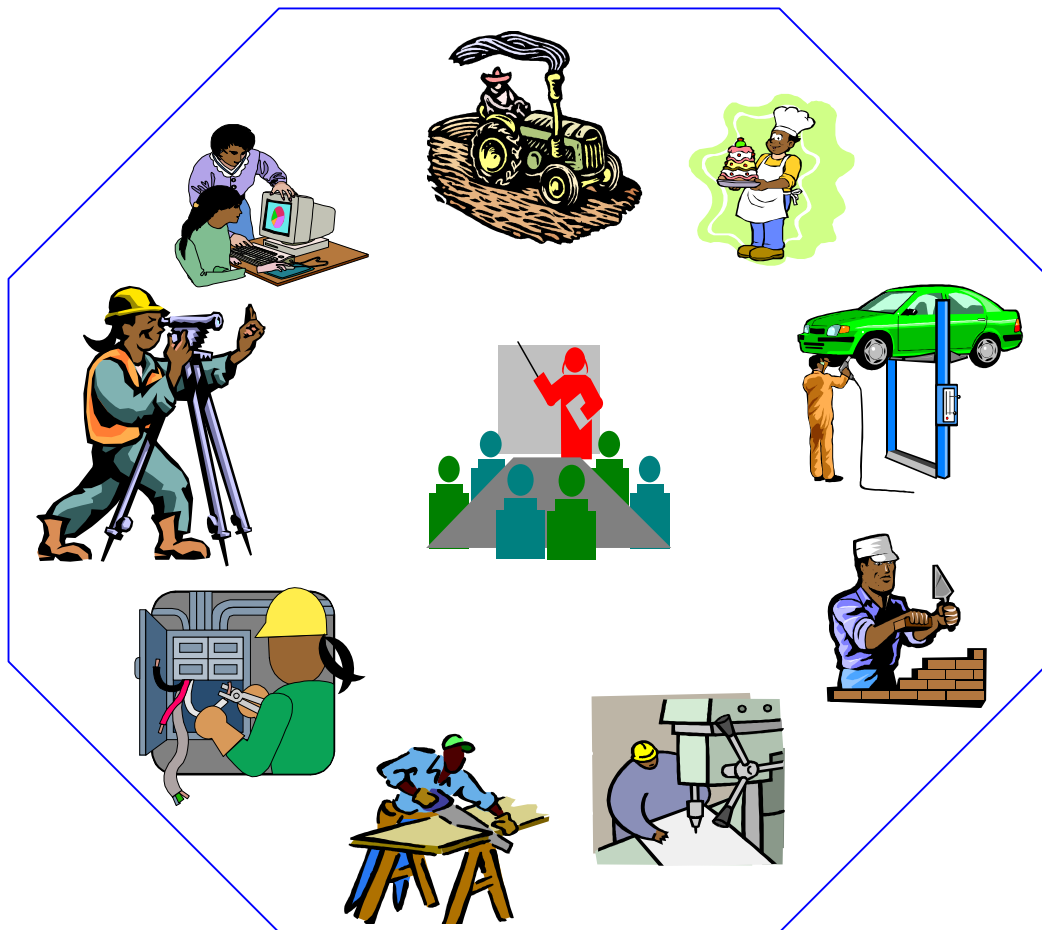




**Federal Democratic Republic of Ethiopia
OCCUPATIONAL STANDARD**



**MARKETING OPERATIONS 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

UNIT OF COMPETENCE CHART

Occupational Standard: Marketing Operations Coordination		
Occupational Code: EIS MOC		
<i>NTQF Level IV</i>		
EIS MOC4 01 0812 Make a Presentation	EIS MOC4 02 0812 Profile the Market	EIS MOC4 03 0812 Analyze Consumer Behavior for Specific Markets
EIS MOC4 04 0812 Conduct Market Research	EIS MOC4 05 0812 Conduct Pre-Campaign Testing	EIS MOC4 06 0812 Address Customer Needs
EIS MOC4 07 0812 Monitor Advertising and Production	EIS MOC4 08 0812 Develop Product Knowledge	EIS MOC4 09 0812 Build Client Relationships and Business Networks
EIS MOC4 10 0812 Identify and Plan Sales Prospects	EIS MOC4 11 0812 Present, Secure and Support Sales Solutions	EIS MOC4 12 0812 Implement Customer Service Standards
EIS MOC4 13 0812 Conduct Electronic Marketing Communications	EIS MOC4 01 0812 Identify Risk and Apply Risk Management Processes	EIS MOC4 15 0812 Write Complex Documents
EIS MOC4 16 0812 Plan and Organize Work	EIS MOC4 17 0812 Migrate to New Technology	EIS MOC4 18 0812 Establish Quality Standards
EIS MOC4 19 0812 Develop Teams and Individual	EIS MOC4 200812 Utilize Specialized Communication Skills	EIS MOC4 21 0812 Manage and Maintain Small and Medium Business Operations
EIS MOC4 22 1012 Manage Continuous Improvement System		

Occupational Standard: Marketing Operations Coordination Level IV	
Unit Title	Make a Presentation
Unit Code	EIS MOC4 01 0812
Unit Descriptor	This unit covers the performance outcomes, skills and knowledge required to prepare, deliver and review a presentation to a target audience.

Elements	Performance Criteria
1. Prepare a presentation	<p>1.1. Presentation approach and intended outcomes are planned and documented</p> <p>1.2. Presentation strategies, format and delivery methods that match the characteristics of the target audience, location, resources and personnel needed are chosen</p> <p>1.3. Presentation aids, materials and techniques that suit the format and purpose of the presentation are selected, and will enhance audience understanding of key concepts and central ideas</p> <p>1.4. Others involved in the presentation on their roles/responsibilities are briefed within the presentation</p> <p>1.5. Techniques to evaluate presentation effectiveness are selected</p>
2. Deliver a presentation	<p>2.1. Desired outcomes of the presentation are explained and discussed with the target audience</p> <p>2.2. Presentation aids, materials and examples are used to support target audience understanding of key concepts and central ideas</p> <p>2.3. Non-verbal and verbal communication of participants are monitored to promote attainment of presentation outcomes</p> <p>2.4. Persuasive communication techniques are used to secure audience interest</p> <p>2.5. Opportunities are provided for participants to seek clarification on central ideas and concepts, and adjust the presentation to meet participant needs and preferences</p> <p>2.6. Key concepts and ideas are summarized at strategic points to facilitate participant understanding</p>
3. Review the presentation	<p>3.1. Techniques to review the effectiveness of the presentation are implemented</p> <p>3.2. Reactions to the presentation are sought and discussed from participants or from key personnel involved in the presentation</p>

	3.3. Feedback is utilized from the audience or from key personnel involved in the presentation to make changes to central ideas presented
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Variable	Range
Presentation strategies may involve:	<ul style="list-style-type: none"> • case studies • demonstration • discussion • group and/or pair work • oral presentations • questioning • simulations and role-play
Presentation format and delivery methods may include:	<ul style="list-style-type: none"> • advertising copy • audio • direct marketing copy • individual presentation • public relations copy • scripts • storyboards • team presentation • verbal presentation • video • visuals
Characteristics may include:	<ul style="list-style-type: none"> • age • cultural and language background • educational background or general knowledge • gender • language, literacy and numeracy needs • physical ability • previous experience with the topic
Presentation aids and materials may include:	<ul style="list-style-type: none"> • computer simulations and presentations • diagrams, charts and posters • models • overhead projector • paper-based materials • video and audio recordings • whiteboard
Presentation techniques may include:	<ul style="list-style-type: none"> • animation • comparative advertising • live action • music • signature elements such as: <ul style="list-style-type: none"> ➤ slogans ➤ logotypes ➤ packaging • sound effects

	<ul style="list-style-type: none"> • use of a guest speaker • use of black and white • use of colour • use of humour
Techniques to evaluate presentation effectiveness may include:	<ul style="list-style-type: none"> • action research • critical friends • focus group interviews • one-on-one interviews with participants and other personnel involve in the presentation • written feedback provided by participants

Evidence Guide	
Critical aspects of Competence	<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> • preparation, delivery and evaluation of the effectiveness of at least two presentations related to the candidate's occupation or area of interest • knowledge of the principles of effective communication
Underpinning Knowledge and Attitudes	<p>Must demonstrate knowledge of:</p> <ul style="list-style-type: none"> • data collection methods that will support review of presentations • industry, product/service • 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 • principles of effective communication • range of presentation aids and materials available to support presentations
Underpinning Skills	<p>Must demonstrate:</p> <ul style="list-style-type: none"> • culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • facilitation and presentation skills to communicate central ideas of a message in an informative and engaging manner, and to utilise verbal and non-verbal techniques to sustain participant engagement • literacy skills to prepare presentation information and to write in a range of styles for different target audiences
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	Competence may be assessed in the work place or in a simulated work place setting.
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Occupational Standard: Marketing Operations Coordination Level IV	
Unit Title	Profile the Market
Unit Code	EIS MOC4 02 0812
Unit Descriptor	This unit describes the performance outcomes, skills and knowledge required to profile a target market or market segments in accordance with a marketing plan and to develop market positioning strategies.

Elements	Performance Criteria
1. Segment the market	<p>1.1. Criteria is identified for use in segmenting the market in accordance with the marketing plan</p> <p>1.2. Sources of information for segmenting and profiling markets are identified and accessed in accordance with the marketing plan</p> <p>1.3. The market is segmented in accordance with identified criteria</p> <p>1.4. Market segments are reviewed for their usefulness in terms of factors such as their size, potential, distinctive needs, easy identification of members or distinctive media use patterns</p> <p>1.5. Market segments are selected to meet marketing objectives, and new segmentation criteria is chosen and applied if required</p>
2. Identify the target market	<p>2.1. Approaches are evaluated to determining and describing the total market for a product or service</p> <p>2.2. The target market is defined in terms of the consumers to be included as prospective users of a product or service, and the selected market segments</p> <p>2.3. Segment descriptors are used to describe the target market</p> <p>2.4. Available strategic marketing options are identified and targeting strategies that best meet the requirements of the marketing plan are selected</p>
3. Profile the target audience	<p>3.1. The total market and selected market segments are described in the form of a consumer profile</p> <p>3.2. Consumer characteristics in standard statistical terms and/or the descriptive terms used in media selection are identified in the consumer profile</p> <p>3.3. Demographic and/or psychographic descriptions are used in the consumer profile in accordance with the requirements of the marketing plan</p>

	<p>3.4. Consumer attitudes are described to products or services being offered</p> <p>3.5. Profile is ensured to meet organizational requirements in terms of language, format, content and level of detail</p>
4. Develop a positioning strategy	<p>4.1. Available positioning strategies are identified and a strategy is chosen to meet marketing requirements and consumer profile</p> <p>4.2. A positioning implementation plan containing several options written, in accordance with organizational requirements</p> <p>4.3. Plan is submitted to supervisor within specified time lines and make appropriate adjustments based on feedback</p>

Variable	Range
Criteria may include:	<ul style="list-style-type: none"> • attitude • average order value in units and Birr • desired benefits • business characteristics • consumer needs • demographics • geography • lifestyle • lifetime value in units, Birr and number of transactions • product or service usage • psychographics • frequency of response to direct marketing activities • social and cultural factors
Sources of information for segmenting and profiling markets may include:	<ul style="list-style-type: none"> • advertising sales representatives • existing research data • industry sources • media representatives • original a priori research (where the market segments are assumed at the beginning and research is used to confirm them) • original response based research • owners or brokers of mail, email and phone lists • sales representatives • website operators
Usefulness in terms of size may include:	<ul style="list-style-type: none"> • segments which are large enough to justify the expense of creating distinctive offers and creative executions • small segments which are viable if telephone and email are used as communication media rather than other types of media
Potential may include:	<ul style="list-style-type: none"> • high response of market segment members to test campaigns • high response to previous campaigns by members of market

	segments
Distinctive needs may include:	<ul style="list-style-type: none"> • specific price points • specific products or services • specific response vehicles such as: <ul style="list-style-type: none"> ➤ store visiting only ➤ website only response • specific timing of communications such as: <ul style="list-style-type: none"> ➤ day of week ➤ seasonality ➤ time of day
Easy identification of members may include:	<ul style="list-style-type: none"> • flags such as: <ul style="list-style-type: none"> ➤ postcode ➤ date of last purchase • geographical location of segment members, such as: <ul style="list-style-type: none"> ➤ city ➤ metropolitan region ➤ regional centre ➤ rural region • spending habits such as: <ul style="list-style-type: none"> ➤ one-off purchasers ➤ subscribers
Distinctive media use patterns may include:	<ul style="list-style-type: none"> • age • email use • ethnic language television, newspapers and radio • gender • internet use • mobile phone use • special interests
Selection of market segments may be contingent upon:	<ul style="list-style-type: none"> • expected frequency of purchase • expected lifetime as customers • expected volume of purchase • how efficiently segment members can be reached with targeted communications • one or more segments
Approaches may include:	<ul style="list-style-type: none"> • describing total market in dollar or unit terms as gross sales of all other products or services similar to those offered by the organisation • describing total market in prospect terms as those most similar to current customers • identifying consumers with relevant needs • identifying current users of a product or service • identifying people with related characteristics
Prospective users may include:	<ul style="list-style-type: none"> • market segment users most similar to current customers

Segment descriptors may include:	<ul style="list-style-type: none"> • demographic descriptions • geographic descriptions • historic descriptions such as: <ul style="list-style-type: none"> ➤ volume of purchase ➤ frequency of purchase • psychographic descriptions
Strategic marketing options may include:	<ul style="list-style-type: none"> • advertising strategies such as: <ul style="list-style-type: none"> ➤ most cost effective creative executions ➤ most cost effective media or media vehicle for each segment ➤ most cost-effective media or media vehicle • distribution strategies such as: <ul style="list-style-type: none"> ➤ one-step ➤ multi-step • innovative strategies
Targeting strategies may include:	<ul style="list-style-type: none"> • anniversary of first purchase • concentrated, differentiated and mass strategies • de-duping prospect lists against customer lists • differentiation and segmentation • ease of entry • frequency of purchase • gender • geography of home or workplace • growth considerations • innovation • market share • media usage • niche markets • price sensitivity • purchasing power • sales volume
Standard statistical terms may include:	<ul style="list-style-type: none"> • categories used by the Central Statistics Agency in collecting and reporting census data • media selection terms such as: <ul style="list-style-type: none"> ➤ behavioristic ➤ demographics ➤ geo-demographic analysis of census data available from proprietary research suppliers ➤ geographic selections and segmentations
Demographic descriptions may include:	<ul style="list-style-type: none"> • age • date and place of birth • disability • education • first language • gender • household income • languages spoken at home • marital status

	<ul style="list-style-type: none"> • nationality • number and age of children • occupation
Psychographic descriptions may include:	<ul style="list-style-type: none"> • activities • affiliations • attitudes • interests • lifestyle • opinions • political views • values
Positioning strategies may include:	<ul style="list-style-type: none"> • competitive positioning • conspicuous positioning • convenience of use • convenience to buy • image perceptions • market follower positions • market leader positions • Me-Too positioning • prestige and exclusive positioning • pricing • quality • repositioning • service positioning • uniqueness • value positioning
Marketing requirements may include:	<ul style="list-style-type: none"> • business-to-business marketing • direct marketing • ideas marketing • marketing of goods • public sector marketing • services marketing • telemarketing

Evidence Guide			
Critical aspects of Competence	Evidence of the following is essential: <ul style="list-style-type: none"> • developing a market positioning strategy that documents market segmentation, consumer profiling, targeting and strategies relevant to a product or service being offered to the marketplace 		
Underpinning Knowledge and Attitudes	Must demonstrate knowledge of: <ul style="list-style-type: none"> • data collection and analysis techniques • industry knowledge including: <ul style="list-style-type: none"> ➢ components of the marketing mix ➢ elements of marketing planning • marketing communications concepts and processes 		
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	<ul style="list-style-type: none"> • organizational structures, roles, responsibilities, business and marketing plans • product and service standards and best practice models • relevant legislation from all forms of government that may affect aspects of business operation in addition to those listed above, especially in relation to occupational health and safety, environmental issues, equal opportunity, industrial relations and anti-discrimination • statistical terms used by the Ethiopian Central Statistics Agency
Underpinning Skills	<p>Must demonstrate:</p> <ul style="list-style-type: none"> • creativity and innovation skills to select targeting and positioning strategies that meet organisation's requirements • culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects of business operations • literacy skills to prepare reports and to interpret internal and external marketing information • research skills to identify and analyse market segments and target markets
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 Marketing Operations Coordination Level IV	
Unit Title	Analyse Consumer Behaviour for Specific Markets
Unit Code	EIS MOC4 03 0812
Unit Descriptor	This unit describes the performance outcomes, skills and knowledge required to analyse consumer behaviour to target marketing to specific markets and specific needs.

Elements	Performance Criteria
1. Confirm product or service market	<p>1.1. Information on the market or market segment is gathered for a product or service in accordance with the marketing plan</p> <p>1.2. Consumer attributes are identified for the market or market segment from the market profile or existing customer data</p> <p>1.3. Features of the product or service are identified and tested in accordance with the marketing plan</p>
2. Assess the reasons for existing levels of consumer interest	<p>2.1. Consumer need is investigated for the product or service through analysis of trends and past performance</p> <p>2.2. Past marketing or positioning of a product or service is reviewed in relation to the effectiveness of its focus of appeal</p> <p>2.3. The impact of individual, social and lifestyle influences is assessed, tested and estimated on consumer behavior for a product or service</p> <p>2.4. Consumer responses are analyzed to previous marketing communications</p> <p>2.5. Organizational behavior capability to respond quickly to consumer demand is assessed for products or services in accordance with the marketing plan</p>
3. Recommend a focus of appeal for marketing strategies for a product or service	<p>3.1. Marketing strategies are ensured to address innate and acquired needs of consumers and appeal to the motives that influence decision making</p> <p>3.2. A rationale is presented for the focus of appeal that outlines how influences on consumer behavior will be used to target effective marketing strategies</p> <p>3.3. The focus of appeal ensured to meet legal and ethical obligations and the budgetary requirements of the marketing plan</p>

Variable	Range
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Information on the market or market segment may include:	<ul style="list-style-type: none"> • customer segments such as: <ul style="list-style-type: none"> ➤ active customers ➤ inactive customers ➤ former customers • demographics • existing product usage • lifestyle • non-customer segments such as: <ul style="list-style-type: none"> ➤ core prospects ➤ non-core prospects • social and cultural factors • values or attitude factors
Marketing may include:	<ul style="list-style-type: none"> • business-to-consumer marketing • business-to-business marketing • direct marketing • ideas marketing • marketing of goods • public sector marketing • services marketing • telemarketing
Individual influences may include:	<ul style="list-style-type: none"> • attitudes • beliefs • learning • past experience • perception • personality • self-image
Consumer responses may include:	<ul style="list-style-type: none"> • average order value • preferred frequency of contact • preferred medium of contact • preferred medium of response • preferred order size • preferred price point for typical purchase • preferred range of options within a single offer
Organizational behaviour may include:	<ul style="list-style-type: none"> • contract buying • group decision making • modified re-purchase • new purchases • re-purchase
Legal and ethical obligations may include:	<ul style="list-style-type: none"> • codes of practice • cultural expectations and influences • ethical principles • relevant legislation • policies and guidelines • regulations • social responsibilities such as: <ul style="list-style-type: none"> ➤ protection of children

	<ul style="list-style-type: none"> ➤ environmental issues • societal expectations
Social influences may include:	<ul style="list-style-type: none"> • culture • family background • family decision-maker/s • social class • socioeconomic factors
Lifestyle influences may include:	<ul style="list-style-type: none"> • aspirations • interests • leisure activities

Evidence Guide	
Critical aspects of Competence	<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> • documenting and presenting an analysis of consumer behaviour including recommendations on what marketing strategies should be developed to influence consumers to be more inclined to purchase a product or service • knowledge of relevant legislation
Underpinning Knowledge and Attitudes	<p>Must demonstrate knowledge of:</p> <ul style="list-style-type: none"> • key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects of business operations such as: <ul style="list-style-type: none"> ➤ anti-discrimination legislation and the principles of equal opportunity, equity, and diversity ➤ ethical principles ➤ privacy laws • industry and product or service knowledge • marketing communication concepts and processes • organizational structure, procedures and marketing objectives
Underpinning Skills	<p>Must demonstrate:</p> <ul style="list-style-type: none"> • culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • literacy skills to prepare reports with complex marketing concepts • research skills to investigate overall market trends, past product/service performance and consumer behaviour characteristics
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: Marketing Operations Coordination Level IV	
Unit Title	Conduct Market Research
Unit Code	EIS MOC4 04 0812
Unit Descriptor	This unit describes the performance outcomes, skills and knowledge required to conduct market research using interview and survey methodologies (not specialist statistical design and analysis) and to report on findings.

Elements	Performance Criteria
1. Conduct desk research to gather background market information	1.1. Initial desk research is conducted using appropriate sources to gather background market information 1.2. Options are identified for information collection and collation tools and methods 1.3. Approval is determined and sought for reporting formats for market research documentation 1.4. Initial research findings are reported in approved formats in accordance with organizational procedures
2. Develop research methodology and objectives	2.1. Hypotheses and research objectives are developed for market research 2.2. Options are identified for quantifying data 2.3. Market research methodology is identified and required survey tools determined, developed, tested and amended 2.4. Methods of data extraction, collation and analysis are determined and tested
3. Recruit respondents	3.1. Market research plans are interpreted to identify potential respondents and their requirements 3.2. Respondents are identified in line with research and organizational requirements 3.3. Respondents are recruited in line with the agreed research methodology and organizational requirements
4. Gather data and information from respondents	4.1. Resources for data gathering are prepared and arranged 4.2. Data and information are gathered using survey tools 4.3. Data and information gathered are recorded in approved formats, in accordance with organizational procedures 4.4. Survey information and data are stored and safeguarded in accordance with organizational procedures
5. Analyze research information	5.1. Checks are conducted on quality of data and information collected 5.2. Appropriate techniques are selected to summarize data

	<p>and information</p> <p>5.3. Software files are designed for entering data and information</p> <p>5.4. Data is processed using a method appropriate to research design</p> <p>5.5. Data and information including categorization are interpreted and aggregated, to provide observations relevant to research objectives</p>
6. Prepare research reports	<p>6.1. Findings are collated and assessed for relevance and usefulness to research objectives</p> <p>6.2. Research reports are prepared</p> <p>6.3. Research findings are communicated to relevant personnel and stakeholders in accordance with organizational procedures</p>

Variable	Range
Appropriate sources of background market information may include:	<ul style="list-style-type: none"> • published (including on the internet) data and information from: <ul style="list-style-type: none"> ➤ articles and advertisements ➤ business advisors ➤ clients and suppliers ➤ conferences ➤ government bodies ➤ industry associations and trade media ➤ other research projects ➤ reports from trade or professional associations annual reports ➤ reports to regulatory or funding bodies ➤ speeches • enterprise information such as: <ul style="list-style-type: none"> ➤ sales data ➤ attendance figures
Information collection and collation tools and methods may include:	<ul style="list-style-type: none"> • forms for recording information sources reviewed • procedures for abstracting key information and citing sources • rules for including or not including information and data reviewed
Reporting formats may include:	<ul style="list-style-type: none"> • prose reports • verbal presentations • visual aids, such as: <ul style="list-style-type: none"> ➤ charts ➤ photographs ➤ tables
Market research methodologies may include:	<ul style="list-style-type: none"> • brand equity research • brand name testing • concept testing

	<ul style="list-style-type: none"> • consumer decision process research • depth interviews • descriptive techniques • experimental techniques • focus groups • mystery shopping • observational techniques • projective techniques • qualitative research • quantitative research • random sampling
Survey tools may include:	<ul style="list-style-type: none"> • handouts • one-on-one discussions • overhead transparencies • questionnaires • small group discussions
Potential respondents may include:	<ul style="list-style-type: none"> • current, past or potential clients • key stakeholders • persons identified from lists or directories • staff
Research and organizational requirements may include:	<ul style="list-style-type: none"> • legal requirements • need for respondent to meet demographic or psychographic criteria • need for respondent to represent an organisation, have specific expertise or knowledge, or meet other criteria • quality assurance policy and procedures • requirements for statistical validity in sampling
Resources for data gathering may include:	<ul style="list-style-type: none"> • appropriate venues and rooms • organisation of tables, chairs, audio and visual equipment, refreshments • audio-visual recording and display devices • telecommunications equipment and facilities
Checks may include:	<ul style="list-style-type: none"> • ensuring data is: <ul style="list-style-type: none"> ➢ a true record of interview ➢ accurate ➢ adequately expressed ➢ authentic ➢ complete ➢ not fabricated • ensuring others collecting data and information have studied and understood instructions • keeping records on data sources, copyright and privacy information • rejecting inadequate data and resurveying to overcome gaps • reporting to senior personnel on issues and problems in data collection • where required, verifying records of interview with respondents

Appropriate techniques to summarise data may include:	<ul style="list-style-type: none"> • charts and tables • coefficient of variation • mean • median • mode • percentile • prose commentary • range • standard deviation • statistical analysis • statistical overview • variance
Software files may include:	<ul style="list-style-type: none"> • databases with specified forms and fields • spreadsheets with specified axes • word processing programs with specified heading structures, text and table formats
Interpreting and aggregating data and information may include:	<ul style="list-style-type: none"> • development of further hypotheses based on initial processing of raw data, and statistical tests of these hypotheses • bringing together data or datasets • statistical analysis of raw data using general or specialist software
Categorisation may include:	<ul style="list-style-type: none"> • creation of a preliminary report table of contents with headings and subheadings under which data and information could be organised • data tabulation in a format appropriate for the type of analysis to be performed • development of basic market segmentation categories by demographic or psychographic characteristics
Research reports may include:	<ul style="list-style-type: none"> • detailed data analysis • explanation of methodology • key observations and findings • key summaries of data • recommendation and implementation issues • recommendations for future research • references, citations and other correct acknowledgement for all non-original material

Evidence Guide	
Critical aspects of Competence	<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> • developing and implementing a market research survey tool • accurately recording and securely storing survey data in accordance with organizational procedures • utilising a range of methodologies to analyse market research information • documenting market research activities and findings in a research report.

Underpinning Knowledge and Attitudes	<p>Must demonstrate knowledge of:</p> <ul style="list-style-type: none"> • key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects of business operations such as: <ul style="list-style-type: none"> ➤ anti-discrimination legislation and principles of equal opportunity, equity, and diversity ➤ ethical principles ➤ privacy laws • marketing communications concepts and processes • market research principles and practices including: <ul style="list-style-type: none"> ➤ data processing methods and data analysis techniques ➤ design of samples ➤ development and use of hypotheses ➤ research reporting formats ➤ roles and uses of qualitative and quantitative research ➤ use of survey instruments • requirements of house or other style manuals or protocols for written communication
Underpinning Skills	<p>Must demonstrate:</p> <ul style="list-style-type: none"> • culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • information management skills to categorise, store and retrieve market research information • innovation and creativity skills to conceptualise, test and refine qualitative and quantitative questionnaires and other tools • literacy skills to prepare reports containing complex ideas • research and data collection skills to locate information sources, to design and analyse a market research strategy
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: Marketing Operations Coordination Level IV	
Unit Title	Conduct Pre-Campaign Testing
Unit Code	EIS MOC4 05 0812
Unit Descriptor	This unit describes the performance outcomes, skills and knowledge required to pilot an advertising campaign and to make adjustments that will maximise the effectiveness of the campaign.

Elements	Performance Criteria
1. Plan for pre campaign testing	1.1. Valid and reliable measurement tools are applied for testing aspects of the advertisement 1.2. Expected outcomes and targets are documented 1.3. The test group and timing of the pilot advertisement are selected in accordance with the advertising brief 1.4. Media placement is negotiated in accordance with budgetary and scheduling requirements
2. Pilot the advertisement	2.1. The advertisement is tested in accordance with the time and financial requirements of the advertising brief and budgetary requirements 2.2. Data collection is conducted in accordance with the requirements of the evaluation tool/s and the advertising brief
3. Utilize pre campaign test results	3.1. Test results are analyzed for their impact on the advertising campaign 3.2. Changes are made to the advertisement or media schedule in response to pre-test information, which meet the requirements of the advertiser 3.3. Options are provided for changes to advertisements and presented to the advertiser if required 3.4. Advertisements are amended, where necessary, so that they meet legal and ethical requirements

Variable	Range
Aspects of the advertisement to be tested may include:	<ul style="list-style-type: none"> • appeal • average cost per response • convenience of reply documents for consumer, such as: <ul style="list-style-type: none"> ➢ paper stock ➢ size of form ➢ spacing of blank lines • credibility • cultural acceptability • impact

	<ul style="list-style-type: none"> • interest-arousing • interpretation • memorability • message clarity • most profitable size or length of advertisement • product/brand identification • production techniques
Legal and ethical requirements may include:	<ul style="list-style-type: none"> • available nations' codes of practice • cultural expectations and influences • ethical principles • legislation • policies and guidelines • regulations • social responsibilities such as protection of children, environmental issues • societal expectations

Evidence Guide	
Critical aspects of Competence	<p>Assessment requires evidence that the candidate:</p> <ul style="list-style-type: none"> • demonstration of planning to test an advertising campaign • pilot testing of an advertisement • modifications made to an advertising campaign based on information gained during the testing process for at least one advertisement
Underpinning Knowledge and Attitudes	<p>Must demonstrate knowledge of:</p> <ul style="list-style-type: none"> • principles of advertising as it relates to the marketing mix • organizational advertising objectives and contents of the advertising, creative and media briefs • legal and ethical requirements for the advertising industry • type of media available for advertisements • identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as: <ul style="list-style-type: none"> ➢ anti-discrimination legislation ➢ consumer protection laws ➢ copyright legislation • ethical principles • fair trading laws <ul style="list-style-type: none"> ➢ privacy laws • techniques for evaluating advertising effectiveness
Underpinning Skills	<p>Must demonstrate skills to:</p> <ul style="list-style-type: none"> • communication skills to question, clarify and report on pre-campaign testing activities and results • literacy skills to interpret campaign evaluation requirements, and legal and ethical requirements • numeracy skills to analyse numerical and other data, and to

	<p>draw conclusions</p> <ul style="list-style-type: none"> • research skills to evaluate responses collected in testing • teamwork skills to collect test data in conjunction with colleagues • technology skills to use a wide range of software and equipment to conduct pre-campaign testing
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: Marketing Operations Coordination Level IV	
Unit Title	Address Customer Needs
Unit Code	EIS MOC4 06 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	1.1. Ensure customer needs are fully explored, understood and agreed 1.2. Available services and products are explained and matched to customer needs 1.3. Rights and responsibilities of customers are identified and communicated to the customer as appropriate
2. Satisfy complex customer needs	2.1. Possibilities are explained for meeting customer needs 2.2. Customers are assisted to evaluate service and/or product options to satisfy their needs 2.3. Preferred actions are determined and prioritized 2.4. Potential areas of difficulty are identified in customer service delivery and appropriate actions are taken in a positive manner
3. Manage networks to ensure customer needs are addressed	3.1. Effective regular communication is established with customers 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 3.3. Procedures are ensured 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 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 3.5. Records of customer interaction are maintained in accordance with organizational procedures

Variable	Range
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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>Must demonstrate 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 service relationships

	<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>Must demonstrate:</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 • 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	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: Marketing Operations Coordination Level IV	
Unit Title	Monitor Advertising and Production
Unit Code	EIS MOC4 07 0812
Unit Descriptor	This unit describes the performance outcomes, skills and knowledge required to monitor and report on pre-production, production and post-production work for advertisements.

Elements	Performance Criteria
1. Oversee pre-production work	<p>1.1. Printing, print production, electronic production specifications, schedule, budget, supplier/s and resource requirements are confirmed for pre-production activities</p> <p>1.2. Pre-production activities are monitored against scheduling and budgetary requirements and likely overruns are reported for action and approval in accordance with organizational policies and procedures</p> <p>1.3. The effect of a delay is estimated in pre-production and recommendations are made to re-schedule activities to meet the pre-production schedule in accordance with organizational policies and procedures</p>
2. Oversee production processes	<p>2.1. Specifications, production schedule, budget, supplier/s and resource requirements are confirmed</p> <p>2.2. Progress is monitored against production schedule and likely variations are identified in accordance with organizational policies and procedures</p> <p>2.3. Approvals are gained from relevant persons for schedule variations to production budget allocations in accordance with organizational policies and procedures if required</p>
3. Monitor post-production processes	<p>3.1. Specifications, schedule, budget, supplier/s and resource requirements are confirmed for post-production activities</p> <p>3.2. Post-production activities are monitored against scheduling and budgetary requirements and variations are reported likely for action and approval in accordance with organizational policies and procedures</p>
4. Produce monitoring reports	<p>4.1. Monitoring reports which contain details of progress are produced for pre-production, production and post-production activities</p> <p>4.2. Monitoring reports which meet organizational requirements are produced in terms of language, format, content, and level of detail</p> <p>4.3. Monitoring reports are provided within the required timeframe</p>

Variable	Range		
Printing specifications may include:	<ul style="list-style-type: none"> • art reproduction, including: <ul style="list-style-type: none"> ➤ halftones ➤ line art ➤ photography ➤ screens • binding/finishing • colour reproduction, including: <ul style="list-style-type: none"> ➤ color register/s ➤ color separation ➤ digital color reproduction ➤ process color ➤ spot color • composition • typesetting 		
Print production specifications may include:	<ul style="list-style-type: none"> • computer software programs • desktop publishing • flexography • inkjet printing • letterpress • offset lithography • pre-print production processes • rotogravure • silk screen 		
Electronic production specifications may include:	<ul style="list-style-type: none"> • film • live recording • sound recording • video • website involving sound, graphics, animation 		
Pre-production activities may include:	<ul style="list-style-type: none"> • artwork • graphics • imposition • music • receipt and review of advertising copy • receipt of visual elements and layout • rehearsals • scripts • set construction • storyboards 		
Production schedule may include:	<ul style="list-style-type: none"> • film or video shooting • pre-production, production and post-production work • print 		
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	<ul style="list-style-type: none"> • sound recording • website development
Post-production activities may include:	<ul style="list-style-type: none"> • assembling scenes • dialogue synchronisation • editing • Foley • sound mixing • special effects

Evidence Guide	
Critical aspects of Competence	<p>Assessment requires evidence that the candidate:</p> <ul style="list-style-type: none"> • confirmation of specifications for production activities • monitoring of the pre-, during and post-production activities for creation for at least one advertisement • producing reports on pre-production, production and post-production monitoring activities for at least one advertisement • formulation of recommendations to re-schedule activities in the event of production delays
Underpinning Knowledge and Attitudes	<p>Must demonstrate knowledge of:</p> <ul style="list-style-type: none"> • legal and ethical requirements for the advertising industry • principles of advertising as it relates to the marketing mix • identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as: <ul style="list-style-type: none"> ➢ anti-discrimination legislation ➢ consumer protection laws ➢ copyright legislation • ethical principles • fair trading laws <ul style="list-style-type: none"> ➢ privacy laws ➢ codes of practice related to advertising • role/s of production personnel • techniques and production processes for radio, television and cinema, print and websites
Underpinning Skills	<p>Must demonstrate skills to:</p> <ul style="list-style-type: none"> • communication skills to question, clarify and report while conducting monitoring activities • literacy skills to read schedules and to write reports • numeracy skills to read budgets and compare actual versus budgeted expenditure • teamwork skills to work with colleagues to achieve production

	<p>objectives</p> <ul style="list-style-type: none"> • technology skills to use a wide range of software and equipment to monitor the production of advertisements
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: Marketing Operations Coordination Level IV	
Unit Title	Develop Product Knowledge
Unit Code	EIS MOC4 08 0812
Unit Descriptor	This unit describes the performance outcomes, skills and knowledge required to develop product knowledge in preparation for the sales process.

Elements	Performance Criteria
1. Acquire knowledge of products in a specified area	1.1. Information sources about products are identified in a specified area and evaluated for reliability and validity 1.2. Product purpose/s and use/s are identified 1.3. Key features of the product/s are identified 1.4. Product strengths and weaknesses are identified 1.5. Guarantees and warranties are articulated and service support details are identified
2. Convert product knowledge into benefits	2.1. Features of the product which have potential buyer appeal are identified 2.2. Features of the product which have buyer appeal are presented as benefits to the buyer 2.3. Product benefits are presented within the context of organizational requirements and legislation
3. Evaluate competitors' products	3.1. A range of information sources are used to identify competitors' products 3.2. Features, benefits, strengths and weaknesses of competitors' products are compared with own products 3.3. Relative standing of the organization's product is established with the competitors' product/s and differences are communicated to the buyer

Variable	Range
Information sources may include:	<ul style="list-style-type: none"> • associations • catalogues • claims of competitive sales people • competitor websites • competitor sales literature • external sales data sources such as warehouse withdrawals • internal sales data records • other company personnel • sales conventions • trade association magazines

	<ul style="list-style-type: none"> • trade shows
Products may include:	<ul style="list-style-type: none"> • goods • ideas • services
Features may include:	<ul style="list-style-type: none"> • brand • colour • country of origin • covenant • manufacturer • product care details • safety aspect • shelf life • size • style • warnings
Organizational requirements may include:	<ul style="list-style-type: none"> • level of client service required • policies and procedures which are formally documented and are available for reference within the workplace

Evidence Guide	
Critical aspects of Competence	<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> • comparison of the key features and benefits of product/s with competitor offerings • demonstration of product knowledge offered by an organisation • presentation of key features and benefits of own product/s.
Underpinning Knowledge and Attitudes	<p>Must demonstrate knowledge of:</p> <ul style="list-style-type: none"> • features, benefits, strengths and weaknesses of own organisation's and competitors' products • industry competitors, trends and developments • organizational structure/s, roles and responsibilities, policies, procedures, product labelling and descriptions • potential buyer markets • processes used when buying and selling products and services • identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as: <ul style="list-style-type: none"> ➤ anti-discrimination ➤ consumer protection ➤ contract law legislation • ethical principles <ul style="list-style-type: none"> ➤ privacy laws

Underpinning Skills	<p>Must demonstrate skills to:</p> <ul style="list-style-type: none"> • information management skills to summarise information verbally and non-verbally • literacy and numeracy skills to interpret sales data and to summarise information obtained from a variety of verbal and non-verbal sources
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: Marketing Operations Coordination Level IV	
Unit Title	Build Client Relationships and Market Networks
Unit Code	EIS MOC4 09 0812
Unit Descriptor	This unit describes the performance outcomes, skills and knowledge required to establish, maintain and improve client relationships, and to actively participate in networks to support attainment of key Market outcomes.

Elements	Performance Criteria
1. Initiate interpersonal communication with clients	<p>1.1. Preferred client communication styles and methods are identified and used</p> <p>1.2. Rapport with clients is established using verbal and non-verbal communication processes</p> <p>1.3. Opportunities are investigated and acted upon to offer positive feedback to clients</p> <p>1.4. Open questions are used to promote two-way communication</p> <p>1.5. Potential barriers to effective communication are identified and acted upon with clients</p> <p>1.6. Communication processes which relate to client needs, preferences and expectations are initiated</p>
2. Establish client relationship management strategies	<p>2.1. Client loyalty objectives focusing on the development of long term business partnerships are developed</p> <p>2.2. Client profile information is assessed to determine approach</p> <p>2.3. Client loyalty strategies are developed to attract and retain clients in accordance with the business strategy</p> <p>2.4. Client care and client service standards are identified and applied</p>
3. Maintain and improve ongoing relationships with clients	<p>3.1. Strategies to obtain ongoing feedback are developed from clients to monitor satisfaction levels</p> <p>3.2. Strategies are developed to elicit feedback which provide information in a form that can be used to improve relationships with clients</p> <p>3.3. Feedback is obtained to develop and implement strategies which maintain and improve relationships with clients</p>
4. Build and maintain networks	<p>4.1. Time is allocated to establish and maintain business contacts</p> <p>4.2. Business associations and/or professional development activities are participated to establish and maintain a network of support for the market and to enhance personal</p>

	<p>knowledge of the market</p> <p>4.3. Communication channels are established to exchange <i>information and ideas</i></p> <p>4.4. Information is provided, sought and verified to the network</p>
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Variable	Range
Preferred client communication styles and methods may include:	<ul style="list-style-type: none"> • email • face-to-face • mail • phone
Verbal communication may include:	<ul style="list-style-type: none"> • articulation • clarity of speech • feedback • language • listening skills • open questions • questioning skills • voice modulation • voice projection
Non-verbal communication may include:	<ul style="list-style-type: none"> • active listening • body language • body orientation • clothing • colour • distance • facial expression • grooming • gestures • music • posture • sound • touching • voice
Barriers to effective communication may include:	<ul style="list-style-type: none"> • acting on false assumptions and stereotypes • cultural differences not being addressed • educational differences not being addressed • failure to prominently display contact details in all communications provided to the client • inappropriate word choice • ineffective non-verbal communication • lack of 'contact us' forms or pages on websites • lack of distribution of reply paid cards or envelopes in mail outs • lack of voice modulation and articulation • limited opening hours of call centres or office

	<ul style="list-style-type: none"> • not listening actively • organizational factors • physical, personal, gender and age differences not being addressed
Client loyalty strategies include:	<ul style="list-style-type: none"> • access to dedicated staff • added value offers • anniversary offers • client clubs • client reward schemes • credit or discount facilities • dedicated or private facilities • discounts • formal letter of thanks • frequent purchaser programs • handwritten note thanking the client • offering promotional items • phone call thanking client for the business • regular re-contact with best clients • thank you gifts and promotions
Client care and client service standards may include:	<ul style="list-style-type: none"> • accuracy of billing • accuracy of product/service descriptions, specifications in marketing communications • complaint resolution times • incidences of stock outs and back orders • on-hold times • order delivery standards such as: <ul style="list-style-type: none"> ➢ whether right product or service was delivered ➢ delivered to right person or address ➢ delivered on time ➢ politeness, helpfulness and grooming of delivery staff ➢ delivery vehicles parked properly ➢ cleanliness of delivery vehicles • shipment tracking services • telephone answering times and responses
Strategies to obtain ongoing feedback may include:	<ul style="list-style-type: none"> • including 'comments and queries' or 'bouquets and brickbats' on all order forms • complaints handling procedures • email • letter • soliciting complaints • surveys of current clients • surveys of lapsed clients to determine reason/s for ceasing to buy • telephone interviews • training staff to ask open questions about product or service levels

Business associations may include:	<ul style="list-style-type: none"> • chambers of commerce • industry associations • institutes • professional bodies • societies
Professional development activities may include:	<ul style="list-style-type: none"> • demonstrations • exhibitions • fairs • industry information seminars • industry training • pre-launch activities • technical information briefings • trade shows
Networks may include:	<ul style="list-style-type: none"> • business • formal • groups • individuals • informal • organisations • personal
Information and ideas may include:	<ul style="list-style-type: none"> • changes in the environment • changing customer requirements • information on competitors' activities • personal, professional or business support

Evidence Guide	
Critical aspects of Competence	<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> • establishing and maintaining relationships with a range of clients related to the candidate's market • participating in and providing, an active contribution to a marketing related network
Underpinning Knowledge and Attitudes	<p>Must demonstrate knowledge of:</p> <ul style="list-style-type: none"> • key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects business operations, such as: <ul style="list-style-type: none"> ➢ anti-discrimination legislation ➢ consumer laws ➢ ethical principles ➢ privacy laws • marketing communications concepts and processes • principles and techniques for effective communication and networking • sources of business related networks
Underpinning Skills	<p>Must demonstrate skills to:</p> <ul style="list-style-type: none"> • communication skills to determine client needs and preferences through active listening and presenting ideas clearly and precisely

	<ul style="list-style-type: none"> • culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • interpersonal skills to establish rapport, and to build and maintain relationships with clients
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: Marketing Operations Coordination Level IV	
Unit Title	Identify and Plan Sales Prospects
Unit Code	EIS MOC4 10 0812
Unit Descriptor	This unit describes the performance outcomes, skills and knowledge required to identify potential sales prospects by applying prospecting methods, and to manage own sales performance by establishing a sales plan and managing stress, time and sales-related paperwork.

Elements	Performance Criteria
1. Employ prospecting methods and qualify prospects	<p>1.1. The strengths and limitations of a range of primary and secondary prospecting methods are identified, considered and evaluated</p> <p>1.2. Prospecting methods are selected to match the market to which the product or service is targeted</p> <p>1.3. Present, previous and new clients are targeted through chosen prospecting methods</p> <p>1.4. Criteria is researched and established for qualifying leads according to buyer accessibility, buyer motives, product affordability, purchase authority, legal compliance and return for the seller</p> <p>1.5. Ensure the established criteria represent a standard against which the buying potential of individuals and groups is gauged</p>
2. Manage prospect information	<p>2.1. A system is developed and implemented for recording prospect information</p> <p>2.2. The effectiveness of the system is monitored and evaluated for recording prospect information</p> <p>2.3. The system is refined for recording prospect information based on evaluation</p>
3. Establish an individualized sales plan	<p>3.1. Individual sales goals and quotas are established to focus work activities based on organizational sales and marketing objectives</p> <p>3.2. Consultation and communication structures are established with clients and supervisors</p> <p>3.3. An individualized sales plan is planned and documented to achieve sales goals and quotas within a work system that is constructed against clear timeframes</p> <p>3.4. Sales plan is monitored and adjusted in relation to established goals and quotas</p>

	3.5. Sales plan and adjust are evaluated where necessary
4. Complete sales paperwork and reports	<p>4.1. A system is established to collect, record and organize data associated with the sales process</p> <p>4.2. Routine reports are completed at regular intervals according to organizational requirements</p> <p>4.3. Available technology is used to facilitate record keeping and production of sales reports</p>
5. Organize workload effectively	<p>5.1. Routines are established to provide structure for work and to manage workload</p> <p>5.2. Time is allocated for specific work tasks and unanticipated events and activities</p> <p>5.3. An analysis of the time spent on work-related activities is conducted and time spent on tasks is adjusted if required</p> <p>5.4. Time-management strategies are applied to minimize non-productive sales activities</p> <p>5.5. Tasks are delegated to individuals or sales team members to share workload as appropriate</p> <p>5.6. Symptoms of stress are monitored and a plan is established to reduce stress</p>

Variable	Range
Prospecting methods may include:	<ul style="list-style-type: none"> • brokers • cold canvassing • databases • direct mail • internet • intra-organizational leads • journals • magazines • media advertising • networking • newspapers • personal observation • public records • referrals • spotters • telemarketing
Clients may include:	<ul style="list-style-type: none"> • consumers • customers • members • patients • members of other business units within an organisation • other work teams within an organisation

	<ul style="list-style-type: none"> • person or organisation who receives or has the potential to receive products, services or ideas supplied by the organisation
Buyer motives may include:	<ul style="list-style-type: none"> • browsing • buying for unqualified prospect e.g. dependant child • gift • housekeeping • replacement item • self-reward • self-gratification
Available technology may include:	<ul style="list-style-type: none"> • databases • email • spreadsheets • word processing software packages • other computer applications
Work tasks may include:	<ul style="list-style-type: none"> • administrative tasks • face-to-face selling • sales preparation • service calls • travelling
Symptoms of stress may include:	<ul style="list-style-type: none"> • anxiety • changed eating habits • difficulty concentrating • fear of criticism or disapproval • feeling overworked or overloaded • feeling tense or on edge • feeling tired • feeling unclear about roles and responsibilities • feeling weak or easily exhausted • increased consumption of alcohol • nervousness • restlessness • trembling or shaking • worry

Evidence Guide

Critical aspects of Competence	<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> • demonstration of the use and management of different prospecting methods targeting a present, previous and new client • research and establishment of criteria used in qualifying leads identified through prospecting methods • recording, storage and retrieval of prospect information • development and documentation of a sales plan for a specified time period, including: <ul style="list-style-type: none"> ➤ sales goals ➤ quotas
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	<ul style="list-style-type: none"> ➤ monitoring and evaluation strategies ➤ organization of own workload
Underpinning Knowledge and Attitudes	<p>Must demonstrate knowledge of:</p> <ul style="list-style-type: none"> • information management strategies used to manage prospect and sales data • key principles associated with self-management • overview knowledge to identify key provisions of relevant legislation, codes of practice and national standards that affect business operations as they relate to sales, such as: <ul style="list-style-type: none"> ➤ anti-discrimination ➤ ethical principles ➤ consumer protection ➤ contract law ➤ privacy laws • prospecting methods used in the sales process • principles of buyer motives • strategies and techniques to prevent and manage stress
Underpinning Skills	<p>Must demonstrate skills to:</p> <ul style="list-style-type: none"> • learning skills to evaluate effectiveness of sales plan and make improvements to contribute to the organisation's operations and outcomes • literacy and information management skills to collect, record and organise data to: <ul style="list-style-type: none"> ➤ establish a sales plan ➤ complete sales reports • planning skills to establish, monitor and adjust sales plan as required • research and data analysis skills to determine prospect requirements • self-evaluation skills to identify symptoms of negative stress • technological skills to use a range of software and business equipment to: <ul style="list-style-type: none"> ➤ collect and record prospect and sales information ➤ design and record formats to facilitate information storage and retrieval • self-management skills to manage own performance and set priorities • time-management skills to: <ul style="list-style-type: none"> ➤ meet sales time lines ➤ sequence tasks ➤ set priorities
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	Competency may be assessed in the work place or in a

Assessment	simulated work place setting
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Occupational Standard: Marketing Operations Coordination Level IV	
Unit Title	Present, Secure and Support Sales Solutions
Unit Code	EIS MOC4 11 0812
Unit Descriptor	This unit describes the performance outcomes, skills and knowledge required to present sales solutions that respond to the specific buying needs of a client, and to use sales processes associated with securing prospect commitment to proceed with a sale. The unit also includes attending to post-sales activities that build and strengthen the partnership between a salesperson and the client, and enhance the prospect of future sales.

Elements	Performance Criteria
1. Prepare for a sales presentation	1.1. Products, ideas and services are obtained and organized for use within a sales presentation 1.2. Product information is reviewed to ensure familiarity with products 1.3. Sales tactic options are identified, assessed and chosen in terms of their ability to meet the needs and preferences of the prospect 1.4. A variety of sales solutions is considered and prepared to meet buyer needs 1.5. Sales aids are identified and selected 1.6. Alternatives are identified for prospects and assessed in relation to anticipated buyer needs
2. Present a sales solution	2.1. Gestures, posture, body language, facial expressions and voice are used to create a supportive selling environment 2.2. Listening skills and open-ended questions are used to identify buyer needs, preferences, motives and objections 2.3. Presentation is adjusted to match the needs and preferences of the buyer 2.4. Persuasive communication techniques are used to secure buyer interest 2.5. The presentation is ensured to demonstrate and communicate the key features of the product and emphasizes benefits in relation to identified buyer needs 2.6. Proof of benefits is obtained and presented through product purchase 2.7. Sales aids are used to build buyer understanding of how the product is aligned with needs
3. Respond to buyer signals	3.1. Verbal and non-verbal buying signals are identified and

	<p>assessed</p> <p>3.2. Probing is used to identify source of buyer resistance</p> <p>3.3. The strengths and limitations of buyer resistance strategies are identified</p> <p>3.4. A strategy is selected and implemented for managing buyer resistance</p> <p>3.5. Trial closes are used strategically during different stages of the sales process</p>
4. Negotiate and finalize the sale	<p>4.1. Formal close is initiated to the sales process following one or more trial closes</p> <p>4.2. A strategy is selected to close the sale and supportive and confirming language are used to support the closure of the sales process</p> <p>4.3. Conditions of the agreement, outline a summary of the agreement are negotiated to the buyer, and the buyer's decision confirmed</p> <p>4.4. Advice on financing arrangements is provided if required</p> <p>4.5. Sales documents, and process are prepared and completed and client order is monitored</p> <p>4.6. Cross-selling opportunities are identified and presented to the buyer</p>
5. Support post-sale activities	<p>5.1. Ensure contact is made with the buyer post-sale to ensure agreed expectations have been met</p> <p>5.2. Technical assistance or advice is provided and clients are assisted to access appropriate after-sales support</p> <p>5.3. Feedback solicitation methods are used on the sales process and product satisfaction</p> <p>5.4. Service problems and difficulties identified are addressed and resolved through feedback</p> <p>5.5. Client loyalty strategies are developed and implemented to secure buyer loyalty and ongoing contact is facilitated</p> <p>5.6. Additional sales solutions and benefits are offered and implemented to clients when opportunities arise</p>

Variable	Range
Sales aids may include:	<ul style="list-style-type: none"> • drawings • electronic media • graphs • models • photographs • printed materials • products

	<ul style="list-style-type: none"> • product samples • transparencies • whiteboards
Proof of benefits may include:	<ul style="list-style-type: none"> • anecdotes and examples • comparisons • statistics • testimonials
Verbal buying signals of the prospect may include:	<ul style="list-style-type: none"> • confirmations • questions • statements of requirement
Non-verbal buying signals of the prospect may include:	<ul style="list-style-type: none"> • close examination of the product • moving closer to where a product is to be installed • smiling and nodding
Source of buyer resistance may include:	<ul style="list-style-type: none"> • company resistance • no perceived need • price resistance • salesperson resistance • service dissatisfaction • timing issues • uncertainty about the product
Buyer resistance strategies may include:	<ul style="list-style-type: none"> • assertive messages • boomerang • checking perceptions • direct denial • incentives offer • indirect denial • requesting additional information from buyers • open and closed questions • superior benefit • trial offer
Formal close may include:	<ul style="list-style-type: none"> • inducement • narrative close • offering alternative choices • salesperson request to the prospect to agree to purchase the product or service • summary of product benefits
Conditions may include:	<ul style="list-style-type: none"> • client loyalty • delivery • length of contract • payment options • price
Feedback solicitation methods may include:	<ul style="list-style-type: none"> • email dialogue • focus groups • one-on-one interviews • surveys

	<ul style="list-style-type: none"> • telephone interviews
Client loyalty strategies may include:	<ul style="list-style-type: none"> • client clubs • client reward schemes • credit or discount facilities • formal letter of thanks • handwritten note thanking the client • offering promotional items • phone call thanking the client for the business

Evidence Guide	
Critical aspects of Competence	<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> • demonstration of principles of effective sales presentation mix and sales closure techniques through presentation of a sales solution • demonstration of support for post-sale activities
Underpinning Knowledge and Attitudes	<p>Must demonstrate knowledge of:</p> <ul style="list-style-type: none"> • detailed product knowledge, including product: <ul style="list-style-type: none"> ➢ advantages and disadvantages ➢ features ➢ service benefits • identification and overview knowledge of key provisions of relevant legislation and codes of practice that relate to sales, for example: <ul style="list-style-type: none"> ➢ anti-discrimination ➢ ethical principles ➢ consumer protection ➢ contract law ➢ privacy laws • materials and aids that support presentations • organizational policies and procedures relating to orders and client services • principles of achieving an effective sales presentation mix • statistical methods to demonstrate sales performance • strategies to manage client accounts, to build client goodwill and to develop client loyalty
Underpinning Skills	<p>Must demonstrate skills to:</p> <ul style="list-style-type: none"> • learning skills to develop and maintain knowledge of products, ideas and services for use within a sales presentation • literacy and numeracy skills to: <ul style="list-style-type: none"> ➢ prepare sales documentation ➢ process sales transactions ➢ calculate financing arrangements ➢ keep client sales records ➢ use sales statistics to support a verbal argument • organizational and time-management skills to schedule follow-up contacts • verbal communication skills to: <ul style="list-style-type: none"> ➢ demonstrate how product benefits and key features fulfill

	<p>buyers' needs</p> <ul style="list-style-type: none"> ➤ develop rapport and build relationships with clients ➤ manage conflict and customer dissatisfaction ➤ negotiate to manage buyer resistance ➤ question clients to determine client needs and preferences ➤ use persuasive and assertive language in promoting product features and benefits ➤ technological skills to use equipment to assist in presenting sales information
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: Marketing Operations Coordination Level IV	
Unit Title	Implement Customer Service Standards
Unit Code	EIS MOC4 12 0812
Unit Descriptor	This unit describes the performance outcomes, skills and knowledge required to contribute to quality customer service standards, and to support personnel to implement customer service standards and systems within the organisation. Operators undertaking this unit would have a detailed knowledge of, and experience in, customer service systems and procedures.

Elements	Performance Criteria
1. Contribute to quality customer service standards	<p>1.1 Customer service standards are accessed, interpreted, applied and monitored in the workplace according to organizational standards, policies and procedures</p> <p>1.2 Contributions are made to the development, refinement and improvement of customer service standards, policies and processes</p>
2. Implement customer service systems	<p>2.1 All personnel are encouraged to consistently implement customer service systems</p> <p>2.2 Customer feedback is reviewed in consultation with appropriate personnel and analysed when improving work practices</p> <p>2.3 Customer service problems are identified and adjustments made to ensure continued service quality</p> <p>2.4 Adjustments in service delivery are communicated to all those involved, within appropriate timeframes</p> <p>2.5 Delivery of services and products is coordinated and managed to ensure they effectively and efficiently meet agreed quality standards</p>
3. Implement team customer service standards	<p>3.1 Team and work activities are planned and implemented to meet customer needs and expectations, and to minimise inconvenience</p> <p>3.2 Resources required to undertake team tasks are identified while meeting required customer service levels</p>

Variable	Range
Customers may include:	<ul style="list-style-type: none"> • customers with routine or special requests • internal and external customers • people from a range of social, cultural or ethnic backgrounds • people who may be unwell, drug affected or emotionally distressed

	<ul style="list-style-type: none"> • people with varying physical and mental abilities • regular and new customers
Organizational standards, policies and procedures may include:	<ul style="list-style-type: none"> • continuous quality improvement cycle – plan/do/check/act • procedural manuals • product and service manuals, labels, instructions • quality systems, standards and guidelines • requirements for staff appearance and presentation
Customer service problems may include:	<ul style="list-style-type: none"> • breakages or faults • damaged stock • delays in delivery of products or services • missing parts or components • poor service • provision of poor advice or information

Evidence Guide			
Critical aspects of Competence	Assessment requires evidence that the candidate: <ul style="list-style-type: none"> • compliance with customer service system and standards • recommendations about how the standards can be improved or adapted to better meet the needs of the organisation and the customers • knowledge of customer service models 		
Underpinning Knowledge and Attitudes	Must demonstrate knowledge of: <ul style="list-style-type: none"> • detailed product and service knowledge • models of customer service • relevant organizational procedures and standards for customer service relationships 		
Underpinning Skills	Must demonstrate skills to: <ul style="list-style-type: none"> • communication skills to: <ul style="list-style-type: none"> ➢ direct others with regard to customer services standards ➢ explain the system and standards to the work team • information management skills to summarise information verbally and non-verbally • literacy and numeracy skills to: <ul style="list-style-type: none"> ➢ interpret product and service features or sales data ➢ read a variety of texts to prepare general information and papers ➢ summarize information obtained from a variety of verbal and non-verbal sources ➢ write formal and informal text • numeracy skills to analyse data, and to compare time lines and promotional costs against budgets • problem-solving skills to: <ul style="list-style-type: none"> ➢ address problems and ensure service standards are met ➢ develop solutions unique to a customer ➢ modify customer service standards when required • self-management skills to: <ul style="list-style-type: none"> ➢ comply with policies and procedures ➢ seek learning and development opportunities 		
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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: Marketing Operations Coordination Level IV	
Unit Title	Conduct Electronic Marketing Communications
Unit Code	EIS MOC4 13 0812
Unit Descriptor	This unit describes the performance outcomes, skills and knowledge required to prepare electronic advertisements for use in Internet, email or facsimile marketing communications, and to evaluate their effectiveness in achieving marketing objectives.

Elements	Performance Criteria
1. Prepare electronic advertisements	<p>1.1. Media is chosen for electronic advertisements in accordance with the organization's marketing (or e-marketing) strategy</p> <p>1.2. Multiple marketing channels are selected to optimize marketing effort</p> <p>1.3. Ensure copy and design elements communicate the desired image, features and benefits of the products or services, and suit the characteristics of the chosen media</p> <p>1.4. Each element of the advertisement is positioned and sized to achieve balance and focus</p> <p>1.5. Ensure typeface selections suit the product, the chosen media and the central message of the advertisement, and that the layout achieves balance in its elements including white space and margins</p> <p>1.6. Ensure any added sound, animation or graphics enhance the content of advertisements and do not distract from the message</p> <p>1.7. Ensure advertisements meet the requirements of the marketing strategy and legal and ethical requirements</p>
2. Use business website as e marketing tool	<p>2.1. Website marketing objectives are identified in the organization's marketing (or e-marketing) strategy and plan</p> <p>2.2. Ensure the website design meets objectives and conveys the required image of the business and the features and benefits of its products or services</p> <p>2.3. Ensure the website content, site map, navigation buttons, frames and multiple pages are in accordance with the marketing strategy and plan</p> <p>2.4. Ensure the website incorporates data recording, contacts and feedback mechanisms to allow evaluation of the website as a marketing tool</p>
3. Use electronic marketing	<p>3.1. The required media vehicles and website hotlinks are identified for electronic advertisements, and contracts are negotiated for website development where necessary to</p>

	<p>meet the requirements of the marketing strategy, budget and legal and ethical requirements</p> <p>3.2. Marketing channels are promoted to identified target market segments</p> <p>3.3. Electronic advertisements are placed or disseminated in accordance with the marketing strategy, media contracts and legal and ethical requirements</p>
4. Monitor and evaluate results of e marketing	<p>4.1. The transmission of the electronic advertisements or other e-marketing products is monitored and any errors or omissions are rectified</p> <p>4.2. Measures of effectiveness are developed for e-marketing advertisements and effectiveness is monitored</p> <p>4.3. The effectiveness of e-marketing advertisements is evaluated against measures of effectiveness and outcomes are recorded in accordance with organizational requirements</p> <p>4.4. Outcomes of evaluation activities and other feedback are used from marketing channels to plan for improvements to electronic marketing strategies and products</p>

Variable	Range
Media may include:	<ul style="list-style-type: none"> • bulletins • chat rooms • email • facsimiles • websites
Electronic advertisements may include:	<ul style="list-style-type: none"> • auto responders • banner exchanges • bulk email • e-zine (electronic magazine distributed or accessed via a file server) and webzine (web-site distributed electronic magazine) advertising • e-zine and webzine publishing as a marketing tool • free or paid classifieds • news groups • search engine submission • web rings
Legal and ethical requirements may include:	<ul style="list-style-type: none"> • codes of practice • confidentiality • cultural expectations and influences • ethical principles • legislation • policies and guidelines • privacy • regulations

	<ul style="list-style-type: none"> • social responsibilities e.g. protection of children, environmental considerations • societal expectations
Measures of effectiveness may include:	<ul style="list-style-type: none"> • attitude measurements • awareness measurements • customer satisfaction ratings • inquiry measurements • media vehicle audience measurements • opinion measurements • readership measurements • recall measurements • sales measurements

Evidence Guide	
Critical aspects of Competence	<p>Assessment requires evidence that the candidate:</p> <ul style="list-style-type: none"> • developing at least one electronic advertisement for a product or service using electronic media to convey marketing communications consistent with an organizational marketing strategy and objectives • monitoring and evaluating the results of electronic advertisements and marketing
Underpinning Knowledge and Attitudes	<p>Must demonstrate knowledge of:</p> <ul style="list-style-type: none"> • overview knowledge of key provisions of relevant legislation from all levels of government, codes of practice and national standards that affect business operations such as: <ul style="list-style-type: none"> ➢ confidentiality requirements ➢ copyright laws ➢ defamation laws ➢ anti-discrimination legislation and principles of equal opportunity, equity, and diversity • industry products and services knowledge • intellectual property requirements • organizational structure, roles and responsibilities • principles of marketing and advertising • software applications used in conducting electronic advertising and marketing
Underpinning Skills	<p>Must demonstrate skills to:</p> <ul style="list-style-type: none"> • creativity and innovation skills for graphic and multimedia design to create advertisements • culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • literacy skills to interpret marketing, advertising and creative requirements and create e-advertisements • technology skills to use a range of computer equipment and software used in conducting electronic marketing, accessing the Internet and using multimedia applications
Resources Implication	<p>Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to</p>
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	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: Marketing Operations Coordination Level IV	
Unit Title	Identify Risk and Apply Risk Management Processes
Unit Code	EIS MOC4 14 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 organisation 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 is identified for risk management 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 are referred to others 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/are 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	<ul style="list-style-type: none"> any related projects or organisations

include:	<ul style="list-style-type: none"> • any resources, including physical assets, which are vital to operations • key operational elements and service of the organisation • organisation or project, how it is organised and its capabilities • own role and responsibilities in relation to overall project or organisation 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 organisation and contextualised for sections of the workplace's operations, such as checklists and testing procedures • tools to prioritise 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 organisation or project • extreme, requiring immediate action, as it has potential to be devastating to the organisation 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 ➢ 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>Must demonstrate knowledge of:</p> <ul style="list-style-type: none"> • National 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>Must demonstrate 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: Marketing Operations Coordination Level IV	
Unit Title	Write Complex Documents
Unit Code	EIS MOC4 15 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 are determined 1.2. Appropriate formats are chosen for documents 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 are identified in required data and information 2.5 Additional material is collected from relevant enterprise personnel 2.6 Text is drafted according to document requirements and genre 2.7 Language appropriate to the audience is used
3. Prepare final text	3.1. Draft text is reviewed to ensure document objectives are achieved and requirements are met 3.2. Grammar, spelling and style are checked for accuracy and punctuation 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 are chosen for documents appropriate to audience and purpose

	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

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 organisation about reporting • file types and sizes for online documents • 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 use of technical language
Categories and logical sequences of data, information and knowledge may include:	<ul style="list-style-type: none"> • arguments and rebuttals • categories and sequences traditionally used for the particular type of document being prepared • chronological, alphabetical or operating sequences • facts, observations, conclusions and recommendations

	<ul style="list-style-type: none"> • 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 'A' section/ 'team A' 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	Must demonstrate knowledge of: <ul style="list-style-type: none"> • enterprise 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
Underpinning Skills	Must demonstrate skills to: <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, organised 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	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: Marketing Operations Coordination Level IV	
Unit Title	Plan and Organize Work
Unit Code	EIS MOC4 16 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

	<ul style="list-style-type: none"> • 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	<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: Marketing Operations Coordination Level IV	
Unit Title	Migrate to New Technology
Unit Code	EIS MOC4 17 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	<p>Demonstrate knowledge of:</p> <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	<p>Demonstrate skills of:</p> <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	<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: Marketing Operations Coordination Level IV

Unit Title	Establish Quality Standards
Unit Code	<u>EIS MOC4 18 0812</u>
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 requirements 5.3 Work is conducted to produce required outcomes

	<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-today 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: Marketing Operations Coordination Level IV	
Unit Title	Develop Individuals and Team
Unit Code	EIS MOC4 19 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>

	4.3 Mutual concern and camaraderie are developed in the team
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 • Work experience and involvement in professional networks • Conference and seminar attendance

Evidence Guide

Critical Aspects of

Demonstrates skills and knowledge in:

Competence	<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	<p>Competence may be assessed in the work place or in a simulated work place setting.</p>

Occupational Standard: Marketing Operations Coordination Level IV	
Unit Title	Utilize Specialized Communication Skills
Unit Code	EIS MOC4 20 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	<p>May include but is not limited to:</p> <ul style="list-style-type: none"> • Recognizing own limitations • Utilizing techniques and aids • Providing written drafts • Verbal and non verbal communication
Effective group interaction	<p>May include but is not limited to:</p> <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	<p>May include but is not limited to:</p> <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	<p>May include but is not limited to:</p> <ul style="list-style-type: none"> • Related to staff issues

	<ul style="list-style-type: none"> • 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: Marketing Operations Coordination Level IV	
Unit Title	Manage and Maintain Small/Medium Business Operations
Unit Code	EIS MOC4 21 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</p>

	timely manner and in accordance with legal requirements
	4.6 Outstanding accounts are collected or followed-up on
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 external sources	<p>May include but is not limited to:</p> <ul style="list-style-type: none"> • staff and colleagues • management, supervisors, advisors or head office • relevant professionals such as lawyers, accountants, 		
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	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 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: Marketing Operations Coordination Level IV	
Unit Title	Manage Continuous Improvement System
Unit Code	EIS MOC4 22 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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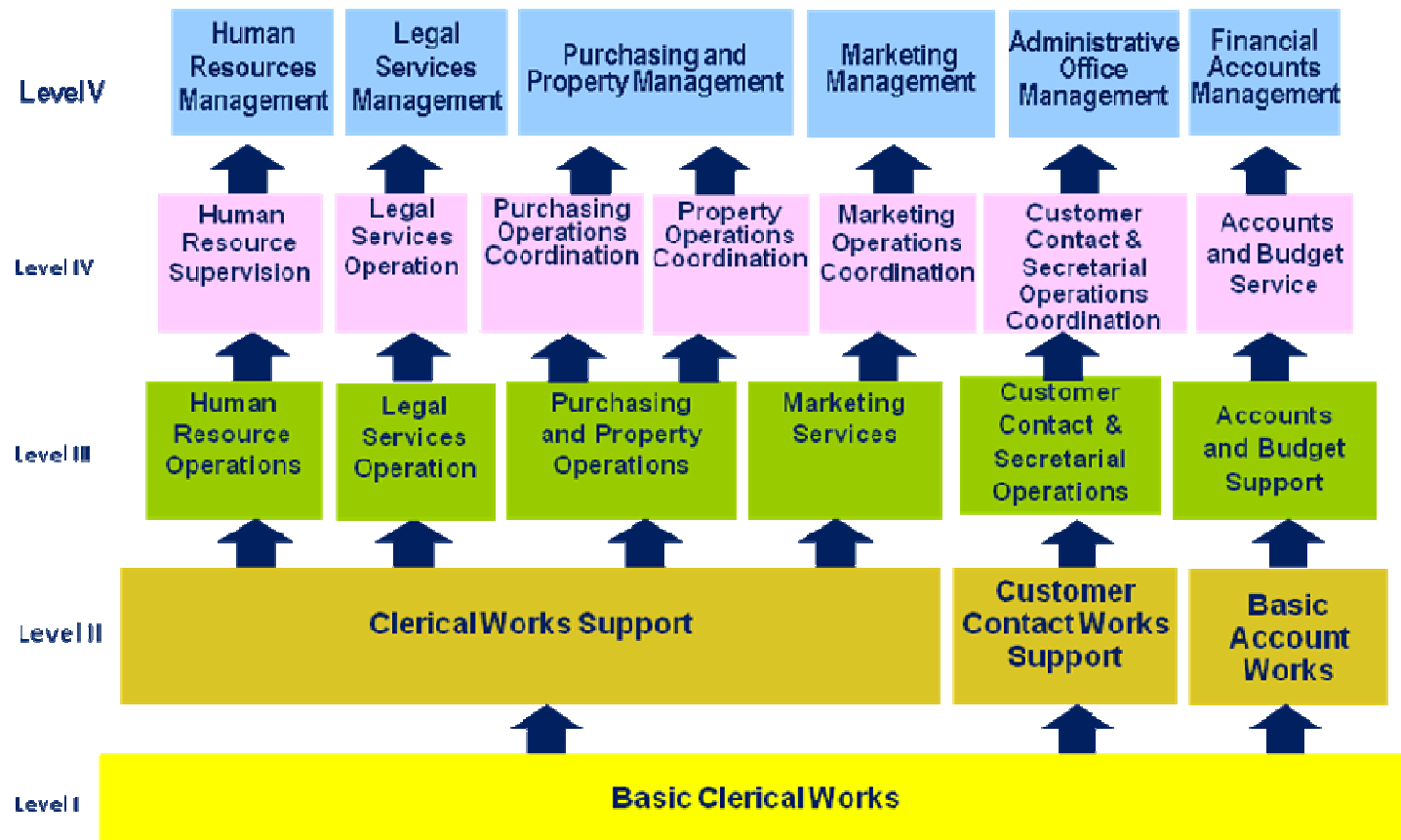
Variable	Range
Supply chains	<p>May include but is not limited to:</p> <ul style="list-style-type: none"> • network of facilities that procures raw materials, transforms them into intermediate products or services and then finished goods or service, and delivers them through a distribution system • procurement, 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 cycle analyses

	<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 • 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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