "Real-Time Communication Etiquette for Communicating with Customers with Disabilities," by the U.S. Department of Labor.
<i>Customer Service Videos.</i> Description: Show videos that illustrate effective customer service.
<i>Research Worksheet.</i> Description: Research Worksheet
<i>Customer Service Role Plan Practice Activity.</i> Description: Have students use the worksheet to prepare for their role play assessment.

Customer Service Research Worksheet

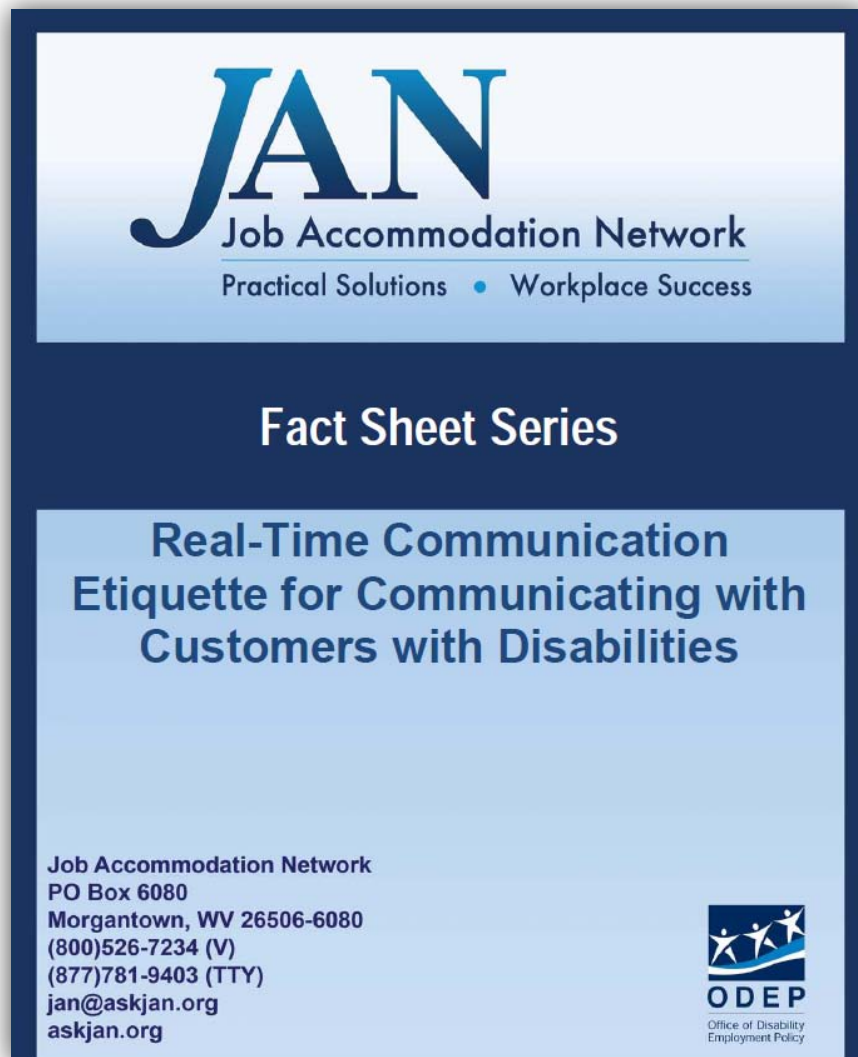
Directions: As you conduct your research, add the websites that you find most useful to the list below. Write a brief description. Add to the list of keywords

List of keywords to use in your search:

- Customer Service
- Explaining Technology to Customers

Website Title	Website URL	Description
10 Ways to Communicate with Customers and Co-workers	http://www.techrepublic.com/blog/10things/10-ways-to-communicate-more-effectively-with-customers-and-co-workers/207	
Are you listening to me? Communicate with Customers	http://www.clickz.com/clickz/column/1707476/are-you-listening-me-communicate-with-customers	
Communicating with customers Part 1	http://www.slideshare.net/s7703863i/communicating-with-customers-part-1	
Toyota Dealers – Rebuilding Trust:	http://www.youtube.com/watch?v=4565M5jNESU	
Tony McGee Communicating With Today's Customers	http://www.youtube.com/watch?v=8dwyfuc0TOI&feature=related	
Two Conversations with Customers	http://www.youtube.com/watch?v=J7Vexjwn7gY&feature=related	
8 Ways to Improve Your Communication Skills	http://www.youtube.com/watch?v=pNDa6c7 mpM&feature=related	

Real-Time Communication Etiquette for Communicating with Customers with Disabilities



JAN'S ACCOMMODATION FACT SHEET SERIES

REAL-TIME COMMUNICATION ETIQUETTE FOR COMMUNICATING WITH CUSTOMERS WITH DISABILITIES

According to the Office of Disability Employment Policy (ODEP) (1998):

the key to providing quality services to customers with disabilities is to remember that all customers are individuals. Persons with disabilities come in all shapes and sizes with diverse personalities, abilities, interests, needs, and preferences --- just like every other customer. Etiquette considered appropriate when interacting with customers with disabilities is based primarily on respect and courtesy. Listen and learn from what the customer tells you regarding his or her needs. Remember, customers with disabilities will continue to patronize businesses that welcome them, are helpful, are accessible and provide quality products and/or services at competitive market prices.

Today, a lot of customer service takes place with voice calls over the telephone and Internet; however, there are other synchronous methods for communicating when individuals are not face-to-face, such as text and instant messaging. For the purposes of this document, non face-to-face methods of communication are referred to as real-time communication. Although the same general rules of etiquette apply when communicating with customers face-to-face, there may be additional issues to consider when communicating in real-time. The following discusses general etiquette issues as well as some issues unique to communicating in real-time.

All Disabilities

Use proper language when referring to a person with a disability. For example, make reference to the person first, then the disability. Use terminology such as "a person with a disability" rather than a "disabled person."

Newer technologies such as instant messaging (IM) and short message service (SMS) text messaging are increasingly popular real-time communication methods. In all situations, be prepared to repeat information using words or phrases instead of common abbreviations, and allow extra time for individuals to complete messages.

Keep in mind that in most cases, the best way to learn how to accommodate customers with disabilities is to ask them directly. However, do not ask unnecessary questions; ask only what you need to know in order to serve the person effectively. In addition, individuals may choose to use different communication technologies for various reasons. For example, communication technologies traditionally used by individuals with hearing impairments may also be helpful to individuals with speech impairments.

Speech Impairments

People with speech impairments may stutter, slur words, sound hoarse, have unintelligible speech, or be non-vocal. When communicating verbally with a person who has speech impairment:

- Listen attentively, be patient, and avoid speaking for the person or finishing his/her sentences.
- Never pretend to understand if you are having difficulty understanding; ask the customer to repeat what was said and then repeat it back to the customer to make sure that you understand it.
- When necessary for clarification, it is appropriate to ask short questions that require short answers.
- Voice clarity can sometimes be achieved by adjusting the frequency of the incoming voice.
- If the person is non-vocal, he/she may use a communication aid, which generates synthesized speech or a prerecorded voice. A person using a communication aid may need additional time to effectively operate the device.
- If no solution to the communication problem can be worked out between you and the customer, ask if there is someone who could interpret on the customer's behalf.

Cognitive Impairments

People with cognitive impairments may have problems with memory and concentration, understanding oral communication, and learning. When communicating in real-time with a person who has a cognitive impairment:

- Be prepared to provide an explanation more than once.
- Be patient, flexible, and supportive; take time to understand the customer and make sure the customer understands you.
- Be prepared to follow up in writing.
- Take time to break long explanations into small, numbered, and sequential steps.

Fine Motor Impairments

People with fine motor impairments may have limited use of one or both hands or no use of the hands and fingers. When communicating over the telephone with people who have fine motor impairments:

- Be prepared to allow extra time for the person to write notes or to use alternative input devices to document notes, numbers, and additional information.
- Be aware that if the person uses speech recognition software for computer keyboard functions in place of handwriting, the individual must speak directly to the computer and may need additional time away from the conversation to inactivate the telephone receiver and perform computer functions by speech.

Vision Impairments

People with vision impairments may use alternative equipment, such as screen reading software and screen magnification software, to access their computers. When communicating in real-time with people who have vision impairments, it is useful to know how alternative equipment works:

- Screen magnification software may distort “typical” Webpage or document settings. What is visible to one individual on a screen may be wrapped or truncated to an individual using this software. Directional cues may need to be adjusted to effectively direct the individual through screens or other functions.

- Screen reading software allows text to be converted into computer synthesized speech. Screen reading software reads the information on the screen in a certain order that is usually controlled by how the document was designed. Customer service representatives should familiarize themselves with how the major screen reading software products work so they will know how to assist customers with vision impairments who use the software. It may be useful to contact the companies that market these products and ask for a demonstration. For more information on vendors of screen reading software, go to: <http://askjan.org/cgi-win/OrgQuery.exe?Vis11>

Hearing Impairments

People with hearing impairments may have mild to severe hearing loss or may be completely deaf.

When communicating with people who are deaf or hard of hearing, keep in mind that:

- For some individuals with mild hearing loss, it might help to raise your voice.
- Other individuals may use hearing aids or amplified telephones, which can sometimes result in high-pitched feedback on the telephone. If you hear feedback, let the customer know so he/she may be able to make simple adjustments to minimize the noise.
- Other individuals with more severe hearing loss may use a TTY (teletypewriter), which is a telephone device that enables individuals who are deaf or hard of hearing to make and receive telephone calls to other TTY users. Businesses should have a TTY or TTY software on site. Customer service representatives should be trained on how to use a TTY and proper TTY etiquette.
- Individuals who are severely hearing impaired or deaf may use a relay service, which is a 24 hour, 7 day a week, free assistance service that allows TTY users to call people who do not have a TTY. To use a relay service, an individual uses his/her TTY to contact a relay operator who also has a TTY. The operator then calls the customer service center and serves as an interpreter. When the individual at the recipient end of the call answers, the operator explains his or her role in the call and from that point forward will relay the communication between the two parties exactly as stated by both parties. When using the relay system, keep in mind that the relay operator types everything you say so do not make comments that you do not want the customer to hear.
- Some individuals may use a video relay service to communicate. Individuals can communicate through a sign language interpreter by placing a video relay call. Video relay calls are made using a high-speed or broadband Internet connection and a videophone, Web camera, or similar technologies. The person who is deaf signs (e.g., using American Sign Language) to a video interpreter (communications assistant), who then communicates with a hearing person by relaying the conversation between the two parties. For more information regarding video relay services, see the Federal Communications Commission (FCC) "Consumer Facts Sheet: Video Relay Services" at <http://www.fcc.gov/cgb/consumerfacts/videorelay.html>

References

Office of Disability Employment Policy. (1998). Providing Quality Services to Customers with Disabilities. Retrieved December 17, 2009, from <http://www.dol.gov/odep/pubs/ek98/provide.htm>

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Customer Service Role Plan Practice Activity

Use this activity sheet to prepare for your Customer Service Role Play

Directions:

1. Review the case study situation that you will use as the basis for your role play.
2. Think about how you would present your recommendations to the customer.
3. Practice with a partner
4. Use the Scoring Guide to self-assess your performance
5. Present your role play to the class

Summarize the customer service situation described in your Case Study:

Summarize the information that you need to communicate to the customer:

Summarize the Customer Service Guidelines that you need to remember when talking to the customer:

Performance Assessment Task 2

Customer Service Role Play Case Study

Target Competency Communicate green technology options to customers

Directions:

1. Review the case study situation that you will use as the basis for your role play.
2. Think about how you would present your recommendations to the customer.
3. Practice with a partner
4. Use the Scoring Guide to self-assess your performance
5. Present your role play to the class
6. Self-assess your Case Study Response using the scoring guide prior to submitting to your instructor.

Scoring Guide

Criteria		Ratings	
1.	you communicate options to customer	met	not met
2.	you use correct terminology	met	not met
3.	you explain recommendations in terms that the customer will understand	met	not met
4.	you support your recommendation with data and information	met	not met

Grade _____

Name _____ **Date** _____

Evaluator's Signature _____ **Date** _____

Comments: