

CRM qualification: evidence before progression

Daniel Praneeth · Independent practice sample · 6 October 2026

Newly authored demonstration with fictional data. Illustrates current design practice; separate from historical employer deliverables or results.

Learning goal

Distinguish a positive buying signal from sufficient evidence for the next commercial decision.

Scenario

Fictional scenario: an operations lead at Northstar Works attends a product demonstration and says the solution looks useful. A seller estimates possible savings, but the buyer has not validated a baseline. The decision authority and procurement path are unknown.

Learner decision

The seller wants to advance the opportunity. What should the record and next conversation contain?

Buyer comment. Record interest as a signal, with its source and date.

Value estimate. Label the estimate as a hypothesis until the buyer validates the problem, baseline and desired outcome.

Buying process. Identify decision authority, criteria and procurement steps; record unknowns explicitly.

Next action. Agree who will clarify the missing evidence, what they will bring and when.

Worked response

Capture the customer signal, distinguish it from assumptions, and plan the missing qualification work. Follow the organisation's approved progression criteria rather than inventing an exit rule.

Design rationale

Teach the decision before the screen sequence. A learner must explain what evidence is missing, not only remember where to click.

How to assess it

Four observable checks: identifies the source; separates fact from estimate; names missing buying-process evidence; specifies an owner and next action.

Release readiness: a decision-led checklist

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Learning goal

Connect changed tasks, learning readiness and unresolved operational risks before a release.

Scenario

Fictional scenario: Atlas Service is changing approval routing for coordinators, managers and support teams. Guidance has been reviewed, but coordinator permissions have not yet been tested.

Learner decision

Is the release communication ready to announce that everyone can use the new workflow?

Changed tasks. Verified: each role has a task-level change summary and support route.

Process review. Verified: process owner has reviewed the guidance.

Role access. Open: coordinator permissions still need a successful task test.

Learning support. Prepared: quick guide, practice task and support contact are available.

Launch decision. Pending: business release owner must resolve or formally accept the access risk.

Worked response

Prepare the communication, but do not state that access is ready. Name the open permission test, its owner and the decision needed. The business release owner decides whether to launch, delay or accept a documented exception.

Design rationale

Make unresolved task execution a visible readiness issue. Content completion alone is insufficient to declare users ready.

How to assess it

The checklist connects each open issue to a role, evidence requirement, owner and release decision.

Learning operations: completion is not competence

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Learning goal

Produce a cohort-specific completion report and interpret its limits correctly.

Scenario

Fictional dataset: twelve unique learners are assigned to Practice A. Ten are marked complete and two incomplete at one defined snapshot. There are no withdrawn or duplicate assignments.

Learner decision

What can you report, and what additional evidence would establish readiness?

Define the cohort. Use Practice A only, with a stated reporting date and assignment definition.

Verify the records. Check twelve unique assignments, ten complete and two incomplete; reconcile the export against the filtered preview.

Calculate completion. $10 \div 12 \times 100 = 83.3\%$, rounded to one decimal place.

Report scope. Describe assignment completion at the snapshot, not task competence or productivity.

Check application. Use a task demonstration, manager observation or assessed practice to investigate readiness.

Worked response

Report 83.3% completion for this fictional cohort and snapshot. Follow up with the two incomplete learners. Keep applied task performance separate from completion and do not infer ramp time from this calculation.

Design rationale

Define the denominator and verification step before presenting a percentage.

How to assess it

The worked result is reproducible from the stated fictional counts. It is a teaching calculation, not an AVEVA metric.

Learning-media QA: a visible before-and-after

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Learning goal

Check meaning, terminology, caption alignment and readability before publishing learning media.

Scenario

Original fictional example: a clip says “Review the Northstar account before saving,” while its caption says “Review the North Start account before saving.” The next instruction appears on screen while the previous caption is still visible.

Learner decision

What must change, and what would confirm that the correction holds?

Terminology. Correct “North Start” to “Northstar” and check it against the fictional narration.

Timing. Align the instruction change with the relevant narration and caption interval.

Consistency. Use a consistent visual treatment for the same record type across the clip.

Verification. Replay the corrected interval, then review the exported subtitle file and the next transition.

Worked response

Correct the term, align the transition and replay the output. A logged correction is a revision; a replay or output check establishes whether it is resolved.

Design rationale

Treat subtitles and on-screen guidance as one learner experience rather than separate files to approve.

How to assess it

Before/after differences and the verification action are explicit. This example demonstrates a QA method, not measured error reduction.