**Federal Democratic Republic of Ethiopia**
**OCCUPATIONAL STANDARD**

**MARKETING SERVICES**
**NTQF Level III**

# 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 Ethiopia Occupational Standards (EOS) is the 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 Ethiopia Occupational Standard which 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 and NTQF level
- Unit title
- Unit code
- 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 occupation with all the key components of a Unit of Competence:
- chart with an overview of all Units of Competence for the respective level (Unit of Competence Chart) including the Unit Codes and the Unit 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 STANDARD CHART**

| Occupational Standard: Marketing Services |
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| Occupational Code: EIS MKS |
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*NTQF Level III*

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| **EIS MKS3 01 0812** Deliver and Monitor a Service to Customers | **EIS MKS3 02 0812** Work Effectively with Diversity | **EIS MKS3 03 0812** Determine and Maintain Business Resources |
| **EIS MKS3 04 0812** Organize Workplace Information | **EIS MKS3 05 0812** Promote Innovation in a Team Environment | **EIS MKS3 06 0812** Process Customer Complaints |
| **EIS MKS3 07 0812** Create and Use Databases | **EIS MKS3 08 0812** Sale Sell Products and Services | **EIS MKS3 09 0812** Apply Point-of-Sale Handling Procedure |
| **EIS MKS3 10 0812** Coordinate Sales Performance | **EIS MKS3 11 0812** Recommend Products and Services | **EIS MKS3 12 0812** Maintain Business-to-business Relationships |
| **EIS MKS3 13 0812** Organize Personal Work Priorities and Development | **EIS MKS3 14 0812** Communicate with Customers Using Technologies | **EIS MKS3 15 0812** Write Simple Documents |
| **EIS MKS3 16 0812** Produce Financial Reports | **EIS MKS3 17 0812** Analyze and Achieve Sales Targets | **EIS MKS3 18 0812** Monitor Implementation of Work Plan/Activities |
| **EIS MKS3 19 0812** Apply Quality Control | **EIS MKS3 20 0812** Lead Workplace Communication | **EIS MKS3 21 0812** Lead Small Teams |
| **EIS MKS3 22 0812** Improve Business Practice | **EIS MKS3 23 1012** Maintain Quality System and Continuous Improvement Processes (Kaizen) | |

| Occupational Standard: Marketing Services Level III | |
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| **Unit Title** | **Deliver and Monitor a Service to Customers** |
| **Unit Code** | **EIS MKS3 01 0812** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to identify customer and monitor service provided to customers. |

| Elements | Performance Criteria |
|---|---|
| 1. Identify customer needs | 1.1 **Appropriate interpersonal skills** are used to accurately identified and clarified **customer needs and expectations**. |
| | 1.2 Customer needs are assessed for urgency to determine priorities for service delivery in accordance with **organizational requirements**. |
| | 1.3 **Effective communication** is used to inform customers about available choices for meeting their needs and selection of preferred options are assisted. |
| | 1.4 Limitations are identified in addressing customers' needs and appropriate assistance from **designated individuals** is sought. |
| 2. Deliver a service to customers | 2.1 Prompt service is provided to customers to meet identified needs in accordance with organizational requirements. |
| | 2.2 Appropriate rapport is established and maintained with customers to ensure completion of quality service delivery. |
| | 2.3 **Customer complaints** are sensitively and courteously handled in accordance with organizational requirements. |
| | 2.4 Assistance or respond are provided to customers with **specific needs** in accordance with organizational requirements. |
| | 2.5 Available opportunities are identified and used to promote and services and products are enhanced to customers. |
| 3. Monitor and report on service delivery | 3.1 Customer satisfaction with service delivery is regularly reviewed using **verifiable evidence** in accordance with organizational requirements. |
| | 3.2 Opportunities are identified to enhance the quality of services and products, and pursued within organizational requirements. |
| | 3.3 Procedural aspects of service delivery are monitored for effectiveness and suitability to customer requirements. |
| | 3.4 Customer feedback is regularly sought and used to improve the provision of products and services. |

<table>
<tr><td></td><td>3.5 Evidence of customer satisfaction in decisions is incorporated to modified products or services, ensuring they are within organizational requirements.</td></tr>
<tr><td></td><td>3.6 Ensure reports are cleared, detailed and contained recommendations focused on critical aspects of service delivery.</td></tr>
</table>

| Variable | Range |
|---|---|
| Appropriate interpersonal skills | May include:<br>• listening actively to what the customer is communicating<br>• providing an opportunity for the customer to confirm their request<br>• questioning to clarify and confirm customer needs<br>• seeking feedback from the customer to confirm understanding of needs<br>• summarizing and paraphrasing to check understanding of customer message<br>• using appropriate body language |
| Customers | May include:<br>• corporate customers<br>• individual members of the organization<br>• individual members of the public<br>• internal or external<br>• other agencies |
| Customer needs and expectations | May include:<br>• accuracy of information<br>• advice or general information<br>• complaints<br>• fairness/politeness<br>• further information<br>• making an appointment<br>• prices/value<br>• purchasing organization's products and services<br>• returning organization's products and services<br>• specific information |
| Organizational requirements | May include:<br>• access and equity principles and practice<br>• anti-discrimination and related policy<br>• defined resource parameters<br>• goals, objectives, plans, systems and processes<br>• legal and organizational policies, guidelines and requirements<br>• OHS policies, procedures and programs<br>• payment and delivery options<br>• pricing and discount improvement processes and standards<br>• quality assurance and/or procedures manuals<br>• replacement and refund policy and procedures |

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| | • who is responsible for products or services |
| Effective communication | May include:<br>• giving customers full attention<br>• maintaining eye contact, except where eye contact may be culturally inappropriate<br>• speaking clearly and concisely<br>• using active listening techniques<br>• using appropriate language and tone of voice<br>• using clear written information/communication<br>• using non-verbal communication e.g. body language, personal presentation (for face-to-face interactions)<br>• using open and/or closed questions |
| Designated individuals | May include:<br>• colleagues<br>• customers<br>• line management<br>• supervisor |
| Customer complaints | May include:<br>• administrative errors such as incorrect invoices or prices<br>• customer satisfaction with service quality<br>• damaged goods or goods not delivered<br>• delivery errors<br>• product not deliver on time<br>• service errors<br>• warehouse or store room errors such as incorrect product delivered |
| Specific needs of customers | May relate to:<br>• age<br>• beliefs/values<br>• culture<br>• disability<br>• gender<br>• language<br>• religious/spiritual observance |
| Verifiable evidence | May include:<br>• customer satisfaction questionnaires<br>• audit documentation and reports<br>• quality assurance data<br>• returned goods<br>• lapsed customers<br>• service calls<br>• complaints |

| Opportunities to promote and enhance services and products | May include:<br>• extending time lines<br>• packaging procedures<br>• procedures for delivery of good<br>• return policy<br>• system for recording complaints<br>• updating customer service charter |
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| **Evidence Guide** | |
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| Critical Aspects of Competence | Evidence of the following is essential:<br>• identifying needs and priorities of customers<br>• distinguishing between different levels of customer satisfaction<br>• treating customers with courtesy and respect<br>• responding to and reporting on, customer feedback<br>• knowledge of organizational policy and procedures for customer service |
| Underpinning Knowledge and Attitudes | Must demonstrate  knowledge of:<br>• key provisions of relevant legislation from all levels of government that may affect aspects of business operation, such as:<br>  ➢ ethical principles<br>  ➢ codes of practice<br>  ➢ privacy laws<br>  ➢ financial legislation<br>  ➢ occupational health and safety (OHS)<br>• organizational policy and procedures for customer service including handling customer complaints<br>• service standards and best practice models<br>• public relations and product promotion<br>• techniques for dealing with customers, including customers with specific needs |
| Underpinning Skills | Must demonstrate  skills to:<br>• literacy skills to read and understand a variety of texts; to prepare general information and papers according to target audience; and to edit and proofread texts to ensure clarity of meaning and accuracy of grammar and punctuation<br>• technology skills to select and use technology appropriate to a task<br>• communication skills to monitor and advise on customer service strategies<br>• problem-solving skills to deal with customer enquiries or complaints<br>• analytical skills to identify trends and positions of products and services<br>• self-management skills to: |

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| | ➢ comply with policies and procedures<br>➢ consistently evaluate and monitor own performance<br>➢ seek learning opportunities |
| 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:<br>• Interview / Written Test<br>• 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 and Sales Services Level III | |
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| **Unit Title** | **Work Effectively with Diversity** |
| **Unit Code** | **EIS MKS3 02 0812** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to recognize and interact productively with diversity in the workplace.  It covers sensitive responses to, and interactions with, all manner of diversity that might be encountered during the course of work. |

| Elements | Performance Criteria |
|---|---|
| 1. Recognize individual and respond appropriately | 1.1 **Individual differences** in **colleagues**, clients and customers are recognized and respected. |
| | 1.2  Differences are sensitively responded. |
| | 1.3  Behaviour that is consistent with **legislative requirements** and **enterprise guidelines** is ensured. |
| | 1.4  Diversity is accommodated using appropriate verbal and non-verbal communication. |
| 2. Work effectively with individual differences | 2.1  Knowledge, skills and experience of others are recognized and documented in relation to team objectives. |
| | 2.2  Colleagues are encouraged to utilize and share their specific qualities, skills or backgrounds with other team members and clients in order to enhance work outcomes. |
| | 2.3  Relations with customers are ensured and clients demonstrated that diversity is valued by the business. |

| Variable | Range |
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| Individual differences | May include:<br>• ability<br>• age<br>• belief system/values<br>• culture<br>• expertise/experience/working styles<br>• gender<br>• interests<br>• interpersonal style<br>• language<br>• mental ability<br>• past experiences<br>• physical characteristics<br>• politics<br>• religion |

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| | • sexual orientation<br>• thinking and learning styles |
| Colleagues | May include:<br>• internal customers<br>• junior staff<br>• managers and supervisor<br>• peers<br>• stakeholders |
| Legislative requirements | May include:<br>• disability discrimination legislation<br>• human rights and equal opportunity legislation<br>• racial and sex discrimination legislation |
| Enterprise guidelines | May include:<br>• codes of conduct or ethics<br>• diversity policies<br>• human resources policies and procedures |

| Evidence Guide | |
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| Critical Aspects of Competence | Evidence of the following is essential:<br>• adjusting language and behaviour as required by interactions with diversity<br>• awareness of diversity issues<br>• knowledge of relevant legislation |
| Underpinning Knowledge and Attitudes | Must demonstrate  knowledge of:<br>• key provisions of relevant legislation from all forms of government that may affect aspects of business operations, such as:<br>  ➢ anti-discrimination legislation<br>  ➢ ethical principles<br>  ➢ codes of practice<br>  ➢ privacy laws<br>  ➢ occupational health and safety (OHS)<br>• major groups in the community and work environment, as defined by cultural, religious and other traditions and practices<br>• reasonable adjustments that facilitate participation by people with a disability<br>• value  of diversity to the economy and society in terms of workforce development, workplace in the global economy, innovation and social justice |
| Underpinning Skills | Must demonstrate  skills to:<br>• Culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities<br>• Problem-solving and initiative skills to recognize and address own responses to difference |
| 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: <br> • Interview / Written Test <br> • Observation / Demonstration with Oral  Questioning |
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| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting. |

| Occupational Standard: Marketing Services Level III | |
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| **Unit Title** | **Determine and Maintain Business Resources** |
| **Unit Code** | **EIS MKS3 03 0812** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to determine, administer and maintain resources and equipment to complete a variety of tasks. |

| Elements | Performance Criteria |
|---|---|
| 1. Advise on resource requirements | 1.1 Estimates of future and **business resource needs** are calculated and presented in accordance with **organizational requirements**. |
| | 1.2 Ensure advice is made clear, concise and relevant to achievement of organizational requirements. |
| | 1.3 Information on the most economical and effective choice of equipment, materials and suppliers is provided. |
| | 1.4 Resource shortages and possible impact on operation are identified. |
| 2. Monitor resource usage and maintenance | 2.1 Resource handling is ensured in according with established organizational requirements including occupational health and safety requirements. |
| | 2.2 **Business technology** is used to monitor and effective use of resources is monitored. |
| | 2.3 Consultation with individuals and teams are used to facilitate effective decision making on the appropriate allocation of resources. |
| | 2.4 Relevant **policies regarding resource use** in the performance of operational tasks are identified and adhered. |
| | 2.5 Resource usage are routinely monitored and compared with estimated requirements in budget plans. |
| 3. Acquire resources | 3.1 Acquisition and storage of resources are ensured and is in accordance with organizational requirements, is cost effective and consistence with organizational timelines. |
| | 3.2 Resources are acquired within available time lines to meet identified requirements. |
| | 3.3 **Resource acquisition processes** are reviewed to identify improvements in future resource acquisitions. |

| Variable | Range |
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| Business resources | May include:<br>• equipment<br>• facilities<br>• human resources<br>• raw materials<br>• software<br>• stock and supplies |
| Organizational requirements | May include:<br>• access and equity principles and practice<br>• business and performance plans<br>• defined resource parameters<br>• ethical standards<br>• goals, objectives, plans, systems and processes<br>• legal and organizational policies, guidelines and requirements<br>• management and accountability channels<br>• manufacturer's and operational specifications<br>• OHS policies, procedures and programs<br>• quality and continuous improvement processes and standards<br>• quality assurance and/or procedures manuals<br>• security and confidentiality requirements |
| Business technology | May include:<br>• computer applications<br>• computers<br>• modems<br>• personal schedules<br>• photocopiers<br>• printers<br>• scanner |
| Policies regarding resource | May include:<br>• budgeting limits<br>• ordering procedures<br>• purchasing authorities<br>• recruitment and personnel<br>• time management<br>• transport/travel policies |
| Resource acquisition | May include:<br>• contracted supplier ordering<br>• internal approvals<br>• non-tendered processes<br>• periodic forecasts<br>• tendered processes |
| Occupational Health and Safety requirements | May include:<br>• decision making delegations<br>• equipment use<br>• first aid kit<br>• medical attention<br>• reporting requirements |

| | • site access |
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| **Evidence Guide** | |
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| Critical Aspects of Competence | Evidence of the following is essential: <br> • collecting and recording data on resource use <br> • observing resource use over defined and operational timeframes <br> • carrying out routine maintenance <br> • knowledge of organizational resources acquisition policies, plants and procedures |
| Underpinning Knowledge and Attitudes | Must demonstrate  knowledge of: <br> • key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as: <br>     ➢ ethical principles <br>     ➢ codes of practices <br>     ➢ Occupational Health and Safety (OHS) <br> • organizational resource acquisition policies, plants and procedures <br> • functions of a range of business equipment <br> • organizational procedures for record keeping/filing systems, security and safe recording practices |
| Underpinning Skills | Must demonstrate  skills to: <br> • literacy skills to read and understand organization's policies and procedures; to write simple instructions for a particular routine task <br> • evaluation skills to diagnose faults and to monitor resource usage <br> • problem-solving  skills to determine appropriate fault repair actions <br> • numeracy skills to calculate resource expenditure <br> • technology skills to select and use technology appropriate to a task |
| 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: <br> • Interview / Written Test <br> • 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 Services Level III | |
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| **Unit Title** | **Organize Workplace Information** |
| **Unit Code** | **EIS MKS3 04 0812** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to gather, organize and apply workplace information in the context of an organization's work processes and knowledge management systems. |

| Elements | Performance Criteria |
|---|---|
| 1. Collect and assess information | 1.1 Product and service **information** are accessed in accordance with **organizational requirements**. |
| | 1.2 **Methods of collecting information** that are reliable are ensured and efficient use of available time and resources are made. |
| | 1.3 Information is assessed for clarity, accuracy, currency and relevance to intended tasks. |
| | 1.4 **Interpersonal skills** are used to access relevant information from teams and individuals. |
| 2. Organize information | 2.1 Information in a **format** suitable for analysis, interpretation and dissemination in accordance with organizational requirements is organized. |
| | 2.2 Appropriate **technology systems** are used to maintain information in accordance with organizational requirements is used. |
| | 2.3 Information and materials are collated and communicated to relevant **designated persons**. |
| | 2.4 Difficulties organizing and accessing information are identified and solved collaboratively with individuals and team members. |
| | 2.5 Information is updated and stored in accordance with organizational requirements and systems. |
| 3. Review information needs | 3.1 **Feedback** on clarity, accuracy and sufficiency of information is actively sought to ensure relevance of information and system. |
| | 3.2 Contribution of information is reviewed to decision making and appropriate modifications to collection processes are implemented. |
| | 3.3 Future information needs are identified and incorporated in modifications to collection processes. |
| | 3.4 Future information needs are documented and incorporated |

| | in modifications to reporting processes. |
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| Variable | Range |
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| Information | May include:<br>• computer databases (e.g. library catalogue, customer records)<br>• computer files (e.g. letters, memos and other documents)<br>• correspondence (e.g. faxes, memos, letters, email)<br>• financial figures<br>• forms (e.g. insurance forms, membership forms)<br>• invoices (e.g. from suppliers, to debtors)<br>• personal records (e.g. personal details, salary rates)<br>• production targets<br>• sales records (e.g. monthly forecasts, targets achieved) |
| Organizational requirements | May include:<br>• code of conduct/code of ethics<br>• information protocols<br>• legal and organizational policies, guidelines and requirements<br>• management and accountability channels<br>• OHS policies, procedures and programs<br>• procedures for updating records<br>• quality assurance and/or procedures manuals<br>• security and confidentiality requirements |
| Methods of collecting information | May include checking:<br>• checking research provided by others<br>• checking written material including referrals and client files<br>• classification tolls<br>• individual research<br>• information from other organizations<br>• interviews with colleagues/customers<br>• observation and listening<br>• previous file records<br>• questioning (in person or indirect)<br>• recruitment applications and other forms |
| Interpersonal skills | May include:<br>• consultation methods, techniques and protocols<br>• networking<br>• seeking feedback from group members to confirm understanding<br>• summarizing and paraphrasing<br>• using appropriate body language |
| Format | May include:<br>• adding headers and footers<br>• incorporating graphics and pictures<br>• inserting symbols<br>• using legends<br>• using a particular software application |

| | • using tables and charts |
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| Technology | May include:<br>• answering machine<br>• computer<br>• e-mail<br>• fax  machine<br>• internet/extranet/intranet<br>• photocopier<br>• printer<br>• scanner<br>• shredder<br>• telephone |
| Systems | May include:<br>• information management systems<br>• knowledge management systems<br>• record management systems |
| Designated persons | May include:<br>• clients<br>• colleagues<br>• committee<br>• external agencies<br>• line management<br>• statutory bodies<br>• supervisor |
| Feedback | May include:<br>• audit documentation and reports<br>• comments from clients and colleagues<br>• customer satisfaction questionnaire<br>• quality assurance data<br>• returned goods |

| **Evidence Guide** | |
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| Critical Aspects of Competence | Evidence of the following is essential:<br>• providing accurate information for defined purposes<br>• systematic maintenance and handling of data and documents<br>• using business technology to manage information<br>• knowledge of relevant legislation |
| Underpinning Knowledge and Attitudes | Must demonstrate  knowledge of:<br>• key provisions of relevant legislation from all forms of government that may affect aspects of business operations, such as:<br>    ➢ ethical principles<br>    ➢ codes of practice<br>    ➢ privacy laws<br>    ➢ occupational health and safety (OHS)<br>• methods for checking validity of information and its sources |

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| | • organizational recordkeeping/filing systems, security procedures and safe recording practices<br>• policies and procedures relating to distribution of workplace information, and legal and ethical obligations |
| Underpinning Skills | Must demonstrate skills to:<br>• analytical skills to classify and report information<br>• literacy skills 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<br>• problem-solving skills to deal with information which is contradictory, ambiguous, inconsistent or inadequate<br>• technology skills to display information in a formal suitable to the target audience |
| 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:<br>• Interview / Written Test<br>• 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 Services Level III | |
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| **Unit Title** | **Promote Innovation in a Team Environment** |
| **Unit Code** | **EIS MKS3 05 0812** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to be an effective and pro-active member of an innovative team. |

| Elements | Performance Criteria |
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| 1. Create opportunities to maximize innovation within the team | 1.1 **What the team needs and wants** to achieve are evaluated and reflected on. |
| | 1.2 **Information about current or potential team members' work** is checked in the context of developing a more innovative team. |
| | 1.3 People is brought into the team or suggestions are made for team members based on what needs to be achieved and the potential for cross-fertilizing ideas. |
| | 1.4 **Different ways that difference people may contribute** to building or enhancing the team are acknowledged respected and discussed. |
| 2. Organize and agree effective ways of working | 2.1 **Ground rules** for how the team will operate are jointly established. |
| | 2.2 Responsibilities are agreed and communicated in ways that encourage and reinforce **team-based innovation**. |
| | 2.3 Tasks and activities are agreed and shared to ensure the best use of skills and abilities within the team. |
| | 2.4 Activities are planned and scheduled to allow time for thinking, challenging and collaborating. |
| | 2.5 Personal rewards and stimulation are established as an integral part of the team's ways of working. |
| 3. Support and guide colleagues | 3.1 **Behavior that supports innovation** is modeled. |
| | 3.2 **External stimuli and ideas** are sought to feed into team activities. |
| | 3.3 Information, knowledge and experiences are pro-actively shared with other team members. |
| | 3.4 Ideas within the team are challenged and tested in a positive and collaborative way. |
| | 3.5 Ideas are pro-actively discussed and explored with other team members on an ongoing basis. |

| 4. Reflect on how the team is working | 4.1 Activities and on opportunities for improvement and innovation are de-briefed and reflected. |
| | 4.2 Feedback is gathered from within and outside the team and used to generate discussion and debate. |
| | 4.3 **Challenges of being innovative** in a constructed and open way are discussed. |
| | 4.4 Ideas are taken for improvement, built into future activities and key issues are communicated to relevant colleagues. |
| | 4.5 Successes and examples of successful innovated are identified, promoted and celebrated. |

| Variable | Range |
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| What the team needs and wants to achieve | May relate to:<br>• addressing particular customer feedback<br>• conceiving and implementing a particular project<br>• developing new services or products<br>• generating ongoing ideas within the work unit<br>• improving or changing work conditions<br>• new ideas that impact beyond the workplace (e.g. that have a broader social or community impact) |
| Information about current or potential team members' work | May relate to:<br>• interests<br>• lifestyle preferences<br>• past jobs<br>• technical strengths<br>• work preferences<br>• working styles |
| Difference ways that different people may contribute | May relate to individual strengths around:<br>• creating positive energy within the team<br>• fundamental literacy strengths (e.g. particularly strong in visual literacy, written or spoken communication)<br>• generating ideas<br>• networks or spheres of influence<br>• particular ways of thinking<br>• powers of persuasions<br>• problem-solving capacities<br>• specific technical skills or knowledge |
| Ground roles | May relate to:<br>• boundaries or lack of boundaries for team activities and ideas<br>• confidentiality<br>• copyright, moral lights or intellectual property<br>• regularity of communication<br>• key roles and responsibilities<br>• time lines |

| | • ways of communicating |
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| Team-based innovation | May be encouraged through:<br>• accessing training and learning opportunities<br>• enough but not too much guidance and structure<br>• equitable sharing of workload<br>• follow-through with ideas<br>• supportive communication |
| Behaviour that supports innovation | May include being:<br>• collaborative<br>• equitable<br>• fair<br>• fun<br>• hardworking<br>• reflective<br>• responsible<br>• sympathetic |
| External stimuli and ideas | Might be from:<br>• overseas<br>• colleagues outside of the team<br>• family and friends<br>• internet<br>• journals<br>• networks or technical experts<br>• other organizations |
| Challenges of being innovative | May relate to:<br>• budgetary or other resource constraints<br>• competing priorities<br>• organizational culture<br>• problems with breaking old patterns of behaviour or thinking<br>• time pressures |

| Evidence Guide | |
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| Critical Aspects of Competence | Evidence of the following is essential:<br>• active participation in a team where the team takes a pro-active and considered approach to innovation and innovative practice<br>• collaborative and open communication within the team<br>• knowledge and understanding of the internal and external factors that contribute to a team becoming and remaining innovative |
| Underpinning Knowledge and Attitudes | Must demonstrate knowledge of:<br>• barriers to innovation that can occur within a team and broader barriers that sometimes hinder innovation<br>• broad concepts of innovation including what innovation is, different types of innovation and the benefits of innovation<br>• characteristics of teams that are more likely to be innovative |

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| | and characteristics of broader environments that support and encourage innovation<br>• difference roles that people may play within a team, how this impacts on the way a team works and what it might achieve<br>• group dynamics in a team |
| Underpinning Skills | Must demonstrate  skills to:<br>• communication skills to work collaboratively as part of a team, to provide guidance and support to others, and to participate in open and constructive discussions<br>• creative thinking skills to generate, explore, test and challenge ideas<br>• learning skills to stretch boundaries of own knowledge and skills<br>• literacy skills to analyze a wide range of information from varied sources<br>• planning and organizational skills to participate in the effective allocation of work in a team context<br>• problem-solving skills to work constructively to overcome issues and challenges of both a practical and conceptual nature and to make ideas become realities<br>• self-management skills to take a pro-active team role and to reflect on own performance in modelling and encouraging behaviour that supports 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:<br>• Interview / Written Test<br>• 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 Services Level III | |
|---|---|
| **Unit Title** | **Process Customer Complaints** |
| **Unit Code** | **EIS MKS 306 0812** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to handle formal and informal negative feedback and complaints from customers. |

| Elements | Performance Criteria |
|---|---|
| 1. Respond to complaints | 1.1 Customer complaints are processed using **effective communication** in accordance with organizational procedures established under organizational policies, legislation or codes of practice. |
| | 1.2 **Document** is obtained and necessary reports relating to customer complaints are reviewed. |
| | 1.3 Decision about customer complaints is made, taking into account applicable legislation, organizational policies and codes. |
| | 1.4 Resolution of the complaint is negotiated and agreement where possible is obtained. |
| | 1.5 A register of complaints/disputes is maintained. |
| | 1.6 Customer is informed of the outcome of the investigation |
| 2. Refer complaints | 2.1 Complaints that require referral to other personnel or external bodies are identified. |
| | 2.2 **Referrals** are made to appropriate personnel for follow-up in accordance with individual level of responsibility. |
| | 2.3 All documents and investigation reports are forwarded. |
| | 2.4 Appropriate personnel are followed-up to gain prompt decisions. |
| 3. Exercise judgment to resolve customer service issues | 3.1 Implications of issues are identified for customer and organization. |
| | 3.2 Appropriate options are analyzed, explained and negotiated for resolution with customer. |
| | 3.3 Viable options are proposed in accordance with appropriate legislative requirements and enterprise policies. |
| | 3.4 Matters are ensured for which a solution cannot be negotiated are referred to appropriate personnel. |

| Variable | Range |
|---|---|

| Effective communication | May include: |
|---|---|
| | • giving customers full attention |
| | • maintaining eye contact (for face-to-face interactions), except where eye contact may be culturally inappropriate |
| | • speaking clearly and concisely |
| | • using appropriate language and tone of voice |
| | • using clear written information/communication |
| | • using non-verbal communication e.g. body language, personal presentation (for face-to-face interactions) |
| Documenting reports relating to customer complaints | May include: |
| | • completed forms and written reports |
| | • using audio-visual tapes |
| | • using computer-based systems |
| Referrals | May include: |
| | • external bodies (e.g. Ombudsman, Federal Ethics and Anti-Corruption, Police, Ethiopian Human Rights Commission) |

| Evidence Guide | |
|---|---|
| Critical Aspects of Competence | Assessment requires evidence that the candidate must: |
| | • applying judgment in the application of industry and/or organizational procedures |
| | • working with customer complaints |
| | • knowledge of organizational procedures and standards for processing complaints |
| Underpinning Knowledge and Attitudes | Must demonstrate  knowledge of: |
| | • key provisions of relevant legislation from all forms of government that may effect aspects of business operations, such as: |
| |    ➢ ethical principles |
| |    ➢ codes of practice |
| |    ➢ privacy laws |
| |    ➢ occupational health and safety (OHS) |
| | • importance of good communication skills and the individual's role in processing customer complaints |
| | • organizational procedures and standards for processing complaints and recommending appropriate action |
| Underpinning Skills | Must demonstrate  skills to: |
| | • analytical skills to identify trends and positions of products and services |
| | • communication skills to interpret customer complaints, and to monitor and advise on customer service strategies and resolutions |
| | • culturally appropriate communication skills to related to people from diverse backgrounds and people with diverse abilities |
| | • literacy skills to read and understand a variety of texts; to prepare general information and papers according to target audience; and to edit and proofread texts to ensure clarity of |

|  | meaning and accuracy of grammar and punctuation |
|  | • problem-solving skills to deal with customer enquiries or complaints, to apply organizational procedures to a range of situations and to exercise judgment in this application |
| 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:<br>• Interview / Written Test<br>• 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 Services Level III | |
|---|---|
| **Unit Title** | **Create and Use Databases** |
| **Unit Code** | **EIS MKS3 07 0812** |
| **Unit Descriptor** | This unit covers the knowledge, skills and attitudes   required to create simple two table relational databases with reports and queries, for the storage and retrieval of information. |

| Elements | Performance Criteria |
|---|---|
| 1. Create a simple database | 1.1 A simple relational database is designed, with at least two tables, using a **database application**, **basic design principles**, **software functions** and **simple formulae**. |
| | 1.2 A table is developed with fields and attributes according to database usage, as well as **data** considerations and user requirements. |
| | 1.3 A primary key for each table is created. |
| | 1.4 Table layout is modified and field attributes as required. |
| | 1.5 A relationship between two tables is created. |
| | 1.6 Data entered is **checked and amended**, in accordance with organizational and task requirements. |
| 2. Create reports and queries | 2.1 Information output, database tables to be used and **report layout** are determined to meet task requirements. |
| | 2.2 Data groupings are determined and criteria is searched and sorted to meet task requirements. |
| | 2.3 Reports and queries are run to check that results and formulae provide the required data. |
| | 2.4 Reports are modified to include or exclude additional requirements. |
| 3. Use database | 3.1 Data input are ensured to meet **designated time lines** and organizational requirements for speed and accuracy. |
| | 3.2 Manual, user documentation and online help are used to overcome problems with database design and production. |
| | 3.3 Database reports or forms are previewed, adjusted and **printed** in accordance with organizational and task requirements. |
| | 3.4 **Databases** are named and **stored**, in accordance with organizational requirements, and applications without data loss or damage are exited. |
| | 3.5 Reports are prepared and distributed to appropriate person in a suitable format. |

| Variable | Range |
|---|---|
| Database applications | May include:<br>• commercial database applications<br>• organizational specific database applications |
| Basic design principles | May include:<br>• naming conventions<br>• data layout<br>• formatting<br>• database use<br>• required output<br>• reporting and presentation requirements |
| Software functions | May include:<br>• adding, deleting, moving, re-labeling fields<br>• altering field widths<br>• calculating, using formula<br>• data protection<br>• field definitions and attributes<br>• formatting fields<br>• formatting text<br>• headers and footers<br>• inserting and deleting blank lines and spaces<br>• repeating (if available)<br>• table, form and report wizards |
| Simple formulae | May include:<br>• average<br>• count<br>• division<br>• maximum<br>• minimum<br>• multiplication<br>• subtraction<br>• sum<br>• combinations of above |
| Data | May include:<br>• numbers<br>• text |
| Checking and amending data | May include:<br>• accuracy of data<br>• accuracy of formulae with calculator<br>• ensuring instructions with regard to content and format have been followed<br>• outcome of sorting or filtering<br>• proofreading<br>• spelling, electronically and manually |
| Report layout | May include:<br>• alignments on page<br>• columns |

| | • enhancements to format – borders, patterns and colours |
| --- | --- |
| | • enhancements to text |
| | • formatting provided through use of a wizard or other automated process |
| | • headers/footers |
| | • logical ordering of data |
| | • tables |
| Designated time lines | May include: |
| | • time line agreed with internal or external client |
| | • time line agreed with supervisor or person requiring database |
| Printing | May include: |
| | • forms |
| | • queries |
| | • records |
| | • reports |
| | • tables |
| Storing databases | May include: |
| | • authorized access |
| | • filing locations |
| | • naming conventions |
| | • organizational policy for backing up files |
| | • organizational policy for filing hard copies of databases |
| | • security |
| | • storage in electronic folders and sub-folders |
| | • storage on disk drives, CD-Rom, back-up tapes |

| Evidence Guide | |
| --- | --- |
| Critical Aspects of Competence | Assessment requires evidence that the candidate: |
| | • creating simple databases and queries |
| | • manipulating data using queries |
| | • formatting data into a final version |
| Underpinning Knowledge and Attitudes | Demonstrate knowledge on: |
| | • key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as: |
| |    ➢ ethical principles |
| |    ➢ codes of practice |
| |    ➢ privacy laws |
| |    ➢ occupational health and safety (OHS) |
| | • organizational requirements relating to data entry, storage and presentation |
| Underpinning Skills | Demonstrate skills to: |
| | • numeracy skills to create simple queries and to use simple formulae |
| | • planning and organizing skills to develop effective databases |
| | • problem-solving skills to address inconsistencies in data and |

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|---|---|
| | issues in database, and to query structures |
| 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:<br>• Interview / Written Test<br>• 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 Services Level III | |
|---|---|
| **Unit Title** | **Sell Products and Services** |
| **Unit Code** | **EIS MKS3 08 0812** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to sell products and services in a marketing environment.<br>It involves the use of sales techniques and encompasses key selling skills, from approaching the customer to closing the sale.<br>It requires a basic level of product knowledge and the recognition and demonstration of verbal and non-verbal communication skills to determine customer requirements, sell the benefits of products and services, overcome objections and close sales.<br>Personal evaluation is used to maximize sales, according to industry codes of practice, relevant legislation and store policy. |

| Elements | Performance Criteria |
|---|---|
| 1. Develop and apply product knowledge. | 1.1 **Product knowledge** is developed by accessing **relevant sources of information** and confirmed with relevant staff. |
| | 1.2 Knowledge of the use and application of relevant products and services is applied in interactions with customers according to store policy and **legislative requirements**. |
| | 1.3 Gaps are identified in product knowledge and resolved by accessing relevant sources of information. |
| 2. Approach customer. | 2.1 **Customers** are identified by name where possible. |
| | 2.2 Knowledge of customer buying behavior is developed by accessing relevant sources of information. |
| | 2.3 Appropriate timing of customer approach is determined and applied according to store policy and customer behavior. |
| | 2.4 Customer contact is initiated according to store policy. |
| | 2.5 A positive impression is conveyed to encourage customer interest according to store policy. |
| 3. Gather and respond to information. | 3.1 Questioning techniques and listening skills are applied to determine customer buying motives and requirements. |
| | 3.2 Non verbal communication cues are interpreted and clarified. |
| | 3.3 Customer is directed to specific merchandise according to customer requirements and store policy. |
| 4. Sell benefits. | 4.1 Customer needs are matched to appropriate products and services. |
| | 4.2 Knowledge of product features and benefits is communicated clearly to customers. |

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|---|---|
| | 4.3 Product use and safety requirements are described to customers. |
| | 4.4 Customers are referred to appropriate product specialist as required. |
| | 4.5 **Routine customer questions** are answered about merchandise accurately and honestly or refer to senior sales staff. |
| 5. Overcome objections. | 5.1 Customer objections are identified and acknowledged according to store policy. |
| | 5.2 Objections are categorized into price, time and merchandise characteristics and consider solutions. |
| | 5.3 Solutions are offered to customer objections according to store policy. |
| | 5.4 **Problem solving** is applied within personal scope of responsibilities to overcome customer objections or refer to senior staff. |
| 6. Close sale. | 6.1 Customer buying signals are monitored, identified and responded appropriately. |
| | 6.2 Customer is encouraged to make purchase decisions. |
| | 6.3 Appropriate method of closing sale is selected and applied. |
| 7. Maximize sales opportunities. | 7.1 Opportunities are recognized and applied for making additional **sales** according to store policy. |
| | 7.2 Customer is advised of complementary products or services according to customers identified need. |
| | 7.3 Personal sales outcomes are reviewed and strategies are considered to maximize future sales in consultation with relevant staff. |

| Variable | Range |
|---|---|
| Product knowledge may include: | • features and benefits <br> • handling and storage requirements <br> • price <br> • safety features <br> • stock availability <br> • use-by dates <br> • warranties |
| Relevant sources of information may include: | • demonstrations <br> • internet <br> • labels <br> • product profiles <br> • staff members <br> • store or supplier product manuals |

| | |
|---|---|
| | • store tours<br>• videos |
| Legislative requirements may include: | • industry codes of practice<br>• liquor laws<br>• lottery legislation<br>• work health and safety (WHS)<br>• sale of second-hand goods<br>• tobacco laws<br>• trading hours<br>• transport, storage and handling of goods |
| Customers may include: | • customers with routine or special requests<br>• internal and external contacts<br>• new or repeat contacts<br>• people from a range of social, cultural and ethnic backgrounds<br>• people with varying physical and mental abilities |
| Routine customer questions may relate to: | • availability<br>• features and benefits<br>• price and price reductions<br>• quality |
| Problem solving may be affected by: | • resource implications<br>• store policies and procedures |
| Sales transactions may be completed: | • face-to-face<br>• online<br>• over the telephone |

| Evidence Guide | |
|---|---|
| Critical aspects of Competence | Assessment requires evidence that the candidate:<br>• applies product knowledge and uses appropriate sales approach to sell the benefits of products and services, overcome objections and close sales<br>• uses questioning, listening and observation skills to determine customer requirements<br>• applies store policies and procedures in regard to selling products and services<br>• maximises sales opportunities according to store policies and procedures<br>• applies industry codes of practice, relevant legislation and statutory requirements in regard to selling products and services<br>• evaluates personal sales performance to maximise future sales |
| Underpinning Knowledge and Attitudes | Must demonstrate  knowledge of:<br>• customer types and needs, including:<br>   ➢ customer behavior and cues<br>   ➢ customer buying motives |

|  | ➢ demographics, lifestyle and income |
| --- | --- |
|  | ➢ individual and cultural differences |
|  | ➢ types of customer needs, such as: |
|  | ➢ functional |
|  | ➢ psychological |
|  | • relevant industry codes of practice, legislation and statutory requirements relating to the sale of products and services |
|  | • selling techniques, including: |
|  | ➢ add-ons and complementary sales |
|  | ➢ closing techniques |
|  | ➢ opening techniques |
|  | ➢ overcoming customer objections |
|  | ➢ recognizing buying signals |
|  | ➢ using strategies to focus customer on specific merchandise |
|  | • specific product knowledge for area or section |
|  | • store merchandise and service range |
|  | • store policies and procedures in regard to: |
|  | ➢ allocated duties and responsibilities |
|  | ➢ selling products and services and sales performance |
| Underpinning Skills | Must demonstrate skills to: |
|  | • communication and interpersonal skills to: |
|  | ➢ handle difficult customers |
|  | • verbal and non-verbal communication skills to: |
|  | ➢ question, listen and observe |
|  | ➢ overcome objections and close sale |
|  | • literacy and numeracy skills to: |
|  | ➢ handle payments for goods |
|  | ➢ read product information |
|  | ➢ read store policies and procedures |
|  | ➢ record information |
|  | ➢ weigh and measure goods |
|  | • selling skills to use a range of selling techniques |
| 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 | Competence may be assessed through: |
|  | • Interview / Written Test / Oral Questioning |
|  | • Observation / Demonstration |
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting |

| Occupational Standard: Marketing Services Level III | |
|---|---|
| **Unit Title** | **Apply Point-of-Sale Handling Procedure** |
| **Unit Code** | **EIS MKS3 09 0812** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to operate point-of-sale equipment, apply store policy and procedures to a range of transactions, interact with customers and package or wrap an item for transportation. |

| Elements | Performance Criteria |
|---|---|
| 1. Operate point-of-sale equipment. | 1.1 Point-of-sale terminal is opened and closed according to **store policy and procedures**. |
| | 1.2 Point-of-sale terminal and transfer tender are cleared according to store procedure. |
| | 1.3 Cash is handled according to store security procedures. |
| | 1.4 Supplies of change are maintained in point-of-sale terminal according to store policy. |
| | 1.5 Active point-of-sale terminals are attended according to store policy. |
| | 1.6 Records are completed for transaction errors according to store policy. |
| | 1.7 Adequate supplies of dockets, vouchers and **point-of-sale documents** are maintained. |
| | 1.8 **Customers** are informed of delays in the point-of-sale operation where required. |
| 2. Ensure accuracy of transactions. | 2.1 **Numerical calculations** are identified and performed to ensure accurate pricing and collection of money. |
| | 2.2 Numerical information is collected from various sources and calculated accurately with or without the use of a calculator. |
| 3. Perform point-of-sale transactions. | 3.1 **Point-of-sale transactions** are completed according to store policy. |
| | 3.2 Store procedures are identified and applied in respect of cash and non cash transactions. |
| | 3.3 Store procedures are identified and applied in regard to exchanges and returns. |
| | 3.4 Goods are moved through point-of-sale area efficiently and with attention to fragility and packaging. |
| | 3.5 Information is entered into **point-of-sale equipment**. |
| | 3.6 Price or total and amount of cash received are stated verbally to customer. |

| | 3.7 Correct change is tendered. |
|---|---|
| 4. Complete sales. | 4.1 Customer order forms, invoices and receipts are completed and any loyalty card transactions processed. |
| | 4.2 Customer delivery requirements are identified and processed according to set timeframes. |
| | 4.3 Sales transactions or direct customers are processed to point-of-sale terminals according to store policy without undue delay. |
| | 4.4 . Customer is acknowledged and thanked in line with store policy and procedures. |
| 5. Wrap and pack goods. | 5.1 Adequate supplies of **wrapping and packaging materials** are maintained and requested. |
| | 5.2 Appropriate wrapping or packaging material is selected. |
| | 5.3 Merchandise is wrapped neatly and effectively where required. |
| | 5.4 Items are packed safely to avoid damage in transit, and attach labels where required. |
| | 5.5 Transfer of merchandise is arranged for parcel pick up or other **delivery methods** if required. |

| Variable | Range |
|---|---|
| Store policy and procedures in regard to: | <ul><li>cash handling</li><li>financial transactions</li><li>handling techniques of stock</li><li>operation of point-of-sale equipment</li><li>sales transactions</li><li>security</li></ul> |
| Point-of-sale documents may include: | <ul><li>credit slips</li><li>message pads</li><li>order forms</li><li>product return slips</li><li>promotional materials</li></ul> |
| Customers may include: | <ul><li>customers with routine or special requests</li><li>internal and external contacts</li><li>new or repeat contacts</li><li>people from a range of social, cultural and ethnic backgrounds</li><li>people with varying physical and mental abilities</li></ul> |
| Numerical calculations may include: | <ul><li>addition and subtraction</li><li>calculations of cash amounts and change</li><li>calculations of discount amounts</li><li>estimation of quantities</li><li>measurement</li><li>multiplication and division</li></ul> |

| | |
|---|---|
| | • percentages |
| Point-of-sale transactions may include: | • cheques<br>• credit cards and store cards<br>• exchanges<br>• gift vouchers<br>• returns<br>• smart cards<br>• travellers cheques |
| Point-of-sale equipment may include: | • cash drawer<br>• cash register<br>• electronic scales<br>• numerical display board<br>• scanner<br>• security tagging |
| Wrapping and packaging materials may include: | • adhesive tape<br>• bags<br>• boxes<br>• bubble wrap<br>• gift wrapping<br>• paper<br>• ribbon<br>• string |
| Delivery methods may include: | • courier<br>• domestic or international delivery<br>• freight<br>• parcel pick-up<br>• post or express post |

| Evidence Guide | |
|---|---|
| Critical aspects of Competence | Assessment requires evidence that the candidate:<br>• operates point-of-sale equipment according to manufacturer instructions and store policy and procedures<br>• applies store policy and procedures in regard to cash handling and point-of-sale transactions<br>• interprets, calculates and records numerical information accurately<br>• processes sales transaction information responsibly and accurately according to store policy and procedures<br>• applies store policy and procedures in regard to the handling, packing, wrapping and delivery of goods or merchandise |
| Underpinning Knowledge and Attitudes | Must demonstrate knowledge of:<br>• cash and non-cash handling procedures, including:<br>  ➢ balancing point-of-sale equipment<br>  ➢ calculating non-cash documents<br>  ➢ change required, denominations of change and tendering change |

| | |
|---|---|
| | <ul><li>➤ clearance of terminal and transference of tender</li><li>➤ counting cash</li><li>➤ maintenance of cash float</li><li>➤ opening and closing point-of-sale terminal</li><li>➤ recording takings</li><li>➤ security of cash and non-cash transactions</li><li>➤ functions and procedures for operating point-of-sale equipment, including:</li><li>➤ calculators</li><li>➤ electronic scales</li><li>➤ numerical display board</li><li>➤ registers</li><li>➤ merchandise handling techniques, including wrapping and packaging techniques</li><li>➤ range of services provided by the store</li></ul><ul><li>relevant legislation and statutory requirements, including:</li><li>➤ industry codes of practice</li><li>➤ work health and safety (WHS)</li><li>➤ scanners</li></ul><ul><li>store policy and procedures in relation to:</li><li>➤ allocated duties and responsibilities</li><li>➤ bag checking</li><li>➤ customer service</li><li>➤ exchanges and returns</li><li>➤ handling, packing and wrapping goods or merchandise</li><li>➤ point-of-sale transactions</li><li>➤ stock availability</li><li>➤ key features of a calculator</li></ul> |
| Underpinning Skills | Must demonstrate skills to:<ul><li>communication and interpersonal skills to:</li><li>➤ ask questions to identify and confirm requirements</li><li>➤ inform customers of delays</li><li>➤ listen actively</li><li>➤ request adequate supplies of wrapping material or bags through clear and direct communication</li><li>➤ share information</li><li>➤ state price or total and amount of cash received</li><li>➤ use and interpret non-verbal communication</li><li>➤ use language and concepts appropriate to cultural differences</li></ul><ul><li>self-management skills to:</li><li>➤ deal with different types of transactions</li><li>➤ follow set routines and procedures</li></ul><ul><li>literacy and numeracy skills to:</li><li>➤ document sales and delivery information</li><li>➤ render change</li></ul><ul><li>undertake work functions, including addition, division, multiplication, percentages and subtraction</li></ul> |
| Resources | Access is required to real or appropriately simulated situations, |

| Implication | including work areas, materials and equipment, and to information on workplace practices and OHS practices. |
|---|---|
| Assessment Methods | Competence may be assessed through:<br>• Interview / Written Test / Oral Questioning<br>• Observation / Demonstration |
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting |

| Occupational Standard: Marketing Services Level III | |
|---|---|
| **Unit Title** | **Coordinate Sales Performance** |
| **Unit Code** | **EIS MKS3 10 0812** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to implement and monitor adherence to sales policies and procedures, and monitor the achievement of sales targets. |

| Elements | Performance Criteria |
|---|---|
| 1. Implement sales policies and procedures. | 1.1. Adherence is implemented and monitored to **store policy and procedures** and **relevant legislation** in regard to **selling**. |
| | 1.2. Store policy and procedures are implemented and monitored in regard to **sales transactions**. |
| | 1.3. **Team** is monitored to ensure information is entered into point-of-sale equipment accurately. |
| | 1.4. Team is monitored to ensure the efficient and safe **handling** of goods through point-of-sale areas. |
| | 1.5. Team is monitored to ensure that products and services are matched to **customer** needs. |
| 2. Provide feedback and coaching to improve implementation of sales policies and procedures. | 2.1. Individual information and coach sales team members are provided in store policy and procedures and relevant legislation in regard to selling. |
| | 2.2 Individual information and coach sales team members are provided on the implementation of store policy and procedures in regard to sales transactions. |
| | 2.3. Support is provided to team members to promote sales and service techniques. |
| 3. Monitor achievement of sales targets. | 3.1. Individual and department sales targets are monitored and recorded according to store policy. |
| | 3.2. Store sales results are monitored and recorded in line with sales targets and according to store policy. |
| | 3.3. **Feedback** is provided to management and staff on sales performance in relation to sales targets and planning. |

| Variable | Range |
|---|---|
| Store policy and procedures in regard to: | • allocated duties and responsibilities<br>• efficient use of resources<br>• internal and external customer contact |

| | |
|---|---|
| | • reporting |
| | • sales transactions |
| | • selling products and services |
| Relevant legislation may include: | • environmental and sustainability legislation |
| | • industry codes of practice |
| | • liquor laws |
| | • lottery legislation |
| | • WHS |
| | • pricing procedures |
| | • sale of second-hand goods |
| | • tobacco laws |
| | • transport, storage and handling of goods |
| Selling may include: | • face-to-face |
| | • internet |
| | • telephone |
| Sales transactions may include: | • cash |
| | • cheque |
| | • credit card |
| | • gift voucher |
| | • store card |
| Team may include: | • full-time, part-time, casual or contract staff |
| | • people from a range of cultural, social and ethnic |
| | • people with varying degrees of language and literacy |
| Handling techniques may vary according to: | • industry codes of practice |
| | • WHS |
| | • stock characteristics |
| Customers may include: | • customers with routine or special requests |
| | • internal or external contacts |
| | • new or repeat contacts |
| | • people from a range of social, cultural and ethnic backgrounds |
| | • people with varying physical and mental abilities |
| Feedback to management and staff may include: | • business documents |
| | • email |
| | • financial reports |
| | • informal meetings |
| | • presentations |
| | • records of store sales |
| | • reports |

| **Evidence Guide** | |
|---|---|
| Critical aspects of Competence | Assessment requires evidence that the candidate: |
| | • applies store policies and procedures and industry codes of practice in regard to customer service and selling products and services |
| | • implements and monitors store policies and procedures in |

| | relation to sales transactions, including non-cash sales and variations to standard sales transactions |
| | • provides information and coaching to sales team members to improve sales policy implementation |
| | • monitors and provides feedback to management and staff on sales performance in relation to sales targets and planning |

| Underpinning Knowledge and Attitudes | Must demonstrate knowledge of:<br>• customer profiles<br>• factors that enhance sales performance<br>• location of store departments and importance of sales to store performance<br>• pricing procedures<br>• principles and techniques of interpersonal communication<br>• relevant industry codes of practice<br>• relevant legislation and statutory requirements, including:<br>• work health and safety (WHS) requirements<br>• sustainability requirements<br>• stock control procedures<br>• store and department sales targets<br>• store merchandise and services<br>• store policies and procedures in regard to:<br>• allocated duties and responsibilities<br>• efficient use of resources<br>• internal and external customer contact<br>• selling products and services |
|---|---|
| Underpinning Skills | Must demonstrate skills to:<br>• communication and interpersonal skills to:<br>  ➢ ask questions to identify and confirm requirements<br>  ➢ give instructions<br>  ➢ provide feedback, coaching and performance analysis through clear and direct communication<br>  ➢ share information<br>  ➢ use and interpret non-verbal communication<br>  ➢ use language and concepts appropriate to cultural differences<br>• literacy and numeracy skills to:<br>  ➢ analyze store, department and individual sales figures<br>  ➢ process and record information<br>• read store policy and procedures |
| 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 | Competence may be assessed through:<br>• Interview / Written Test / Oral Questioning<br>• Observation / Demonstration |
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting |

| Occupational Standard: Marketing Services Level III | |
|---|---|
| **Unit Title** | **Recommend Products and Services** |
| **Unit Code** | **EIS MKS3 11 0812** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to provide advice and information within an organization about the development and distribution of its products and services. |

| Elements | Performance Criteria |
|---|---|
| 1. Develop and maintain knowledge of products and services | 1.1 Knowledge and understanding of **industry products and services** using **authoritative sources** are actively and regularly researched. |
| | 1.2 Available product and service documentation is used to identify and understand characteristics of products and services, and comparisons with other products and service are made. |
| | 1.3 Information on products and services are accurately documented and maintained in a format consistent with **organizational requirements**. |
| | 1.4 Acquired knowledge is applied to improve quality within personal work areas. |
| 2. Recommend products and services | 2.1 Recommendation on products and services is ensured and in line with organizational requirements. |
| | 2.2 Recommendations that emphasize **product and services issues** relevant to client needs are provided. |
| | 2.3 Evidence in support of recommendations is ensured, verifiable and presented in a suitable format. |
| | 2.4 Recommendations are structured to identify clear benefits to clients and the organization. |
| 3. Advise on promotional activities | 3.1 Advice that is clear, is provided and supported by verifiable evidence and is compatible with organizational requirements. |
| | 3.2 Promotional documentation and materials are ensured and appropriate to presentation of the organization's products and services. |
| | 3.3 Costs of promotional activities conform to budget resources are ensured. |
| | 3.4 Impact of **promotional activities** from **verifiable customer feedback sources** is estimated. |
| | 3.5 Benefits of promotional activities are evaluated and incorporated in plans for future promotional activities. |

| Variable | Range |
|---|---|
| Industry products and services | May include:<br>• competitor products and services<br>• complementary products and services<br>• emerging products and services<br>• historical products and services<br>• organization's products<br>• specified range of products and services within an organization's offerings |
| Authoritative sources | May include:<br>• authorized suppliers<br>• industry associations<br>• industry conferences<br>• recognized industry media sources |
| Organizational requirements | May include:<br>• access and equity principles and practice<br>• confidentiality and security requirements<br>• defined resource parameters<br>• ethical standards<br>• filing and documentation storage processes<br>• goals, objectives, plans, systems and processes<br>• legal and organizational policies, guidelines and requirements<br>• OHS policies, procedures and programs<br>• payment and delivery options<br>• pricing and discount policies<br>• quality assurance and/or procedures manuals<br>• replacement and refund policy and procedures<br>• responsible for products and services |
| Product and service issues | May include:<br>• customer delivery<br>• faults<br>• market share data<br>• organizational product knowledge<br>• production down-time<br>• sales figures |
| Promotional activities | May include:<br>• advertisements<br>• client functions<br>• employee functions<br>• media announcements<br>• product launches<br>• web pages |
| Verifiable customer feedback sources | May include:<br>• audit documentation and reports<br>• complaints<br>• customer satisfaction questionnaires |

|  | • lapsed clients |
|  | • quality assurance data |
|  | • returned goods |
|  | • service calls |

| **Evidence Guide** | |
|---|---|
| Critical Aspects of Competence | A person must be able to provide evidence of:<br>• assessing and reporting on customer satisfaction<br>• identifying commercial characteristics of products and services<br>• knowledge of products and service standards and best practice models<br>• preparing and structuring advice on products and services<br>• researching market availability of products and services |
| Underpinning Knowledge and Attitudes | Demonstrate knowledge on:<br>• key provision of relevant legislation from all levels of government that may affect aspects of business operations, such as:<br>  ➢ anti-discrimination legislation<br>  ➢ ethical principles<br>  ➢ codes of practice<br>  ➢ privacy laws<br>  ➢ occupational health and safety (OHS)<br>• organization's products and services<br>• organizational policies and procedures for customer service including handling customer complaints<br>• product and service standards and best practice models<br>• principles and techniques of public relations and product promotion<br>• mechanisms to obtain and analyze customer feedback |
| Underpinning Skills | Demonstrate skills to:<br>• literacy skills to read and understand a variety of texts; to prepare general information and papers according to target audience; and to edit and proofread texts to ensure clarity of meaning, and accuracy of grammar and punctuation<br>• technology skills to select and use technology appropriate to a task<br>• communication skills to monitor and advise on customer service strategies<br>• problem-solving skills to deal with customer enquiries or complaints<br>• analytical skills to identify trends and positions of products and services |
| Resources Implication | Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices. |

| Assessment Methods | Competence may be assessed through:<br>• Interview / Written Test / Oral Questioning<br>• Observation / Demonstration |
|---|---|
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting |

| Occupational Standard: Marketing Services Level III | |
|---|---|
| **Unit Title** | **Maintain Business-to-Business Relationships** |
| **Unit Code** | **EIS MKS3 12 0812** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to develop and maintain enduring relationships with business customers, focusing on identification of customer needs. |

| Elements | Performance Criteria |
|---|---|
| 1. Maintain close contact with business customers. | 1.1. **Relevant contact personnel** are confirmed for each business or account customer.<br><br>1.2. **Team** efforts are participated and contributed to service business customers.<br><br>1.3. External relationships are built to improve **supply chain efficiency**.<br><br>1.4. Business customer contact is maintained consistent with **business policy and procedures**. |
| 2. Identify business customer needs. | 2.1. Means are confirmed to **identify business customer needs**.<br><br>2.2. Relevant customer contacts are consulted to review business needs.<br><br>2.3. Current business and **promotional activities** are analyzed and future directions are determined.<br><br>2.4. **Trading terms** are outlined and confirmed for specific customers.<br><br>2.5. Pricing policy and procedures are confirmed.<br><br>2.6. Business reviews are processed using latest forecasts of current and future trends. |
| 3. Improve business customer outcomes and business relationships. | 3.1. The needs of business customers and end consumers are reported, promoted and advocated within the organization.<br><br>3.2. Quality assurance and compliance procedures are established and used to qualify and quantify business customer needs.<br><br>3.3. Judgment is used to guide the standards of quality required to meet business customer service needs and expectations.<br><br>3.4. Future business customer needs and factor are anticipated into management activities.<br><br>3.5. Regular, effective and targeted feedback are provided to business customers regarding the services and the value that is provided. |

| Variable | Range |
|---|---|
| Relevant contact personnel may include: | • internal and external contacts<br>• new or repeat contacts<br>• people from a range of social, cultural and ethnic backgrounds<br>• people with varying physical and mental abilities |
| Team members may include: | • full-time, part-time, casual or contract staff<br>• people from a range of cultural, social and ethnic backgrounds<br>• people with a range of responsibilities and job descriptions<br>• people with varying degrees of language and literacy |
| Supply chain efficiency may be influenced by factors, including: | • account management<br>• effectiveness and timeliness of product or service supply<br>• efficacy of supply arrangements and distribution systems<br>• product management<br>• quality, accuracy and timeliness of information provision and communications |
| Business policy and procedures in relation to: | • client relationship management<br>• interaction with customers<br>• pricing arrangements<br>• sale and distribution of products and services<br>• trading terms |
| Methods to identify business customer needs may include: | • appropriate questioning and active listening<br>• observation<br>• review of sales records<br>• verbal or non-verbal communication with:<br>   ➢ customer contacts<br>   ➢ staff<br>   ➢ supervisors and management<br>   ➢ suppliers |
| Promotional activities may include: | • advertising<br>• catalogues<br>• corporate or locally-based activities<br>• dealing with advertising agencies and consultants<br>• internal and external activities<br>• internet<br>• newspapers<br>• posters<br>• radio or television<br>• suppliers<br>• website |
| Trading terms may be influenced by: | • continuous improvement<br>• due diligence requirements<br>• infrastructure and capital outlay requirements<br>• intellectual property and technology rights<br>• market position<br>• organisational systems integration and compatibility |

|  | • planning cycles and timing<br>• risk sharing<br>• supply chain management<br>• terms and conditions agreed<br>• value for money |
|---|---|

| **Evidence Guide** | |
|---|---|
| Critical aspects of Competence | Assessment requires evidence that the candidate:<br>• builds sustainable relationships with business customers that deliver agreed business outcomes<br>• identifies key contact personnel for businesses with a given territory or customer account<br>• describes and uses a range of means to identify specific needs of business customers<br>• confirms trading terms for customers according to business policy and procedures |
| Underpinning Knowledge and Attitudes | Must demonstrate  knowledge of:<br>• business policy and procedures for building relationships with business customers<br>• information sources on product and supply arrangements for customers<br>• relevant legislation and statutory requirements, including work health and safety (WHS)<br>• pricing policies<br>• trading terms |
| Underpinning Skills | Must demonstrate  skills to:<br>• communication and interpersonal skills to facilitate:<br>  ➤ building relationships with business customers<br>  ➤ consultation<br>  ➤ dispute resolution<br>  ➤ negotiation<br>  ➤ presentation<br>• literacy skills to read, analyse and interpret a range of business policy and procedures, documents and research information<br>• planning and organising skills to:<br>  ➤ collect and organize information<br>  ➤ prioritize work schedule<br>  ➤ process business forecasts for implementation<br>  ➤ review business needs and basic forecasts<br>• problem-solving skills to anticipate future business customer needs<br>• self-management skills to:<br>  ➤ confirm trading terms, pricing policies and other relevant procedures to customers<br>  ➤ demonstrate flexibility when communicating within teams and responding to customers<br>  ➤ identify and maintain key contact personnel at customer |

| | businesses<br>• teamwork skills to contribute to team service to specific customers<br>• technology skills to use technology effectively |
|---|---|
| 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 | Competence may be assessed through:<br>• Interview / Written Test / Oral Questioning<br>• Observation / Demonstration |
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting |

| Occupational Standard: Marketing Services Level III | |
|---|---|
| **Unit Title** | **Organize Personal Work Priorities and Development** |
| **Unit Code** | **EIS MKS3 13 0812** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to organize own work schedules, to monitor and obtain feedback on work performance, and to maintain required levels of competence. |

| Elements | Performance Criteria |
|---|---|
| 1. Organize and complete own work schedule | 1.1 **Work goals and objectives** are understood, negotiated and agreed in accordance with **organizational requirements** are ensured. |
| | 1.2 Workload is assessed and prioritized to ensure tasks are completed within identified timeframes. |
| | 1.3 **Factors affecting the achievement of work objectives** are identified and contingencies are incorporated into work plans. |
| | 1.4 **Business technology** is efficiently and effectively used to manage and scheduling and completion of tasks are monitored. |
| 2. Monitor own work performance | 2.1 Personal work performance through self-assessment is accurately monitored and adjusted to ensure achievement of tasks. |
| | 2.2 **Feedback on performance** is actively sought and evaluated from colleagues and clients in the context of individual and group requirements are ensured. |
| | 2.3 Variations in the quality of service and products are routinely identified and reported in accordance with organizational requirements. |
| | 2.4 **Signs of stress** and effects on **personal wellbeing** are identified. |
| | 2.5 **Sources of stress** are identified and appropriate **supports and resolutions strategies** are accessed. |
| 3. Coordinate personal skill development and learning | 3.1 Personal learning needs and skill gaps using self-assessment are identified and colleagues and clients in relation to role and organizational requirements are advised. |
| | 3.2 Opportunities for undertaking personal skill development activities in liaison with work groups and relevant personnel |

are identified, prioritized and planned.

3.3 **_Professional development opportunities_** are accessed, completed and recorded to facilitate continuous learning and career development.

3.4 Formal and informal feedbacks are incorporated into review of further learning needs.

| Variable | Range |
|---|---|
| Work goals and objectives | May include: <br> • budgetary targets <br> • production targets <br> • reporting deadlines <br> • sales targets <br> • team and individual learning goals <br> • team participation |
| Organizational requirements | May include: <br> • access and equity principles and practice <br> • business and performance plans <br> • defined resource parameters <br> • ethical standards <br> • goals, objectives, plans, systems and processes <br> • legal and organizational policies, guidelines and requirements <br> • OHS policies, procedures  and programs <br> • quality and continuous improvement processes and standards <br> • quality assurance and/or procedures manuals |
| Factors affecting the achievement of work objectives | May include: <br> • budget constraints <br> • competing work demands <br> • environmental factors such as time, weather <br> • resource and materials availability <br> • technology/equipment breakdowns <br> • unforeseen incidents <br> • workplace hazards, risks and controls |
| Business technology | May include: <br> • computer applications <br> • computer <br> • email <br> • facsimile machines <br> • internet/extranet/intranet <br> • modems <br> • personal schedulers <br> • photocopies <br> • printers <br> • scanners |
| Feedback on | May include: |

| performance | • formal/informal performance appraisals<br>• obtaining feedback from clients<br>• obtaining feedback from supervisors and colleagues<br>• personal, reflective behavior strategies<br>• routine organizational methods for monitoring service delivery |
|---|---|
| Signs of stress | May include:<br>• absence from work<br>• alcohol or other substance abuse<br>• conflict<br>• poor work performance |
| Personal well being | May include:<br>• cultural<br>• emotional<br>• social<br>• spiritual |
| Sources of stress | May include:<br>• complex tasks<br>• cultural issues<br>• work and family conflict<br>• workloads |
| Supports and resolution strategies | May include:<br>• awareness raising<br>• counseling<br>• employee assistance programs (EAP)<br>• family support<br>• group activities<br>• job design<br>• mediation<br>• sharing load<br>• time off<br>• training |
| Professional development opportunities | May include:<br>• career planning/development<br>• coaching, mentoring and/or supervision<br>• formal/informal training provision<br>• performance appraisals<br>• personal study<br>• quality assurance assessments and recommendations<br>• recognition of current competence/skills recognition<br>• work experience/exchange/opportunities<br>• workplace skills assessment |

| **Evidence Guide** | |
|---|---|
| Critical Aspects of Competence | A person must be able to provide evidence of:<br>• preparing work plans<br>• Scheduling and prioritizing work objectives and tasks |

| | |
|---|---|
| | • Knowledge of the principles and techniques of goal setting, measuring performance, time management and personal assessment |
| Underpinning Knowledge and Attitudes | Demonstrate knowledge on: <br> • key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as: <br> ➢ anti-discrimination legislation <br> ➢ ethical principles <br> ➢ codes of practice <br> ➢ privacy laws <br> ➢ occupational health and safety (OHS) <br> • organizational policies, plans and procedures <br> • methods to elicit, analyze and interpret feedback <br> • principles and techniques of goal setting, measuring performance, time management and personal assessment <br> • competence standards and how to interpret them in relation to self <br> • methods to identify and prioritize personal learning needs |
| Underpinning Skills | Demonstrate skills to: <br> • literacy skills to read and understand the organization's procedures, own work goals and objectives <br> • planning skills to organize work priorities and arrangements <br> • problem-solving skills to solve routine problems <br> • communication skills to give and receive constructive feedback relating to development needs |
| 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 | Competence may be assessed through: <br> • Interview / Written Test / Oral Questioning <br> • Observation / Demonstration |
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting |

| Occupational Standard: Marketing Services Level III | |
|---|---|
| **Unit Title** | **Communicate with Customers Using Technologies** |
| **Unit Code** | **EIS MKS3 14 0812** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to use technologies to communicate with customers according to workplace protocols. It involves correct operation of technologies, development of customer relationships to encourage use of technologies, and contacting customers using technologies such as mobile phone and web applications to inform and promote to customers. |

| Elements | Performance Criteria |
|---|---|
| 1. Clarify procedures for customer contact using technologies. | 1.1 **Organizational information** relating to the use of **technologies** is identified and reviewed for communicating with customers. |
| | 1.2 Personal responsibility and limitations are identified in relation to communication with customers using technologies. |
| | 1.3 Protocols are identified for collecting **customer data** to communication is facilitated using technologies. |
| | 1.4 Protocols are identified for **nature and frequency of customer contact** using different types of technologies. |
| 2. Operate technologies. | 2.1 Procedures are identified for operation of technologies and associated applications. |
| | 2.2 Operation of technologies and associated applications is tested and protocols are applied in line with nature of customer contact. |
| | 2.3 Feedback is obtained and applied from relevant staff on operation of technologies. |
| 3. Promote customer communication using technologies. | 3.1 Relationships are developed with customers to identify scope for communication using technologies. |
| | 3.2 Benefits of communication are explained using technologies relevant to customers. |
| | 3.3 Required customer data is collected for communication using technologies. |
| | 3.4 Customer data is processed according to workplace procedures. |
| 4. Contact customers. | 4.1 Customers are contacted using technologies according to workplace procedures. |
| | 4.2 Feedback is obtained from customers on communication using technologies according to workplace requirements. |

| | 4.3 Potential is considered and discussed for improvement of customer communications with relevant staff. |
| | 4.4 Suggested improvements are applied to improve customer communications. |

| Variable | Range |
|---|---|
| Organisational information may include: | • mission, values and goals of business<br>• product and service details<br>• workplace procedures |
| Technologies may include: | • mobile phone technologies and programs<br>• web technologies and programs<br>• wireless technologies and programs |
| Customer data may include: | • name<br>• address<br>• mobile phone number<br>• email address<br>• social networking contact details |
| Nature and frequency of customer contact may include: | • limitations on the number of contacts in a given time period<br>• prescribed content of typical messages<br>• prescribed timeframes for contacts<br>• style guide for content of communications |

| Evidence Guide | |
|---|---|
| Critical aspects of Competence | Assessment requires evidence that the candidate:<br>• adheres to organisational protocols for customer contact using technologies<br>• promotes benefits of communication to relevant customers using technologies<br>• communicates with a range of customers using a range of technologies<br>• obtains and implements feedback on communication procedures. |
| Underpinning Knowledge and Attitudes | Must demonstrate  knowledge of:<br>• scope of organisation's sales and services<br>• types of technology and their application to the  marketing sector<br>• workplace procedures relating to:<br>  ➢ collection of customer data<br>  ➢ customer service<br>  ➢ operation of technologies |
| Underpinning Skills | Must demonstrate  skills to:<br>• communication and interpersonal skills to:<br>  ➢ ask questions relating to information and procedures<br>  ➢ develop relationships with customers<br>  ➢ explain use of technologies to customers |

| | |
|---|---|
| | <ul><li>➤ share information</li><li>➤ use and interpret non-verbal communication</li><li>➤ use language and concepts appropriate to cultural differences</li></ul><ul><li>literacy skills to find, read and record information</li><li>planning and organizing skills to:<ul><li>➤ collect and collate information</li><li>➤ schedule and complete tasks</li><li>➤ set and meet timeframes</li></ul></li><li>technology skills to operate communication technologies</li></ul> |
| 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 | Competence may be assessed through:<ul><li>Interview / Written Test / Oral Questioning</li><li>Observation / Demonstration</li></ul> |
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting |

| Occupational Standard: Marketing Services Level III | |
|---|---|
| **Unit Title** | **Write Simple Documents** |
| **Unit Code** | **EIS MKS3 15 0812** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to plan, draft and review a basic document before writing the final version. |

| Elements | Performance Criteria |
|---|---|
| 1. Plan document | 1.1 **Audience** and **purpose** for the document are determined. |
| | 1.2 **Format** and **structure** are determined. |
| | 1.3 Key points are established for inclusion. |
| | 1.4 **Organizational requirements** are identified. |
| | 1.5 **Method of communication** is established. |
| | 1.6 **Mean of communication** is established. |
| 2. Draft document | 2.1 Draft document is developed to communicate key points. |
| | 2.2 Any required additional information is obtained and included. |
| 3. Review document | 3.1 Draft is checked for suitability of tone for audience, purpose, and format and communication style. |
| | 3.2 Draft is checked for readability, grammar, spelling, and sentence and paragraph construction. |
| | 3.3 Draft is checked for sequencing and structure. |
| | 3.4 Draft is checked to ensure it meets organizational requirements. |
| | 3.5 Draft is proofread, where appropriate, by supervisor or colleague is ensured. |
| 4. Write final document | 4.1 Necessary changes is made and proofread. |
| | 4.2 Document is sent to **intend recipient** is ensured. |
| | 4.3 Copy of document is filed in accordance with organizational policies and procedures. |

| Variable | Range |
|---|---|
| Audience | May include:<br>• internal and external customers<br>• recipient/s who receive a copy for information<br>• primary recipient/s of the communication |
| Purpose | May include:<br>• clarification of issues<br>• communication about meetings or events |

| | |
|---|---|
| | • information<br>• minutes/outcomes of meetings<br>• request for information, advice or assistance<br>• statements of fact<br>• straightforward advice |
| Format | May include:<br>• email<br>• forms<br>• letters<br>• memos<br>• minutes of meetings<br>• organizational templates or proformas for letters, memos or reports<br>• tables |
| Structure | May include:<br>• organization of the material to suit the format (e.g. scannability for on-screen use)<br>• treatment of attachments and hyperlinks<br>• visual signposting of material, including use of headings, lists, keywords and text in boxes |
| Organizational requirements | May include:<br>• house style requirements<br>• identified authorities for signatories for correspondence/ communications<br>• protocols, both written and unwritten for the organization's internal and external communication<br>• requirements for inclusive and non-discriminatory language and for adherence for copyright legislation |
| Method of communication | May include:<br>• inclusive communication<br>• use of active or passive voice<br>• use of the appropriate register or style of language – formal, standard or informal |
| Means of communication | May include:<br>• software packages such as MS Word, Excel, PageMaker, PowerPoint and templates |
| Intended recipient | Refers to:<br>• audience for document<br>• signatory of the document<br>• supervisor or other staff member who may add to or forward document to another recipient |

| Evidence Guide | |
|---|---|
| Critical Aspects of Competence | A person must be able to provide evidence of:<br>• producing a range of documents that accurately convey required basic information<br>• using formatting suitable for intended audience |

| | • knowledge of organizational policies and procedures for document production |
|---|---|
| Underpinning Knowledge and Attitudes | Demonstrate knowledge on: <br> • basic grammar, spelling and punctuation <br> • communication protocols <br> • how audience, purpose and method of communication influence tone <br> • organizational policies and procedures for document production <br> • resources to assist in document production, such as dictionary, thesaurus, templates, style sheets |
| Underpinning Skills | Demonstrate skills to: <br> • literacy skills to read and understand a variety of texts; to prepare general information and papers according to target audience; and to proofread and edit documents to ensure clarity of meaning and conformity to organizational requirements <br> • problem-solving skills to determine document design and production processes |
| 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 | Competence may be assessed through: <br> • Interview / Written Test / Oral Questioning <br> • Observation / Demonstration |
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting |

| Occupational Standard: Marketing Services Level III | |
|---|---|
| **Unit Title** | **Produce Financial Reports** |
| **Unit Code** | **EIS MKS3 16 0812** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to produce financial reports in a sales environment. It involves entering payment summaries into journals, reconciling accounts to balance, preparing bank reconciliations, and receiving and documenting payments and takings. It also involves dispatching statements to debtors, dispatching payments to creditors and preparing financial reports. |

| Elements | Performance Criteria |
|---|---|
| 1. Enter payment summaries into journals. | 1.1 Payment documents are filled out identifying relevant details. |
| | 1.2 Payment documents are checked for authenticity of claim. |
| | 1.3 Payment documents are balanced on a routine basis. |
| 2. Reconcile accounts to balance. | 2.1 Discrepancies are identified between **transaction** documentation and account balances. |
| | 2.2 Errors are rectified in documentation. |
| | 2.3 Data on **nominated system** is recorded within designated time limits. |
| 3. Prepare bank reconciliations. | 3.1 Deposit entries and cash payment summaries are checked for accuracy against bank statements. |
| | 3.2 Discrepancies are noted and resolved. |
| | 3.3 Regular reconciliation reports are produced within designated time limits to provide data for preparation of trial balance. |
| | 3.4 Pay in documentation is completed accurately. |
| | 3.5 All transaction calculations are balanced. |
| 4. Dispatch statements to debtors and follow up outstanding accounts. | 4.1 Cash is counted correctly and correct change given, if applicable. |
| | 4.2 Cheque and credit card payments are verified with the **relevant personnel** or department prior to acceptance. |
| | 4.3 Receipts are completed and issued. |
| 5. Dispatch statements to debtors and follow up outstanding accounts. | 5.1 Debtor statements are checked for accuracy of contents. |
| | 5.2 Any noted discrepancies are rectified accurately. |
| | 5.3 Debtor statements are dispatched within designated time limits. |
| | 5.4 Outstanding accounts are collected within designated credit |

|  | periods. |
|  | 5.5 Credit terms are reviewed and controlled to ensure payment within designated time limits. |
|  | 5.6 Debtors' ledger is maintained to reflect current situation. |
|  | 5.7 Customer credit terms are reviewed when indicated, according to **store policy and procedures.** |
| 6. Dispatch payments to creditors. | 6.1 Payment documentation prepared by others is checked for accuracy of information and dispatch to creditors within designated time limits. |
|  | 6.2 Creditors' statements are reconciled with accounting **records**. |
|  | 6.3 Relevant data is input to creditors' ledger. |
|  | 6.4 General ledger is reconciled against accounting records. |
| 7. Generate financial documents. | 7.1 Purpose of the report is clarified with relevant personnel. |
|  | 7.2 Relevant data is identified and obtained from nominated internal or external **sources**. |
|  | 7.3 Nominated internal records are updated to show current status of financial report. |
|  | 7.4 Data is transcribed onto nominated form and in the authorised manner. |


| Variable | Range |
|---|---|
| Transactions may include: | • cash<br>• cheque<br>• credit card<br>• store card<br>• internet payments<br>• gift vouchers<br>• returns |
| Nominated system may include: | • recording<br>• documenting<br>• reporting systems<br>• accounting |
| Relevant personnel may include: | • supervisor<br>• team leader<br>• manager |
| Store policy and procedures in regard to: | • financial systems<br>• cash handling<br>• reconciling accounts |
| Records may be: | • manual<br>• electronic |

| Sources may include: | • staff members<br>• formal or informal reports<br>• written or verbal data<br>• formal or informal meetings<br>• quantitative and qualitative data |
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| **Evidence Guide** | |
|---|---|
| Critical aspects of Competence | Assessment requires evidence that the candidate:<br>• consistently applies store policy and procedures when producing financial reports<br>• consistently applies store policy and procedures in regard to handling cash<br>• consistently applies store policy and procedures in regard to the accurate and effective recording of data for reporting and processing document discrepancies and the reconciliation of reports for preparation of trial balances<br>• consistently applies store policy and procedures in regard to receiving, recording and dispatching to debtors and creditors<br>• applies follow-up procedures for outstanding accounts |
| Underpinning Knowledge and Attitudes | Must demonstrate knowledge of:<br>• store policy and procedures in regard to:<br>  ➢ register or terminal balance<br>  ➢ cash and non-cash transactions security<br>  ➢ cash balances<br>  ➢ banking procedures<br>  ➢ purchase requisitions and orders<br>  ➢ issuing of receipts<br>  ➢ delivery dockets<br>  ➢ credit notes<br>  ➢ statements<br>  ➢ remittance advices<br>  ➢ cash register rolls<br>  ➢ deposit books<br>  ➢ change required and denomination of change<br>  ➢ operation of equipment used at register or terminal<br>  ➢ processing delivery document discrepancies<br>  ➢ invoicing procedures for debtors and creditors<br>• payment and invoice procedures<br>• relevant legislation and statutory requirements<br>• cash and non-cash handling procedures, including:<br>  ➢ balancing point-of-sale terminal<br>  ➢ recording takings<br>  ➢ security of cash and non-cash transactions<br>  ➢ change required and denominations of change<br>  ➢ credit cards<br>  ➢ gift vouchers<br>• credits and returns |

| Underpinning Skills | Must demonstrate  skills to: |
| --- | --- |
| | • literacy skills to: |
| |    ➢ interpret documentation |
| |    ➢ write reports |
| | • numeracy skills to: |
| |    ➢ reconcile accounts |
| |    ➢ count cash |
| |    ➢ calculate non-cash transactions |
| |    ➢ report on takings |
| | • interpersonal skills to: |
| |    ➢ verify cheque and credit card payments with relevant personnel or department prior to acceptance |
| |    ➢ clarify purpose of report with relevant personnel |
| |    ➢ identify and obtain relevant data through clear and direct communication |
| |    ➢ ask questions to identify and confirm requirements |
| |    ➢ use language and concepts appropriate to cultural differences |
| |    ➢ use and interpret non-verbal communication |
| 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 | Competence may be assessed through: |
| | • Interview / Written Test / Oral Questioning |
| | • Observation / Demonstration |
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting. |

| Occupational Standard: Marketing Services Level III | |
|---|---|
| **Unit Title** | **Analyze and Achieve Sales Targets** |
| **Unit Code** | **EIS MKS3 17 0812** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to set, analyse and achieve personal sales targets to guide performance and monitor the progress of sales against business objectives. |

| Elements | Performance Criteria |
|---|---|
| 1. Analyse sales targets. | 1.1 **Team sales targets** are confirmed according to **business policy and procedures**. |
| | 1.2 Personal sales targets are analysed against **agreed parameters**. |
| | 1.3 Progress is regularly monitored towards sales targets. |
| | 1.4 Performance of different customers and areas is analysed to determine common factors supporting or deterring sales. |
| 2. Determine factors affecting attainment of sales targets. | 2.1 **Factors affecting sales performance** are evaluated against the agreed sales targets. |
| | 2.2 Factors are anticipated and addressed likely to impinge upon attainment of sales targets. |
| | 2.3 Amended or new **sales targets** are approved according to business policy and procedures. |
| 3. Attain sales targets. | 3.1 **Actions are initiated** to address customers with under-performing sales, and report progress to senior management in line with standard organisational policies and procedures. |
| | 3.2 Customers are identified with strong sales performance and actions are initiated to extend sales opportunities and sustain customer loyalty. |
| | 3.3 Changing business circumstances that may influence capacity are identified to meet or exceed sales targets and determine a course of action to address the challenge. |
| | 3.4 Sales progress is reported to senior management using standard organisational policies and procedures. |

| Variable | Range |
|---|---|
| Team may include: | • business team<br>• full-time, part-time, casual or contract staff<br>• people from a range of cultural, social and ethnic backgrounds<br>• people with a range of responsibilities and job descriptions |

| | |
|---|---|
| | • people with varying degrees of language and literacy<br>• small work teams |
| Business policy and procedures in relation to: | • approval processes<br>• interaction with colleagues<br>• interaction with customers<br>• sale of products and services<br>• sales planning and evaluation |
| Agreed parameters may include: | • customer accounts<br>• customer satisfaction<br>• market share<br>• price<br>• regional area<br>• trading terms<br>• volume |
| Factors affecting sales performance may include: | • associated promotions<br>• associated sales<br>• competitor activities<br>• customer requirements<br>• logistics<br>• market share<br>• merchandise availability<br>• presentation or merchandising of the product<br>• promotional tie-ins or co-location<br>• quality of products or services |
| Sales targets may vary, according to: | • merchandising and sales strategy<br>• product or service<br>• promotional strategies and their duration, cycle, area coverage and product or service focus<br>• sales strategy |
| Initiating actions to address customers with under-performing sales may include: | • assessing the impact of competitor's products and ability to offer better solution<br>• exiting unviable relationship with customer<br>• identifying reasons that may limit sales, including:<br>  ➢ product suitability<br>  ➢ quality of customer service<br>  ➢ viability of the product line to the customer's business<br>• offering alternative products |

| Evidence Guide | |
|---|---|
| Critical aspects of Competence | Assessment requires evidence that the candidate:<br>• a business-to-business sales work environment<br>• relevant documentation, such as:<br>  ➢ business policy and procedures<br>  ➢ business plans and objectives<br>• a range of customers with different requirements |

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|---|---|
| Underpinning Knowledge and Attitudes | Must demonstrate knowledge of:<br>• business plans and targets affecting personal sales targets<br>• business policy and procedures<br>• customer needs<br>• factors affecting sales<br>• parameters determining successful attainment of personal sales targets<br>• range of products and services<br>• relevant business policy and procedures<br>• relevant legislation and statutory requirements relating to the retail industry, including:<br>  ➢ work health and safety (WHS)<br>  ➢ commercial law and legislation<br>• regional characteristics and features<br>• types of business customers |
| Underpinning Skills | Must demonstrate skills to:<br>• collecting, analysing and organising skills to:<br>  ➢ confirm and implement sales targets<br>  ➢ determine factors affecting sales performance<br>  ➢ establish personal sales targets against agreed parameters<br>  ➢ monitor progress towards sales targets<br>• literacy and numeracy skills to:<br>  ➢ document procedures for improving sales<br>  ➢ read and interpret information<br>  ➢ review personal sales outcomes<br>• planning and organising skills to plan personal tasks and priorities<br>• time management skills to initiate regular evaluation of sales performance and adjust strategies and targets where required |
| 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 | Competence may be assessed through:<br>• Interview / Written Test / Oral Questioning<br>• Observation / Demonstration |
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting |

| Occupational Standard: Marketing Services Level III | |
|---|---|
| **Unit Title** | **Monitor Implementation of Work Plan/Activities** |
| **Unit Code** | **EIS MKS3 18 0812** |
| **Unit Descriptor** | This unit covers competence required to oversee and monitor the quality of work operations within an enterprise. This unit may be carried out by team leaders or supervisors. |

| Elements | Performance Criteria |
|---|---|
| 1. Monitor and improve workplace operations | 1.1 Efficiency and service levels are monitored on an ongoing basis. |
| | 1.2 Operations in the workplace support overall enterprise goals and quality assurance initiatives. |
| | 1.3 Quality **problems** and issues are promptly identified and adjustments are made accordingly. |
| | 1.4 Procedures and systems are changed in consultation with colleagues to improve efficiency and effectiveness. |
| | 1.5 Colleagues are consulted about ways to improve efficiency and service levels. |
| 2. Plan and organise workflow | 2.1 Current workload of colleagues is accurately assessed. |
| | 2.2 Work is scheduled in a manner which enhances efficiency and customer service quality. |
| | 2.3 Work is delegated to appropriate people in accordance with principles of delegation. |
| | 2.4 Workflow is assessed against agreed objectives and timelines and colleagues are assisted in prioritisation of workload. |
| | 2.5 Input is provided to appropriate management regarding staffing needs. |
| 3. Maintain workplace records | 3.1 **Workplace records** are accurately completed and submitted within required timeframes. |
| | 3.2 Where appropriate completion of records is delegated and monitored prior to submission. |
| 4. Solve problems and make decisions | 4.1 Workplace problems are promptly identified and considered from an operational and customer service perspective. |
| | 4.2 Short term action is initiated to resolve the immediate problem where appropriate. |
| | 4.3 Problems are analysed for any long term impact and potential solutions are assessed and actioned in |

| | 4.4 Where problem is raised by a team member, they are encouraged to participate in solving the problem. |
| | 4.5 Follow up action is taken to monitor the effectiveness of solutions in the workplace. |

| Variables | Range |
|---|---|
| Problems | May include but not limited to:<br>• difficult customer service situations<br>• equipment breakdown/technical failure<br>• delays and time difficulties<br>• competence |
| Workplace records | May include but is not limited to:<br>• staff records and regular performance reports |

| Evidence Guide | |
|---|---|
| Critical Aspects of Competence | Demonstrates skills and knowledge in:<br>• ability to effectively monitor and respond to a range of common operational and service issues in the workplace<br>• understanding of the role of staff involved in workplace monitoring<br>• knowledge of quality assurance, principles of workflow planning, delegation and problem solving |
| Underpinning Knowledge and Attitudes | Demonstrate knowledge of:<br>• roles and responsibilities in monitoring work operations<br>• overview of leadership and management responsibilities<br>• principles of work planning and principles of delegation<br>• typical work organization methods appropriate to the sector<br>• quality assurance principles and time management<br>• problem solving and decision making processes<br>• industrial and/or legislative issues which affect short term work organization as appropriate to industry sector |
| Underpinning Skills | Demonstrate skills to:<br>• monitor and improve workplace operations<br>• plan and organize workflow<br>• maintain workplace records |
| 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:<br>• Interview / Written Test<br>• Observation / Demonstration with Oral Questioning |
| Context of | Competence may be assessed in the work place or in a simulated |

| Assessment | work place setting. |
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| Occupational Standard: Marketing Services Level III | |
|---|---|
| **Unit Title** | **Apply Quality Control** |
| **Unit Code** | **EIS MKS3 19 0812** |
| **Unit Descriptor** | This unit covers the knowledge, attitudes and skills required in applying quality control in the workplace. |


| Elements | Performance Criteria |
|---|---|
| 1. Implement quality standards | 1.1 Agreed quality standard and procedures are acquired and confirmed. |
| | 1.2 Standard procedures are introduced to organizational staff/personnel. |
| | 1.3 Quality standard and procedures documents are provided to employees in accordance with the organization policy. |
| | 1.4 Standard procedures are revised / updated when necessary. |
| 2. Assess quality of service delivered | 2.1 Services delivered are **quality checked** against organization **quality standards** and specifications. |
| | 2.2 Service delivered are evaluated using the appropriate evaluation **quality parameters** and in accordance with organization standards. |
| | 2.3 Causes of any identified faults are identified and corrective actions are taken in accordance with organization policies and procedures. |
| 3. Record information | 3.1 Basic information on the quality performance is recorded in accordance with organization procedures. |
| | 3.2 Records of work quality are maintained according to the requirements of the organization. |
| 4. Study causes of quality deviations | 4.1 Causes of deviations from final outputs or services are investigated and reported in accordance with organization procedures. |
| | 4.2 Suitable preventive action is recommended based on organization quality standards and identified causes of deviation from specified quality standards of final service or output. |
| 5. Complete documentation | 5.1 Information on quality and other indicators of service performance is recorded. |
| | 5.2 All service processes and outcomes are recorded. |

| Variable | Range |
|---|---|
| Quality check | May include but not limited to:<br>• Check against design / specifications<br>• Visual inspection and Physical inspection |
| Quality standards | May include but not limited to:<br>• Materials<br>• Components<br>• Process<br>• Procedures |
| Quality parameters | May include but not limited to:<br>• Standard Design / Specifications<br>• Material Specification |

| Evidence Guide | |
|---|---|
| Critical Aspects of Competence | Demonstrates skills and knowledge in:<br>• Checked completed work continuously against organization standard<br>• Identified and isolated faulty or poor service<br>• Checked service delivered against organization standards<br>• Identified and applied corrective actions on the causes of identified faults or error<br>• Recorded basic information regarding quality performance<br>• Investigated causes of deviations of services against standard<br>• Recommended suitable preventive actions |
| Underpinning Knowledge | Demonstrates knowledge of:<br>• Relevant quality standards, policies and procedures<br>• Characteristics of services<br>• Safety environment aspects of service processes<br>• Evaluation techniques and quality checking procedures<br>• Workplace procedures and reporting procedures |
| Underpinning Skills | Demonstrates skills to:<br>• interpret work instructions, specifications and standards appropriate to the required work or service<br>• carry out relevant performance evaluation<br>• maintain accurate work records<br>• meet work specifications and requirements<br>• communicate effectively within defined workplace procedures |
| 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:<br>• Interview / Written Test<br>• Observation / Demonstration with Oral Questioning |
| Context of | Competence may be assessed in the work place or in a simulated work place setting. |

| Assessment | |
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| Occupational Standard: Marketing Services Level III | |
|---|---|
| **Unit Title** | **Lead Workplace Communication** |
| **Unit Code** | **EIS MKS3 20 0812** |
| **Unit Descriptor** | This unit covers the knowledge, attitudes and skills needed to lead in the dissemination and discussion of information and issues in the workplace. |

| Elements | Performance Criteria |
|---|---|
| 1. Communicate information about workplace processes | 1.1 Appropriate **communication method** is selected<br>1.2 Multiple operations involving several topics areas are communicated accordingly<br>1.3 Questions are used to gain extra information<br>1.4 Correct sources of information are identified<br>1.5 Information is selected and organized correctly<br>1.6 Verbal and written reporting is undertaken when required<br>1.7 Communication skills are maintained in all situations |
| 2. Lead workplace discussion | 2.1 Response to workplace issues are sought<br>2.2 Response to workplace issues are provided immediately<br>2.3 Constructive contributions are made to workplace discussions on such issues as production, quality and safety<br>2.4 Goals/objectives and action plan undertaken in the workplace are communicated. |
| 3. Identify and communicate issues arising in the workplace | 3.1 Issues and problems are identified as they arise<br>3.2 Information regarding problems and issues are organized coherently to ensure clear and effective communication<br>3.3 Dialogue is initiated with appropriate staff/personnel<br>3.4 Communication problems and issues are raised as they arise |

| Variable | Range |
|---|---|
| Methods of communication | May include but not limited to:<br>• Non-verbal gestures<br>• Verbal<br>• Face to face<br>• Two-way radio<br>• Speaking to groups |

|  | • Using telephone<br>• Written<br>• Using Internet<br>• Cell phone |
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| **Evidence Guide** | |
|---|---|
| Critical Aspects of Competence | Demonstrates skills and knowledge in:<br>• Dealt with a range of communication/information at one time<br>• Made constructive contributions in workplace issues<br>• Sought workplace issues effectively<br>• Responded to workplace issues promptly<br>• Presented information clearly and effectively written form<br>• Used appropriate sources of information<br>• Asked appropriate  questions<br>• Provided accurate information |
| Underpinning Knowledge and Attitudes | Demonstrates knowledge of:<br>• Organization requirements for written and electronic communication methods<br>• Effective verbal communication methods |
| Underpinning Skills | Demonstrates skills to:<br>• Organize information<br>• Understand and convey intended meaning<br>• Participate in variety of workplace discussions<br>• Comply with organization  requirements for the use of written and electronic communication methods |
| 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:<br>• Interview / Written Test<br>• 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 Services Level III | |
|---|---|
| **Unit Title** | **Lead Small Teams** |
| **Unit Code** | **EIS MKS3_21 0812** |
| **Unit Descriptor** | This unit covers the skills, knowledge and attitudes required to determine individual and team development needs and facilitate the development of the work group. |

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

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

| Variable | Range |
|---|---|
| Learning and development needs | May include but not limited to: <br> • Coaching, mentoring and/or supervision <br> • Formal/informal learning program <br> • Internal/external training provision <br> • Work experience/exchange/opportunities <br> • Personal study <br> • Career planning/development <br> • Performance appraisals <br> • Workplace skills assessment <br> • Recognition of prior learning |
| Organizational requirements | May include but not limited to: <br> • Quality assurance and/or procedures manuals <br> • Goals, objectives, plans, systems and processes <br> • Legal and organizational policy/guidelines and requirements <br> • Safety policies, procedures and programs <br> • Confidentiality and security requirements <br> • Business and performance plans <br> • Ethical standards <br> • Quality and continuous improvement processes and standards |
| Feedback on performance | May include but not limited to: <br> • Formal/informal performance appraisals <br> • Obtaining feedback from supervisors and colleagues <br> • Obtaining feedback from clients <br> • Personal and reflective behavior strategies <br> • Routine and organizational methods for monitoring service delivery |
| Learning delivery methods | May include but not limited to: <br> • On the job coaching or mentoring <br> • Problem solving <br> • Presentation/demonstration <br> • Formal course participation |

| | • Work experience and Involvement in professional networks |
| --- | --- |
| | • Conference/seminar attendance and induction |

| **Evidence Guide** | |
| --- | --- |
| Critical Aspects of Competence | Demonstrates skills and knowledge in:<br>• identified and implemented learning opportunities for others<br>• gave and received feedback constructively<br>• facilitated participation of individuals in the work of the team<br>• negotiated learning plans to improve the effectiveness of learning<br>• prepared learning plans to match skill needs<br>• accessed and designated learning opportunities |
| Underpinning Knowledge and Attitude | Demonstrates knowledge of:<br>• coaching and mentoring principles<br>• understanding how to work effectively with team members who have diverse work styles, aspirations, cultures and perspective<br>• understanding how to facilitate team development and improvement<br>• understanding methods and techniques for eliciting and interpreting feedback<br>• understanding methods for identifying and prioritizing personal development opportunities and options<br>• knowledge of career paths and competence standards in the industry |
| Underpinning Skills | Demonstrates skills to:<br>• read and understand a variety of texts, prepare general information and documents according to target audience; spell with accuracy; use grammar and punctuation effective relationships and conflict management<br>• receive feedback and report, maintain effective relationships and conflict management<br>• organize required resources and equipment to meet learning needs<br>• provide support to colleagues<br>• organize information; assess information for relevance and accuracy; identify and elaborate on learning outcomes<br>• facilitation skills to conduct small group training sessions<br>• relate to people from a range of social, cultural, physical and mental backgrounds |
| Resource Implications | Access to relevant workplace or appropriately simulated environment where assessment can take place |
| Methods of Assessment | Competence may be assessed through:<br>• Interview / Written exam<br>• Observation / Demonstration with Oral Questioning |
| Context of Assessment | Competence may be assessed in the workplace or in a simulated workplace setting |

| Occupational Standard: Marketing Services Level III | |
|---|---|
| **Unit Title** | **Improve Business Practice** |
| **Unit Code** | **EIS MKS3 22 0812** |
| **Unit Descriptor** | This unit covers the skills, knowledge and attitudes required in promoting, improving and growing business operations. |

| Elements | Performance Criteria |
|---|---|
| 1. Diagnose the business | 1.1 **Data required** for diagnosis is determined and acquired. |
| | 1.2 **Competitive advantage** of the business is determined from the data. |
| | 1.3 **SWOT analysis** of the data is undertaken. |
| 2. Benchmark the business | 2.1 Sources of relevant benchmarking data are identified. |
| | 2.2 **Key indicators** for benchmarking are selected in consultation with key stakeholders. |
| | 2.3 Like indicators of own practice are compared with benchmark indicators. |
| | 2.4 Areas for improvement are identified. |
| 3. Develop plans to improve business performance | 3.1 A consolidated list of required improvements is developed. |
| | 3.2 Cost-benefit ratios for required improvements are determined. |
| | 3.3 Work flow changes resulting from proposed improvements are determined. |
| | 3.4 Proposed improvements are ranked according to agreed criteria. |
| | 3.5 An action plan is developed and agreed to implement the top ranked improvements. |
| | 3.6 **Organizational structures** are checked to ensure they are suitable. |
| 4. Develop marketing and promotional plans | 4.1 The practice vision statement is reviewed. |
| | 4.2 Practice **objectives** are developed/ reviewed. |
| | 4.3 Target markets are identified/ refined. |
| | 4.4 **Market research data** is obtained. |
| | 4.5 **Competitor analysis** is obtained. |
| | 4.6 **Market position** is developed/ reviewed. |
| | 4.7 **Practice brand** is developed. |
| | 4.8 **Benefits** of practice/practice products/services are identified. |

|  | 4.9 **Promotion tools** are selected/ developed. |
| --- | --- |
| 5. Develop business growth plans | 5.1 Plans are developed to increase **yield per existing client**. |
|  | 5.2 Plans are developed to add new clients. |
|  | 5.3 Proposed plans are ranked according to agreed criteria. |
|  | 5.4 An action plan is developed and agreed to implement the top ranked plans. |
|  | 5.5 Practice work practices are reviewed to ensure they support growth plans. |
| 6. Implement and monitor plans | 6.1 Implementation plan is developed in consultation with all relevant stakeholders. |
|  | 6.2 Indicators of success of the plan are agreed. |
|  | 6.3 Implementation is monitored against agreed indicators. |
|  | 6.4 Implementation is adjusted as required. |

| Variable | Range |
| --- | --- |
| Data required includes: | May include but not limited to:<br>• organization capability<br>• appropriate business structure<br>• level of client service which can be provided<br>• internal policies, procedures and practices<br>• staff levels, capabilities and structure<br>• market, market definition<br>• market changes/market segmentation<br>• market consolidation/fragmentation<br>• revenue<br>• level of commercial activity<br>• expected revenue levels, short and long term<br>• revenue growth rate<br>• break even data<br>• pricing policy<br>• revenue assumptions<br>• business environment<br>• economic conditions<br>• social factors<br>• demographic factors<br>• technological impacts<br>• political/legislative/regulative impacts<br>• competitors, competitor pricing and response to pricing<br>• competitor marketing/branding<br>• competitor products |
| Competitive advantage | May include but not limited to:<br>• services/products<br>• fees |

| | |
|---|---|
| | • location<br>• timeframe |
| SWOT analysis | May include but not limited to:<br>• internal strengths such as staff capability, recognized<br>• quality<br>• internal weaknesses such as poor morale,<br>• under-capitalization, poor technology<br>• external opportunities such as changing market and<br>• economic conditions<br>• external threats such as industry fee structures, strategic<br>• alliances, competitor marketing |
| Key indicators | May include but not limited to:<br>• salary cost and staffing<br>• personnel productivity (particularly of principals)<br>• profitability<br>• fee structure<br>• client base<br>• size staff/principal<br>• overhead/overhead control |
| Organizational structures | May include but not limited to:<br>• Legal structure (partnership, Limited Liability Company, etc.)<br>• organizational structure/hierarchy<br>• reward schemes |
| Objectives should be 'SMART' | May include but not limited to:<br>• S: Specific<br>• M: Measurable<br>• A: Achievable<br>• R: Realistic<br>• T: Time defined |
| Market research data | May include but not limited to:<br>• data about existing clients<br>• data about possible new clients<br>• data from internal sources<br>• data from external sources such as:<br>  ➢ trade associations/journals<br>  ➢ Yellow Pages small business surveys<br>  ➢ libraries<br>  ➢ Internet<br>  ➢ Chamber of Commerce<br>  ➢ client surveys<br>  ➢ industry reports<br>  ➢ secondary market research<br>• primary market research such as:<br>  ➢ telephone surveys<br>  ➢ personal interviews<br>  ➢ mail surveys |
| Competitor analysis | May include but not limited to: |

| | |
|---|---|
| | • competitor offerings<br>• competitor promotion strategies and activities<br>• competitor profile in the market place |
| Market position should include data on: | May include but not limited to:<br>• product<br>• the good or service provided<br>• product mix<br>• the core product - what is bought<br>• the tangible product - what is perceived<br>• the augmented product - total package of consumer<br>• features/benefits<br>• product differentiation from competitive products<br>• new/changed products<br>• Price and pricing strategies (cost plus, supply/demand, ability to pay, etc.)<br>• Pricing objectives (profit, market penetration, etc.)<br>• cost components<br>• market position<br>• distribution strategies<br>• marketing channels<br>• promotion<br>• promotional strategies<br>• target audience<br>• communication<br>• promotion budget |
| Practice brand | May include but not limited to:<br>• practice image<br>• practice logo/letter head/signage<br>• phone answering protocol<br>• facility decor<br>• slogans<br>• templates for communication/invoicing<br>• style guide<br>• writing style<br>• AIDA (attention, interest, desire, action) |
| Benefits | May include but not limited to:<br>• features as perceived by the client<br>• benefits as perceived by the client |
| Promotion tools | May include but not limited to:<br>• networking and referrals<br>• seminars<br>• advertising<br>• press releases<br>• publicity and sponsorship<br>• brochures<br>• newsletters (print and/or electronic)<br>• websites |

| | • direct mail<br>• telemarketing/cold calling |
|---|---|
| Yield per existing client | May include but not limited to:<br>• raising charge out rates/fees<br>• packaging fees<br>• reduce discounts<br>• sell more services to existing clients |

| Evidence Guide | |
|---|---|
| Critical Aspects of Competence | Demonstrates skills and knowledge in:<br>• ability to identify the key indicators of business performance<br>• ability to identify the key market data for the business<br>• knowledge of a wide range of available information sources<br>• ability to acquire information not readily available within a business<br>• ability to analyze data and determine areas of improvement<br>• ability to negotiate required improvements to ensure implementation<br>• ability to evaluate systems against practice requirements<br>• and form recommendations and/or make recommendations<br>• ability to assess the accuracy and relevance of information |
| Underpinning Knowledge and Attitudes | Demonstrates knowledge of:<br>• data analysis<br>• communication skills<br>• computer skills to manipulate data and present information<br>• negotiation skills<br>• problem solving<br>• planning skills<br>• marketing principles<br>• ability to acquire and interpret relevant data<br>• current product and marketing mix<br>• use of market intelligence<br>• development and implementation strategies of promotion and growth plans |
| Underpinning Skills | Demonstrates skill in:<br>• data analysis and manipulation<br>• ability to acquire and interpret required data, current practice systems and structures and sources of relevant benchmarking data<br>• applying methods of selecting relevant key benchmarking indicators<br>• communication skills<br>• working and consulting with others when developing plans for the business<br>• planning skills, negotiation skills and problem solving<br>• using computers to manipulate, present and distribute 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. |
| Methods of Assessment | Competence may be assessed through:<br>• Interview / Written Test<br>• Observation / Demonstration with Oral Questioning |
| Context of | Competence may be assessed in the work place or in a simulated work place setting. |

| Assessment | |
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| Occupational Standard: Marketing Services Level III | |
|---|---|
| **Unit Title** | **Maintain Quality System and Continuous Improvement Processes (Kaizen)** |
| **Unit Code** | **EIS MKS3 23 1012** |
| **Unit Descriptor** | This unit of competence covers the skills and knowledge required to prevent process improvements in their own work from slipping back to former practices or digressing to less efficient practices. It covers responsibility for the day- to-day operation of the work/functional area and ensuring that quality system requirements are met and that continuous improvements are initiated and institutionalized. |

| Elements | Performance Criteria |
|---|---|
| 1. Develop and maintain quality framework within work area | 1.1 Information about the enterprise's quality system is distributed and explained to personnel |
| | 1.2 Personnel are encouraged to participate in improvement processes and to assume responsibility and authority |
| | 1.3 Responsibilities are allocated for quality within work area in accordance with quality system |
| | 1.4 **Coaching and mentoring** are provided to ensure that personnel are able to meet their responsibilities and quality requirements |
| 2. Maintain quality documentation | 2.1 Required quality documentation, including records of improvement plans and initiatives are identified |
| | 2.2 Quality documentation is prepared and accurate data records are maintained and kept |
| | 2.3 Document control system is maintained for work area |
| | 2.4 The development and revision of quality manuals and work instructions are contributed to the work area |
| | 2.5 Inspection and test plans are developed and implemented for quality controlled products |
| 3. Facilitate the application of standardized procedures | 3.1 All required procedures are ensured to be accessible by relevant personnel |
| | 3.2 Personnel are assisted to access relevant procedures, as required |
| | 3.3 Facilitate the resolution of conflicts arising from job |
| | 3.4 Facilitate the completion of required work in accordance with standard procedures and practices |

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| 4. Provide training in quality systems and improvement processes | 4.1 Roles, duties and current competency of relevant personnel are analyzed |
| | 4.2 Training needs are identified in relation to quality system and **continuous improvement processes (kaizen)** |
| | 4.3 Opportunities are identified for skills development and/or training programs to meet needs |
| | 4.4 Training and skills development programs are initiated and monitored |
| | 4.5 Accurate training record is maintained |
| 5. Monitor and review performance | 5.1 Performance outcomes are reviewed to identify ways in which planning and operations could be improved |
| | 5.2 The organization's systems and **technology** are used to monitor and review progress and to identify ways in which planning and operations could be improved |
| | 5.3 **Customer service** is enhanced through the use of quality improvement techniques and processes |
| | 5.4 Plans are adjusted and communicated to personnel involved in their development and implementation |
| 6. Build continuous improvement process | 6.1 Improvement team is organized and facilitated |
| | 6.2 Work group members are encouraged to routinely monitor **key process indicators** |
| | 6.3 Capacity in the work group is built to critically review the relevant parts of the value chain |
| | 6.4 Work group members are assisted to formalize improvement suggestions |
| | 6.5 Relevant resources are facilitated and work group members are assisted to develop implementation plans |
| | 6.6 Implementation of improvement plans taking appropriate actions is monitored to assist implementation where required. |
| 7. Facilitate the identification of improvement opportunities | 7.1 The job completion process is analyzed |
| | 7.2 Relevant questions of job incumbent are asked |
| | 7.3 Job incumbents are encouraged to conceive and suggest improvements |
| | 7.4 The trying out of improvements is facilitated, as appropriate |
| 8. Evaluate relevant components of quality system | 8.1 Regular audits of components of the quality system that relate to the work area are undertaken |
| | 8.2 **Continuous improvement tools** are implemented in the quality system in accordance with own level of |

|  | responsibility and workplace procedures |
|  | 8.3 The updating of standard procedures and practices is facilitated |
|  | 8.4 The capability of the work team aligns with the requirements of the procedure is ensured |

| Variable | Range |
|---|---|
| Coaching and mentoring | May include but not limited to: <br> • providing assistance with problem-solving <br> • providing feedback, support and encouragement <br> • teaching another member of the team, usually focusing on a specific work task or skill |
| Continuous improvement processes | May include but not limited to: <br> • cyclical audits and reviews of workplace, team and individual performance <br> • evaluations and monitoring of effectiveness <br> • implementation of quality systems, such as International Standardization for Organization (ISO) <br> • modifications and improvements to systems, processes, services and products <br> • policies and procedures which allow the organization to systematically review and improve the quality of its products, services and procedures <br> • seeking and considering feedback from a range of stakeholders <br> • Kaizen <br> • Enterprise-specific improvement systems |
| Technology | May include but not limited to: <br> • computerized systems and software such as databases, project management and word processing <br> • telecommunications devices <br> • any other technology used to carry out work roles and responsibilities |
| Customer service | May include but not limited to: <br> • internal or external <br> • to existing, new or potential clients |
| Key process indicators | Key process indicators may include: <br> • statistical process control data/charts <br> • orders <br> • lost time, injury and other OHS records <br> • equipment reliability charts, etc. |

| Continuous improvement tools | May include but not limited to:<br>• statistics<br>• cause and effect diagrams<br>• fishbone diagram<br>• Pareto diagrams<br>• run charts<br>• X bar R charts<br>• PDCA<br>• Sigma techniques<br>• balanced scorecards<br>• benchmarking<br>• performance measurement<br>• upstream and downstream customers<br>• internal and external customers immediate and/or final |
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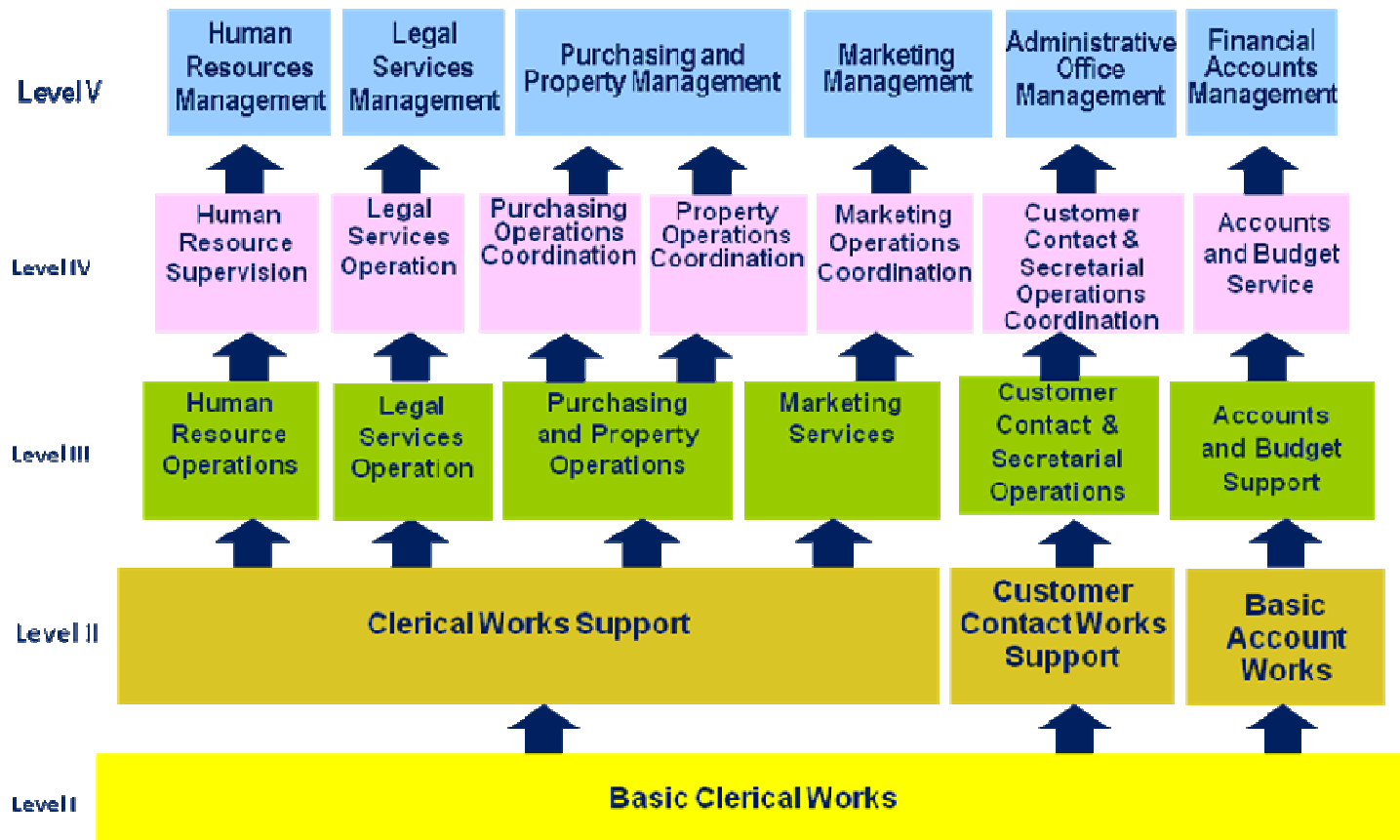| **Evidence Guide** | |
|---|---|
| Critical Aspects of Competence | Evidence of the following is essential:<br>• taking active steps to implement, monitor and adjust plans, processes and procedures to improve performance<br>• supporting others to implement the continuous improvement system/processes, and to identify and report opportunities for further improvement<br>• knowledge of principles and techniques associated with continuous improvement systems and processes<br>• assist others to follow standard procedures and practices<br>• assist others make improvement suggestions<br>• standardize and sustain improvements<br>Assessors should ensure that candidates can:<br>• implement and monitor defined quality system<br>• requirements and initiate continuous improvements within the work area<br>• apply effective problem identification and problem solving techniques<br>• strengthen customer service through a focus on continuous improvement<br>• implement, monitor and evaluate quality systems in the work area<br>• initiate quality processes to enhance the quality of performance of individuals and teams in the work area<br>• gain commitment of individuals/teams to quality principles and practices<br>• implement effective communication strategies<br>• encourage ideas and feedback from team members when developing and refining techniques and processes<br>• analyze training needs and implement training programs<br>• prepare and maintain quality and audit documentation |
| Underpinning | Demonstrates knowledge of: |

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|---|---|
| Knowledge and Attitudes | • principles and techniques associated with:<br>   ➢ benchmarking<br>   ➢ best practice<br>   ➢ change management<br>   ➢ continuous improvement systems and processes<br>   ➢ quality systems<br>• range of procedures available and their application to different jobs<br>• applicability of TAKT time and MUDA to jobs<br>• identification and possible causes of variability in jobs<br>• continuous improvement process for organization<br>• questioning techniques<br>• methods of conceiving improvements<br>• suggestion and try out procedures<br>• relevant OHS<br>• quality measurement tools for use in continuous improvement processes<br>• established communication channels and protocols<br>• communication/reporting protocols<br>• continuous improvement principles and process<br>• enterprise business goals and key performance indicators<br>• enterprise information systems management<br>• enterprise organizational structure, delegations and responsibilities<br>• policy and procedure development processes<br>• relevant health, safety and environment requirements<br>• relevant national and international quality standards and protocols<br>• standard operating procedures (SOPs) for the technical work performed in work area<br>• enterprise quality system |
| Underpinning Skills | Demonstrates skills to:<br>• coach and mentor team members<br>• gain the commitment of individuals and teams to continuously improve<br>• innovate or design better ways of performing work<br>• communicate with relevant people<br>• prioritize and plan tasks related to encouraging and improving use of standardized procedures<br>• negotiate with others to resolve conflicts and gain commitment to standardized procedures<br>• facilitate other employees in improvement activities<br>• implement and monitor defined quality system requirements<br>• initiate continuous improvements within the work area<br>• apply effective problem identification and problem solving techniques<br>• strengthen customer service through a focus on continuous |

| | improvement |
|---|---|
| | • implement, monitor and evaluate quality systems |
| | • implement effective communication strategies |
| | • encourage ideas and feedback from team members when developing and refining techniques and processes |
| | • analyze training needs and implementing training programs |
| | • prepare and maintain quality and audit documentation |
| 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:<br>• Interview / Written Test<br>• 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



**Level V**

| Human Resources Management | Legal Services Management | Purchasing and Property Management | Marketing Management | Administrative Office Management | Financial Accounts Management |

**Level IV**

| Human Resource Supervision | Legal Services Operation | Purchasing Operations Coordination | Property Operations Coordination | Marketing Operations Coordination | Customer Contact & Secretarial Operations Coordination | Accounts and Budget Service |

**Level III**

| Human Resource Operations | Legal Services Operation | Purchasing and Property Operations | Marketing Services | Customer Contact & Secretarial Operations | Accounts and Budget Support |

**Level II**

| Clerical Works Support | Customer Contact Works Support | Basic Account Works |

**Level I**

Basic Clerical Works

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