

P9 S2 Learner Requirements Form

Section 1: Staff Member

PLEASE USE BLOCK CAPITALS

Name: Date:

Section 2: Your Details

PLEASE USE BLOCK CAPITALS

First Name: Surname:

Address:

Phone Number:

Mobile:

Email Address:

Source of enquiry e.g. flyer, poster, website, newspaper, friend, word of mouth, walk-in

Section 3: Your Aims / Objectives

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Course(s) of interest So... you said you were interested in...

Occupation So Are you working at the moment? Where? Doing what? How do you find it? Are you looking to move?

Aims / Objectives Tell me, what do you hope to achieve by doing this course? Have you any thoughts on the type of job you are looking for? What kind of job role would you like to see yourself in the future?
Can I ask, what difference will it make for you when you have found that job?

Motivation Can I just ask, what's made you do something about it now?
How committed are you to achieving this?
How Important is it for you to do so?

Section 4: Your Skills

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Current skills	Can I just ask, what are your current computer skills like?
Software familiar with	Tell me, which software packages are you familiar with and to which level? (e.g. proficient in word and Excel)
Typing	By the way how's your typing? Can you type-write (without looking at the keyboard)? How many words per minute do you have?
Access to PC	Do you have access to a PC at home or in work?
Internet	Are you able to use the internet? Do you have access to a to the internet at home or in work
Skills Gap	What likely gaps would a prospective employer see in your CV?

Section 5: Your Individual Learning Requirements

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Time Constraints	Incidentally how many hours do you work a week? Is that a permanent position? How many days/hours a week are you able to attend a course? How many hours per week can you spare for studies at home?
Previous Learning Experiences	In general, how easy do you find learning new skills? Have you taken any training courses in the past? How did you find it? What did you like about it? What didn't you like?
Special Requirements	Do you have any personal/special requirements that you think we should discuss? e.g. adjustable chair, very frequent breaks, wheelchair access

Section 6: Recap and Recommendations

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Demo Practical skills assessment	You could do the following with the student: Speed typing test, Demo Pitman Training self paced (Choose word/excel and appropriate lesson to suit ability of student), 10 min assessment finding info on the internet or send/receive e-mail
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Funding? Finance

Is there any funding we can offer the student?

Well having spent some time talking to you, it sounds like we could really help you, but there will be a cost involved. Now remember I mentioned earlier that typically our students are happy to invest between €400 and €4,000. So obviously finances are very important, can I ask how much would you be happy to spend?

Recap notes

OK well assuming we could find some help for you and arrange an affordable payment plan, what's the most you would be happy with? (Keep recapping with customer.)

Let's just go over these details then... (Recap and Summarise requirements)

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Now do you think that I've got a reasonable picture or is there anything else I need to know? (You are looking for all objections.)

Courses recommended

Great, well I'm sure I can help, just wait here a minute whilst I check to find out exactly what's available and which courses will help you the most.

(On your return – armed with relevant brochures) ** Go through each of the modules on each course**

Based on what you have told me either "X Diploma/Course" or "Y Diploma/Course" is going to suit you best.

These are the workbooks you'll be using. Of course you can stop and start as often as you like. (Keep promoting features and benefits)

Do you remember, you said you wanted to learn about, well in this course you will get which means that

Section 6: Recap and Recommendations Cntd.

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Final Recommendation

How does that fit in with what you had in mind? (Stay Silent – let them answer)
Which one fits best with what you had in mind? (Stay Silent – let them answer)
Course/Diploma decided on _____
Great, to help us plan and be ready for you - When would you like to start? {THEN BE SILENT –let them answer!}

Price Proposal

Take out Price proposal form and fill it in, include deposit, payment plan, start date etc,
Keeping selling the benefits
When would you like to start and when could you bring in the deposit to get things underway?

Customer Checklist

(Refer to and start summarising the content of the Customer checklist BUT get THEM to tot up the number of positives with you)

Agreed Follow-up Action

One final point – you will probably have a lot more questions about the training course we recommended. I'll give you a call next ____ day at around ____ o'clock – is that OK? – and I'll answer any other questions you have.

Fill them with Positivity

That's the hardest bit over now, committing to doing it, you should be pleased that you're doing something about it, so many people aren't! You've booked the right course! You're going to love it!

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