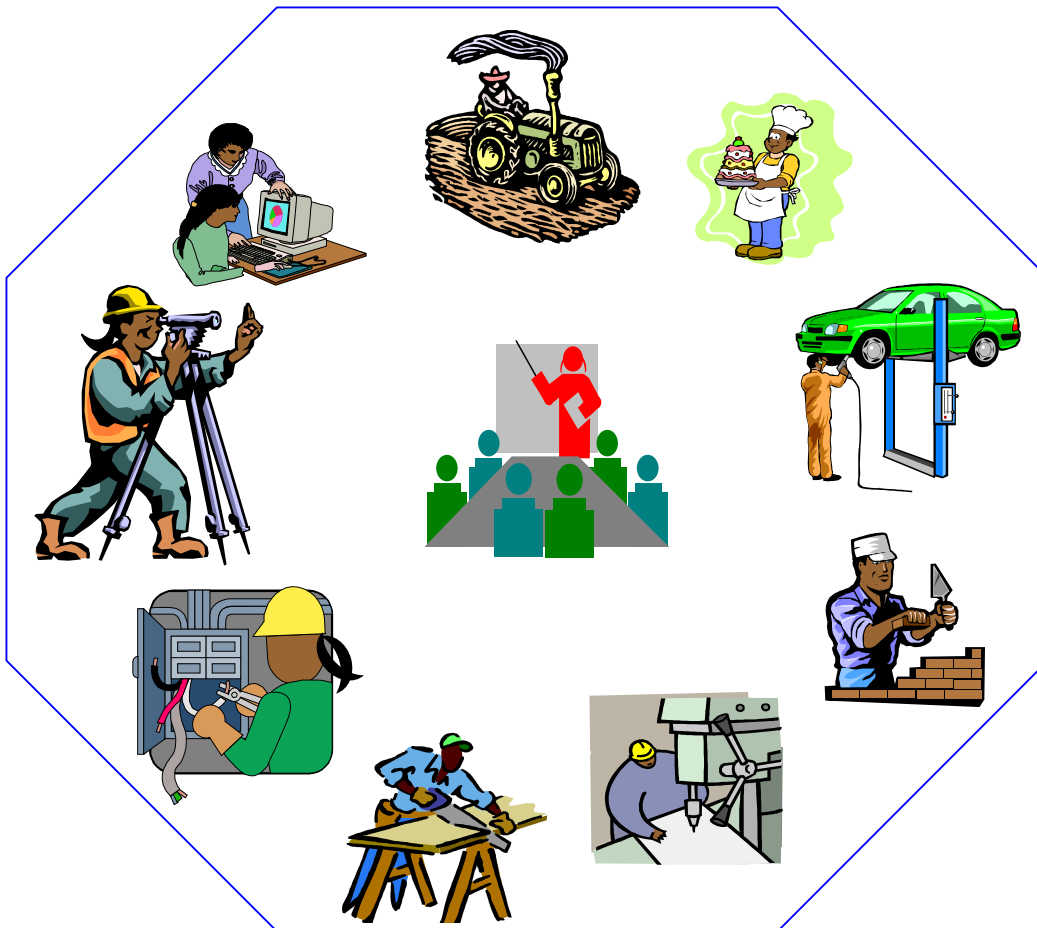




Federal Democratic Republic of Ethiopia
OCCUPATIONAL STANDARD
CUSTOMER CONTACT & SECRETARIAL OPERATIO
COORDINATION
NTQF Level IV



*Ministry of Education
August 2012*

Introduction

Ethiopia has embarked on a process of reforming its TVET-System. Within the policies and strategies of the Ethiopian Government, technology transformation – by using international standards and international best practices as the basis, and, adopting, adapting and verifying them in the Ethiopian context – is a pivotal element. TVET is given an important role with regard to technology transfer. The new paradigm in the outcome-based TVET system is the orientation at the current and anticipated future demand of the economy and the labor market.

The Ethiopian Occupational Standards (EOS) are - a core element of the Ethiopian National TVET-Strategy and an important factor within the context of the National TVET-Qualification Framework (NTQF). They are national Ethiopian standards, which define the occupational requirements and expected outcome related to a specific occupation without taking TVET delivery into account.

This document details the mandatory format, sequencing, wording and layout for the Ethiopian Occupational Standard comprised of Units of Competence.

A Unit of Competence describes a distinct work activity. It is documented in a standard format that comprises:

- Occupational title, NTQF level
- Unit code
- Unit title
- Unit descriptor
- Elements and Performance criteria
- Variables and Range statement
- Evidence guide

Together all the parts of a Unit of Competence guide the assessor in determining whether the candidate is competent.

The ensuing sections of this EOS document comprise a description of the respective occupation with all the key components of a Unit of Competence:

- chart with an overview of all Units of Competence for the respective level including the Unit Codes and Unit of Titles
- contents of each Unit of Competence (competence standard)
- occupational map providing the technical and vocational education and training (TVET) providers with information and important requirements to consider when designing training programs for this standards, and for the individual, a career path

Page 1 of 71	Ministry of Education Copyright	Customer Contact & Secretarial Operations Coordination Ethiopian Occupational Standard	Version 2 August 2012
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UNIT OF COMPETENCE CHART

Occupational Standard: Customer Contact and Secretarial Operations Coordination		
Occupational Code: EIS CSC		
NTQF Level IV		
EIS CSC4 01 0812 Gather, Collate and Record Information	EIS CSC4 02 0812 Coordinate Implementation of Customer Service Strategies	EIS CSC4 03 0812 Address Customer Needs
EIS CSC4 04 0812 Organise and Monitor the Operation of Compliance Management System	EIS CSC4 05 0812 Implement Continuous Improvement	EIS CSC4 06 0812 Organize Meetings
EIS CSC4 07 0812 Coordinate Business Resources	EIS CSC4 08 0812 Write Complex Documents	EIS CSC4 09 0812 Organise Business Travel
EIS CSC4 10 0812 Establish Networks	EIS CSC4 11 0812 Identify Risk and Apply Risk Management Processes	EIS CSC4 12 0812 Plan and Organize Work
EIS CSC4 13 0812 Migrate to New Technology	EIS CSC4 14 0812 Establish Quality Standards	EIS CSC4 15 0812 Develop Individuals and Team
EIS CSC4 16 0812 Utilized Specialized Communication Skills	EIS CSC4 17 0812 Manage and Maintain Small/Medium Business Operations	EIS CSC4 18 1012 Manage Continuous Improvement System

Occupational Standard: Customer Contact Level IV	
Unit Title	Gather, Collate and Record Information
Unit Code	EIS CSC4 01 0812
Unit Descriptor	This unit describes the performance outcomes, skills and knowledge required to gather, collate and accurately record information from a variety of sources including interviews and database systems.

Elements	Performance Criteria
1. Obtain, record and analyze information from the community	1.1. Information sources are identified. 1.2. Information is collected and recorded in accordance with legislation, policy and procedures. 1.3. Information collected is collated, sorted and analyzed in relation to the purpose for which it is being obtained. 1.4. Contents of recording forms/reports are ensured to be complete, accurate, concise, legible, understandable and in the correct format.
2. Take and compile statements	2.1. Statements are obtained from sources appropriate to the matter being investigated. 2.2. Comprehensive statements that contain all details relevant to the matter being investigated are taken, in accordance with legislation, policy and procedures. 2.3. Active and accurate listening is used when taking statements from people.
3. Conduct interviews	3.1. Interviews are planned, managed and conducted to gather maximum amount of information relevant to the matter being examined 3.2. All interviewees are treated fairly and equitably 3.3. Interviews are conducted and recorded in accordance with legislation, policy and procedures
4. Utilize information/ database systems	4.1. Information is accurately entered on database 4.2. Data entry security procedures are adhered 4.3. Appropriate sources of information are identified and correctly used 4.4. Information is accessed/stored in accordance with legislation, policy and procedures
5. Use interview and evidence recording	5.1. All recording equipment is operated in accordance with legislation, policy and procedures 5.2. Ensure records produced are authorized, stored and

equipment	<p>assessed in accordance with organizational procedures</p> <p>5.3. Records produced are ensured to be clear, audible and presentable</p> <p>5.4. Equipment and usage logs are maintained in good order</p>
6. Exchange information with other members within the organization	<p>6.1. Communication links are identified and used within the organization to exchange information</p> <p>6.2. The relevance of information received is assessed in terms of its intended purpose</p> <p>6.3. Irrelevant information is disposed in accordance with legislation, policy and procedures</p>

Variable	Range
Information sources may include:	<ul style="list-style-type: none"> • community groups • community leaders • crime/accident/incident scenes • customers or clients • fellow staff • general public • individuals • information databases • local government • local media • schools • specific target groups - in the case of opinion polls and surveys
Information may include:	<ul style="list-style-type: none"> • addressing public order/general community issues • assisting in an investigation • details of an incident or medical emergency • locating a specific person • location of witnesses • opinion poll or customer survey • progressing/supporting court hearings/matters
Recording forms/reports may include:	<ul style="list-style-type: none"> • hand written and electronically based pro-formas and reporting styles • use of organization's information system
Comprehensive statements may include:	<ul style="list-style-type: none"> • all detail required by the organization • all information required for the investigation or research task • all relevant information • records in a format that comply with the legal requirements for statements; where appropriate and legal, statements may also be recorded in forms other than written such as audio-tape or audio-visual (video) tape

Recording equipment may:	<ul style="list-style-type: none"> • include: <ul style="list-style-type: none"> ➢ audio-tape recorders ➢ authorization, storage and filing of tapes/film, original and duplicates ➢ basic fingerprinting equipment ➢ video cameras and recording equipment • be modified for use by people with a disability
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Evidence Guide	
Critical aspects of Competence	<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> • accurately collated information • records of interviews (including audio-tapes and statement if relevant to role) • demonstration of interview techniques • knowledge of statutory, regulatory and legislative requirements
Underpinning Knowledge and Attitudes	<p>Demonstrates knowledge of:</p> <ul style="list-style-type: none"> • information types and their sources • procedures and security measures for accessing, storing, retrieving and sharing data from databases • rights of individuals in relation to the conduct of interviews and statement compilation • statutory, regulatory and legislative requirements • use of evidence/contact recording technology
Underpinning Skills	<p>Demonstrates:</p> <ul style="list-style-type: none"> • analytical skills to effectively analyse information and data • interpersonal skills to establish rapport and to develop relationships with customers • literacy skills to clearly articulate information, advice and instructions, and to prepare and compile detailed statements or reports • numeracy skills to accurately analyse, record and store data in accordance with organizational requirements • organizational skills to manage own tasks within timeframes • questioning and listening skills to effectively understand and resolve issues raised
Resources Implication	<p>Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices.</p>
Methods of Assessment	<p>Competence may be assessed through:</p> <ul style="list-style-type: none"> • Interview / Written Test • Observation / Demonstration with Oral Questioning
Context of Assessment	<p>Competence may be assessed in the work place or in a simulated work place setting.</p>

Occupational Standard: Customer Contact Level IV	
Unit Title	Coordinate Implementation of Customer Service Strategies
Unit Code	EIS CSC4 02 0812
Unit Descriptor	This unit describes the performance outcomes, skills and knowledge required to advise on, carry out and evaluate customer service strategies, including the design of improvement strategies based on feedback.

Elements	Performance Criteria
1. Advise on customer service needs	<p>1.1. Customer needs are clarified and accurately assessed using appropriate communication techniques</p> <p>1.2. Problems matching service delivery to customers are diagnosed and options are developed for improved service within organizational requirements</p> <p>1.3. Relevant and constructive advice are provided to promote the improvement of customer service delivery</p> <p>1.4. Business technology and/or online services are used to structure and present information on customer service needs</p>
2. Support implementation of customer service strategies	<p>2.1. Ensure customer service strategies and opportunities are promoted to designated individuals and groups</p> <p>2.2. Available budget resources are identified and allocated to fulfill customer service objectives</p> <p>2.3. Procedures to resolve customer difficulties and complaints are promptly done within organizational requirements</p> <p>2.4. Ensure that decisions are taken to implement strategies in consultation with designated individuals and groups</p>
3. Evaluate and report on customer service	<p>3.1. Client satisfaction with service delivery is reviewed using verifiable data in accordance with organizational requirements</p> <p>3.2. Changes necessary is identified and reported to maintain service standards to designated individuals and groups</p> <p>3.3. Conclusions and recommendations are prepared from verifiable evidence and provide constructive advice on future directions of client service strategies</p> <p>3.4. Systems, records and reporting procedures are maintained to compare changes in customer satisfaction</p>

Variable	Range
Customer needs may relate to:	<ul style="list-style-type: none"> • accuracy of information • advice or general information • complaints • fairness/politeness • further information • making an appointment • prices/value • purchasing organization's products and services • returning organization's products and services • specific information
Communication techniques may include:	<ul style="list-style-type: none"> • analysing customer satisfaction surveys • analysing quality assurance data • conducting interviews • consultation methods, techniques and protocols • making recommendations • obtaining management decisions • questioning • seeking feedback to confirm understanding • summarising and paraphrasing
Customers may include:	<ul style="list-style-type: none"> • corporate customers • individual members of the organization • individual members of the public • internal or external • other agencies
Organizational requirements may include:	<ul style="list-style-type: none"> • access and equity principles and practice • anti-discrimination and related policy • confidentiality and security requirements • defined resource parameters • ethical standards • goals, objectives, plans, systems and processes • legal and organizational policies, guidelines and requirements • OHS policies, procedures and programs • payment and delivery options • pricing and discount policies • quality and continuous improvement processes and standards • quality assurance and/or procedures manuals • replacement and refund policy and procedures • who is responsible for products or services
Business technology may include:	<ul style="list-style-type: none"> • answering machine • binder • computer • fax machine • photocopier • printer

	<ul style="list-style-type: none"> • shredder • telephone
Online services may include:	<ul style="list-style-type: none"> • access to product database by customers online • access to purchase, delivery and account records • call/contact centre • online ordering • online payments • online registration • quick/reasonable response • two-way communication online
Designated individuals and groups may include:	<ul style="list-style-type: none"> • colleagues • committee • customers • external organization • line management • supervisor
Procedures to resolve customer difficulties may include:	<ul style="list-style-type: none"> • external agencies (e.g. Ombudsman) • item replacement • referrals to supervisor • refund of monies • review of products or services • using conflict management techniques
Customer complaints may include:	<ul style="list-style-type: none"> • administrative errors such as incorrect invoices or prices • customer satisfaction with service quality • damaged goods or goods not delivered • delivery errors • products not delivered on time • service errors • specific e-business problems and issues: <ul style="list-style-type: none"> ➤ difficulty accessing services ➤ inactive links ➤ not appreciating differing hardware and software ➤ services not available ➤ supply errors such as incorrect product delivered ➤ time taken to access services ➤ unfriendly website design ➤ website faults • warehouse or store room errors such as incorrect product delivered
Customer service strategies may include:	<ul style="list-style-type: none"> • courtesy/politeness • delivery times • merchandise characteristics • price offers • product/refund guarantees • product/service availability

Evidence Guide	
Critical aspects of Competence	Evidence of the following is essential: <ul style="list-style-type: none"> • identifying needs and priorities of the organization in delivering services to customers • responding to and reporting on customer feedback • designing strategies to improve delivery of products and services • knowledge of the principles of customer service
Underpinning Knowledge and Attitudes	Demonstrates knowledge of: <ul style="list-style-type: none"> • key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as: <ul style="list-style-type: none"> ➢ anti-discrimination legislation ➢ ethical principles ➢ codes of practice ➢ privacy laws ➢ environmental issues ➢ occupational health and safety (OHS) • principles of customer service • organizational business structure, products and services • product and service standards and best practice models
Underpinning Skills	Demonstrates skills to: <ul style="list-style-type: none"> • literacy skills to read a variety of texts, to prepare general information and papers, and to write formal and informal letters according to target audience • planning skills to develop implementation schedules • problem-solving skills to diagnose organizational problems relating to customer services
Resources Implication	Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices.
Methods of Assessment	Competence may be assessed through: <ul style="list-style-type: none"> • Interview / Written Test • Observation / Demonstration with Oral Questioning
Context of Assessment	Competence may be assessed in the work place or in a simulated work place setting.

Occupational Standard: Customer Contact Level IV	
Unit Title	Address Customer Needs
Unit Code	EIS CSC4 03 0812
Unit Descriptor	This unit describes the performance outcomes, skills and knowledge required to manage the ongoing relationship with a customer, which includes assisting the customer to articulate their needs, meeting customer needs and managing networks to ensure customer needs are addressed.

Elements	Performance Criteria
1. Assist customer to articulate needs	<p>1.1. Ensure customer needs are fully explored, understood and agreed</p> <p>1.2. Available services and products are explained and matched to customer needs</p> <p>1.3. Rights and responsibilities of customers are identified and communicated to the customer as appropriate</p>
2. Satisfy complex customer needs	<p>2.1. Possibilities are explained for meeting customer needs</p> <p>2.2. Customers are assisted to evaluate service and/or product options to satisfy their needs</p> <p>2.3. Preferred actions are determined and prioritized</p> <p>2.4. Potential areas of difficulty in customer service delivery are identified and appropriate actions are taken in a positive manner</p>
3. Manage networks to ensure customer needs are addressed	<p>3.1. Effective regular communication is established with customers</p> <p>3.2. Relevant networks are established, maintained and expanded to ensure appropriate referral of customers to products and services from within and outside the organization</p> <p>3.3. Ensure procedures are used in place to ensure that decisions about targeting of customer services are based on up-to-date information about the customer, and the products and services available</p> <p>3.4. Ensure procedures are put in place to ensure that referrals are based on the matching of the assessment of customer needs and availability of products and services</p> <p>3.5. Records of customer interaction are maintained in accordance with organizational procedures</p>

Variable	Range
Customers may include:	<ul style="list-style-type: none"> • customers with routine or specific requests • in person, computer-based and telephone customers • internal and external customers • people from a range of social, cultural or ethnic backgrounds • people who may be unwell, drug affected or emotionally distressed • people with varying physical and mental abilities • regular and new customers
Rights and responsibilities of customers may include:	<ul style="list-style-type: none"> • fulfilment of external obligations • informed consent
Effective regular communication may include:	<ul style="list-style-type: none"> • giving customers full attention • handling sensitive and confidential issues • maintaining eye-contact (for face-to-face interactions), except where eye-contact may be culturally inappropriate • speaking clearly and concisely • using active listening techniques • using appropriate language and tone of voice • using clearly written information/communication • using non-verbal communication e.g. body language, personal presentation (for face-to-face interactions) • using open and/or closed questions
Organizational procedures may include:	<ul style="list-style-type: none"> • procedural manuals • quality systems, standards and guidelines

Evidence Guide	
Critical aspects of Competence	<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> • assisting customers to articulate their needs • documenting processes used and customer satisfaction with the products/services offered • assisting customers to address their needs
Underpinning Knowledge and Attitudes	<p>Demonstrates knowledge of:</p> <ul style="list-style-type: none"> • key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as: <ul style="list-style-type: none"> ➤ anti-discrimination legislation ➤ ethical principles ➤ codes of practice ➤ privacy laws ➤ environmental issues ➤ occupational health and safety • organizational procedures and standards for customer

	<p>service relationships</p> <ul style="list-style-type: none"> • detailed product knowledge which may be of significant breadth (so as to propose alternative products and services), or of significant depth (so as to propose variations within a limited product and service range)
Underpinning Skills	<p>Demonstrates:</p> <ul style="list-style-type: none"> • literacy skills to read a variety of texts, to prepare general information and papers, and to write formal and informal letters according to target audience • numeracy skills to analyse data, and to compare time lines and promotional costs against budgets • problem-solving skills to develop solutions unique to a customer • culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
Resources Implication	<p>Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices.</p>
Methods of Assessment	<p>Competence may be assessed through:</p> <ul style="list-style-type: none"> • Interview / Written Test • Observation / Demonstration with Oral Questioning
Context of Assessment	<p>Competence may be assessed in the work place or in a simulated work place setting.</p>

Occupational Standard: Customer Contact Level IV	
Unit Title	Organize and Monitor the Operation of Compliance Management System
Unit Code	EIS CSC4 04 0812
Unit Descriptor	This unit describes the performance outcomes, skills and knowledge required to organize and monitor the operation of a compliance program/management system established by an organization.

Elements	Performance Criteria
1. Identify compliance roles and responsibilities	<p>1.1. The compliance requirements applicable to the organization are confirmed and interpreted</p> <p>1.2. The structure of the organization is examined to determine the roles, accountabilities and responsibilities of managers and operational staff in maintaining compliance within the organization's planned compliance program/management system</p>
2. Organize the operation of the compliance program/management system	<p>2.1. The components of the planned compliance program/management system are confirmed and the proposed structures, procedures and budgetary arrangements are clarified for their implementation</p> <p>2.2. An implementation strategy and schedule for the establishment of the planned compliance program/management system are developed in accordance with relevant Ethiopian and international standards</p> <p>2.3. Resources for the planned compliance program/management system are assigned or acquired in accordance with organizational procedures and policies</p> <p>2.4. Appropriate briefings and training are arranged to ensure relevant managers and operations staff are aware of their roles and responsibilities</p> <p>2.5. The compliance program/management system is launched in accordance with organization's plan</p>
3. Monitor the operation of the compliance program/management system	<p>3.1. Information on the operation of the compliance program/management system is gathered from appropriate sources</p> <p>3.2. Feedback and performance indicators on the operation of the compliance program/management system are reviewed in terms of agreed criteria</p> <p>3.3. Problems in the operation of the compliance program/management system and in particular any breach</p>

	<p>of compliance requirements are identified and appropriate action is taken to address problems</p> <p>3.4. Detailed compliance requirements in the case of breaches are provided, specific timely action is initiated and all relevant internal and external personnel are informed through the established reporting systems</p>
4. Document the operation and monitoring of the compliance program/management system	<p>4.1. Information on the operation of the compliance program/management system is prepared and disseminated to relevant internal and external personnel in accordance with the communication strategy for the compliance program/management system</p> <p>4.2. Periodic reports on the operation of the compliance program/management system are prepared and disseminated, any operational problems are identified and any related action is taken to relevant internal and external personnel</p> <p>4.3. Reports on any identified breaches of compliance requirements are prepared and disseminated and any related action is taken to relevant internal and external personnel.</p>

Variable	Range
Compliance requirements may include:	<ul style="list-style-type: none"> • cross-industry, industry-specific and internal organizational compliance requirements in such areas as (examples in alphabetical groupings): <ul style="list-style-type: none"> ➤ anti-discrimination (including discrimination by race, sex, disability, religion, etc.), alcohol licensing (licensing regulations covering clubs, pubs, licensed premises, etc.), aviation ➤ bankruptcy ➤ chemical use, child protection, construction, conveyancing/real estate, copyright, corporate governance, customs, credit ➤ education, electricity, environmental protection, equal opportunity ➤ financial services (including banking), fire, food hygiene, freedom of information, freight forwarding ➤ gambling, gene technology ➤ health, human rights ➤ insurance, immigration, intellectual property ➤ land management ➤ maritime, mining ➤ pharmaceuticals, patents, privacy ➤ quarantine ➤ racing, rail transport, road transport

	<ul style="list-style-type: none"> ➤ safety (including cross-industry generic regulations as well as industry, equipment or product-specific sub-categories e.g. marine safety, rail safety, food safety, aviation safety, road safety, dangerous goods, construction safety, mine safety, road safety, etc.), security, sewage, superannuation ➤ taxation, telecommunications, tobacco, trade practices and consumer protection ➤ water supply, workers compensation, workers rehabilitation • different types of external and internal compliance requirements including: <ul style="list-style-type: none"> ➤ regulations of a state/territory, national or international regulatory authority ➤ accreditation requirements of an institute, professional organization or registration body ➤ requirements for certification under statutory licensing systems ➤ statutory standards or codes of practice ➤ internal policies, procedures, standards or codes of practice of an organization ➤ industrial relations agreements and policies
<p>Components of the planned compliance program/management system may include:</p>	<ul style="list-style-type: none"> • breach management policies and processes including the identification, classification, investigation, rectification and reporting of breaches in compliance requirements • compliance complaints handling systems • compliance related management information systems • compliance reporting procedures • continuous improvement processes for compliance including monitoring, evaluation and review • corporate induction and training processes related to compliance management • documentation of compliance requirements relevant to the organization • liaison procedures with relevant internal and external personnel on compliance related matters • processes for the internal and external promulgation and promotion of information on compliance requirements and compliance program/management system • record keeping systems required for compliance management • reporting processes on compliance management including reports on breaches and rectification action • specifications of compliance management functions, accountabilities and responsibilities within the organization • strategies for developing a positive compliance culture within the organization

	<ul style="list-style-type: none"> • techniques and performance indicators for monitoring the operation of a compliance program/management system
Relevant Ethiopian and international standards may include:	<ul style="list-style-type: none"> • Compliance programs • Customer satisfaction - Guidelines for complaints handling in organizations • Records management • Risk management
Resources for the planned compliance program/management system may include:	<ul style="list-style-type: none"> • audiovisual resources where applicable • computer hardware, software and files • facilities and physical resources • hardcopy and electronic documentation • management and operations personnel • management information system
Appropriate sources may include:	<ul style="list-style-type: none"> • information from advisors, consultants and others with expertise in the development, operation and maintenance of compliance program/management systems • internal personnel with expertise in the development, operation and maintenance of compliance program/management systems • publications (hardcopy and electronic) of authorities and organizations in relevant compliance areas • representatives of authorities and organizations in relevant compliance areas
Performance indicators may include:	<ul style="list-style-type: none"> • content of reports of breaches of compliance requirements • number and details of alleged breaches of relevant laws, codes and organizational standards • number and details of complaints recorded that are related to compliance requirements and action taken • operational costs of the compliance program/management system • reported problems in the operation of the complaints management system • reports on action taken in the event of a breach in compliance requirements • results of assessments of skills and knowledge of managers and operations staff in terms of the organization's compliance requirements, the compliance program/management system and their individual roles, accountabilities and responsibilities
Relevant internal personnel may include:	<ul style="list-style-type: none"> • board of directors • chief executive officer • chief executives and managers in related organizations with an interest in the compliance requirements and the compliance program/management system • compliance management team (where relevant) • compliance specialists at the management level

	<ul style="list-style-type: none"> • compliance specialists at the operational level • frontline managers • legal and business advisors and consultants with expertise and interest in compliance requirements and related management systems • representatives of professional associations and institutes relevant to the compliance requirements and the compliance program/management system • representatives of relevant authorities with an interest in the compliance requirements and the compliance program/management system • senior management team
Relevant external personnel and organizations may include:	<ul style="list-style-type: none"> • educational institutions and organizations • government departments • professional associations and institutes • state/territory or national licensing authorities • state/territory or national statutory standards authorities • state/territory, national or international regulatory authorities
Communication strategy may include:	<ul style="list-style-type: none"> • attendance at relevant conferences, seminars, etc. dealing with relevant aspects of applicable compliance requirements and related compliance management • hardcopy and electronic newsletters either dedicated to compliance management issues or having a section dealing with compliance management issues • nominated internal contacts linked to an established network of external contacts in relevant regulatory authorities and other organizations with an interest in applicable compliance requirements • presentations and papers at conferences or in relevant journals covering relevant aspects of the organization's compliance program/management system • production and distribution of external documentation requirements including press releases, published information on compliance policies and organizational initiatives for compliance management, submissions and reports to regulatory authorities and others with an interest in applicable compliance requirements • production and distribution of internal documentation requirements including overall specification of the compliance program/management system, procedures, standards, organizational structures, descriptions of staff roles and responsibilities, information on compliance program/management system components, breach management policies and procedures • subscription to and/or systematic access and review of, relevant publications and periodicals dealing with relevant

	<p>aspects of applicable compliance requirements and related compliance management</p> <ul style="list-style-type: none"> • website and email arrangements for communication with relevant internal and external personnel
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Evidence Guide	
Critical aspects of Competence	<p>Assessment requires evidence that the candidate:</p> <ul style="list-style-type: none"> • organising and monitoring compliance programs or management systems • knowledge of relevant Ethiopian and international standards
Underpinning Knowledge and Attitudes	<p>Demonstrates knowledge of:</p> <ul style="list-style-type: none"> • Ethiopian and international standards including but not limited to: <ul style="list-style-type: none"> ➤ Compliance programs ➤ Customer satisfaction - Guidelines for complaints handling in organizations ➤ Records management ➤ Risk management • compliance policies and requirements relevant to the organization • elements of the compliance program/management system including: <ul style="list-style-type: none"> ➤ documentation of compliance requirements relevant to the organization ➤ specification of compliance management functions, accountabilities and responsibilities within the organization ➤ compliance related management information systems ➤ record keeping systems required for compliance management ➤ liaison procedures with relevant internal and external personnel on compliance related matters ➤ breach management policies and processes including identifying, classifying, investigating, rectifying and reporting breaches in compliance requirements ➤ compliance reporting procedures ➤ corporate induction and training processes related to compliance management ➤ processes for the internal and external promulgation and promotion of information on compliance requirements and compliance program/management system ➤ compliance complaints handling systems ➤ continuous improvement processes for compliance including monitoring, evaluation and review ➤ strategies for developing a positive compliance culture

	<p>within the organization</p> <ul style="list-style-type: none"> ➤ techniques and performance indicators for monitoring the operation of a compliance program/management system ➤ reporting processes on compliance management including reports on breaches and rectification action • relevant organizational policies and procedures including: <ul style="list-style-type: none"> ➤ compliance plans and policies in various compliance areas ➤ organizational standards for operations and ethics
Underpinning Skills	<p>Demonstrates skills to:</p> <ul style="list-style-type: none"> • financial skills to manage budgetary resources for compliance management systems • interpersonal skills to establish rapport and to build relationships with clients, team members and stakeholders who have an interest in the operation of an organization's compliance program or management system • leadership skills to gain trust and confidence of colleagues and clients • literacy skills to prepare and edit reports containing complex concepts and ideas • organizational and time management skills to organize compliance management systems, and associated finances and human resources within an organization • problem solving skills to create innovative solutions to problems arising from the organization and monitoring of compliance management systems • research and data collection skills to investigate an organization's compliance management system • research and data collection skills to monitor the operation of a management system
Resources Implication	Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices.
Assessment Methods	<p>Competency may be assessed through:</p> <ul style="list-style-type: none"> • Interview / Written Test / Oral Questioning • Observation / Demonstration
Context of Assessment	Competency may be assessed in the work place or in a simulated work place setting.

Occupational Standard: Customer Contact Level IV	
Unit Title	Implement Continuous Improvement
Unit Code	EIS CSC4 05 0812
Unit Descriptor	This unit describes the performance outcomes, skills and knowledge required to implement the organization's continuous improvement systems and processes. Particular emphasis is on using systems and strategies to actively encourage the team to participate in the process, monitoring and reviewing performance, and identifying opportunities for further improvements.

Elements	Performance Criteria
1. Implement continuous improvement systems and processes	<p>1.1. Systems are implemented to ensure that individuals and teams are actively encouraged and supported to participate in decision making processes, responsibility and exercise initiative are assumed</p> <p>1.2. The organization's continuous improvement processes are communicated to individuals and teams, and feedback is obtained</p> <p>1.3. Effective mentoring and coaching that allows individuals and teams are ensured to implement the organization's continuous improvement processes</p>
2. Monitor and review performance	<p>2.1. The organization's systems and technology are used to monitor and review progress and to identify ways in which planning and operations could be improved</p> <p>2.2. Customer service is improved through continuous improvement techniques and processes</p> <p>2.3. Recommendations are formulated and communicated for adjustments to those who have a role in their development and implementation</p>
3. Provide opportunities for further improvement	<p>3.1. Processes to ensure that team members are informed of savings and productivity/service improvements are implemented in achieving the business plan</p> <p>3.2. Work performance is documented to aid the identification of further opportunities for improvement</p> <p>3.3. Records, reports and recommendations are managed for improvement within the organization's systems and processes</p>

Variable	Range
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Systems may refer to:	<ul style="list-style-type: none"> • forums, meetings • newsletters and reports • organizational policies and procedures • web-based communication devices
Participation in decision making processes may include:	<ul style="list-style-type: none"> • feedback in relation to outcomes of the consultative process • processes which ensures all employees have the opportunity to contribute to organizational issues
Continuous improvement processes may include:	<ul style="list-style-type: none"> • cyclical audits and reviews of workplace, team and individual performance • evaluations and monitoring of effectiveness • implementation of quality systems, such as International Standardization for Organization (ISO) • modifications and improvements to systems, processes, services and products • policies and procedures which allow the organization to systematically review and improve the quality of its products, services and procedures • seeking and considering feedback from a range of stakeholders
Mentoring and coaching may refer to:	<ul style="list-style-type: none"> • providing assistance with problem-solving • providing feedback, support and encouragement • teaching another member of the team, usually focusing on a specific work task or skill
Technology may include:	<ul style="list-style-type: none"> • computerised systems and software such as databases, project management and word processing • telecommunications devices • any other technology used to carry out work roles and responsibilities
Customer service may be:	<ul style="list-style-type: none"> • internal or external • to existing, new or potential clients
Processes to ensure that team members are informed of savings and productivity/service improvements may refer to:	<ul style="list-style-type: none"> • email/intranet, newsletters or other communication devices • newsletters and bulletins • staff reward mechanisms • team meetings

Evidence Guide

Critical aspects of Competence	<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> • taking active steps to implement, monitor and adjust plans, processes and procedures to improve performance • supporting others to implement the continuous improvement system/processes, and to identify and report opportunities for further improvement
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	<ul style="list-style-type: none"> • knowledge of principles and techniques associated with continuous improvement systems and processes
Underpinning Knowledge and Attitudes	<p>Demonstrates knowledge of:</p> <ul style="list-style-type: none"> • principles and techniques associated with: <ul style="list-style-type: none"> ➤ benchmarking ➤ best practice ➤ change management ➤ continuous improvement systems and processes ➤ quality systems
Underpinning Skills	<ul style="list-style-type: none"> • communication skills to: <ul style="list-style-type: none"> ➤ coach and mentor team members ➤ gain the commitment of individuals and teams to continuously improve • innovation skills to design better ways of performing work
Resources Implication	Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices.
Methods of Assessment	<p>Competence may be assessed through:</p> <ul style="list-style-type: none"> • Interview / Written Test • Observation / Demonstration with Oral Questioning
Context of Assessment	Competence may be assessed in the work place or in a simulated work place setting.

Occupational Standard: Customer Contact Level IV	
Unit Title	Organize Meetings
Unit Code	EIS CSC4 06 0812
Unit Descriptor	This unit describes the performance outcomes, skills and knowledge required to organize meetings including making arrangements, liaising with participants, and developing and distributing meeting related documentation.

Elements	Performance Criteria
1. Make meeting arrangements	1.1. Type of meeting and its purpose are identified 1.2. Any legal or ethical requirements are identified and complied 1.3. Requirements of meeting and participants are identified 1.4. Meeting arrangements are made in accordance with requirements of meeting 1.5. Participants are advised of meeting details
2. Prepare documentation for meetings	2.1. Notice of meeting, agenda and meeting papers are prepared in accordance with meeting requirements 2.2. Documentation is checked for accuracy and any errors are corrected 2.3. Documentation is distributed to participants within designated time lines 2.4. Spare sets of documents are prepared
3. Record and produce minutes of meeting	3.1. Notes are taken with the required speed and accuracy to ensure an accurate record of the meeting 3.2. Minutes that reflect a true and accurate account of the meeting are produced 3.3. Minutes are checked for accuracy and submitted for approval by the nominated person 3.4. Copies of minutes are dispatched within designated time lines

Variable	Range
Type of meeting may include:	<ul style="list-style-type: none"> • annual general meeting • board meeting • face-to-face • staff meeting

	<ul style="list-style-type: none"> • teleconference • videoconference
Legal and ethical requirements may include:	<ul style="list-style-type: none"> • codes of practice • legislation relating to organization or associations • requirements for public meetings
Requirements of meeting may include:	<ul style="list-style-type: none"> • meeting structure: <ul style="list-style-type: none"> ➢ formal ➢ informal ➢ self-managed ➢ semi-formal ➢ structured • number of participants • purpose of the meeting • specific needs of participants • specific resources and equipment required by participants e.g. video and data projectors, whiteboards • teleconferencing or videoconferencing meeting protocols and equipment • voting procedures
Arrangements may include:	<ul style="list-style-type: none"> • booking an appropriate venue • establishing costs and operating within a budget • organising accommodation and transport • organising appropriate communication technology • organising catering • preparing relevant documentation for participants • scheduling the date and time for the meeting
Agenda may include:	<ul style="list-style-type: none"> • correspondence • date of next meeting • date, time and location of meeting • general business • major agenda items • matters or business arising from the minutes • minutes of the previous meeting • reports • statement of the meeting's purpose • welcome
Papers may include:	<ul style="list-style-type: none"> • chairperson's report • committee reports • correspondence • draft documentation • financial reports • itemised meeting papers • minutes of previous meeting • research reports
Notes may include:	<ul style="list-style-type: none"> • action items • arrangements for next meeting

	<ul style="list-style-type: none"> • decisions taken at the meeting • formal motions • future action • issues raised at the meeting • points discussed at the meeting • record of participants who were present at or absent from the meeting (attendees and apologies) • suggestions made at the meeting
Minutes may include:	<ul style="list-style-type: none"> • meeting details (e.g. title, date, time, location) • agenda items • apologies • names of absent and attending participants • approval of the record of the previous minutes • correspondence • lists rather than complete sentences • matters arising from the previous meetings • other business • reports • date of the next meeting • using organization templates • using previous minutes to determine required format

Evidence Guide			
Critical aspects of Competence	Evidence of the following is essential: <ul style="list-style-type: none"> • organising meetings, including informing participants and preparing materials • preparing an agenda • taking minutes during a meeting and preparing draft minutes after the meeting 		
Underpinning Knowledge and Attitudes	Demonstrates knowledge of: <ul style="list-style-type: none"> • culturally appropriate communication techniques • formats for agendas and minutes • key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as: <ul style="list-style-type: none"> ➤ anti-discrimination legislation ➤ ethical principles ➤ codes of practice ➤ privacy laws ➤ occupational health and safety. 		
Underpinning Skills	Demonstrates: <ul style="list-style-type: none"> • communication skills to coordinate and consult with participants, to orally present written reports with a number of defined sections, and to clarify points made in meetings • literacy skills to: <ul style="list-style-type: none"> ➤ write and compile agenda items 		
Page 25 of 71	Ministry of Education Copyright	Customer Contact & Secretarial Operations Coordination Ethiopian Occupational Standard	Version 2 August 2012

	<ul style="list-style-type: none"> ➤ record minutes ➤ make notes from spoken texts in meetings ➤ use a variety of strategies for planning, reviewing and proofreading documentation ➤ time management skills to allow sufficient time to prepare for and conduct meetings
Resources Implication	Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices.
Methods of Assessment	Competence may be assessed through: <ul style="list-style-type: none"> • Interview / Written Test • Observation / Demonstration with Oral Questioning
Context of Assessment	Competence may be assessed in the work place or in a simulated work place setting.

Occupational Standard: Customer Contact Level IV	
Unit Title	Coordinate Business Resources
Unit Code	EIS CSC4 07 0812
Unit Descriptor	This unit describes the performance outcomes, skills and knowledge required to determine and analyse existing and required resources, their effective application and the accountability for their use.

Elements	Performance Criteria
1. Determine resource requirements	<p>1.1. Resource requirements are determined in accordance with business and operational plans, and organizational requirements</p> <p>1.2. Opportunities are provided to individuals and workgroups to contribute to the identification of resource requirements</p> <p>1.3. Resource expenditure is ensured realistic and efficient use of available budget resources are made</p> <p>1.4. Recommendations on resource requirements are presented in the required format, style and structure using relevant business equipment and technology</p>
2. Acquire and allocate resources	<p>2.1. Physical resources and services are acquired in accordance with organizational requirements</p> <p>2.2. Resources are checked to ensure quality and quantity, in line with service agreements</p> <p>2.3. Resources are allocated promptly to enable achievement of workgroup objectives</p> <p>2.4. Consultation with individuals and teams on allocation of resources is ensured to be participative and is conducted using appropriate interpersonal skills</p>
3. Monitor and report on resource usage	<p>3.1. Effectiveness of resource planning is measured, and assessed against actual costs, shortfalls and surpluses are identified</p> <p>3.2. Methods of monitoring resource use are developed and implemented to enable timely and accurate reporting against business and operational plans</p> <p>3.3. Improvements in resource planning are identified through consultation and feedback, and implemented in accordance with organizational requirements</p> <p>3.4. Records concerning equipment and resource purchases are maintained, in accordance with organizational</p>

	requirements
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Variable	Range
Resource requirements may include:	<ul style="list-style-type: none"> • human resources • location/premises • OHS resources • plant/machinery • raw materials • refurbishment • staff amenities • stock and supplies • storage space • technological equipment/software • training materials
Organizational requirements may include:	<ul style="list-style-type: none"> • access and equity principles and practices • business and performance plans • defined resource parameters • ethical standards • goals, objectives, plans, systems and processes • legal and organizational policies, guidelines and requirements • management and accountability channels • manufacturers' and operational specifications • OHS policies, procedures and programs • quality and continuous improvement processes and standards • quality assurance and/or procedures manuals • reporting requirements • security and confidentiality requirements
Business equipment and technology may include:	<ul style="list-style-type: none"> • answering machine • binder • computer • fax machine • photocopier • printer • shredder • telephone
Appropriate interpersonal skills may include:	<ul style="list-style-type: none"> • clarity of language • consultation methods, techniques and protocols • seeking feedback from group members to confirm understanding • summarising and paraphrasing • using appropriate body language
Feedback sources may include:	<ul style="list-style-type: none"> • customer/client response data • employee data • equipment meter readings

	<ul style="list-style-type: none"> • financial forecasts • sales orders • suppliers' invoices
Records may include:	<ul style="list-style-type: none"> • computerised or manual • financial statements • invoices • maintenance schedules • order forms • petty cash forms • purchase orders • stock list and inventory control

Evidence Guide	
Critical aspects of Competence	<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> • monitoring resource usage to determine resource needs • maintaining records of resource requirements • calculating costs and expenditures in relation to use and maintenance of business resources • knowledge of relevant legislation
Underpinning Knowledge and Attitudes	<p>Demonstrates knowledge of:</p> <ul style="list-style-type: none"> • common equipment faults • functions of a range of business equipment • key provisions of relevant legislation from all forms of government that may affect aspects of business operations, such as: <ul style="list-style-type: none"> ➢ anti-discrimination legislation ➢ ethical principles ➢ codes of practice ➢ privacy laws ➢ environmental issues ➢ occupational health and safety (OHS) • organizational policies, plans and procedures • record management processes and techniques related to maintenance schedules
Underpinning Skills	<p>Demonstrates:</p> <ul style="list-style-type: none"> • communication skills to request advice, to receive feedback and to work with a team • literacy skills to draft complex reports and to display logical information on resource usage • numeracy skills to interpret, compare and calculate resource usage costs • planning skills to schedule and track resource use and availability
Resources Implication	<p>Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices.</p>

Methods of Assessment	Competence may be assessed through: <ul style="list-style-type: none"> • Interview / Written Test • Observation / Demonstration with Oral Questioning
Context of Assessment	Competence may be assessed in the work place or in a simulated work place setting.

Occupational Standard: Customer Contact Level IV	
Unit Title	Write Complex Documents
Unit Code	EIS CSC4 08 0812
Unit Descriptor	This unit describes the performance outcomes, skills and knowledge required to plan documents, draft text, prepare final text and produce documents of some complexity.

Elements	Performance Criteria
1. Plan documents	1.1. The purposes of documents is determined 1.2. Appropriate formats for documents are chosen 1.3. Means of communication are established 1.4. Requirements of documents are determined 1.5. Categories and logical sequences of data, information and knowledge are determined to achieve document objectives 1.6. Overview of structure and content of documents are developed
2. Draft text	2.1. Available data, information and knowledge are reviewed and organized according to proposed structure and content 2.2. Ensure data, information and knowledge is aggregated, interpreted and summarized to prepare text that satisfies document purposes and objectives 2.3. Graphics are included as appropriate 2.4. Gaps in required data and information are identified, and additional material is collected from relevant personnel 2.5. Text is drafted according to document requirements and genre 2.6. Language appropriate to the audience is used
3. Prepare final text	3.1. Review draft text to ensure document objectives are achieved and requirements are met 3.2. Grammar, spelling and style for accuracy and punctuation are checked 3.3. Ensure draft text is approved by relevant enterprise personnel 3.4. Text amendments are processed as required
4. Produce document	4.1. Basic design elements for documents appropriate to audience and purpose are chosen 4.2. Word processing software is used to apply basic design

	elements to text 4.3. Documents are checked to ensure all requirements are met
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Variable	Range
Purposes of documents may include:	<ul style="list-style-type: none"> • conveying research findings • documenting policies, procedures and processes • influencing attitudes, opinions, beliefs • meeting legal requirements • meeting other data, information or knowledge needs of an audience • proposing recommendations, options and actions
Appropriate formats for documents may include:	<ul style="list-style-type: none"> • detailed business letters • emails • instructions and procedures • manuals • publications, leaflets, brochures • reports • speeches and presentations • submissions tender documentation and public notices • website text
Means of communication may include:	<ul style="list-style-type: none"> • software packages such as MS Word, MS Excel, MS PageMaker, MS PowerPoint and templates
Requirements of documents may include:	<ul style="list-style-type: none"> • compliance with genre • compliance with proformas, standardised reporting requirements or undertakings made by the organization about reporting • file types and sizes for online documents • languages other than English requirements • legal or traditional requirements for the particular document format • organizational policy, procedures and guidelines applying to writing documents, including house style • point numbering systems • requirements for illustrations, photographs, graphs, charts, maps and other illustrative material to explain texts • standards for references, footnotes, citations, acknowledgements • time lines, including deadlines • word length • writing styles, including simplicity of English and use of technical language
Categories and logical sequences of data, information	<ul style="list-style-type: none"> • arguments and rebuttals • categories and sequences traditionally used for the particular type of document being prepared

and knowledge may include:	<ul style="list-style-type: none"> • chronological, alphabetical or operating sequences • facts, observations, conclusions and recommendations • illustrative case studies and other examples • linking and summary statements • recommendations and supporting arguments
Relevant enterprise personnel may include:	<ul style="list-style-type: none"> • colleagues/staff in own work section/ team members • consultative committees • internal providers of specialist expertise • managers/leaders/coordinators/supervisors • owners • staff in relevant work sections
Design elements may include:	<ul style="list-style-type: none"> • capitals and underlining • fonts • headings • illustrations, photographs and other illustrative material for design purposes • justification and alignment • lists and tables • logos, branding, organizational identity requirements • margins and paragraph indentation • page shape • page size • templates • use and amount of colour • use and amount of white space

Evidence Guide	
Critical aspects of Competence	Assessment requires evidence that the candidate: <ul style="list-style-type: none"> • production of documents • editing draft text to ensure accuracy and clarity of information • knowledge of enterprise style guide/house style
Underpinning Knowledge and Attitudes	Demonstrates knowledge of: <ul style="list-style-type: none"> • organization style guide/house style • formatting styles and their impact on formatting, readability and appearance of documents • organizational requirements for ergonomics, work periods and breaks, and resource conservation techniques • rules and conventions for written English, as defined by general and specialist dictionaries and books about grammar

Underpinning Skills	<p>Demonstrates skills to:</p> <ul style="list-style-type: none"> • communication skills to clarify requirements of documents • literacy skills to edit and proofread documents; to create documents with a complex, organized structure of linked paragraphs which use simple and complex syntactic structure • numeracy skills to collate and present data, graphs and annotated references • problem-solving skills to use processes flexibly and interchangeably
Resources Implication	Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices.
Assessment Methods	<p>Competency may be assessed through:</p> <ul style="list-style-type: none"> • Interview / Written Test / Oral Questioning • Observation / Demonstration
Context of Assessment	Competency may be assessed in the work place or in a simulated work place setting.

Occupational Standard: Customer Contact Level IV	
Unit Title	Organize Business Travel
Unit Code	EIS CSC4 09 0812
Unit Descriptor	This unit describes the performance outcomes, skills and knowledge required to organize domestic and overseas business travel, including developing associated itineraries, booking travel and accommodation, preparing travel related documentation and making travel arrangements.

Elements	Performance Criteria
1. Organize business itinerary for domestic and overseas travel	<p>1.1. Purpose and requirements of domestic and overseas travel including planned itinerary, budget, meeting requirements and traveler preferences are confirmed</p> <p>1.2. Points of contact and names of contact persons are identified, and arrangements for meetings are made and confirmed in accordance with planned itinerary</p> <p>1.3. Daily itineraries with appointments, arrival and departure times, accommodation and other itinerary details are prepared in accordance with travel purpose</p> <p>1.4. Documents and support material for meetings are sourced, prepared and provided within designated time lines</p> <p>1.5. Itinerary is prepared in accordance with meeting requirements and traveler's occupational health and safety (OHS) requirements</p> <p>1.6. Itinerary and meeting documents are provided to the traveler within designated time lines</p>
2. Make travel arrangements	<p>2.1. Bookings are made in accordance with organizational policies and procedures for business travel</p> <p>2.2. Travel documents are identified and arranged in accordance with itinerary and individual requirements</p> <p>2.3. Travel arrangements are confirmed and checked and confirmation documents are dispatched to the traveler within designated time lines</p> <p>2.4. Alternative arrangements in response to changed requirements are negotiated and confirmed</p> <p>2.5. Travel details and itinerary are recorded in accordance with organizational requirements</p> <p>2.6. Communication arrangements are negotiated and confirmed in accordance with organizational requirements</p>

3. Arrange credit facilities	<p>3.1. Methods of payment are checked and confirmed</p> <p>3.2. Credit arrangements are made in accordance with organizational policy and procedures</p>
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Variable	Range
Purpose and requirements may include considering:	<ul style="list-style-type: none"> • available accommodation • budget • class of accommodation • class of travel • connections and transfers • mode of travel • time differences • time management • transport timetables
Other itinerary details may include:	<ul style="list-style-type: none"> • arrangements for meals • contact names and numbers of all personnel involved • required documentation for each appointment • suggested leisure activities • transport arrangements • local money details and accessibility of banks and automatic teller machines (ATMs) where applicable
Material for meetings may include:	<ul style="list-style-type: none"> • business proposals • catalogues • contracts • electronic presentations • information technology (e.g. laptop, computer software) • meeting papers • office supplies • overhead transparencies • presentation kits • prior work completed for the client • product prototypes or samples • product samples • promotional brochures • reports • telecommunications equipment (e.g. mobile phone, teleconferencing equipment) • tenders
Traveller's occupational health and safety (OHS) requirements may include:	<ul style="list-style-type: none"> • leisure time • limit on total amount of travel per day • limit on total appointments in any one day • lunch breaks • rest periods • time between appointments

	<ul style="list-style-type: none"> • time for connections and transfers • travelling time to reach venues
Bookings may include:	<ul style="list-style-type: none"> • online • telephone • travel agent
Travel documents may include:	<ul style="list-style-type: none"> • accommodation confirmation email, facsimile or letter • business schedule and contact details • electronic or printed airline itinerary • e-ticket and/or paper ticket • health or medical-related documentation • insurance details and contacts • list of contacts including overseas if applicable • maps • meeting agenda and other documents • passport • timetable/s • travel itinerary • travel vouchers and accommodation guides • visa/s
Recording travel details may include:	<ul style="list-style-type: none"> • individual travel file for each key aspect of the trip • making electronic copies of critical travel documents such as passport details page, airline tickets, itinerary • separate file for each business trip • using a diary • using a prepared checklist • using the organization's standard checklist
Communication arrangements may include:	<ul style="list-style-type: none"> • email and facsimile access • mobile access • points of contact
Methods of payment may include:	<ul style="list-style-type: none"> • accounts established with the organization • company credit cards • purchase order • special arrangement made between the organization and individual suppliers • providing the traveller with a cash advance • reimbursing traveller for payments made on presentation of receipts
Credit arrangements may include:	<ul style="list-style-type: none"> • cab charges • currency • debit or credit cards • electronic funds transfer • petty cash • travellers cheques

Evidence Guide

Critical aspects of Competence	Evidence of the following is essential: <ul style="list-style-type: none"> organising business-related travel for others, including scheduling and developing itineraries and travel-related documents efficiently booking and organising travel within budgets and time constraints to meet traveller and organization needs
Underpinning Knowledge and Attitudes	Demonstrates knowledge of: <ul style="list-style-type: none"> booking procedures communication techniques to relate to people from diverse backgrounds and people with diverse abilities key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as: <ul style="list-style-type: none"> ➤ anti-discrimination legislation ➤ ethical principles ➤ codes of practice ➤ privacy laws ➤ OHS organizational policies and procedures regarding travel, internet sites and other online resources sources of relevant documents and support material
Underpinning Skills	Demonstrates: <ul style="list-style-type: none"> communication skills to organize and confirm travel arrangements with relevant parties literacy skills to read a variety of texts and to write clear and detailed instructions in a logical sequence planning and organising skills to allow sufficient time to prepare business and travel documentation and to schedule trip according to requirements problem-solving skills to select and obtain the most effective travel itinerary research skills to locate specific information such as appropriate transport, meeting venues, accommodation, contacts technology skills to access online travel and booking resources
Resources Implication	Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices.
Assessment Methods	Competency may be assessed through: <ul style="list-style-type: none"> Interview / Written Test / Oral Questioning Observation / Demonstration
Context of Assessment	Competency may be assessed in the work place or in a simulated work place setting.

Occupational Standard: Customer Contact Level IV

Unit Title

Establish Networks

Unit Code	<u>EIS CSC4 10 0812</u>
Unit Descriptor	This unit describes the performance outcomes, skills and knowledge required to develop and maintain effective work relationships and networks. It covers the relationship building and negotiation skills required by workers within an organization as well as freelance or contract workers.

Elements	Performance Criteria
1. Develop and maintain business networks	<p>1.1. Appropriate network strategies are used to establish and maintain relationships that promote the development of business opportunities</p> <p>1.2. Network opportunities are identified and pursued to maximize a range of contacts</p> <p>1.3. Information regarding new networks is communicated to inform individuals, colleagues and clients of potential benefits</p> <p>1.4. Professional networks and associations are participated in to obtain and maintain personal knowledge and skills</p>
2. Establish and maintain business relationships	<p>2.1. Relationships are developed and maintained to promote benefits consistent with organizational/client requirements</p> <p>2.2. Trust and confidence of contacts are gained and maintained through demonstration of high standards of business practices</p> <p>2.3. A high level of negotiation skills is used to encourage positive outcomes</p> <p>2.4. Difficult situations and negotiate solutions are identified using collaborative problem-solving techniques</p> <p>2.5. Specialist advice in the development of contacts is sought where appropriate</p>
3. Promote the relationship	<p>3.1. Strategies are developed to represent and promote the interests and requirements of the relationship</p> <p>3.2. Appropriate presentation skills are used to communicate the goals and objectives of the relationship</p> <p>3.3. Issues, policies and practices of the relationship are effectively communicated to a range of audiences, in writing and verbally</p> <p>3.4. Feedback is obtained to identify and develop ways to improve promotional activities within available opportunities</p>

Variable	Range
Network strategies may include:	<ul style="list-style-type: none"> • association memberships • conference participation • distributing materials • individual marketing • maintaining regular contact • seminar attendance
Professional networks and associations may include:	<ul style="list-style-type: none"> • advisory committees • colleagues • committees • government agencies • internal/external customers • lobby groups • local inter-agency groups • other organizations • professional/occupational associations • project specific ad hoc consultative/reference groups • specific interest or support groups • suppliers • work team
Organizational /client requirements may be included in:	<ul style="list-style-type: none"> • access and equity principles and practices • defined resource parameters • ethical standards • goals, objectives, plans, systems and processes • legal and organizational policies, guidelines and requirements • marketing plan • occupational health and safety policies, procedures and programs • quality and continuous improvement processes and standards • quality assurance and/or procedures manuals
Negotiation skills may include:	<ul style="list-style-type: none"> • assertiveness • bargaining • collaboration • confidence building • conflict reduction • empathising • offers and counter offers • solution designing • stress management
Feedback may include:	<ul style="list-style-type: none"> • accuracy and sufficiency of information • appropriateness of audience • benefits to organization • impact of message • liaison with networks

	<ul style="list-style-type: none"> • participation of competitors • use of media
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Evidence Guide	
Critical aspects of Competence	<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> • establishing contacts and participating in networks • identifying opportunities for networking • knowledge of related organizations, agencies and networks • maintaining records of relevant contacts
Underpinning Knowledge and Attitudes	<p>Demonstrates knowledge of:</p> <ul style="list-style-type: none"> • organizational policies, plans and procedures • related organizations, agencies and networks • trends and forecasts for relevant industries, services and products
Underpinning Skills	<p>Demonstrates:</p> <ul style="list-style-type: none"> • communication skills to receive and report on feedback, to maintain effective relationships and to manage conflict • culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • leadership skills to gain trust and confidence of clients and colleagues • negotiation skills to achieve mutually acceptable outcomes • technology skills to support effective communication and presentation
Resources Implication	<p>Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices.</p>
Assessment Methods	<p>Competency may be assessed through:</p> <ul style="list-style-type: none"> • Interview / Written Test / Oral Questioning • Observation / Demonstration
Context of Assessment	<p>Competency may be assessed in the work place or in a simulated work place setting.</p>

Occupational Standard: Customer Contact Level IV	
Unit Title	Identify Risk and Apply Risk Management Processes
Unit Code	EIS CSC4 11 0812
Unit Descriptor	This unit describes the performance outcomes, skills and knowledge required to identify risks and to apply established risk management processes to a subset of an organization or project's operations that are within the person's own work responsibilities and area of operation.

Elements	Performance Criteria
1. Identify risks	1.1. The context for risk management is identified 1.2. Risks are identified using tools , ensuring all reasonable steps have been taken to identify all risks 1.3. Identified risks are documented in accordance with relevant policies, procedures and legislation
2. Analyze and evaluate risks	2.1. Risks are analyzed and documented in consultation with relevant stakeholders 2.2. Risk categorization is undertaken and level of risk determined 2.3. Analysis processes and outcomes are documented
3. Treat risks	3.1. Appropriate control measures are determined for risks and assessed for strengths and weaknesses 3.2. Control measures are identified for all risks 3.3. Risks relevant to whole of organization or having an impact beyond own work responsibilities and area of operation to others are referred as per established policies and procedures 3.4. Control measures are chosen and implemented for own area of operation and/or responsibilities 3.5. Treatment plans are prepared and implemented
4. Monitor and review effectiveness of risk treatment/s	4.1. Implemented treatment/s is regularly reviewed against measures of success 4.2. Review results are used to improve the treatment of risks 4.3. Assistance is provided to auditing risk in own area of operation 4.4. Management of risk is monitored and reviewed in own area of operation

Variable	Range
Context may include:	<ul style="list-style-type: none"> • any related projects or organizations • any resources, including physical assets, which are vital to operations • key operational elements and service of the organization • organization or project, how it is organized and its capabilities • own role and responsibilities in relation to overall project or organization design
Risks may include:	<ul style="list-style-type: none"> • commercial and legal relationships • economic circumstances and scenarios • human behaviour • individual activities • management activities and controls • natural events • political circumstances • positive risk • technology - technological issues
Tools may include:	<ul style="list-style-type: none"> • documentation to assist in process of identifying risk, and assessing impact and likelihood of occurrence • standard instruments developed for the organization and contextualised for sections of the workplace's operations, such as checklists and testing procedures • tools to prioritize risks, including where relevant, numerical scoring systems for risks
Stakeholders may include:	<ul style="list-style-type: none"> • contractors • employees • financial managers • insurance agents • managers • public • service providers • suppliers • unions • volunteers
Risk categorisation may include:	<ul style="list-style-type: none"> • likelihood of risks: <ul style="list-style-type: none"> ➢ almost certain ➢ likely ➢ possible ➢ unlikely ➢ rare • consequences of risks: <ul style="list-style-type: none"> ➢ insignificant ➢ minor ➢ moderate ➢ major ➢ catastrophic

	➤ current control measures
Level of risk may include:	<ul style="list-style-type: none"> • low, treated with routine procedures • moderate, with specific responsibility allocated for the risk, and monitoring and response procedures implemented • high, requiring action, as it has potential to be damaging to the organization or project • extreme, requiring immediate action, as it has potential to be devastating to the organization or project
Control measures may include:	<ul style="list-style-type: none"> • hierarchy of controls: <ul style="list-style-type: none"> ➤ reduction in likelihood of risks ➤ reduction of consequences of risks • retention of risks <ul style="list-style-type: none"> ➤ risk aversion ➤ transfer of responsibility of risks
Measures of success may include:	<ul style="list-style-type: none"> • costs • reductions in impact • reductions in likelihood • reductions in occurrence

Evidence Guide	
Critical aspects of Competence	<p>Assessment requires evidence that the candidate:</p> <ul style="list-style-type: none"> • identification, analysis and evaluation of risks • demonstrated understanding of personal role in relation to wider organizational or project context • demonstrated understanding of risk management processes and procedures
Underpinning Knowledge and Attitudes	<p>Demonstrates knowledge of:</p> <ul style="list-style-type: none"> • Australian and international standards for risk management • key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as: <ul style="list-style-type: none"> ➤ anti-discrimination legislation ➤ ethical principles ➤ codes of practice ➤ privacy laws ➤ environmental issues ➤ occupational health and safety • organizational policies and procedures relating to risk management processes and strategies • auditing requirements relating to risk management
Underpinning Skills	<p>Demonstrates skills to:</p> <ul style="list-style-type: none"> • literacy skills sufficient to read and understand a variety of texts; and to write, edit and proofread documents to ensure clarity of meaning, accuracy and consistency of information • research and data collection skills to monitor and evaluate risks • problem-solving skills to appropriately address identified risks

Resources Implication	Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices.
Assessment Methods	Competency may be assessed through: <ul style="list-style-type: none"> • Interview / Written Test / Oral Questioning • Observation / Demonstration
Context of Assessment	Competency may be assessed in the work place or in a simulated work place setting.

Occupational Standard: Customer Contact Level IV	
Unit Title	Plan and Organize Work
Unit Code	EIS CSC4 12 0812
Unit Descriptor	This unit covers the knowledge, skills and attitude required in planning and organizing work activities in a production application. It may be applied to a small independent operation or to a section of a large organization.

Elements	Performance Criteria
1. Set objectives	<p>1.1 Objectives are planned consistent with and linked to work activities in accordance with organizational aims.</p> <p>1.2 Objectives are stated as measurable targets with clear time frames.</p> <p>1.3 Support and commitment of team members are reflected in the objectives.</p> <p>1.4 Realistic and attainable objectives are identified.</p>
2. Plan and schedule work activities	<p>2.1 Tasks/work activities to be completed are identified and prioritized as directed.</p> <p>2.2 Tasks/work activities are broken down into steps in accordance with set time frames and achievable components.</p> <p>2.3 Task/work activities are assigned to appropriate team or individuals in accordance with agreed functions.</p> <p>2.4 Resources are allocated as per requirements of the activity.</p> <p>2.5 Schedule of work activities is coordinated with personnel concerned.</p>
3. Implement work plans	<p>3.1 Work methods and practices are identified in consultation with personnel concerned.</p> <p>3.2 Work plans are implemented in accordance with set time frames, resources and standards.</p>
4. Monitor work activities	<p>4.1 Work activities are monitored and compared with set objectives.</p> <p>4.2 Work performance is monitored.</p> <p>4.3 Deviations from work activities are reported and recommendations are coordinated with appropriate personnel and in accordance with set standards.</p> <p>4.4 Reporting requirements are complied with in accordance with recommended format.</p> <p>4.5 Timeliness of report is observed.</p>
	4.6 Files are established and maintained in accordance with standard operating procedures.

5. Review and evaluate work plans and activities	<p>5.1 Work plans, strategies and implementation are reviewed based on accurate, relevant and current information.</p> <p>5.2 Review is done based on comprehensive consultation with appropriate personnel on outcomes of work plans and reliable feedback.</p> <p>5.3 Results of review are provided to concerned parties and formed as the basis for adjustments/simplifications to be made to policies, processes and activities.</p> <p>5.4 Performance appraisal is conducted in accordance with organization rules and regulations.</p> <p>5.5 Performance appraisal report is prepared and documented regularly as per organization requirements.</p> <p>5.6 Recommendations are prepared and presented to appropriate personnel/authorities.</p> <p>5.7 Feedback mechanisms are implemented in line with organization policies.</p>
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Variable	Range
Objectives	May include but not limited to: <ul style="list-style-type: none"> • Specific • General
Resources	May include but not limited to: <ul style="list-style-type: none"> • Personnel • Equipment and technology • Services • Supplies and materials • Sources for accessing specialist advice • Budget
Schedule of work activities	May include but not limited to: <ul style="list-style-type: none"> • Daily • Work-based • Contractual • Regular
Work methods and practices	May include but not limited to: <ul style="list-style-type: none"> • Legislated regulations and codes of practice • Industry regulations and codes of practice • Occupational health and safety practices
Work plans	May include but not limited to: <ul style="list-style-type: none"> • Daily work plans • Project plans • Program plans • Resource plans • Skills development plans • Management strategies and objectives
Standards	May include but not limited to:

	<ul style="list-style-type: none"> • Performance targets • Performance management and evaluation systems • Occupational standards • Employment contracts • Client contracts • Discipline procedures • Workplace assessment guidelines • Internal quality assurance • Internal and external accountability and auditing requirements • Training Regulation Standards • Safety Standards
Appropriate personnel/ authorities	<p>May include but not limited to:</p> <ul style="list-style-type: none"> • Appropriate personnel include: • Management • Line Staff
Feedback mechanisms	<p>May include but not limited to:</p> <ul style="list-style-type: none"> • Verbal feedback • Informal feedback • Formal feedback • Questionnaire • Survey • Group discussion

Evidence Guide	
Critical Aspects of Competence	<p>Demonstrates skills and knowledge in:</p> <ul style="list-style-type: none"> • set objectives • planned and scheduled work activities • implemented work plans • monitored work activities • reviewed and evaluated work plans and activities
Underpinning Knowledge and Attitudes	<p>Demonstrates knowledge of:</p> <ul style="list-style-type: none"> • organization's strategic plan, policies rules and regulations, laws and objectives for work unit activities and priorities • organizations policies, strategic plans, guidelines related to the role of the work unit • team work and consultation strategies
Underpinning Skills	<p>Demonstrates skill to:</p> <ul style="list-style-type: none"> • plan • lead • organize • coordinate • communicate • inter-and intra-person/motivation skills • present

Resource Implications	Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices.
Methods of Assessment	Competence may be assessed through: <ul style="list-style-type: none"> • Interview / Written Test • Observation / Demonstration with Oral Questioning
Context of Assessment	Competence may be assessed in the work place or in a simulated work place setting.

Occupational Standard: Customer Contact Level IV	
Unit Title	Migrate to New Technology
Unit Code	EIS CSC4 13 0812
Unit Descriptor	This unit defines the competence required to apply skills and knowledge in using new or upgraded technology. The rationale behind this unit emphasizes the importance of constantly reviewing work processes, skills and techniques in order to ensure that the quality of the entire business process is maintained at the highest level possible through the appropriate application of new technology. To this end, the person is typically engaged in on-going review and research in order to discover and apply new technology or techniques to improve aspects of the organization's activities.

Elements	Performance Criteria
1. Apply existing knowledge and techniques to technology and transfer	1.1 Situations are identified where existing knowledge can be used as the basis for developing new skills. 1.2 New or upgraded technology skills are acquired and used to enhance learning. 1.3 New or upgraded equipment are identified, classified and used where appropriate, for the benefit of the organization.
2. Apply functions of technology to assist in solving organizational problems	2.1 Testing of new or upgraded equipment is conducted according to the specification manual. 2.2 Features of new or upgraded equipment are applied within the organization 2.3 Features and functions of new or upgraded equipment are used for solving organizational problems 2.4 Sources of information relating to new or upgraded equipment are accessed and used
3. Evaluate new or upgraded technology performance	3.1 New or upgraded equipment is evaluated for performance, usability and against OHS standards. 3.2 Environmental considerations are determined from new or upgraded equipment. 3.3 Feedback is sought from users where appropriate.

Variables	Range
Environmental Considerations	May include but is not limited to: <ul style="list-style-type: none"> recycling, safe disposal of packaging (e.g. cardboard, polystyrene, paper, plastic) and correct disposal of waste materials by an authorized body

Feedback	May include but is not limited to: <ul style="list-style-type: none"> • surveys, • questionnaires, • interviews and meetings.
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Evidence Guide	
Critical Aspects of Competence	Competence must confirm the ability to transfer the application of existing skills and knowledge to new technology
Underpinning Knowledge and Attitudes	Demonstrate knowledge of: <ul style="list-style-type: none"> • Broad awareness of current technology trends and directions in the industry (e.g. systems/procedures, services, new developments, new protocols) • Knowledge of vendor product directions • Ability to locate appropriate sources of information regarding metal manufacturing and new technologies • Current industry products/services, procedures and techniques with knowledge of general features • Information gathering techniques
Underpinning Skills	Demonstrate skills of: <ul style="list-style-type: none"> • Research skills for identifying broad features of new technologies • Ability to assist in the decision making process • Literacy skills in regard to interpretation of technical manuals • Ability to solve known problems in a variety of situations and locations • Evaluate and apply new technology to assist in solving organizational problems • General analytical skills in relation to known problems
Resources Implication	Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices.
Methods of Assessment	Competence may be assessed through: <ul style="list-style-type: none"> • Interview / Written Test • Observation / Demonstration with Oral Questioning
Context of Assessment	Competence may be assessed in the work place or in a simulated work place setting.

Occupational Standard: Customer Contact Level IV	
Unit Title	Establish Quality Standards
Unit Code	EIS CSC4 14 0812
Unit Descriptor	This unit covers the knowledge, skills and attitudes required to establish quality specifications for work outcomes and work performance. It includes monitoring and participation in maintaining and improving quality, identifying critical control points in the production of quality output and assisting in planning and implementing of quality assurance procedures.

Elements	Performance Criteria
1. Establish quality specifications for product	1.1 Market specifications are sourced and legislated requirements identified. 1.2 Quality specifications are developed and agreed upon 1.3 Quality specifications are documented and introduced to organization staff / personnel in accordance with the organization policy 1.4 Quality specifications are updated when necessary
2. Identify hazards and critical control points	2.1. Critical control points impacting on quality are identified. 2.2. Degree of risk for each hazard is determined. 2.3. Necessary documentation is accomplished in accordance with organization quality procedures
3. Assist in planning of quality assurance procedures	3.1 Procedures for each identified control point are developed to ensure optimum quality. 3.2 Hazards and risks are minimized through application of appropriate controls. 3.3 Processes are developed to monitor the effectiveness of quality assurance procedures.
4. Implement quality assurance procedures	4.1 Responsibilities for carrying out procedures are allocated to staff and contractors. 4.2 Instructions are prepared in accordance with the enterprise's quality assurance program. 4.3 Staff and contractors are given induction training on the quality assurance policy. 4.4 Staff and contractors are given in-service training relevant to their allocated safety procedures .
5. Monitor quality of work outcome	5.1 Quality requirements are identified 5.2 Inputs are inspected to confirm capability to meet quality

	<p>requirements</p> <p>5.3 Work is conducted to produce required outcomes</p> <p>5.4 Work processes are monitored to confirm quality of output and/or service</p> <p>5.5 Processes are adjusted to maintain outputs within specification.</p>
6. Participate in maintaining and improving quality at work	<p>6.1 Work area, materials, processes and product are routinely monitored to ensure compliance with quality requirements</p> <p>6.2 Non-conformance in inputs, process, product and/or service is identified and reported according to workplace reporting requirements</p> <p>6.3 Corrective action is taken within level of responsibility, to maintain quality standards</p> <p>6.4 Quality issues are raised with designated personnel</p>
7. Report problems that affect quality	<p>7.1 Potential or existing quality problems are recognized.</p> <p>7.2 Instances of variation in quality are identified from specifications or work instructions.</p> <p>7.3 Variation and potential problems are reported to supervisor/manager according to enterprise guidelines.</p>

Variable	Range
Sourced	<p>May include but is not limited to:</p> <ul style="list-style-type: none"> • End-users • Customers or stakeholders
Legislated requirements	<p>May include but is not limited to:</p> <ul style="list-style-type: none"> • Verification of product quality as part of consumer legislation or specific legislation related to product content or composition.
Safety procedures.	<p>May include but is not limited to:</p> <ul style="list-style-type: none"> • Use of tools and equipment for fabrication/production/manufacturing works • Workplace environment and handling of material safety, • Following occupational health and safety procedures designated for the task • Respect the policies, regulations, legislations, rule and procedures for manufacturing/production/fabrication works

Evidence Guide	
Critical Aspect of Competence	<p>Demonstrates skills and knowledge in:</p> <ul style="list-style-type: none"> • Monitored quality of work • Established quality specifications for product • Participated in maintaining and improving quality at work • Identified hazards and critical control points in the production of quality product • Assisted in planning of quality assurance procedures • Reported problems that affect quality • Implemented quality assurance procedures
Underpinning Knowledge	<p>Demonstrates knowledge of:</p> <ul style="list-style-type: none"> • work and product quality specifications • quality policies and procedures • improving quality at work • hazards and critical points of operation • obtaining and using information • applying federal and regional legislation within day-to-day work activities • accessing and using management systems to keep and maintain accurate records • requirements for correct preparation and operation • technical writing
Underpinning Skills	<p>Demonstrates skills to:</p> <ul style="list-style-type: none"> • monitor quality of work • establish quality specifications for product • participate in maintaining and improving quality at work • identify hazards and critical control points in the production of quality product • assist in planning of quality assurance procedures • report problems that affect quality • implement quality assurance procedures
Resource Implications	<p>Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices.</p>
Methods of Assessment	<p>Competence may be assessed through:</p> <ul style="list-style-type: none"> • Interview / Written Test • Observation / Demonstration
Context of Assessment	<p>Competence may be assessed in the work place or in a simulated work place setting.</p>

Occupational Standard: Customer Contact Level IV	
Unit Title	Develop Individuals and Team
Unit Code	EIS CSC4 15 0812
Unit Descriptor	This unit covers the knowledge, skills and attitudes required to determine individual and team development needs and facilitate the development of the workgroup.

Elements	Performance Criteria
1. Provide team leadership	<p>1.1 Learning and development needs are systematically identified and implemented in line with organizational requirements</p> <p>1.2 Learning plan to meet individual and group training and developmental needs is collaboratively developed and implemented</p> <p>1.3 Individuals are encouraged to self-evaluate performance and identify areas for improvement</p> <p>1.4 Feedback on performance of team members is collected from relevant sources and compared with established team learning process</p>
2. Foster individual and organizational growth	<p>2.1 Learning and development program goals and objectives are identified to match the specific knowledge and skills requirements of Competence standards</p> <p>2.2 Learning delivery methods are made appropriate to the learning goals, the learning style of participants and availability of equipment and resources</p> <p>2.3 Workplace learning opportunities and coaching/ mentoring assistance are provided to facilitate individual and team achievement of competencies</p> <p>2.4 Resources and timelines required for learning activities are identified and approved in accordance with organizational requirements</p>
3. Monitor and evaluate workplace learning	<p>3.1 Feedback from individuals or teams is used to identify and implement improvements in future learning arrangements</p> <p>3.2 Outcomes and performance of individuals/teams are assessed and recorded to determine the effectiveness of development programs and the extent of additional support</p> <p>3.3 Modifications to learning plans are negotiated to improve the efficiency and effectiveness of learning</p> <p>3.4 Records and reports of competence are maintained within organizational requirement</p>

4. Develop team commitment and cooperation	<p>4.1 Open communication processes to obtain and share information is used by team</p> <p>4.2 Decisions are reached by the team in accordance with its agreed roles and responsibilities</p> <p>4.3 Mutual concern and camaraderie are developed in the team</p>
5. Facilitate accomplishment of organizational goals	<p>5.1 Team members are actively participated in team activities and communication processes</p> <p>5.2 Individual and joint responsibility is developed by teams members for their actions</p> <p>5.3 Collaborative efforts are sustained to attain organizational goals</p>

Variable	Range
Learning and development needs	<p>May include but is not limited to:</p> <ul style="list-style-type: none"> • Coaching, monitoring and/or supervision • Formal/informal learning program • Internal/external training provision • Work experience/exchange/opportunities • Personal study • Career planning/development • Performance evaluation • Workplace skills assessment • Recognition of prior learning
Organizational requirements	<p>May include but is not limited to:</p> <ul style="list-style-type: none"> • Quality assurance and/or procedures manuals • Goals, objectives, plans, systems and processes • Legal and organizational policy/guidelines and requirements • Safety policies, procedures and programs • Confidentiality and security requirements • Business and performance plans • Ethical standards • Quality and continuous improvement processes and standards
Feedback on performance	<p>May include but is not limited to:</p> <ul style="list-style-type: none"> • Formal/informal performance evaluation • Obtaining feedback from supervisors and colleagues • Obtaining feedback from clients • Personal and reflective behavior strategies • Routine and organizational methods for monitoring service delivery
Learning delivery methods	<p>May include but is not limited to:</p> <ul style="list-style-type: none"> • On the job coaching or monitoring • Problem solving • Presentation/demonstration • Formal course participation

	<ul style="list-style-type: none"> • Work experience and involvement in professional networks • Conference and seminar attendance
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Evidence Guide	
Critical Aspects of Competence	<p>Demonstrates skills and knowledge in:</p> <ul style="list-style-type: none"> • identified and implemented learning opportunities for others • gave and received feedback constructively • facilitated participation of individuals in the work of the team • negotiated plans to improve the effectiveness of learning • prepared learning plans to match skill needs • accessed and designated learning opportunities
Underpinning Knowledge and Attitude	<p>Demonstrates knowledge of:</p> <ul style="list-style-type: none"> • coaching and monitoring principles • understanding how to work effectively with team members who have diverse work styles, aspirations, cultures and perspective • understanding how to facilitate team development and improvement • understanding methods and techniques to obtain and interpreting feedback • understanding methods for identifying and prioritizing personal development opportunities and options • knowledge of career paths and competence standards in the industry
Underpinning Skills	<p>Demonstrates skills to:</p> <ul style="list-style-type: none"> • read and understand a variety of texts, preparing general information and documents according to target audience; spell with accuracy; use grammar and punctuation effective relationships and conflict management • communicate including receiving feedback and reporting, maintaining effective relationships and conflict management • plan and organize required resources and equipment to meet learning needs • coach and mentor skills to provide support to colleagues • report to organize information; assess information for relevance and accuracy; identify and elaborate on learning outcomes • facilitate and conduct small group training sessions • relate to people from a range of social, cultural, physical and mental backgrounds
Resource Implications	<p>Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices.</p>
Methods of Assessment	<p>Competence may be assessed through:</p> <ul style="list-style-type: none"> • Interview / Written Test • Observation / Demonstration with Oral Questioning

Context of Assessment	Competence may be assessed in the work place or in a simulated work place setting.
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Occupational Standard: Customer Contact Level IV	
Unit Title	Utilize Specialized Communication Skills
Unit Code	EIS CSC4 16 0812
Unit Descriptor	This unit covers the knowledge, skills and attitudes required to use specialized communication skills to meet specific needs of internal and external clients, conduct interviews, facilitate group discussions, and contribute to the development of communication strategies.

Elements	Performance Criteria
1. Meet common and specific communication needs of clients and colleagues	1.1 Specific communication needs of clients and colleagues are identified and met 1.2 Different approaches are used to meet communication needs of clients and colleagues 1.3 Conflict is addressed promptly and in a timely way and in a manner which does not compromise the standing of the organization
2. Contribute to the development of communication strategies	2.1 Strategies for internal and external dissemination of information are developed, promoted, implemented and reviewed as required 2.2 Channels of communication are established and reviewed regularly 2.3 Coaching in effective communication is provided 2.4 Work related network and relationship are maintained as necessary 2.5 Negotiation and conflict resolution strategies are used where required 2.6 Communication with clients and colleagues is appropriate to individual needs and organizational objectives
3. Represent the organization	3.1 When participating in internal or external fora, presentation is relevant, appropriately researched and presented in a manner to promote the organization 3.2 Presentation is made clear and sequential and delivered within a predetermined time 3.3 Appropriate media is utilized to enhance presentation 3.4 Differences in views are respected 3.5 Written communication is made consistent with organizational standards 3.6 Inquiries are responded in a manner consistent with organizational standard

4. Facilitate group discussion	<p>4.1 Mechanisms which enhance effective group interaction are defined and implemented</p> <p>4.2 Strategies which encourage all group members to participate are used routinely</p> <p>4.3 Objectives and agenda are routinely set and followed for meetings and discussions</p> <p>4.4 Relevant information are provided to group to facilitate outcomes</p> <p>4.5 Evaluation of group communication strategies is undertaken to promote participation of all parties</p> <p>4.6 Specific communication needs of individuals are identified and addressed</p>
5. Conduct interview	<p>5.1 A range of appropriate communication strategies are employed in interview situations</p> <p>5.2 Different types of interview is conducted in accordance with the organizational procedures</p> <p>5.3 Records of interviews are made and maintained in accordance with organizational procedures</p> <p>5.4 Effective questioning, listening and nonverbal communication techniques are used to ensure that required message is communicated</p>

Variable	Range
Strategies	May include but is not limited to: <ul style="list-style-type: none"> • Recognizing own limitations • Utilizing techniques and aids • Providing written drafts • Verbal and non verbal communication
Effective group interaction	May include but is not limited to: <ul style="list-style-type: none"> • Identifying and evaluating what is occurring within an interaction in a non-judgmental way • Using active listening • Making decision about appropriate words, behavior • Putting together response which is culturally appropriate • Expressing an individual perspective • Expressing own philosophy, ideology and background and exploring impact with relevance to communication
Interview situations	May include but is not limited to: <ul style="list-style-type: none"> • Establish rapport • obtain facts and information • Facilitate resolution of issues • Develop action plans • Diffuse potentially difficult situation
Types of Interview	May include but is not limited to:

	<ul style="list-style-type: none"> • Related to staff issues • Routine • Confidential • Evidential • Non-disclosure • Disclosure
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Evidence Guide	
Critical Aspects of Competence	Demonstrates skills and knowledge in: <ul style="list-style-type: none"> • Demonstrated effective communication skills with clients and work colleagues accessing service • Adopted relevant communication techniques and strategies to meet client particular needs and difficulties
Underpinning Knowledge and Values	Demonstrates knowledge of: <ul style="list-style-type: none"> • communication process • dynamics of groups and different styles of group leadership • communication skills relevant to client groups
Underpinning Skills	Demonstrates skills to: <ul style="list-style-type: none"> • full range of communication techniques including: <ul style="list-style-type: none"> ➢ active listening ➢ feedback ➢ interpretation ➢ role boundaries setting ➢ negotiation ➢ establishing empathy ➢ communication strategies • communicate to fulfill job roles as specified by the organization
Resource Implications	Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices.
Methods of Assessment	Competence may be assessed through: <ul style="list-style-type: none"> • Interview / Written Test • Observation / Demonstration with Oral Questioning
Context of Assessment	Competence may be assessed in the work place or in a simulated work place setting.

Occupational Standard: Customer Contact Level IV	
Unit Title	Manage and Maintain Small/Medium Business Operations
Unit Code	EIS CSC4 17 0812
Unit Descriptor	This unit covers the operation of day-to-day business activities in a micro or small business. The strategies involve developing, monitoring and managing work activities and financial information, developing effective work habits, and adjusting work schedules as needed.

Elements	Performance Criteria
1. Identify daily work requirements	<p>1.1 Work requirements are identified for a given time period by taking into consideration resources and constraints</p> <p>1.2 Work activities are prioritized based on business needs, requirements and deadlines</p> <p>1.3 If appropriate, work is allocated to relevant staff or contractors to optimize efficiency</p>
2. Monitor and manage work	<p>2.1 People, resources and/or equipment are coordinated to provide optimum results</p> <p>2.2 Staff, clients and/or contractors are communicated within a clear and regular manner, to monitor work in relation to business goals or timelines</p> <p>2.3 Problem solving techniques are applied to work situations to overcome difficulties and achieve positive outcomes</p>
3. Develop effective work habits	<p>3.1 Work and personal priorities are identified and a balance is achieved between competing priorities using appropriate time management strategies</p> <p>3.2 Input from internal and external sources is sought and used to develop and refine new ideas and approaches</p> <p>3.3 Business or inquiries is/are responded to promptly and effectively</p> <p>3.4 Information is presented in a format appropriate to the industry and audience</p>
4. Interpret financial information	<p>4.1 Relevant documents and reports are identified</p> <p>4.2 Documents and reports are read and understood and any implications discussed with appropriate persons</p> <p>4.3 Data and numerical calculations are analyzed, checked, evaluated, organized and reconciled</p> <p>4.4 Daily financial records and cash flow are maintained correctly and in accordance with legal and accounting requirements</p>

	<p>4.5 Invoices and payments are prepared and distributed in a timely manner and in accordance with legal requirements</p> <p>4.6 Outstanding accounts are collected or followed-up on</p>
5. Evaluate work performance	<p>5.1 Opportunities for improvements are monitored according to business demands</p> <p>5.2 Work schedules are adjusted to incorporate necessary modifications to existing work and routines or changing needs and requirements</p> <p>5.3 Proposed changes are clearly communicated and recorded to aid in future planning and evaluation</p> <p>5.4 Relevant codes of practice are used to guide an ethical approach to workplace practices and decisions</p>

Variable	Range
Resources	<p>May include but is not limited to:</p> <ul style="list-style-type: none"> • staff • money • time • equipment • space
Business goals	<p>May include but is not limited to:</p> <ul style="list-style-type: none"> • sales targets • budgetary targets • team and individual goals • production targets • reporting deadlines
Problem solving techniques	<p>May include but is not limited to:</p> <ul style="list-style-type: none"> • gaining additional research and information to make better informed decisions • looking for patterns • considering related problems or those from the past and how they were handled • eliminating possibilities • identifying and attempting sub-tasks • collaborating and asking for advice or help from additional sources
Time management strategies	<p>May include but is not limited to:</p> <ul style="list-style-type: none"> • prioritizing and anticipating • short term and long term planning and scheduling • creating a positive and organized work environment • clear timelines and goal setting that is regularly reviewed and adjusted as necessary • breaking large tasks into smaller tasks • getting additional support if identified and necessary
Internal and	<p>May include but is not limited to:</p>

external sources	<ul style="list-style-type: none"> • staff and colleagues • management, supervisors, advisors or head office • relevant professionals such as lawyers, accountants, management consultants • professional associations
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Evidence Guide	
Critical Aspects of Competence	<p>A person must be able to demonstrate:</p> <ul style="list-style-type: none"> • ability to identify daily work requirements and allocate work appropriately • ability to interpret financial documents in accordance with legal requirements
Underpinning Knowledge and Attitudes	<p>Demonstrate knowledge of:</p> <ul style="list-style-type: none"> • Federal and Local Government legislative requirements affecting business operations, especially in regard to occupational health and safety (OHS), equal employment opportunity, industrial relations and anti-discrimination • technical or specialist skills relevant to the business operation • relevant industry code of practice • planning techniques to establish realistic timelines and priorities • identification of relevant performance measures • quality assurance principles and methods • relevant marketing, management, sales and financial concepts • methods for monitoring performance and implementing improvements • structured approaches to problem solving, idea management and time management
Underpinning Skills	<p>Demonstrate skills to:</p> <ul style="list-style-type: none"> • interpret legal requirements, company policies and procedures and immediate, day-to-day demands • communicate using questioning, clarifying, reporting, and giving and receiving constructive feedback • numeracy skills for performance information, setting targets and interpreting financial documents and reports • technical and analytical skills to interpret business document, reports and financial statements and projections • relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities • solve problem and develop contingency plans • using computers and software packages to record and manage data and to produce reports • evaluate using assessment work and outcomes • observe for identifying appropriate people, resources and to monitor work
Resource	Access is required to real or appropriately simulated situations,

Implications	including work areas, materials and equipment, and to information on workplace practices and OHS practices.
Methods of Assessment	Competence may be assessed through: <ul style="list-style-type: none"> • Interview / Written Test • Observation / Demonstration with Oral Questioning
Context of Assessment	Competence may be assessed in the work place or in a simulated work place setting.

Occupational Standard: Customer Contact Level IV	
Unit Title	Manage Continuous Improvement System
Unit Code	EIS CSC4 18 1012
Unit Descriptor	This unit describes the performance outcomes, skills and knowledge required to sustain and develop an environment in which continuous improvement, innovation and learning are promoted and rewarded.

Elements	Performance Criteria
1. Review programs, systems and processes	<p>1.1 Strategies are established to monitor and evaluate performance of key systems and processes</p> <p>1.2 Detailed analyses of supply chains, operational and product/service delivery systems is undertaken</p> <p>1.3 Performance measures, and assessment tools and techniques are identified, and their effectiveness is evaluated</p> <p>1.4 Performance reports and variance are analyzed from plans for all key result areas of the organization</p> <p>1.5 Changing trends and opportunities relevant to the organization are identified and analyzed</p> <p>1.6 Advice is sought from specialists, where appropriate, to identify technology and electronic commerce opportunities</p>
2. Develop options for continuous improvement	<p>2.1 Groups are briefed on performance improvement strategies and innovation as an essential element of competition</p> <p>2.2 Creative climate and organizational learning are fostered through the promotion of interaction within and between work groups</p> <p>2.3 New ideas and entrepreneurial behavior are encouraged, tested and recognized where successful</p> <p>2.4 Failure of an idea is accepted during trialing, and success are recognized, celebrated and embedded into systems</p> <p>2.5 Risk management and cost benefit analyses are undertaken for each option/idea approved for trial</p> <p>2.6 Innovations are approved through agreed organizational processes</p>
3. Implement innovative processes	<p>3.1 Sustainability/continuous improvement is promoted as an essential part of doing business</p> <p>3.2 Impact of change and consequences are addressed for people, and transition plans are implemented</p>

	<p>3.3 Objectives, timeframes, measures and communication plans are ensured in place to manage implementation</p> <p>3.4 Contingency plans are implemented in the event of non-performance</p> <p>3.5 Failure is followed-up by prompt investigation and analysis of causes</p> <p>3.6 Emerging challenges and opportunities are managed effectively</p> <p>3.7 Continuous improvement systems and processes are evaluated regularly</p> <p>3.8 Costs and benefits of innovations and improvements are communicated to all relevant groups and individuals</p>
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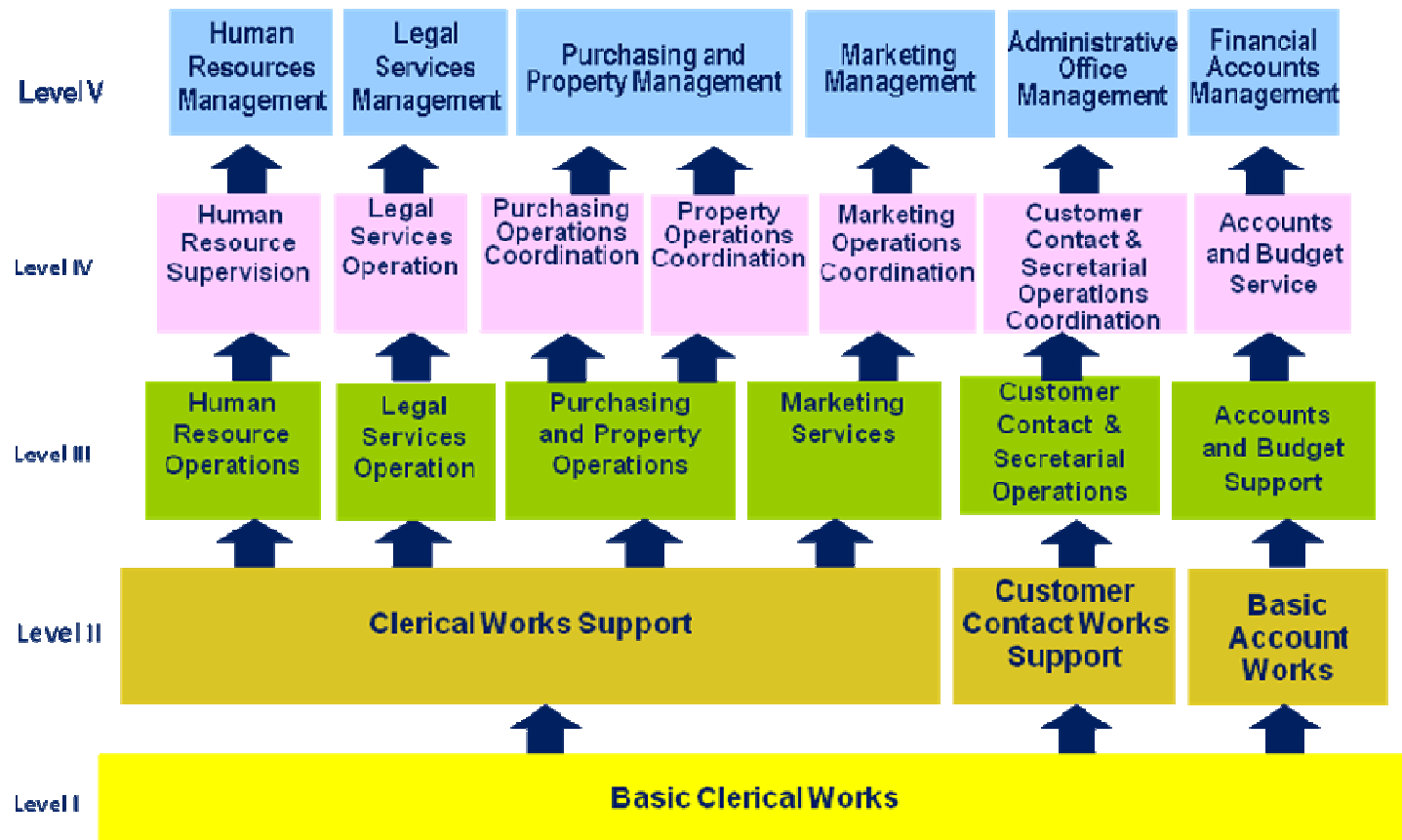
Variable	Range
Supply chains	<p>May include but is not limited to:</p> <ul style="list-style-type: none"> • network of facilities that procures raw materials, transforms them into intermediate products or services and then finished goods or service, and delivers them through a distribution system • procurement, production and distribution, viewed as interlinked not as discrete elements
Performance reports	<p>May include but is not limited to:</p> <ul style="list-style-type: none"> • budget or cost variance • customer service • environmental • financial • OHS • quality • other operating parameters
Sustainability/continuous improvement	<p>May include but is not limited to:</p> <ul style="list-style-type: none"> • addressing environmental and resource sustainability initiatives, such as environmental management systems, action plans, green office programs, surveys and audits • applying the waste management hierarchy in the workplace • complying with regulations and corporate social responsibility considerations for sustainability to enhance the organization's standing in business and community environments • determining organization's most appropriate waste treatment, including waste to landfill, recycling, re-use, recoverable resources and wastewater treatment • implementing ecological footprint • implementing environmental management systems, e.g. ISO 14001:1996 Environmental management systems life

	<p>cycle analyses</p> <ul style="list-style-type: none"> • implementing government initiatives, • improving resource and energy efficiency • initiating and maintaining appropriate organizational procedures for operational energy consumption • introducing a green office program - a cultural change program • introducing green purchasing • introducing national and international reporting initiatives, • introducing product stewardship • reducing emissions of greenhouse gases • reducing use of non-renewable resources • referencing standards, guidelines and approaches, such as sustainability covenants and compacts or triple bottom line reporting • supporting sustainable supply chain
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Evidence Guide	
Critical Aspects of Competence	<p>Demonstrates skills and knowledge in:</p> <ul style="list-style-type: none"> • demonstration of consultation processes to introduce or evaluate an existing continuous improvement process or system, including suggested actions or an action plan • generation of an idea or concept which exhibits creative thinking and which offers the possibility of advantaging the organization • how the concept or idea was introduced, tested and evaluated - the idea or concept does not have to have been shown to work or to be adopted by the business • knowledge of quality management and continuous improvement theories
Underpinning Knowledge and Attitudes	<p>Demonstrates knowledge of:</p> <ul style="list-style-type: none"> • quality management and continuous improvement theories • creativity/innovation theories/concepts • risk management • cost-benefit analysis methods • creativity and innovation theories and concepts • organizational learning principles • quality management and continuous improvement theories • risk management • sustainability practices
Underpinning Skills	<p>Demonstrates skills to:</p> <ul style="list-style-type: none"> • analyze and identify improvement opportunities in relation to • deliver services/products or develop concepts/ideas • do flexibility and creativity skills to think laterally

	<ul style="list-style-type: none"> • use leadership skills to foster a commitment to quality and an openness to innovation • use teamwork and leadership skills to foster a commitment to quality and an openness to innovation
Resources Implication	Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices.
Methods of Assessment	Competence may be assessed through: <ul style="list-style-type: none"> • Interview / Written Test • Observation / Demonstration with Oral Questioning
Context of Assessment	Competence may be assessed in the work place or in a simulated work place setting.

Sector: Economic Infrastructure
Sub-Sector: Business and Finance



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