

Occupational and Technical Knowledge and Skills
S&SVP Customer Service and Sales Skill Standards
August 2001

Following are the occupational and technical knowledge and skills that are required to perform each critical work function. As you review the statements, you may notice that some letters appear to have been omitted. That is because not all statements in a category are related to each critical work function.

Critical Work Function 1: Learns About Products or Services

Category 1: Workplace Health, Safety and Security: The knowledge and skills that relate to the health, safety and security of both the employee and customer, including the security of information.

- A. Knowledge of relevant federal and state health and safety regulations (e.g., pertinent OSHA regulations).
- B. Knowledge of company health, safety and security standards for both customers and employees.
- C. Knowledge of company policies and legal consequences related to aiding or participating in illegal or inappropriate behavior.
- D. Knowledge of company procedures for handling and reporting unexpected health issues, violent and threatening behavior of customers and co-workers, and other emergency situations, such as lost child or personal belongings, accidents, fire, etc., based on company policies and procedures.
- E. Knowledge of privacy laws and company standards for obtaining, using, and protecting information obtained from a customer or another employee.
- F. Knowledge of company policies regarding what employees should do to deter and prevent unauthorized access to, use, or theft of property or resources.

Category 2: Industry and Company Knowledge and Awareness: The knowledge and skills that enable individuals to connect what's going on in the company and industry with how they sell to and serve customers.

- A. Knowledge of suppliers' practices, dependability and flexibility (e.g., delivery times of one manufacturer vs. another; dependability of one vendor's services vs. another's, etc.).
- B. Knowledge of how seasonal changes affect the needs of customers and the products or services offered.
- C. Knowledge of sources of information about new products and services, changes to products and services, changes to competitors' products and services, and changes to the industry at large, and applying that information on the job.

Category 3: Client Needs and Expectations: The knowledge and skills needed to identify customer needs and expectations for products and services.

- A. Knowledge of how to determine customer needs and expectations related to the product or service, the company or the employee.

Category 4: Goal Setting: The knowledge and skills needed to set and carry out professional goals that are consistent with company needs.

- A. Skill in developing professional goals that align with company goals and mission.
- B. Knowledge of company goals, objectives, rewards and incentives.
- C. Skill in motivating oneself to meet professional goals.

Occupational and Technical Knowledge and Skills
S&SVP Customer Service and Sales Skill Standards
August 2001

Category 5: Initiating Product and Service Improvements: The knowledge and skills leading to an understanding of product and service improvements.

- A. Knowledge of employee options for improving or helping to improve products and services.
- B. Knowledge of techniques used to determine if process changes improve services.
- C. Skill at appropriately balancing company goals and needs with those of the customer when making improvements.
- D. Knowledge of company policies and procedures for proposing or suggesting improvements.

Category 6: Product and Service Awareness: The knowledge and skills needed to understand and communicate the specifics of the company's products and services.

- A. Knowledge of geographic area in which company provides products or services.
- B. Knowledge of differences in company products or services by geographic area or by different stores or offices.
- C. Knowledge of specific product information including recalls, health and safety issues, product defects, etc.
- D. Knowledge of company's product and service lines— including benefits to customers—how they work, how much they cost, service policies, warranties, follow-up commitments, etc.
- F. Knowledge of the health and safety regulations regarding the intended uses of different products and services.

Category 7: Company Policies and Procedures: The knowledge and skills necessary to understand the conditions under which employee can conduct sales and service activities.

- A. Knowledge of sources of information about company policies, procedures and special events.
- B. Skill in carrying out all appropriate company service policies.
- C. Knowledge of company policies and procedures for documenting and maintaining records.
- D. Knowledge of ethical standards and practices set by company (e.g., standards regarding the acceptance of tips, the designation of commissions, etc.).

Category 8: Sales Procedures and Techniques: The knowledge and skills necessary to implement company sales systems.

- A. Knowledge of relevant sales procedures (e.g., charge vs. cash vs. checks; special orders, drop shipments, returns, refunds and exchanges, etc.).
- D. Knowledge of complementary and promotional products and services (e.g., add-ons and cross-selling).

Category 9: Equipment and Tools: The knowledge and skills necessary to utilize specialized equipment or tools in the performance of sales and service functions.

- A. Knowledge of pertinent government and company regulations for use of equipment and tools.
- B. Knowledge of policies regarding maintenance of equipment and tools.
- C. Knowledge of requirements for reporting unsafe or defective equipment and tools.
- D. Skill at safely and appropriately operating company's equipment.
- E. Knowledge of which tools and equipment to use for specific tasks.

Critical Work Function 2: Assesses Customer Needs

Category 1: Workplace Health, Safety and Security: The knowledge and skills that relate to the health, safety and security of both the employee and customer, including the security of information.

- B. Knowledge of company health, safety and security standards for both customers and employees.
- E. Knowledge of privacy laws and company standards for obtaining, using, and protecting information obtained from a customer or another employee.
- H. Knowledge of policy and procedures for handling and reporting customer concerns or complaints regarding health, safety, and security.

Category 2: Industry and Company Knowledge and Awareness: The knowledge and skills that enable individuals to connect what's going on in the company and industry with how they sell to and serve customers.

- A. Knowledge of suppliers' practices, dependability and flexibility (e.g., delivery times of one manufacturer vs. another; dependability of one vendor's services vs. another's, etc.).
- B. Knowledge of how seasonal changes affect the needs of customers and the products or services offered.
- C. Knowledge of sources of information about new products and services, changes to products and services, changes to competitors' products and services, and changes to the industry at large, and applying that information on the job.
- D. Knowledge of company's product servicing policies (e.g., what kinds of faults will be repaired, extended warranty contracts, etc.) and other services available that relate to a product (e.g., clothing alterations, product delivery services, etc.).
- E. Knowledge of company standards regarding how to interact with customers (e.g., company protocols for addressing and communicating with customers, handling complaints, etc.).

Category 3: Client Needs and Expectations: The knowledge and skills needed to identify customer needs and expectations for products and services.

- A. Knowledge of how to determine customer needs and expectations related to the product or service, the company or the employee.
- B. Skill in demonstrating cost/benefits/value to customer based on customer expectations and needs.

Category 4: Goal Setting: The knowledge and skills needed to set and carry out professional goals that are consistent with company needs.

- A. Skill in developing professional goals that align with company goals and mission.
- B. Knowledge of company goals, objectives, rewards and incentives.
- C. Skill in motivating oneself to meet professional goals.

Category 5: Initiating Product and Service Improvements: The knowledge and skills leading to an understanding of product and service improvements.

- A. Knowledge of employee options for improving or helping to improve products and services.
- B. Knowledge of techniques used to determine if process changes improve services.
- C. Skill at appropriately balancing company goals and needs with those of the customer when making improvements.

Occupational and Technical Knowledge and Skills
S&SVP Customer Service and Sales Skill Standards
August 2001

- E. Skill in obtaining feedback from customer about performance through available and appropriate mechanisms.
- F. Skill at adjusting work practices to respond appropriately to customer needs.
- G. Knowledge of appropriate follow-up actions designed to improve products and services.

Category 6: Product and Service Awareness: The knowledge and skills needed to understand and communicate the specifics of the company's products and services.

- A. Knowledge of geographic area in which company provides products or services.
- B. Knowledge of differences in company products or services by geographic area or by different stores or offices.
- C. Knowledge of specific product information including recalls, health and safety issues, product defects, etc.
- D. Knowledge of company's product and service lines—including benefits to customers—how they work, how much they cost, service policies, warranties, follow-up commitments, etc.
- E. Knowledge of sources of relevant information regarding company products in order to respond to customer needs (e.g., packaging, product manuals, warranties, etc.).
- F. Knowledge of the health and safety regulations regarding the intended uses of different products and services.
- G. Knowledge of how product will perform in different circumstances.

Category 7: Company Policies and Procedures: The knowledge and skills necessary to understand the conditions under which employee can conduct sales and service activities.

- A. Knowledge of sources of information about company policies, procedures and special events.
- B. Skill in carrying out all appropriate company service policies.
- C. Knowledge of company policies and procedures for documenting and maintaining records.
- D. Knowledge of ethical standards and practices set by company (e.g., standards regarding the acceptance of tips, the designation of commissions, etc.).

Category 8: Sales Procedures and Techniques: The knowledge and skills necessary to implement company sales systems.

- A. Knowledge of relevant sales procedures (e.g., charge vs. cash vs. checks; special orders, drop shipments, returns, refunds and exchanges, etc.).
- B. Skill in negotiating agreements with customers based on company policies.
- C. Skill in using appropriate selling techniques, based on company policies, in order to complete a sale (e.g., suggestive selling).
- D. Knowledge of complementary and promotional products and services (e.g., add-ons and cross-selling).
- E. Skill at increasing customer base and generating repeat business.

Category 9: Equipment and Tools: The knowledge and skills necessary to utilize specialized equipment or tools in the performance of sales and service functions.

- A. Knowledge of pertinent government and company regulations for use of equipment and tools.
- B. Knowledge of policies regarding maintenance of equipment and tools.
- C. Knowledge of requirements for reporting unsafe or defective equipment and tools.
- D. Skill at safely and appropriately operating company's equipment.
- E. Knowledge of which tools and equipment to use for specific tasks.

Critical Work Function 3: Educates Customer

Category 1: Workplace Health, Safety and Security: The knowledge and skills that relate to the health, safety and security of both the employee and customer, including the security of information.

- A. Knowledge of relevant federal and state health and safety regulations (e.g., pertinent OSHA regulations).
- B. Knowledge of company health, safety and security standards for both customers and employees.
- D. Knowledge of company procedures for handling and reporting unexpected health issues, violent and threatening behavior of customers and co-workers, and other emergency situations, such as lost child or personal belongings, accidents, fire, etc., based on company policies and procedures.
- E. Knowledge of privacy laws and company standards for obtaining, using, and protecting information obtained from a customer or another employee.
- G. Knowledge of what information regarding the safety of products and services to make available to the customer.

Category 2: Industry and Company Knowledge and Awareness: The knowledge and skills that enable individuals to connect what's going on in the company and industry with how they sell to and serve customers.

- A. Knowledge of suppliers' practices, dependability and flexibility (e.g., delivery times of one manufacturer vs. another; dependability of one vendor's services vs. another's, etc.).
- B. Knowledge of how seasonal changes affect the needs of customers and the products or services offered.
- C. Knowledge of sources of information about new products and services, changes to products and services, changes to competitors' products and services, and changes to the industry at large, and applying that information on the job.
- D. Knowledge of company's product servicing policies (e.g., what kinds of faults will be repaired, extended warranty contracts, etc.) and other services available that relate to a product (e.g., clothing alterations, product delivery services, etc.).
- E. Knowledge of company standards regarding how to interact with customers (e.g., company protocols for addressing and communicating with customers, handling complaints, etc.).

Category 3: Client Needs and Expectations: The knowledge and skills needed to identify customer needs and expectations for products and services.

- A. Knowledge of how to determine customer needs and expectations related to the product or service, the company or the employee.
- B. Skill in demonstrating cost/benefits/value to customer based on customer expectations and needs.
- C. Skill in generating several alternative solutions that will meet a customer's needs.

Category 4: Goal Setting: The knowledge and skills needed to set and carry out professional goals that are consistent with company needs.

- A. Skill in developing professional goals that align with company goals and mission.
- B. Knowledge of company goals, objectives, rewards and incentives.
- C. Skill in motivating oneself to meet professional goals.

Occupational and Technical Knowledge and Skills
S&SVP Customer Service and Sales Skill Standards
August 2001

Category 5: Initiating Product and Service Improvements: The knowledge and skills leading to an understanding of product and service improvements.

- A. Knowledge of employee options for improving or helping to improve products and services.
- C. Skill at appropriately balancing company goals and needs with those of the customer when making improvements.
- E. Skill in obtaining feedback from customer about performance through available and appropriate mechanisms.
- F. Skill at adjusting work practices to respond appropriately to customer needs.
- G. Knowledge of appropriate follow-up actions designed to improve products and services.

Category 6: Product and Service Awareness: The knowledge and skills needed to understand and communicate the specifics of the company's products and services.

- A. Knowledge of geographic area in which company provides products or services.
- C. Knowledge of specific product information including recalls, health and safety issues, product defects, etc.
- D. Knowledge of company's product and service lines— including benefits to customers—how they work, how much they cost, service policies, warranties, follow-up commitments, etc.
- E. Knowledge of sources of relevant information regarding company products in order to respond to customer needs (e.g., packaging, product manuals, warranties, etc.).
- F. Knowledge of the health and safety regulations regarding the intended uses of different products and services.
- G. Knowledge of how product will perform in different circumstances.
- H. Knowledge of how products and services have been improved compared to previous offerings.

Category 7: Company Policies and Procedures: The knowledge and skills necessary to understand the conditions under which employee can conduct sales and service activities.

- A. Knowledge of sources of information about company policies, procedures and special events.
- B. Skill in carrying out all appropriate company service policies.
- C. Knowledge of company policies and procedures for documenting and maintaining records.
- D. Knowledge of ethical standards and practices set by company (e.g., standards regarding the acceptance of tips, the designation of commissions, etc.).

Category 8: Sales Procedures and Techniques: The knowledge and skills necessary to implement company sales systems.

- B. Skill in negotiating agreements with customers based on company policies.
- D. Knowledge of complementary and promotional products and services (e.g., add-ons and cross-selling).
- E. Skill at increasing customer base and generating repeat business.
- G. Skill in overcoming customer's objections when making a sale or serving a customer.

Category 9: Equipment and Tools: The knowledge and skills necessary to utilize specialized equipment or tools in the performance of sales and service functions.

- A. Knowledge of pertinent government and company regulations for use of equipment and tools.
- B. Knowledge of policies regarding maintenance of equipment and tools.
- C. Knowledge of requirements for reporting unsafe or defective equipment and tools.

Occupational and Technical Knowledge and Skills
S&SVP Customer Service and Sales Skill Standards
August 2001

- D. Skill at safely and appropriately operating company's equipment.
- E. Knowledge of which tools and equipment to use for specific tasks.

Critical Work Function 4: Meets Customer's Needs and Provides Ongoing Support

Category 1: Workplace Health, Safety and Security: The knowledge and skills that relate to the health, safety and security of both the employee and customer, including the security of information.

- B. Knowledge of company health, safety and security standards for both customers and employees.
- C. Knowledge of company policies and legal consequences related to aiding or participating in illegal or inappropriate behavior.
- D. Knowledge of company procedures for handling and reporting unexpected health issues, violent and threatening behavior of customers and co-workers, and other emergency situations, such as lost child or personal belongings, accidents, fire, etc., based on company policies and procedures.
- E. Knowledge of privacy laws and company standards for obtaining, using, and protecting information obtained from a customer or another employee.
- H. Knowledge of policy and procedures for handling and reporting customer concerns or complaints regarding health, safety, and security.

Category 2: Industry and Company Knowledge and Awareness: The knowledge and skills that enable individuals to connect what's going on in the company and industry with how they sell to and serve customers.

- A. Knowledge of suppliers' practices, dependability and flexibility (e.g., delivery times of one manufacturer vs. another; dependability of one vendor's services vs. another's, etc.).
- B. Knowledge of how seasonal changes affect the needs of customers and the products or services offered.
- C. Knowledge of sources of information about new products and services, changes to products and services, changes to competitors' products and services, and changes to the industry at large, and applying that information on the job.
- D. Knowledge of company's product servicing policies (e.g., what kinds of faults will be repaired, extended warranty contracts, etc.) and other services available that relate to a product (e.g., clothing alterations, product delivery services, etc.).
- E. Knowledge of company standards regarding how to interact with customers (e.g., company protocols for addressing and communicating with customers, handling complaints, etc.).

Category 3: Client Needs and Expectations: The knowledge and skills needed to identify customer needs and expectations for products and services.

- A. Knowledge of how to determine customer needs and expectations related to the product or service, the company or the employee.
- B. Skill in demonstrating cost/benefits/value to customer based on customer expectations and needs.
- C. Skill in generating several alternative solutions that will meet a customer's needs.

Occupational and Technical Knowledge and Skills
S&SVP Customer Service and Sales Skill Standards
August 2001

Category 4: Goal Setting: The knowledge and skills needed to set and carry out professional goals that are consistent with company needs.

- A. Skill in developing professional goals that align with company goals and mission.
- B. Knowledge of company goals, objectives, rewards and incentives.
- C. Skill in motivating oneself to meet professional goals.

Category 5: Initiating Product and Service Improvements: The knowledge and skills leading to an understanding of product and service improvements.

- A. Knowledge of employee options for improving or helping to improve products and services.
- B. Knowledge of techniques used to determine if process changes improve services.
- C. Skill at appropriately balancing company goals and needs with those of the customer when making improvements.
- E. Skill in obtaining feedback from customer about performance through available and appropriate mechanisms.
- F. Skill at adjusting work practices to respond appropriately to customer needs.
- G. Knowledge of appropriate follow-up actions designed to improve products and services.

- H. Knowledge of company policy regarding special requests and extraordinary circumstances.

Category 6: Product and Service Awareness: The knowledge and skills needed to understand and communicate the specifics of the company's products and services.

- D. Knowledge of company's product and service lines—including benefits to customers—how they work, how much they cost, service policies, warranties, follow-up commitments, etc.
- E. Knowledge of sources of relevant information regarding company products in order to respond to customer needs (e.g., packaging, product manuals, warranties, etc.).
- F. Knowledge of the health and safety regulations regarding the intended uses of different products and services.
- G. Knowledge of how product will perform in different circumstances.
- I. Knowledge of company's products and services that will soon become available.

Category 7: Company Policies and Procedures: The knowledge and skills necessary to understand the conditions under which employee can conduct sales and service activities.

- C. Knowledge of company policies and procedures for documenting and maintaining records.
- D. Knowledge of ethical standards and practices set by company (e.g., standards regarding the acceptance of tips, the designation of commissions, etc.).

Category 8: Sales Procedures and Techniques: The knowledge and skills necessary to implement company sales systems.

- A. Knowledge of relevant sales procedures (e.g., charge vs. cash vs. checks; special orders, drop shipments, returns, refunds and exchanges, etc.).
- B. Skill in negotiating agreements with customers based on company policies.
- C. Skill in using appropriate selling techniques, based on company policies, in order to complete a sale (e.g., suggestive selling).
- D. Knowledge of complementary and promotional products and services (e.g., add-ons and cross-selling).

Occupational and Technical Knowledge and Skills
S&SVP Customer Service and Sales Skill Standards
August 2001

- E. Skill at increasing customer base and generating repeat business.

Category 9: Equipment and Tools: The knowledge and skills necessary to utilize specialized equipment or tools in the performance of sales and service functions.

- A. Knowledge of pertinent government and company regulations for use of equipment and tools.
- B. Knowledge of policies regarding maintenance of equipment and tools.
- C. Knowledge of requirements for reporting unsafe or defective equipment and tools.
- D. Skill at safely and appropriately operating company's equipment.
- E. Knowledge of which tools and equipment to use for specific tasks.
- F. Skill at operating specialized equipment associated with occupation.
- G. Skill at basic troubleshooting and maintenance procedures for general office equipment (e.g., how to change the paper in a fax machine, how to change the receipt tape in a cash register, how to adjust a sun bed, etc.).
- H. Knowledge of how to handle business transactions when equipment and tools are inoperable.

Critical Work Function 5: Prepares For Selling

Category 1: Workplace Health, Safety and Security: The knowledge and skills that relate to the health, safety and security of both the employee and customer, including the security of information.

- A. Knowledge of relevant federal and state health and safety regulations (e.g., pertinent OSHA regulations).
- B. Knowledge of company health, safety and security standards for both customers and employees.
- C. Knowledge of company policies and legal consequences related to aiding or participating in illegal or inappropriate behavior.
- D. Knowledge of company procedures for handling and reporting unexpected health issues, violent and threatening behavior of customers and co-workers, and other emergency situations, such as lost child or personal belongings, accidents, fire, etc., based on company policies and procedures.
- E. Knowledge of privacy laws and company standards for obtaining, using, and protecting information obtained from a customer or another employee.
- F. Knowledge of company policies regarding what employees should do to deter and prevent unauthorized access to, use, or theft of property or resources.
- I. Skill in identifying potentially dangerous circumstances posed by the services, products, or work environment.
- J. Skill in generating situation-specific solutions or alternatives to prevent accidents or injuries from occurring.

Category 2: Industry and Company Knowledge and Awareness: The knowledge and skills that enable individuals to connect what's going on in the company and industry with how they sell to and serve customers.

- A. Knowledge of suppliers' practices, dependability and flexibility (e.g., delivery times of one manufacturer vs. another; dependability of one vendor's services vs. another's, etc.).
- B. Knowledge of how seasonal changes affect the needs of customers and the products or services offered.
- C. Knowledge of sources of information about new products and services, changes to products and services, changes to competitors' products and services, and changes to the industry at large, and applying that information on the job.

Occupational and Technical Knowledge and Skills
S&SVP Customer Service and Sales Skill Standards
August 2001

Category 3: Client Needs and Expectations: The knowledge and skills needed to identify customer needs and expectations for products and services.

- A. Knowledge of how to determine customer needs and expectations related to the product or service, the company or the employee.

Category 4: Goal Setting: The knowledge and skills needed to set and carry out professional goals that are consistent with company needs.

- A. Skill in developing professional goals that align with company goals and mission.
- B. Knowledge of company goals, objectives, rewards and incentives.
- C. Skill in motivating oneself to meet professional goals.

Category 5: Initiating Product and Service Improvements: The knowledge and skills leading to an understanding of product and service improvements.

- A. Knowledge of employee options for improving or helping to improve products and services.
- B. Knowledge of techniques used to determine if process changes improve services.
- C. Skill at appropriately balancing company goals and needs with those of the customer when making improvements.
- D. Knowledge of company policies and procedures for proposing or suggesting improvements.

Category 6: Product and Service Awareness: The knowledge and skills needed to understand and communicate the specifics of the company's products and services.

- B. Knowledge of differences in company products or services by geographic area or by different stores or offices.
- C. Knowledge of specific product information including recalls, health and safety issues, product defects, etc.
- D. Knowledge of company's product and service lines—including benefits to customers—how they work, how much they cost, service policies, warranties, follow-up commitments, etc.
- F. Knowledge of the health and safety regulations regarding the intended uses of different products and services.
- J. Knowledge of how to determine inventory availability.
- K. Knowledge of current promotions and sales.

Category 7: Company Policies and Procedures: The knowledge and skills necessary to understand the conditions under which employee can conduct sales and service activities.

- A. Knowledge of sources of information about company policies, procedures and special events.
- B. Skill in carrying out all appropriate company service policies.
- C. Knowledge of company policies and procedures for documenting and maintaining records.
- D. Knowledge of ethical standards and practices set by company (e.g., standards regarding the acceptance of tips, the designation of commissions, etc.).

Category 8: Sales Procedures and Techniques: The knowledge and skills necessary to implement company sales systems.

- C. Skill in using appropriate selling techniques, based on company policies, in order to complete a sale (e.g., suggestive selling).

Occupational and Technical Knowledge and Skills
S&SVP Customer Service and Sales Skill Standards
August 2001

- D. Knowledge of complementary and promotional products and services (e.g., add-ons and cross-selling).
- E. Skill at increasing customer base and generating repeat business.
- F. Skill in presenting and demonstrating products and services that meet customer needs and help to close the sale.

Category 9: Equipment and Tools: The knowledge and skills necessary to utilize specialized equipment or tools in the performance of sales and service functions.

- A. Knowledge of pertinent government and company regulations for use of equipment and tools.
- B. Knowledge of policies regarding maintenance of equipment and tools.
- C. Knowledge of requirements for reporting unsafe or defective equipment and tools.
- D. Skill at safely and appropriately operating company's equipment.
- E. Knowledge of which tools and equipment to use for specific tasks.

Critical Work Function 6: Gains Customer Commitment and Closes Sale

Category 1: Workplace Health, Safety and Security: The knowledge and skills that relate to the health, safety and security of both the employee and customer, including the security of information.

- B. Knowledge of company health, safety and security standards for both customers and employees.
- E. Knowledge of privacy laws and company standards for obtaining, using, and protecting information obtained from a customer or another employee.
- K. Skill in safely demonstrating potentially dangerous products properly.

Category 2: Industry and Company Knowledge and Awareness: The knowledge and skills that enable individuals to connect what's going on in the company and industry with how they sell to and serve customers.

- A. Knowledge of suppliers' practices, dependability and flexibility (e.g., delivery times of one manufacturer vs. another; dependability of one vendor's services vs. another's, etc.).
- B. Knowledge of how seasonal changes affect the needs of customers and the products or services offered.
- C. Knowledge of sources of information about new products and services, changes to products and services, changes to competitors' products and services, and changes to the industry at large, and applying that information on the job.
- D. Knowledge of company's product servicing policies (e.g., what kinds of faults will be repaired, extended warranty contracts, etc.) and other services available that relate to a product (e.g., clothing alterations, product delivery services, etc.).
- E. Knowledge of company standards regarding how to interact with customers (e.g., company protocols for addressing and communicating with customers, handling complaints, etc.).

Category 3: Client Needs and Expectations: The knowledge and skills needed to identify customer needs and expectations for products and services.

- A. Knowledge of how to determine customer needs and expectations related to the product or service, the company or the employee.
- B. Skill in demonstrating cost/benefits/value to customer based on customer expectations and needs.
- C. Skill in generating several alternative solutions that will meet a customer's needs.

Occupational and Technical Knowledge and Skills
S&SVP Customer Service and Sales Skill Standards
August 2001

Category 4: Goal Setting: The knowledge and skills needed to set and carry out professional goals that are consistent with company needs.

- A. Skill in developing professional goals that align with company goals and mission.
- B. Knowledge of company goals, objectives, rewards and incentives.
- C. Skill in motivating oneself to meet professional goals.

Category 5: Initiating Product and Service Improvements: The knowledge and skills leading to an understanding of product and service improvements.

- A. Knowledge of employee options for improving or helping to improve products and services.
- C. Skill at appropriately balancing company goals and needs with those of the customer when making improvements.
- E. Knowledge of sources of relevant information regarding company products in order to respond to customer needs (e.g., packaging, product manuals, warranties, etc.).
- F. Knowledge of the health and safety regulations regarding the intended uses of different products and services.
- G. Knowledge of how product will perform in different circumstances.

Category 6: Product and Service Awareness: The knowledge and skills needed to understand and communicate the specifics of the company's products and services.

- D. Knowledge of company's product and service lines— including benefits to customers—how they work, how much they cost, service policies, warranties, follow-up commitments, etc.
- E. Knowledge of sources of relevant information regarding company products in order to respond to customer needs (e.g., packaging, product manuals, warranties, etc.).
- F. Knowledge of the health and safety regulations regarding the intended uses of different products and services.
- G. Knowledge of how product will perform in different circumstances.

Category 7: Company Policies and Procedures: The knowledge and skills necessary to understand the conditions under which employee can conduct sales and service activities.

- A. Knowledge of sources of information about company policies, procedures and special events.
- B. Skill in carrying out all appropriate company service policies.
- C. Knowledge of company policies and procedures for documenting and maintaining records.
- D. Knowledge of ethical standards and practices set by company (e.g., standards regarding the acceptance of tips, the designation of commissions, etc.).

Category 8: Sales Procedures and Techniques: The knowledge and skills necessary to implement company sales systems.

- A. Knowledge of relevant sales procedures (e.g., charge vs. cash vs. checks; special orders, drop shipments, returns, refunds and exchanges, etc.).
- B. Skill in negotiating agreements with customers based on company policies.
- C. Skill in using appropriate selling techniques, based on company policies, in order to complete a sale (e.g., suggestive selling).
- D. Knowledge of complementary and promotional products and services (e.g., add-ons and cross-selling.)
- E. Skill at increasing customer base and generating repeat business.

Occupational and Technical Knowledge and Skills
S&SVP Customer Service and Sales Skill Standards
August 2001

- G. Skill in overcoming customer's objections when making a sale or serving a customer.
- H. Skill in responding to exceptional situations (e.g., return policies for heavily used items, requests to bargain for a product when it is typically sold at a fixed price).

Category 9: Equipment and Tools: The knowledge and skills necessary to utilize specialized equipment or tools in the performance of sales and service functions.

- A. Knowledge of pertinent government and company regulations for use of equipment and tools.
- B. Knowledge of policies regarding maintenance of equipment and tools.
- C. Knowledge of requirements for reporting unsafe or defective equipment and tools.
- D. Skill at safely and appropriately operating company's equipment.
- E. Knowledge of which tools and equipment to use for specific tasks.
- H. Knowledge of how to handle business transactions when equipment and tools are inoperable.

Critical Work Function 7: Develops and Implements a Sales Follow-up Plan

Category 1: Workplace Health, Safety and Security: The knowledge and skills that relate to the health, safety and security of both the employee and customer, including the security of information.

- B. Knowledge of company health, safety and security standards for both customers and employees.
- C. Knowledge of company policies and legal consequences related to aiding or participating in illegal or inappropriate behavior.
- E. Knowledge of privacy laws and company standards for obtaining, using, and protecting information obtained from a customer or another employee.
- H. Knowledge of policy and procedures for handling and reporting customer concerns or complaints regarding health, safety, and security.

Category 2: Industry and Company Knowledge and Awareness: The knowledge and skills that enable individuals to connect what's going on in the company and industry with how they sell to and serve customers.

- A. Knowledge of suppliers' practices, dependability and flexibility (e.g., delivery times of one manufacturer vs. another; dependability of one vendor's services vs. another's, etc.).
- C. Knowledge of sources of information about new products and services, changes to products and services, changes to competitors' products and services, and changes to the industry at large, and applying that information on the job.
- D. Knowledge of company's product servicing policies (e.g., what kinds of faults will be repaired, extended warranty contracts, etc.) and other services available that relate to a product (e.g., clothing alterations, product delivery services, etc.).
- E. Knowledge of company standards regarding how to interact with customers (e.g., company protocols for addressing and communicating with customers, handling complaints, etc.).

Category 3: Client Needs and Expectations: The knowledge and skills needed to identify customer needs and expectations for products and services.

- A. Knowledge of how to determine customer needs and expectations related to the product or service, the company or the employee.
- B. Skill in demonstrating cost/benefits/value to customer based on customer expectations and needs.
- C. Skill in generating several alternative solutions that will meet a customer's needs.

Occupational and Technical Knowledge and Skills
S&SVP Customer Service and Sales Skill Standards
August 2001

Category 4: Goal Setting: The knowledge and skills needed to set and carry out professional goals that are consistent with company needs.

- A. Skill in developing professional goals that align with company goals and mission.
- B. Knowledge of company goals, objectives, rewards and incentives.
- C. Skill in motivating oneself to meet professional goals.

Category 5: Initiating Product and Service Improvements: The knowledge and skills leading to an understanding of product and service improvements.

- A. Knowledge of employee options for improving or helping to improve products and services.
- C. Skill at appropriately balancing company goals and needs with those of the customer when making improvements.
- E. Skill in obtaining feedback from customer about performance through available and appropriate mechanisms.
- F. Skill at adjusting work practices to respond appropriately to customer needs.
- G. Knowledge of appropriate follow-up actions designed to improve products and services.
- H. Knowledge of company policy regarding special requests and extraordinary circumstances.

Category 6: Product and Service Awareness: The knowledge and skills needed to understand and communicate the specifics of the company's products and services.

- D. Knowledge of company's product and service lines— including benefits to customers—how they work, how much they cost, service policies, warranties, follow-up commitments, etc.
- E. Knowledge of sources of relevant information regarding company products in order to respond to customer needs (e.g., packaging, product manuals, warranties, etc.).
- F. Knowledge of the health and safety regulations regarding the intended uses of different products and services.
- G. Knowledge of how product will perform in different circumstances.
- I. Knowledge of company's products and services that will soon become available.

Category 7: Company Policies and Procedures: The knowledge and skills necessary to understand the conditions under which employee can conduct sales and service activities.

- C. Knowledge of company policies and procedures for documenting and maintaining records.
- D. Knowledge of ethical standards and practices set by company (e.g., standards regarding the acceptance of tips, the designation of commissions, etc.).

Category 8: Sales Procedures and Techniques: The knowledge and skills necessary to implement company sales systems.

- A. Knowledge of relevant sales procedures (e.g., charge vs. cash vs. checks; special orders, drop shipments, returns, refunds and exchanges, etc.).
- B. Skill in negotiating agreements with customers based on company policies.
- C. Skill in using appropriate selling techniques, based on company policies, in order to complete a sale (e.g., suggestive selling).
- D. Knowledge of complementary and promotional products and services (e.g., add-ons and cross-selling).
- E. Skill at increasing customer base and generating repeat business.
- G. Skill in overcoming customer's objections when making a sale or serving a customer.

Occupational and Technical Knowledge and Skills
S&SVP Customer Service and Sales Skill Standards
August 2001

Category 9: Equipment and Tools: The knowledge and skills necessary to utilize specialized equipment or tools in the performance of sales and service functions.

- D. Skill at safely and appropriately operating company's equipment.
- G. Skill at basic troubleshooting and maintenance procedures for general office equipment (e.g., how to change the paper in a fax machine, how to change the receipt tape in a cash register, how to adjust a sun bed, etc.).