

Customer Service and Sales Skill Standards



*A Partner in the
National Skill Standards System*

Notice

The Sales & Service Voluntary Partnership is pleased to present **Customer Service and Sales Skill Standards**, approved by the National Skills Standard Board (NSSB), in support of a voluntary, national system of standards, assessment, and certification. This milestone marks the culmination of extensive work to identify and validate the skills and knowledge needed to succeed in sales and service positions in the retail, wholesale, personal services, and real estate industries...and beyond.

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Introduction

Promoting excellence in customer service and sales is the mission of a unique collaboration representing business, trade associations, labor, education, government, and others who came together as the Sales & Service Voluntary Partnership (S&SVP). The national skill standards presented in this publication are the result of a collaborative effort to establish a new standard for sales and service work in high-performance environments. The standards presented here also guide employees, job seekers, and students to the performance capabilities they need to succeed in the workplace.

In 1998, the S&SVP was officially formed and funded by the National Skill Standards Board (NSSB) to develop voluntary, national skill standards and certification for the retail, wholesale, personal services, and real estate industries. The S&SVP, managed by the NRF Foundation and supported by its own Board, took on the challenge to define the elements of work and skills that are common among these industries. For workers, the standards increase opportunities to transfer job skills and expand career opportunities because the standards apply to companies of all sizes regardless of geographic location. For businesses, the standards provide a benchmark for evaluating and improving their work processes.

The S&SVP Standards are one element of a national system of skill standards. The ultimate goal is to develop standards for specific, well-defined clusters of industries across the entire U.S. economy. Each of these industry clusters will accomplish that task following common guidelines provided by the NSSB to ensure that the skills are transferable and portable across all sectors of the economy. *(To learn more about the NSSB and its initiatives, please refer to the Resources section for information on how to order the publication Built to Work – A Common Framework for Skill Standards.)*

The S&SVP invites you to integrate these standards into your training, learning, and workplace development programs. Additional information is available in the Customer Service & Sales Skill Standards publication (an order form follows these skill standards). Meanwhile, we continue to expand the skill standards initiative for sales and service industries. We hope you will provide input to the S&SVP to ensure that standards are useful in workplace, education, and training settings.

CUSTOMER SERVICE

1. **Learns About Products or Services**
2. Assesses Customer Needs
3. Educates Customer
4. Meets Customer's Needs And Provides Ongoing Support



Critical Work Function



Learns About Products or Services



Learns About Products or Services

Key Activity 1.1**Performance Indicators**

Undergoes company provided training to support product or services as well as follow-up training.

- ▶ Attendance records show that employee has participated in required training.
- ▶ Documentation (e.g., test results, checklists, instructor or manager evaluations) indicates satisfactory performance in training.
- ▶ Training assignments (e.g., homework or participation in role plays) are completed satisfactorily and on time.
- ▶ Employee has mastered techniques to efficiently access additional information or training (e.g., reference manuals, supervisors, co-workers or the Internet) if needed and if available.
- ▶ Employee demonstrates understanding of skills being taught (e.g., role playing, sign-off by manager, responses to clarifying questions or other observable behaviors).

Key Activity 1.2

Reviews and comprehends written and multimedia material pertaining to products or services produced by employee's company or trade organization.

- ▶ Clear and accurate verbal explanations of company, industry, manufacturer, or supplier products and services are given when answering questions, including providing sufficient information to meet regulatory requirements, if necessary.
- ▶ Relevant sources of information (e.g., articles in trade magazines, popular media, company policy manuals or guidelines) are cited to clarify or strengthen points.

Key Activity 1.3

Tests and samples products or services.

- ▶ Demonstrations of products or services for customers are performed competently, knowledgeably, and safely.
- ▶ Descriptions of products and services include comparative information on alternative products or services based on testing and sampling.
- ▶ Demonstrations and explanations of product reflect a full understanding of all relevant features of the product or service.
- ▶ Demonstrations and explanations of features of products or services reflect appropriateness to specific customer needs.

Key Activity 1.4

Studies competitors' products or services, including competitors' marketing materials (ads, fliers, TV commercials, web pages, etc.).

- ▶ A description of competitors' products and services, including pricing structure, is provided in response to questions from customers.
- ▶ Sales presentations and answers to customer questions demonstrate knowledge of advantages and disadvantages of own company's products and services compared to those of competitors.
- ▶ Sales presentations and answers to customer questions demonstrate knowledge of which products or services offered by company are comparable to those offered by competitors.
- ▶ Description of why company's products or services are better than those of competitors is provided when relevant.

Learns About Products or Services

Academic and Employability Knowledge and Skills

Skill	Overall Complexity Rating**		Complexity Dimension	Complexity Subdimension	Complexity Subdimension Rating**			
	worker	supervisor			worker	supervisor		
	W	S			W	S		
Reading	1.85	2.09	Complexity of Text		1.89	2.09		
			Complexity of Reading Skills		1.74	2.05		
			Complexity of Reading Purpose		1.74	2.14		
Writing	1.48	1.86	Complexity of Text	Complexity of Text	1.56	1.55		
			Complexity of Writing Product	Type of Product	1.48	1.73		
				Organization	1.52	1.77		
				Elaboration	1.44	1.95		
			Complexity of Writing Process	Writing Development	1.25	1.64		
			Complexity of Writing Purpose	To Inform	1.46	2.14		
				To Persuade	1.30	1.62		
Mathematics	1.13	1.45	Mathematics Content	Number Sense & Computation	1.33	1.57		
				Geometry, Measurement, and Spatial Sense	*	1.15		
				Complexity of Data Analysis, Statistics, & Probability	*	1.39		
						Functions and Algebraic Thinking	*	1.22
						Complexity of Representation and Communication	1.13	1.38
			Problem Solving	Mathematical Methods	1.09	1.55		
				Mathematical Reasoning	1.04	1.43		
				Mathematical Tools	1.21	1.76		
Science	*	1.11	Scientific Inquiry	Design	*	*		
				Use of Evidence	*	1.12		
			Understanding the Nature of Science	Unifying Concepts and Processes	*	1.18		
				Physical Science	*	1.11		
				Life Science	*	*		
			Applied Science	Earth and Space Science	*	*		
				Science and Technology	*	*		
				Science in Personal and Social Perspective	1.13	1.17		
Listening	1.81	2.23	Complexity of Communication	Content Complexity	1.70	2.05		
				Demands for Attention	1.89	2.36		
				Communication Indirectness	1.48	1.86		
			Barriers to Communication	Limitations on Interaction	1.63	1.50		
				Distractions	1.67	1.86		
Speaking	1.74	2.23	Complexity of Communication	Content Complexity	1.67	2.05		
				Tact and Sensitivity Required	1.56	1.86		
				Communication Indirectness	1.52	1.68		
			Context Demands	Diversity of Audience	2.04	2.55		
				Constraints on Preparation	1.81	2.32		
				Distractions	1.93	2.00		
				Listener Resistance	1.67	1.90		
Using Information & Communication Technology	1.69	1.73	Complexity of Technology Application	Complexity of Equipment or Technology	1.35	1.68		
				Complexity of Applications	1.36	1.50		
			Frequency of Technology Change	Training Time Constraints	1.65	1.77		
				New Learning Required	1.77	1.86		
Gathering & Analyzing Information	1.93	2.09	Difficulty of Information Gathering	Amount of Information	2.19	2.48		
				Number and Variety of Sources	1.92	2.18		
				Resourcefulness Needed	1.50	1.77		
			Complexity of Analysis	Complexity of Information and Analysis	1.52	1.86		
				Need to Evaluate Source Information	1.41	1.45		
				Lack of Analysis Guidelines	1.44	1.48		

****Overall Complexity Ratings** are the level of the knowledge/skill needed to perform this Critical Work Function. **Complexity Dimensions and Subdimensions** are factors that affect the complexity of the knowledge/skill; the level of knowledge/skill needed based on these factors is reflected in the Complexity Subdimension Rating. **Ratings are 1 = low, 2 = moderate, and 3 = high.** For more detailed information about Academic and Employability Skill Scales, please refer to the NSSB publication titled *Skill Scales Companion Guide* in the Resources section. *Indicates that this knowledge/skill is not required to perform this Critical Work Function.

Skill	Overall Complexity Rating**		Complexity Dimension	Complexity Subdimension	Complexity Subdimension Rating**	
	worker	supervisor			worker	supervisor
	W	S			W	S
Analyzing & Solving Problems	1.48	1.85	Problem Complexity	Problem Uniqueness or Difficulty	1.23	1.60
				Number and Range of Problems	1.52	1.95
			Solution Complexity	1.52	1.85	
Making Decisions & Judgments	1.38	1.85	Degree of Judgment or Inference Required	Lack of Guidance or Precedents	1.22	1.24
				Integration Difficulty	1.33	1.57
				Quantity or Ambiguity of Risks and Consequences	1.31	1.32
			Individual Decision-Making Responsibility	1.70	2.00	
			Absence of Rules or Policy Constraints	1.31	1.65	
Organizing & Planning	1.38	2.05	Complexity of Plans	Goal Complexity or Ambiguity	1.22	1.62
				Flexibility Required	1.67	2.05
				Resource Coordination Required	1.15	1.95
				Scope and Effects of Planning	1.00	1.86
			Constraints on Planning	Lack of Guidelines	1.22	1.55
				Lack of Feedback	1.52	1.50
				Constraints on Resource Availability	1.44	1.70
Using Social Skills	1.78	2.00	Complexity of Social Interactions	Diversity	2.15	2.14
				Structure or Protocols Required	1.48	1.71
				Tact and Sensitivity Required	1.52	1.95
Adaptability	1.59	2.05	Degree of Adaptability Required Difficulty of Adapting	Frequency of Change	1.85	2.27
				Unpredictability of Change	1.52	1.95
				Lack of Support for Change	1.22	1.57
Working in Teams	1.67	1.76	Degree of Collaboration Required Team Member Heterogeneity Goal or Role Ambiguity	Task Interdependence	1.67	1.67
				Team Diversity	1.96	2.10
				Lack of Clarity or Support for Team Goals	1.04	1.26
				Lack of Clarity or Stability of Responsibilities	1.21	1.33
Leading Others	*	2.25	Work Challenges	Challenges to Goal Attainment	*	1.95
				Work Structuring Requirements	*	1.90
				Scope and Complexity of Leadership Responsibility	*	1.95
			People Challenges	Coaching or Mentoring Needs	*	2.35
				Conflict Management Needs	*	1.94
Building Consensus	1.15	1.50	Consensus Process Inhibitors	Numbers and Diversity of Stakeholders	1.28	1.41
				Ambiguity of Goals	1.00	1.28
				Lack of Organizational Support, Incentives or Consensus Leadership	1.10	1.33
				High Consensus Standards	1.41	1.38
			Difficulty of Issues Requiring Consensus	Complexity of Issues	1.21	1.39
				Contentiousness of Issues	1.40	1.56
				Lack of Opportunity for Agreement	1.26	1.35
Self & Career Development	1.70	1.91	Need for Learning & Development Limitations on Learning & Development Opportunities	Self & Career Development Requirements	1.96	2.05
				Time, Resource, or Support Constraints	1.48	1.68
				Application Constraints	1.15	1.19

Learns About Products or Services

Occupational and Technical Knowledge and Skills

Category	Definition	Knowledge and Skill
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.	<ul style="list-style-type: none"> 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.
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.	<ul style="list-style-type: none"> 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.
3 Client Needs and Expectations	The knowledge and skills needed to identify customer needs and expectations for products and services.	<ul style="list-style-type: none"> A. Knowledge of how to determine customer needs and expectations related to the product or service, the company or the employee.
4 Goal Setting	The knowledge and skills needed to set and carry out professional goals that are consistent with company needs.	<ul style="list-style-type: none"> 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.
5 Initiating Product and Service Improvements	The knowledge and skills leading to an understanding of product and service improvements.	<ul style="list-style-type: none"> 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	Definition	Knowledge and Skill
6 Product and Service Awareness	The knowledge and skills needed to understand and communicate the specifics of the company's products and services.	<ul style="list-style-type: none"> 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.
7 Company Policies and Procedures	The knowledge and skills necessary to understand the conditions under which employee can conduct sales and service activities.	<ul style="list-style-type: none"> 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.).
8 Sales Procedures and Techniques	The knowledge and skills necessary to implement company sales systems.	<ul style="list-style-type: none"> 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).
9 Equipment and Tools	The knowledge and skills necessary to utilize specialized equipment or tools in the performance of sales and service functions.	<ul style="list-style-type: none"> 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.

CUSTOMER SERVICE

1. Learns About Products or Services
2. **Assesses Customer Needs**
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Critical Work Function

2

Assesses Customer Needs



Assesses Customer Needs

Key Activity 2.1**Performance Indicators**

Addresses the customer, either in person, by telephone, e-mail or other means.

- ▶ Customer receives prompt greeting or acknowledgment.
- ▶ Customer promptly receives an offer of assistance (e.g., How can I help you?).
- ▶ Customer receives courteous, professional treatment throughout the interaction.

Key Activity 2.2

Gathers information about customer's needs, and customer's knowledge of products or services.

- ▶ Customer's objectives, desires, and problems that relate to the product or service are identified.
- ▶ Information on how the customer plans to use the product or service is collected.
- ▶ Outdated and inaccurate information or impressions related to the company's product or service are identified, as needed.
- ▶ Information is gathered in a courteous, professional manner.
- ▶ The most efficient interviewing technique is selected and used when gathering information from customers (e.g., open- vs. close-ended questions, knowing when to use follow-up questions).
- ▶ Approach is tailored to meet the needs of customers with different demographic characteristics (e.g., age, cultural background, disability status) and personalities.

Key Activity 2.3

Responds to customer's comments and questions.

- ▶ Courteous, complete attention is provided to customer.
- ▶ Customer's request for an advertised item results in prompt offer to sell the item.
- ▶ Customer's comments, questions, concerns, and objections are welcomed and are addressed with clear, direct, accurate and timely responses.
- ▶ Customer's needs and objectives are clarified and re-confirmed (e.g., restated back to the customer) if necessary.

Key Activity 2.4

Determines customer's price considerations.

- ▶ Customer is questioned clearly and courteously about price range considerations.
- ▶ Customer's approximate desired price range is correctly ascertained.
- ▶ Customer is presented with products of varying price ranges to gauge specific price limits.

Assesses Customer Needs

Academic and Employability Knowledge and Skills

Skill	Overall Complexity Rating**		Complexity Dimension	Complexity Subdimension	Complexity Subdimension Rating**	
	worker	supervisor			worker	supervisor
	W	S			W	S
Reading	1.42	1.30	Complexity of Text		1.32	1.16
			Complexity of Reading Skills		1.38	1.29
			Complexity of Reading Purpose		1.42	1.40
Writing	1.50	1.70	Complexity of Text	Complexity of Text	1.32	1.32
			Complexity of Writing Product	Type of Product	1.32	1.42
				Organization	1.48	1.53
				Elaboration	1.60	1.79
			Complexity of Writing Process	Writing Development	1.28	1.32
			Complexity of Writing Purpose	To Inform	1.50	1.75
		To Persuade	1.38	1.53		
Mathematics	1.28	1.27	Mathematics Content	Number Sense & Computation	1.26	1.29
				Geometry, Measurement, and Spatial Sense	*	1.13
				Complexity of Data Analysis, Statistics, & Probability	*	1.19
				Functions and Algebraic Thinking	*	1.19
				Complexity of Representation and Communication	1.12	1.20
				Problem Solving	Mathematical Methods	1.22
				Mathematical Reasoning	1.13	1.14
	Mathematical Tools	1.26	1.64			
Science	*	1.17	Scientific Inquiry	Design	*	*
				Use of Evidence	*	1.17
			Understanding the Nature of Science	Unifying Concepts and Processes	*	*
				Physical Science	*	1.12
				Life Science	*	*
			Applied Science	Earth and Space Science	*	*
				Science and Technology	*	*
	Science in Personal and Social Perspective	1.13	1.24			
Listening	2.11	2.14	Complexity of Communication	Content Complexity	1.78	1.82
				Demands for Attention	2.22	2.36
				Communication Indirectness	2.22	2.09
			Barriers to Communication	Limitations on Interaction	1.59	1.50
				Distractions	2.11	2.36
Speaking	2.19	2.50	Complexity of Communication	Content Complexity	1.70	1.86
				Tact and Sensitivity Required	2.04	2.41
				Communication Indirectness	1.93	2.09
			Context Demands	Diversity of Audience	2.41	2.68
				Constraints on Preparation	2.19	2.64
				Distractions	1.93	2.41
				Listener Resistance	1.78	2.09
Using Information & Communication Technology	1.37	1.45	Complexity of Technology Application	Complexity of Equipment or Technology	1.22	1.37
				Complexity of Applications	1.26	1.45
			Frequency of Technology Change	Training Time Constraints	1.46	1.53
				New Learning Required	1.56	1.58
Gathering & Analyzing Information	1.85	2.14	Difficulty of Information Gathering	Amount of Information	2.00	2.45
				Number and Variety of Sources	1.89	1.91
				Resourcefulness Needed	1.63	1.95
			Complexity of Analysis	Complexity of Information and Analysis	1.44	1.86
				Need to Evaluate Source Information	1.52	1.91
	Lack of Analysis Guidelines	1.70	1.91			

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Complexity Dimensions and Subdimensions are factors that affect the complexity of the knowledge/skill; the level of knowledge/skill needed based on these factors is reflected in the Complexity Subdimension Rating. Ratings are 1 = low, 2 = moderate, and 3 = high. For more detailed information about Academic and Employability Skill Scales, please refer to the NSSB publication titled *Skill Scales Companion Guide* in the Resources section.

*Indicates that this knowledge/skill is not required to perform this Critical Work Function.

Skill	Overall Complexity Rating**		Complexity Dimension	Complexity Subdimension	Complexity Subdimension Rating**	
	worker	supervisor			worker	supervisor
	W	S			W	S
Analyzing & Solving Problems	1.96	2.05	Problem Complexity	Problem Uniqueness or Difficulty	1.77	1.86
				Number and Range of Problems	1.85	2.18
			Solution Complexity	2.08	2.05	
Making Decisions & Judgments	1.81	1.95	Degree of Judgment or Inference Required	Lack of Guidance or Precedents	1.41	1.64
				Integration Difficulty	1.59	1.73
				Quantity or Ambiguity of Risks and Consequences	1.67	1.59
			Individual Decision-Making Responsibility	1.96	2.32	
			Absence of Rules or Policy Constraints	1.59	1.68	
Organizing & Planning	1.70	2.05	Complexity of Plans	Goal Complexity or Ambiguity	1.41	1.76
				Flexibility Required	1.96	2.14
				Resource Coordination Required	1.27	1.95
			Constraints on Planning	Scope and Effects of Planning	1.15	1.81
				Lack of Guidelines	1.52	1.57
				Lack of Feedback	1.59	1.81
			Constraints on Resource Availability	1.42	1.81	
Using Social Skills	2.52	2.64	Complexity of Social Interactions	Diversity	2.67	2.82
				Structure or Protocols Required	2.04	2.05
				Tact and Sensitivity Required	2.26	2.55
Adaptability	1.89	2.27	Degree of Adaptability Required	Frequency of Change	2.07	2.41
				Unpredictability of Change	1.89	2.09
			Difficulty of Adapting	1.52	1.52	
Working in Teams	1.48	1.70	Degree of Collaboration Required	Task Interdependence	1.50	1.70
				Team Member Heterogeneity	1.71	2.06
			Goal or Role Ambiguity	Lack of Clarity or Support for Team Goals	1.17	1.56
				Lack of Clarity or Stability of Responsibilities	1.44	1.53
Leading Others	*	2.20	Work Challenges	Challenges to Goal Attainment	*	2.15
				Work Structuring Requirements	*	2.00
				Scope and Complexity of Leadership Responsibility	*	1.90
			People Challenges	Coaching or Mentoring Needs	*	2.20
				Conflict Management Needs	*	1.79
Building Consensus	1.59	1.95	Consensus Process Inhibitors	Numbers and Diversity of Stakeholders	1.50	1.65
				Ambiguity of Goals	1.36	1.63
				Lack of Organizational Support, Incentives or Consensus Leadership	1.33	1.35
				High Consensus Standards	1.70	2.00
			Difficulty of Issues Requiring Consensus	Complexity of Issues	1.59	1.72
				Contentiousness of Issues	1.68	1.89
			Lack of Opportunity for Agreement	1.38	1.42	
Self & Career Development	1.48	1.67	Need for Learning & Development	Self & Career Development Requirements	1.67	1.71
				Time, Resource, or Support Constraints	1.25	1.70
			Limitations on Learning & Development Opportunities	1.36	1.24	

Assesses Customer Needs

Occupational and Technical Knowledge and Skills

Category	Definition	Knowledge and Skill
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.
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.).
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.
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.
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.

Category	Definition	Knowledge and Skill
6 Product and Service Awareness	<p>The knowledge and skills needed to understand and communicate the specifics of the company's products and services.</p>	<ul style="list-style-type: none"> 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.
7 Company Policies and Procedures	<p>The knowledge and skills necessary to understand the conditions under which employee can conduct sales and service activities.</p>	<ul style="list-style-type: none"> 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.).
8 Sales Procedures and Techniques	<p>The knowledge and skills necessary to implement company sales systems.</p>	<ul style="list-style-type: none"> 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.
9 Equipment and Tools	<p>The knowledge and skills necessary to utilize specialized equipment or tools in the performance of sales and service functions.</p>	<ul style="list-style-type: none"> 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.

CUSTOMER SERVICE

1. Learns About Products or Services
2. Assesses Customer Needs
- 3. Educates Customer**
4. Meets Customer's Needs And Provides Ongoing Support



Critical Work Function

3

Educates Customer



Educates Customer

Key Activity 3.1**Performance Indicators**

Explains and demonstrates products or services and prices to customer.

- ▶ Clear and complete explanations and demonstrations of products or services are provided to customers.
- ▶ Information about the complete array of products or services that will meet each customer's specific needs is provided.
- ▶ Information about other products or services that are necessary or desirable to complement the sale is offered (e.g., accessories that match a clothing selection, conditioner with shampoo, house warranty with home purchase).
- ▶ Accurate pricing information, including payment options, is provided to customers.
- ▶ When necessary and relevant, information about which products or services are on sale is provided to customers.
- ▶ Information about the rationale for product or service prices (e.g., higher-priced products or services include additional features) and about the comparative advantages and disadvantages of differently priced offerings is provided to customers when appropriate.

Key Activity 3.2

Identifies alternative or additional products, services, and/or options available.

- ▶ Customers are provided with alternatives if advertised product or service is unavailable (e.g., rain checks when specified in the advertisement or information about when product or service may be available again).
- ▶ If requested products or services are not available, information about equivalent or alternative company offerings is provided to customers (within company policy).
- ▶ If customer needs cannot be met by company products or services, information about other companies' products or services that will meet those needs is provided (within company policy).

Key Activity 3.3

Informs customer about service policies (returns, warranties, guarantees, service plans).

- ▶ Complete and accurate information about service policies (e.g., return policies, warranties, guarantees, and service plans) is provided to customers in response to questions and when required by company policy.
- ▶ Complete and accurate information about Federal and State rules pertaining to warranties, guarantees and returns is provided when necessary.
- ▶ Complete and accurate information about inclusive or optional service plans is provided when appropriate.
- ▶ Accurate information is provided about expiration dates for warranties and service plans.

Key Activity 3.4

Solicits supervisor or co-worker support and advice when necessary to meet customer needs.

- ▶ Requests to supervisor or co-worker for support and advice are clear, concise and timely and include all relevant, available information concerning the customer and the product or service.
- ▶ When additional support or advice is required, a clear explanation is provided to the customer of how and when he or she will be re-contacted.

Educates Customer

Academic and Employability Knowledge and Skills

Skill	Overall Complexity Rating**		Complexity Dimension	Complexity Subdimension	Complexity Subdimension Rating**		
	worker	supervisor			worker	supervisor	
	W	S			W	S	
Reading	1.56	1.70	Complexity of Text		1.67	1.65	
			Complexity of Reading Skills		1.52	1.65	
			Complexity of Reading Purpose		1.48	1.60	
Writing	1.60	1.71	Complexity of Text	Complexity of Text	1.48	1.55	
			Complexity of Writing Product	Type of Product	1.56	1.57	
				Organization	1.52	1.57	
				Elaboration	1.72	1.90	
			Complexity of Writing Process	Writing Development	1.28	1.43	
			Complexity of Writing Purpose	To Inform	1.72	2.14	
To Persuade	1.58	1.95					
Mathematics	1.26	1.27	Mathematics Content	Number Sense & Computation	1.44	1.36	
				Geometry, Measurement, and Spatial Sense	1.00	1.06	
				Complexity of Data Analysis, Statistics, & Probability	*	1.06	
				Functions and Algebraic Thinking	*	*	
				Complexity of Representation and Communication	1.19	1.33	
			Problem Solving	Mathematical Methods	1.23	1.36	
				Mathematical Reasoning	1.04	1.18	
				Mathematical Tools	1.33	1.59	
Science	*	1.21	Scientific Inquiry	Design	*	*	
				Use of Evidence	*	1.18	
			Understanding the Nature of Science	Unifying Concepts and Processes	*	*	
				Core Scientific Content	Physical Science	*	1.24
					Life Science	*	*
			Applied Science	Earth and Space Science	*	*	
				Science and Technology	*	*	
				Science in Personal and Social Perspective	1.11	1.26	
Listening	1.93	2.05	Complexity of Communication	Content Complexity	1.67	1.68	
				Demands for Attention	1.96	2.18	
				Communication Indirectness	2.04	1.82	
			Barriers to Communication	Limitations on Interaction	1.67	1.55	
				Distractions	1.96	2.32	
Speaking	2.26	2.45	Complexity of Communication	Content Complexity	1.89	1.95	
				Tact and Sensitivity Required	2.07	2.27	
				Communication Indirectness	1.93	1.95	
			Context Demands	Diversity of Audience	2.56	2.73	
				Constraints on Preparation	2.11	2.41	
				Distractions	2.15	2.32	
				Listener Resistance	2.04	2.00	
Using Information & Communication Technology	1.78	1.48	Complexity of Technology Application	Complexity of Equipment or Technology	1.37	1.30	
				Complexity of Applications	1.41	1.48	
			Frequency of Technology Change	Training Time Constraints	1.56	1.45	
				New Learning Required	1.85	1.55	
Gathering & Analyzing Information	1.85	1.90	Difficulty of Information Gathering	Amount of Information	2.04	2.14	
				Number and Variety of Sources	1.78	1.95	
				Resourcefulness Needed	1.63	1.67	
			Complexity of Analysis	Complexity of Information and Analysis	1.48	1.71	
				Need to Evaluate Source Information	1.41	1.38	
				Lack of Analysis Guidelines	1.52	1.45	

****Overall Complexity Ratings** are the level of the knowledge/skill needed to perform this Critical Work Function.

Complexity Dimensions and Subdimensions are factors that affect the complexity of the knowledge/skill; the level of knowledge/skill needed based on these factors is reflected in the Complexity Subdimension Rating. **Ratings are 1 = low, 2 = moderate, and 3 = high.** For more detailed information about Academic and Employability Skill Scales, please refer to the NSSB publication titled *Skill Scales Companion Guide* in the Resources section.

*Indicates that this knowledge/skill is not required to perform this Critical Work Function.

Skill	Overall Complexity Rating**		Complexity Dimension	Complexity Subdimension	Complexity Subdimension Rating**	
	worker	supervisor			worker	supervisor
	W	S			W	S
Analyzing & Solving Problems	1.89	2.00	Problem Complexity	Problem Uniqueness or Difficulty	1.70	1.86
				Number and Range of Problems	1.85	2.00
			Solution Complexity	Number and Complexity of Possible Solutions	1.89	1.95
Making Decisions & Judgments	1.73	1.62	Degree of Judgment or Inference Required	Lack of Guidance or Precedents	1.41	1.48
				Integration Difficulty	1.41	1.57
				Quantity or Ambiguity of Risks and Consequences	1.78	1.57
			Individual Decision-Making Responsibility	Accountability and Autonomy	1.93	1.95
			Absence of Rules or Policy Constraints	1.59	1.57	
Organizing & Planning	1.67	1.90	Complexity of Plans	Goal Complexity or Ambiguity	1.41	1.62
				Flexibility Required	2.04	2.00
				Resource Coordination Required	1.56	1.84
			Constraints on Planning	Scope and Effects of Planning	1.28	1.84
				Lack of Guidelines	1.52	1.52
				Lack of Feedback	1.48	1.62
			Constraints on Resource Availability	1.48	1.71	
Using Social Skills	2.59	2.55	Complexity of Social Interactions	Diversity	2.70	2.73
				Structure or Protocols Required	2.19	2.09
				Tact and Sensitivity Required	2.33	2.41
Adaptability	1.89	2.14	Degree of Adaptability Required	Frequency of Change	2.00	2.36
				Unpredictability of Change	1.85	2.00
			Difficulty of Adapting	Lack of Support for Change	1.44	1.67
Working in Teams	1.81	1.81	Degree of Collaboration Required	Task Interdependence	1.88	1.79
				Team Member Heterogeneity	Team Diversity	1.92
			Goal or Role Ambiguity	Lack of Clarity or Support for Team Goals	1.23	1.44
				Lack of Clarity or Stability of Responsibilities	1.46	1.45
Leading Others	1.45	2.15	Work Challenges	Challenges to Goal Attainment	1.32	2.00
				Work Structuring Requirements	*	1.80
				Scope and Complexity of Leadership Responsibility	*	1.63
			People Challenges	Coaching or Mentoring Needs	1.32	2.10
				Conflict Management Needs	1.30	1.79
Building Consensus	1.71	2.05	Consensus Process Inhibitors	Numbers and Diversity of Stakeholders	1.36	1.83
				Ambiguity of Goals	1.30	1.63
				Lack of Organizational Support, Incentives or Consensus Leadership	1.18	1.72
				High Consensus Standards	1.75	2.12
			Difficulty of Issues Requiring Consensus	Complexity of Issues	1.63	1.84
				Contentiousness of Issues	1.46	1.94
				Lack of Opportunity for Agreement	1.54	1.67
Self & Career Development	1.56	1.71	Need for Learning & Development	Self & Career Development Requirements	2.00	1.76
				Time, Resource, or Support Constraints	1.30	1.67
			Limitations on Learning & Development Opportunities	Application Constraints	1.19	1.52

Educates Customer

Occupational and Technical Knowledge and Skills

Category	Definition	Knowledge and Skill
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.	<ul style="list-style-type: none"> 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.
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.	<ul style="list-style-type: none"> 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.).
3 Client Needs and Expectations	The knowledge and skills needed to identify customer needs and expectations for products and services.	<ul style="list-style-type: none"> 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.
4 Goal Setting	The knowledge and skills needed to set and carry out professional goals that are consistent with company needs.	<ul style="list-style-type: none"> 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.
5 Initiating Product and Service Improvements	The knowledge and skills leading to an understanding of product and service improvements.	<ul style="list-style-type: none"> 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.

Category	Definition	Knowledge and Skill
		<p>F. Skill at adjusting work practices to respond appropriately to customer needs.</p> <p>G. Knowledge of appropriate follow-up actions designed to improve products and services.</p>
6 Product and Service Awareness	<p>The knowledge and skills needed to understand and communicate the specifics of the company's products and services.</p>	<p>A. Knowledge of geographic area in which company provides products or services.</p> <p>C. Knowledge of specific product information including recalls, health and safety issues, product defects, etc.</p> <p>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.</p> <p>E. Knowledge of sources of relevant information regarding company products in order to respond to customer needs (e.g., packaging, product manuals, warranties, etc.).</p> <p>F. Knowledge of the health and safety regulations regarding the intended uses of different products and services.</p> <p>G. Knowledge of how product will perform in different circumstances.</p> <p>H. Knowledge of how products and services have been improved compared to previous offerings.</p>
7 Company Policies and Procedures	<p>The knowledge and skills necessary to understand the conditions under which employee can conduct sales and service activities.</p>	<p>A. Knowledge of sources of information about company policies, procedures and special events.</p> <p>B. Skill in carrying out all appropriate company service policies.</p> <p>C. Knowledge of company policies and procedures for documenting and maintaining records.</p> <p>D. Knowledge of ethical standards and practices set by company (e.g., standards regarding the acceptance of tips, the designation of commissions, etc.).</p>
8 Sales Procedures and Techniques	<p>The knowledge and skills necessary to implement company sales systems.</p>	<p>B. Skill in negotiating agreements with customers based on company policies.</p> <p>D. Knowledge of complementary and promotional products and services (e.g., add-ons and cross-selling).</p> <p>E. Skill at increasing customer base and generating repeat business.</p> <p>G. Skill in overcoming customer's objections when making a sale or serving a customer.</p>
9 Equipment and Tools	<p>The knowledge and skills necessary to utilize specialized equipment or tools in the performance of sales and service functions.</p>	<p>A. Knowledge of pertinent government and company regulations for use of equipment and tools.</p> <p>B. Knowledge of policies regarding maintenance of equipment and tools.</p> <p>C. Knowledge of requirements for reporting unsafe or defective equipment and tools.</p> <p>D. Skill at safely and appropriately operating company's equipment.</p> <p>E. Knowledge of which tools and equipment to use for specific tasks.</p>

CUSTOMER SERVICE

1. Learns About Products or Services
2. Assesses Customer Needs
3. Educates Customer
4. Meets Customer's Needs And Provides Ongoing Support



Critical Work Function



**Meets Customer's
Needs and Provides
Ongoing Support**



Meets Customer's Needs and Provides Ongoing Support**Key Activity 4.1****Performance Indicators**

Coordinates as needed with other services to expedite delivery of service or product.

- ▶ Accurate information about when product will be delivered is communicated to customers.
- ▶ Delivery records indicate that the necessary arrangements were made with other individuals or services to ensure accurate and timely delivery.
- ▶ Information, including accurate order numbers and properly-completed paperwork, is provided to customer to enable them to check on status of delivery.

Key Activity 4.2

Contacts customer to determine if products or services meet customer's expectations.

- ▶ Customer receives timely follow-up inquiry to determine whether products or services met customer's expectations.
- ▶ Customer follow-up responses are documented according to company policy.
- ▶ Noteworthy or significant customer feedback is conveyed immediately to supervisors or other relevant individuals and departments.

Key Activity 4.3

If customer's expectations are not met, informs the customer of how the company will satisfy the customer's needs and facilitates resolution process.

- ▶ Customer receives clear and accurate information regarding company's process and policies for resolving customer complaints and problems.
- ▶ Problem is resolved appropriately and in a timely manner, according to company's process and policies.
- ▶ Customer feedback indicates satisfaction with employee actions and behavior.

Meets Customer's Needs and Provides Ongoing Support

Academic and Employability Knowledge and Skills

Skill	Overall Complexity Rating**		Complexity Dimension	Complexity Subdimension	Complexity Subdimension Rating**		
	worker	supervisor			worker	supervisor	
	W	S			W	S	
Reading	1.46	1.43	Complexity of Text		1.50	1.33	
			Complexity of Reading Skills		1.42	1.48	
			Complexity of Reading Purpose		1.54	1.43	
Writing	1.54	1.43	Complexity of Text	Complexity of Text	1.35	1.40	
			Complexity of Writing Product	Type of Product	1.54	1.52	
				Organization	1.54	1.38	
				Elaboration	1.79	1.43	
			Complexity of Writing Process	Writing Development	1.25	1.35	
			Complexity of Writing Purpose	To Inform	1.60	1.81	
		To Persuade	1.52	1.40			
Mathematics	1.10	1.05	Mathematics Content	Number Sense & Computation	1.14	1.10	
				Geometry, Measurement, and Spatial Sense	*	*	
				Complexity of Data Analysis, Statistics, & Probability	*	1.00	
				Functions and Algebraic Thinking	*	*	
				Complexity of Representation and Communication	1.15	1.06	
				Problem Solving	Mathematical Methods	1.19	1.11
					Mathematical Reasoning	1.00	1.05
Mathematical Tools	1.24	1.14					
Science	*	1.06	Scientific Inquiry	Design	*	*	
				Use of Evidence	*	*	
				Understanding the Nature of Science	Unifying Concepts and Processes	*	*
					Physical Science	*	*
					Life Science	*	*
				Applied Science	Earth and Space Science	*	*
					Science and Technology	*	*
					Science in Personal and Social Perspective	1.06	1.13
Listening	1.88	1.91	Complexity of Communication	Content Complexity	1.42	1.68	
				Demands for Attention	1.88	1.95	
				Communication Indirectness	2.00	1.86	
				Barriers to Communication	Limitations on Interaction	1.62	1.59
					Distractions	1.92	1.95
Speaking	2.08	2.27	Complexity of Communication	Content Complexity	1.58	1.73	
				Tact and Sensitivity Required	2.12	2.18	
				Communication Indirectness	1.73	1.91	
				Context Demands	Diversity of Audience	2.35	2.50
					Constraints on Preparation	2.12	2.18
					Distractions	1.92	2.14
					Listener Resistance	1.92	1.95
Using Information & Communication Technology	1.46	1.48	Complexity of Technology Application	Complexity of Equipment or Technology	1.23	1.45	
				Complexity of Applications	1.27	1.43	
				Training Time Constraints	1.58	1.55	
				Frequency of Technology Change	1.54	1.57	
Gathering & Analyzing Information	1.81	1.91	Difficulty of Information Gathering	Amount of Information	1.73	2.00	
				Number and Variety of Sources	1.85	1.77	
				Resourcefulness Needed	1.73	1.77	
				Complexity of Analysis	Complexity of Information and Analysis	1.35	1.55
					Need to Evaluate Source Information	1.46	1.68
	Lack of Analysis Guidelines	1.54	1.59				

**Overall Complexity Ratings are the level of the knowledge/skill needed to perform this Critical Work Function.

Complexity Dimensions and Subdimensions are factors that affect the complexity of the knowledge/skill; the level of knowledge/skill needed based on these factors is reflected in the Complexity Subdimension Rating. Ratings are 1 = low, 2 = moderate, and 3 = high. For more detailed information about Academic and Employability Skill Scales, please refer to the NSSB publication titled *Skill Scales Companion Guide* in the Resources section.

*Indicates that this knowledge/skill is not required to perform this Critical Work Function.

Skill	Overall Complexity Rating**		Complexity Dimension	Complexity Subdimension	Complexity Subdimension Rating**		
	worker	supervisor			worker	supervisor	
	W	S			W	S	
Analyzing & Solving Problems	1.96	2.00	Problem Complexity	Problem Uniqueness or Difficulty	1.73	1.95	
				Number and Range of Problems	1.85	2.05	
			Solution Complexity	2.08	2.00		
Making Decisions & Judgments	1.68	1.95	Degree of Judgment or Inference Required	Lack of Guidance or Precedents	1.46	1.62	
				Integration Difficulty	1.50	1.76	
				Quantity or Ambiguity of Risks and Consequences	1.73	1.76	
			Individual Decision-Making Responsibility	1.69	2.19		
			Absence of Rules or Policy Constraints	1.38	1.76		
Organizing & Planning	1.77	2.19	Complexity of Plans	Goal Complexity or Ambiguity	1.46	1.71	
				Flexibility Required	1.92	2.38	
				Resource Coordination Required	1.80	2.19	
			Constraints on Planning	Scope and Effects of Planning	1.46	2.00	
				Lack of Guidelines	1.54	1.57	
				Lack of Feedback	1.46	1.71	
			Constraints on Resource Availability	1.62	1.71		
Using Social Skills	2.38	2.59	Complexity of Social Interactions	Diversity	2.65	2.82	
				Structure or Protocols Required	2.04	2.23	
				Tact and Sensitivity Required	2.38	2.55	
Adaptability	1.96	2.24	Degree of Adaptability Required	Frequency of Change	2.00	2.48	
				Difficulty of Adapting	Unpredictability of Change	1.92	2.00
					Lack of Support for Change	1.50	1.71
Working in Teams	1.96	2.27	Degree of Collaboration Required	Task Interdependence	1.92	2.36	
				Team Member Heterogeneity	2.19	2.45	
			Goal or Role Ambiguity	Lack of Clarity or Support for Team Goals	1.27	1.62	
				Lack of Clarity or Stability of Responsibilities	1.38	1.71	
Leading Others	1.58	2.19	Work Challenges	Challenges to Goal Attainment	1.54	1.95	
				Work Structuring Requirements	1.73	2.00	
				Scope and Complexity of Leadership Responsibility	*	2.05	
			People Challenges	Coaching or Mentoring Needs	1.35	2.30	
				Conflict Management Needs	1.61	2.10	
Building Consensus	1.78	2.16	Consensus Process Inhibitors	Numbers and Diversity of Stakeholders	1.48	1.68	
				Ambiguity of Goals	1.57	1.68	
				Lack of Organizational Support, Incentives or Consensus Leadership	1.36	1.78	
				High Consensus Standards	1.86	2.33	
			Difficulty of Issues Requiring Consensus	Complexity of Issues	1.70	2.11	
				Contentiousness of Issues	1.91	2.05	
			Lack of Opportunities for Agreement	1.74	1.74		
Self & Career Development	1.64	1.76	Need for Learning & Development	Self & Career Development Requirements	1.72	1.81	
				Time, Resource, or Support Constraints	1.52	1.67	
			Limitations on Learning & Development Opportunities	1.36	1.62		

Meets Customer's Needs and Provides Ongoing Support

Occupational and Technical Knowledge and Skills

Category	Definition	Knowledge and Skill
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.	<p>B. Knowledge of company health, safety and security standards for both customers and employees.</p> <p>C. Knowledge of company policies and legal consequences related to aiding or participating in illegal or inappropriate behavior.</p> <p>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.</p> <p>E. Knowledge of privacy laws and company standards for obtaining, using, and protecting information obtained from a customer or another employee.</p> <p>H. Knowledge of policy and procedures for handling and reporting customer concerns or complaints regarding health, safety, and security.</p>
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.	<p>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.).</p> <p>B. Knowledge of how seasonal changes affect the needs of customers and the products or services offered.</p> <p>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.</p> <p>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.).</p> <p>E. Knowledge of company standards regarding how to interact with customers (e.g., company protocols for addressing and communicating with customers, handling complaints, etc.).</p>
3 Client Needs and Expectations	The knowledge and skills needed to identify customer needs and expectations for products and services.	<p>A. Knowledge of how to determine customer needs and expectations related to the product or service, the company or the employee.</p> <p>B. Skill in demonstrating cost/benefits/value to customer based on customer expectations and needs.</p> <p>C. Skill in generating several alternative solutions that will meet a customer's needs.</p>
4 Goal Setting	The knowledge and skills needed to set and carry out professional goals that are consistent with company needs.	<p>A. Skill in developing professional goals that align with company goals and mission.</p> <p>B. Knowledge of company goals, objectives, rewards and incentives.</p> <p>C. Skill in motivating oneself to meet professional goals.</p>
5 Initiating Product and Service Improvements	The knowledge and skills leading to an understanding of product and service improvements.	<p>A. Knowledge of employee options for improving or helping to improve products and services.</p> <p>B. Knowledge of techniques used to determine if process changes improve services.</p> <p>C. Skill at appropriately balancing company goals and needs with those of the customer when making improvements.</p> <p>E. Skill in obtaining feedback from customer about performance through available and appropriate mechanisms.</p>

Category	Definition	Knowledge and Skill
		<p>F. Skill at adjusting work practices to respond appropriately to customer needs.</p> <p>G. Knowledge of appropriate follow-up actions designed to improve products and services.</p> <p>H. Knowledge of company policy regarding special requests and extraordinary circumstances.</p>
6 Product and Service Awareness	The knowledge and skills needed to understand and communicate the specifics of the company's products and services.	<p>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.</p> <p>E. Knowledge of sources of relevant information regarding company products in order to respond to customer needs (e.g., packaging, product manuals, warranties, etc.).</p> <p>F. Knowledge of the health and safety regulations regarding the intended uses of different products and services.</p> <p>G. Knowledge of how product will perform in different circumstances.</p> <p>I. Knowledge of company's products and services that will soon become available.</p>
7 Company Policies and Procedures	The knowledge and skills necessary to understand the conditions under which employee can conduct sales and service activities.	<p>C. Knowledge of company policies and procedures for documenting and maintaining records.</p> <p>D. Knowledge of ethical standards and practices set by company (e.g., standards regarding the acceptance of tips, the designation of commissions, etc.).</p>
8 Sales Procedures and Techniques	The knowledge and skills necessary to implement company sales systems.	<p>A. Knowledge of relevant sales procedures (e.g., charge vs. cash vs. checks; special orders, drop shipments, returns, refunds and exchanges, etc.).</p> <p>B. Skill in negotiating agreements with customers based on company policies.</p> <p>C. Skill in using appropriate selling techniques, based on company policies, in order to complete a sale (e.g., suggestive selling).</p> <p>D. Knowledge of complementary and promotional products and services (e.g., add-ons and cross-selling).</p> <p>E. Skill at increasing customer base and generating repeat business.</p>
9 Equipment and Tools	The knowledge and skills necessary to utilize specialized equipment or tools in the performance of sales and service functions.	<p>A. Knowledge of pertinent government and company regulations for use of equipment and tools.</p> <p>B. Knowledge of policies regarding maintenance of equipment and tools.</p> <p>C. Knowledge of requirements for reporting unsafe or defective equipment and tools.</p> <p>D. Skill at safely and appropriately operating company's equipment.</p> <p>E. Knowledge of which tools and equipment to use for specific tasks.</p> <p>F. Skill at operating specialized equipment associated with occupation.</p> <p>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.).</p> <p>H. Knowledge of how to handle business transactions when equipment and tools are inoperable.</p>

CUSTOMER SERVICE

1. Learns About Products or Services
2. Assesses Customer Needs
3. Educates Customer
4. Meets Customer's Needs And Provides Ongoing Support

SALES

5. Prepares for Selling
6. Gains Customer Commitment and Closes Sale
7. Develops and Implements a Sales Follow-up Plan



5

Critical Work Function

Prepares for Selling



Key Activity 5.1

Performance Indicators

Reviews and understands future sales goals and how they are based on current and past performance.

- ▶ Sales quotas prepared, based on past and current sales goals, activities, advertising and promotions and other relevant information about company and/or store goals.
- ▶ Group sales performance reviewed and evaluated according to company policies and procedures for measuring and tracking sales goals.
- ▶ Individual sales performance reviewed and evaluated according to company policies and procedures for measuring and tracking sales goals.

Key Activity 5.2

Develops and implements strategy for selling products or services.

- ▶ Strategy identifies specific actions to increase sales.
- ▶ Strategy identifies sales quotas or financial goals for specific products or services.
- ▶ Strategy for meeting sales or financial goals is implemented according to company goals and plans.
- ▶ Strategy implemented makes effective use of available resources.
- ▶ Sales performance meets company/individual goals.
- ▶ Sales strategy is continually revised, based on sales experiences, to maximize likelihood of sales.

Key Activity 5.3

Familiarizes self with pricing strategies and policies.

- ▶ Company pricing strategies, policies, and current prices, as well as sources for that information, are described accurately.
- ▶ Changes in prices, and pricing strategies and policies (e.g., price increases, sales, etc.), are learned in a timely manner.
- ▶ Sales presentation and answers to customer questions demonstrate knowledge of pricing policies (e.g., policy on price adjustments).
- ▶ Sales presentation and answers to customer questions demonstrate knowledge of how pricing translates to customer value.

Key Activity 5.4

Identifies and prioritizes potential customers within market target area.

- ▶ Customer information, including information relevant to increasing potential customers, is maintained according to company policy.
- ▶ Customer information is evaluated in order to prioritize customers and enhance sales performance.
- ▶ Sales prospects are prioritized in a way that is consistent with company and/or store sales strategies.
- ▶ Potential new customers are identified through walk-ins and referrals (including other customers, associates, friends).
- ▶ New and old customers contacted, and resulting information incorporated into customer information database.

Prepares for Selling

Academic and Employability Knowledge and Skills

Skill	Overall Complexity Rating**		Complexity Dimension	Complexity Subdimension	Complexity Subdimension Rating**			
	worker	supervisor			worker	supervisor		
	W	S			W	S		
Reading	1.81	2.18	Complexity of Text		1.89	2.18		
			Complexity of Reading Skills		1.78	2.05		
			Complexity of Reading Purpose		1.78	2.18		
Writing	1.72	1.86	Complexity of Text	Complexity of Text	1.60	1.73		
			Complexity of Writing Product	Type of Product	1.60	1.86		
				Organization	1.76	2.00		
				Elaboration	1.71	1.90		
			Complexity of Writing Process	Writing Development	1.46	1.52		
			Complexity of Writing Purpose	To Inform	1.83	1.91		
		To Persuade	1.86	1.67				
Mathematics	1.37	1.86	Mathematics Content	Number Sense & Computation	1.63	2.09		
				Geometry, Measurement, and Spatial Sense	*	*		
				Complexity of Data Analysis, Statistics, & Probability	*	1.58		
					Functions and Algebraic Thinking	*	1.41	
					Complexity of Representation and Communication	1.32	1.52	
					Problem Solving	Mathematical Methods	1.36	1.76
						Mathematical Reasoning	1.20	1.62
			Mathematical Tools	1.37	1.91			
Science	*	*	Scientific Inquiry	Design	*	*		
				Use of Evidence	*	*		
			Understanding the Nature of Science	Unifying Concepts and Processes	*	*		
				Core Scientific Content	Physical Science	*	*	
					Life Science	*	*	
			Applied Science	Earth and Space Science	*	*		
				Science and Technology	*	*		
	Science in Personal and Social Perspective	1.19	1.33					
Listening	1.68	1.90	Complexity of Communication	Content Complexity	1.56	1.75		
				Demands for Attention	1.72	1.95		
				Communication Indirectness	1.63	1.63		
			Barriers to Communication	Limitations on Interaction	1.70	1.55		
				Distractions	1.67	1.85		
Speaking	1.83	1.95	Complexity of Communication	Content Complexity	1.70	1.81		
				Tact and Sensitivity Required	1.83	1.76		
				Communication Indirectness	1.50	1.52		
			Context Demands	Diversity of Audience	2.32	2.05		
				Constraints on Preparation	1.78	1.81		
				Distractions	1.65	1.76		
				Listener Resistance	1.74	1.65		
Using Information & Communication Technology	1.65	1.82	Complexity of Technology Application	Complexity of Equipment or Technology	1.35	1.68		
				Complexity of Applications	1.35	1.68		
				Training Time Constraints	1.65	1.71		
			Frequency of Technology Change	New Learning Required	1.58	1.73		
Gathering & Analyzing Information	1.96	2.18	Difficulty of Information Gathering	Amount of Information	2.11	2.50		
				Number and Variety of Sources	1.96	2.23		
				Resourcefulness Needed	1.74	1.73		
			Complexity of Analysis	Complexity of Information and Analysis	1.78	2.00		
				Need to Evaluate Source Information	1.33	1.73		
	Lack of Analysis Guidelines	1.48	1.64					

**Overall Complexity Ratings are the level of the knowledge/skill needed to perform this Critical Work Function.

Complexity Dimensions and Subdimensions are factors that affect the complexity of the knowledge/skill; the level of knowledge/skill needed based on these factors is reflected in the Complexity Subdimension Rating. Ratings are 1 = low, 2 = moderate, and 3 = high. For more detailed information about Academic and Employability Skill Scales, please refer to the NSSB publication titled *Skill Scales Companion Guide* in the Resources section.

*Indicates that this knowledge/skill is not required to perform this Critical Work Function.

Skill	Overall Complexity Rating**		Complexity Dimension	Complexity Subdimension	Complexity Subdimension Rating**		
	worker	supervisor			worker	supervisor	
	W	S			W	S	
Analyzing & Solving Problems	1.88	2.23	Problem Complexity	Problem Uniqueness or Difficulty	1.73	1.86	
				Number and Range of Problems	1.85	2.14	
			Solution Complexity	1.92	2.18		
Making Decisions & Judgments	1.88	1.82	Degree of Judgment or Inference Required	Lack of Guidance or Precedents	1.63	1.50	
				Integration Difficulty	1.70	1.73	
				Quantity or Ambiguity of Risks and Consequences	1.70	1.73	
			Individual Decision-Making Responsibility	1.89	1.95		
Absence of Rules or Policy Constraints	1.74	1.73					
Organizing & Planning	2.00	2.41	Complexity of Plans	Goal Complexity or Ambiguity	1.89	2.27	
				Flexibility Required	2.07	2.50	
				Resource Coordination Required	1.81	2.09	
				Scope and Effects of Planning	1.52	2.27	
			Constraints on Planning	Lack of Guidelines	1.70	1.64	
				Lack of Feedback	1.67	1.77	
				Constraints on Resource Availability	1.67	1.71	
Using Social Skills	1.92	2.05	Complexity of Social Interactions	Diversity	2.12	2.22	
				Structure or Protocols Required	1.84	1.79	
				Tact and Sensitivity Required	1.72	1.95	
Adaptability	1.85	2.00	Degree of Adaptability Required	Frequency of Change	2.11	2.14	
				Difficulty of Adapting	Unpredictability of Change	1.81	1.95
					Lack of Support for Change	1.63	1.52
Working in Teams	1.67	1.86	Degree of Collaboration Required	Task Interdependence	1.61	1.80	
				Team Member Heterogeneity	1.96	2.10	
			Goal or Role Ambiguity	Lack of Clarity or Support for Team Goals	1.29	1.20	
				Lack of Clarity or Stability of Responsibilities	1.42	1.45	
Leading Others	*	2.15	Work Challenges	Challenges to Goal Attainment	*	1.70	
				Work Structuring Requirements	*	1.95	
				Scope and Complexity of Leadership Responsibility	*	1.95	
			People Challenges	Coaching or Mentoring Needs	*	2.05	
				Conflict Management Needs	*	1.84	
Building Consensus	1.65	1.79	Consensus Process Inhibitors	Numbers and Diversity of Stakeholders	1.47	1.74	
				Ambiguity of Goals	1.25	1.47	
				Lack of Organizational Support, Incentives or Consensus Leadership	1.45	1.39	
				High Consensus Standards	1.78	1.83	
			Difficulty of Issues Requiring Consensus	Complexity of Issues	1.90	1.74	
				Contentiousness of Issues	1.60	1.68	
				Lack of Support for Agreement	1.60	1.56	
Self & Career Development	1.74	1.95	Need for Learning & Development	Self & Career Development Requirements	1.93	2.27	
				Time, Resource, or Support Constraints	1.70	1.59	
			Limitations on Learning & Development Opportunities	1.37	1.50		

Prepares for Selling

Occupational and Technical Knowledge and Skills

Category	Definition	Knowledge and Skill
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.	<ul style="list-style-type: none"> 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.
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.	<ul style="list-style-type: none"> 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.
3 Client Needs and Expectations	The knowledge and skills needed to identify customer needs and expectations for products and services.	<ul style="list-style-type: none"> A. Knowledge of how to determine customer needs and expectations related to the product or service, the company or the employee.
4 Goal Setting	The knowledge and skills needed to set and carry out professional goals that are consistent with company needs.	<ul style="list-style-type: none"> 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.
5 Initiating Product and Service Improvements	The knowledge and skills leading to an understanding of product and service improvements.	<ul style="list-style-type: none"> 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	Definition	Knowledge and Skill
6 Product and Service Awareness	The knowledge and skills needed to understand and communicate the specifics of the company's products and services.	<ul style="list-style-type: none"> 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.
7 Company Policies and Procedures	The knowledge and skills necessary to understand the conditions under which employee can conduct sales and service activities.	<ul style="list-style-type: none"> 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.).
8 Sales Procedures and Techniques	The knowledge and skills necessary to implement company sales systems.	<ul style="list-style-type: none"> 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. F. Skill in presenting and demonstrating products and services that meet customer needs and help to close the sale.
9 Equipment and Tools	The knowledge and skills necessary to utilize specialized equipment or tools in the performance of sales and service functions.	<ul style="list-style-type: none"> 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.

CUSTOMER SERVICE

1. Learns About Products or Services
2. Assesses Customer Needs
3. Educates Customer
4. Meets Customer's Needs And Provides Ongoing Support

SALES

5. Prepares for Selling
- 6. Gains Customer Commitment and Closes Sale**
7. Develops and Implements a Sales Follow-up Plan



Critical Work Function

6

Gains Customer Commitment and Closes Sale



Gains Customer Commitment and Closes Sale

Key Activity 6.1**Performance Indicators**

Observes customer for verbal or body language signs indicating that he or she is ready to complete the sale.

- ▶ Judgments about whether a customer is ready to complete a sale are accurate.
- ▶ Determinations that customers will definitely not make a purchase are accurate.
- ▶ Judgments about customer intentions (e.g., whether they are ready to complete a sale, whether they will definitely not make a purchase) take both verbal signals and body language into consideration.

Key Activity 6.2

Engages in negotiation process.

- ▶ An accurate and clear explanation of company policies regarding negotiations (e.g., whether negotiations are permitted and under what circumstances) is provided to customer when necessary.
- ▶ Customer receives courteous treatment throughout negotiation.
- ▶ Responses to customer statements and questions during negotiations are accurate and relevant.
- ▶ Points of customer confusion, misunderstanding and resistance are accurately identified, and attempts are made to address these obstacles in order to complete the sale.
- ▶ Customer receives discount or other conditions favorable to the customer (within company guidelines), in order to complete the sale.
- ▶ Customer is treated courteously and encouraged to shop again with the company, if the negotiation is unsuccessful.

Key Activity 6.3

Closes and confirms sale with customer.

- ▶ Suggestion to complete the sale is made at appropriate time.
- ▶ Customer receives all available information (including written material, phone numbers, or Internet addresses) on how to properly and safely use the product (including cleaning and maintenance).
- ▶ All steps in the sales transaction are completed accurately.
- ▶ All paperwork is completed accurately and submitted in a timely manner.

Key Activity 6.4

Discusses specifics of the sale (delivery and/or installation date, warranties, product protection plan).

- ▶ Complete and accurate information about the specifics of the sale is provided to the customer.
- ▶ Complete and accurate information in response to questions about Federal and State laws and regulations pertaining to warranties, guarantees, and returns is provided to customers.
- ▶ Explanations provided to customer are clear.

Key Activity 6.5

Handles sales transaction.

- ▶ Proper equipment is selected and used proficiently to process transaction.
- ▶ All components of the transactions are accurately performed, including rain checks, warranty charges, taxes, and discounts.
- ▶ Clear, complete, and accurate explanations of all components of the transaction are provided to customer.
- ▶ The correct amount of change is provided to customer.
- ▶ Clear, complete, and accurate explanations of company policies regarding payment (e.g., personal checks, credit cards, etc.) are provided to customer.
- ▶ Transaction is correctly documented and receipt provided to customer.
- ▶ Merchandise is properly handled for the customer (e.g., remove ink tags, provide boxes, bags).
- ▶ Customer receives a gesture of appreciation (e.g., thank you, complimentary gift, invitation to come back soon).

Gains Customer Commitment and Closes Sale

Academic and Employability Knowledge and Skills

Skill	Overall Complexity Rating		Complexity Dimension	Complexity Subdimension	Complexity Subdimension Rating**		
	worker	supervisor			worker	supervisor	
	W	S			W	S	
Reading	1.35	1.67	Complexity of Text		1.35	1.67	
			Complexity of Reading Skills		1.22	1.52	
			Complexity of Reading Purpose		1.35	1.62	
Writing	1.35	1.48	Complexity of Text	Complexity of Text	1.27	1.38	
			Complexity of Writing Product	Type of Product	1.38	1.52	
				Organization	1.38	1.38	
				Elaboration	1.39	1.57	
			Complexity of Writing Process	Writing Development	1.17	1.38	
			Complexity of Writing Purpose	To Inform	1.42	1.71	
To Persuade	1.52	1.62					
Mathematics	1.26	1.45	Mathematics Content	Number Sense & Computation	1.30	1.77	
				Geometry, Measurement, and Spatial Sense	*	1.06	
				Complexity of Data Analysis, Statistics, & Probability	*	1.28	
				Functions and Algebraic Thinking	*	1.25	
				Complexity of Representation and Communication	1.19	1.29	
				Problem Solving	Mathematical Methods	1.17	1.40
			Mathematical Reasoning		1.17	1.52	
	Mathematical Tools	1.33	1.50				
Science	*	*	Scientific Inquiry	Design	*	*	
				Use of Evidence	*	*	
			Understanding the Nature of Science	Unifying Concepts and Processes	*	*	
				Core Scientific Content	Physical Science	*	*
					Life Science	*	*
			Applied Science	Earth and Space Science	*	*	
				Science and Technology	*	*	
Science in Personal and Social Perspective	1.06	1.38					
Listening	2.37	2.41	Complexity of Communication	Content Complexity	1.78	1.95	
				Demands for Attention	2.44	2.27	
				Communication Indirectness	2.56	2.32	
			Barriers to Communication	Limitations on Interaction	1.70	1.55	
				Distractions	2.04	2.36	
Speaking	2.41	2.55	Complexity of Communication	Content Complexity	1.93	2.00	
				Tact and Sensitivity Required	2.15	2.50	
				Communication Indirectness	2.26	2.41	
			Context Demands	Diversity of Audience	2.56	2.59	
				Constraints on Preparation	2.22	2.41	
				Distractions	2.22	2.41	
				Listener Resistance	2.00	2.14	
Using Information & Communication Technology	1.56	1.36	Complexity of Technology Application	Complexity of Equipment or Technology	1.37	1.29	
				Complexity of Applications	1.44	1.32	
			Frequency of Technology Change	Training Time Constraints	1.44	1.33	
				New Learning Required	1.56	1.45	
Gathering & Analyzing Information	1.78	1.95	Difficulty of Information Gathering	Amount of Information	2.07	2.23	
				Number and Variety of Sources	1.63	1.91	
				Resourcefulness Needed	1.56	1.68	
			Complexity of Analysis	Complexity of Information and Analysis	1.44	1.73	
				Need to Evaluate Source Information	1.44	1.64	
Lack of Analysis Guidelines	1.48	1.81					

****Overall Complexity Ratings** are the level of the knowledge/skill needed to perform this Critical Work Function. **Complexity Dimensions and Subdimensions** are factors that affect the complexity of the knowledge/skill; the level of knowledge/skill needed based on these factors is reflected in the Complexity Subdimension Rating. **Ratings are 1 = low, 2 = moderate, and 3 = high.** For more detailed information about Academic and Employability Skill Scales, please refer to the NSSB publication titled *Skill Scales Companion Guide* in the Resources section. *Indicates that this knowledge/skill is not required to perform this Critical Work Function.

Skill	Overall Complexity Rating		Complexity Dimension	Complexity Subdimension	Complexity Subdimension Rating**	
	worker	supervisor			worker	supervisor
	W	S			W	S
Analyzing & Solving Problems	2.00	2.05	Problem Complexity	Problem Uniqueness or Difficulty	1.74	1.91
				Number and Range of Problems	1.96	2.09
			Solution Complexity	1.93	2.14	
Making Decisions & Judgments	1.81	2.00	Degree of Judgment or Inference Required	Lack of Guidance or Precedents	1.70	1.71
				Integration Difficulty	1.70	1.81
				Quantity or Ambiguity of Risks and Consequences	1.81	1.90
			Individual Decision-Making Responsibility	1.93	2.29	
			Absence of Rules or Policy Constraints	1.41	1.76	
Organizing & Planning	1.63	2.05	Complexity of Plans	Goal Complexity or Ambiguity	1.33	1.62
				Flexibility Required	2.15	2.19
				Resource Coordination Required	1.62	1.95
				Scope and Effects of Planning	1.15	1.75
			Constraints on Planning	Lack of Guidelines	1.59	1.57
				Lack of Feedback	1.67	1.80
				Constraints on Resource Availability	1.48	1.55
Using Social Skills	2.44	2.64	Complexity of Social Interactions	Diversity	2.59	2.77
				Structure or Protocols Required	2.07	2.32
				Tact and Sensitivity Required	2.37	2.45
Adaptability	2.11	2.18	Degree of Adaptability Required Difficulty of Adapting	Frequency of Change	2.26	2.23
				Unpredictability of Change	2.04	2.05
				Lack of Support for Change	1.63	1.81
Working in Teams	1.46	1.90	Degree of Collaboration Required Team Member Heterogeneity Goal or Role Ambiguity	Task Interdependence	1.46	1.95
				Team Diversity	1.81	2.06
				Lack of Clarity or Support for Team Goals	1.32	1.35
				Lack of Clarity or Stability of Responsibilities	1.28	1.68
Leading Others	*	2.21	Work Challenges	Challenges to Goal Attainment	*	2.00
				Work Structuring Requirements	*	2.05
				Scope and Complexity of Leadership Responsibility	*	1.94
			People Challenges	Coaching or Mentoring Needs	*	2.21
				Conflict Management Needs	*	1.78
Building Consensus	1.88	2.05	Consensus Process Inhibitors	Numbers and Diversity of Stakeholders	1.58	1.80
				Ambiguity of Goals	1.63	1.70
				Lack of Organizational Support, Incentives or Consensus Leadership	1.63	1.63
				High Consensus Standards	1.91	2.26
			Difficulty of Issues Requiring Consensus	Complexity of Issues	1.88	1.80
				Contentiousness of Issues	1.67	2.10
			Lack of Support for Agreement	1.42	1.85	
Self & Career Development	1.77	1.65	Need for Learning & Development Limitations on Learning & Development Opportunities	Self & Career Development Requirements	2.00	1.75
				Time, Resource, or Support Constraints	1.65	1.55
				Application Constraints	1.42	1.40

Gains Customer Commitment and Closes Sale

Occupational and Technical Knowledge and Skills

Category	Definition	Knowledge and Skill
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.	<ul style="list-style-type: none"> 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.
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.	<ul style="list-style-type: none"> 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.).
3 Client Needs and Expectations	The knowledge and skills needed to identify customer needs and expectations for products and services.	<ul style="list-style-type: none"> 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.
4 Goal Setting	The knowledge and skills needed to set and carry out professional goals that are consistent with company needs.	<ul style="list-style-type: none"> 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.
5 Initiating Product and Service Improvements	The knowledge and skills leading to an understanding of product and service improvements.	<ul style="list-style-type: none"> 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	Definition	Knowledge and Skill
6 Product and Service Awareness	<p>The knowledge and skills needed to understand and communicate the specifics of the company's products and services.</p>	<ul style="list-style-type: none"> 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.
7 Company Policies and Procedures	<p>The knowledge and skills necessary to understand the conditions under which employee can conduct sales and service activities.</p>	<ul style="list-style-type: none"> 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.).
8 Sales Procedures and Techniques	<p>The knowledge and skills necessary to implement company sales systems.</p>	<ul style="list-style-type: none"> 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. 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).
9 Equipment and Tools	<p>The knowledge and skills necessary to utilize specialized equipment or tools in the performance of sales and service functions.</p>	<ul style="list-style-type: none"> 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.

CUSTOMER SERVICE

1. Learns About Products or Services
2. Assesses Customer Needs
3. Educates Customer
4. Meets Customer's Needs And Provides Ongoing Support

SALES

5. Prepares for Selling
6. Gains Customer Commitment and Closes Sale
7. Develops and Implements a Sales Follow-up Plan



7

Critical Work Function

Develops and Implements a Sales Follow-up Plan



Develops and Implements a Sales Follow-up Plan

Key Activity 7.1**Performance Indicators**

Follows up with customers regarding suggestions for future purchases.

- ▶ Suggestions for future purchases, including information on products or services that complement past purchases as well as information on new products or services, is provided to customers.
- ▶ Customer follow-up conforms to company policy.
- ▶ Customer is contacted in a timely fashion.
- ▶ Customer receives courteous treatment throughout follow-up.

Key Activity 7.2

Maintains contact with customers through correspondence, phone calls and casual contacts in community.

- ▶ Up-to-date and accurate customer information database is maintained.
- ▶ Contacts are professional and appropriate.
- ▶ Contacts are routinely conducted.
- ▶ Information obtained from customer contacts (e.g., suggested changes to sales procedures, satisfaction with products or services, complaints about products or services) is documented.

Key Activity 7.3

Converts returns to exchanges

- ▶ Customer concerns are addressed courteously and in accordance with company policy.
- ▶ Options available to customer for resolving concerns are described.
- ▶ Suggestions for more suitable products or services are provided to customer.
- ▶ Proportion of customers with exchanges rather than returns increases.
- ▶ Warranty and return policies are implemented according to company policies.

Key Activity 7.4

Analyzes and evaluates the effectiveness of prospecting methods, sales strategies, and marketing/merchandising plans, and makes any necessary adjustments.

- ▶ Routine analyses are conducted of the effectiveness of prospecting methods, sales strategies, and marketing/merchandising plans, using customer information database, sales data, and any other relevant information.
- ▶ Actual problems, potential problems, and potential for improvements are identified.
- ▶ Review and revision of prospecting methods, sales strategies, and marketing or merchandising are conducted regularly.
- ▶ Adjustments to prospecting methods, sales strategies, and/or marketing/merchandising plans are clearly connected to analyses performed and identification of problems and potential improvements.
- ▶ Increased sales directly result from changes to prospecting methods, sales strategies or marketing/merchandising plans.

Develops and Implements a Sales Follow-up Plan

Academic and Employability Knowledge and Skills

Skill	Overall Complexity Rating**		Complexity Dimension	Complexity Subdimension	Complexity Subdimension Rating**		
	worker	supervisor			worker	supervisor	
	W	S			W	S	
Reading	1.70	1.90	Complexity of Text		1.70	1.86	
			Complexity of Reading Skills		1.70	1.71	
			Complexity of Reading Purpose		1.74	1.76	
Writing	1.77	1.95	Complexity of Text	Complexity of Text	1.65	1.68	
			Complexity of Writing Product	Type of Product	1.73	1.73	
				Organization	1.77	1.86	
				Elaboration	1.88	1.86	
			Complexity of Writing Process	Writing Development	1.60	1.73	
			Complexity of Writing Purpose	To Inform	1.92	1.82	
		To Persuade	1.68	1.86			
Mathematics	1.39	1.64	Mathematics Content	Number Sense & Computation	1.38	1.76	
				Geometry, Measurement, and Spatial Sense	*	*	
				Complexity of Data Analysis, Statistics, & Probability	1.30	1.42	
					Functions and Algebraic Thinking	*	1.35
					Complexity of Representation and Communication	1.36	1.57
			Problem Solving	Mathematical Methods	1.42	1.55	
					Mathematical Reasoning	1.39	1.52
		Mathematical Tools	1.46	1.73			
Science	*	1.27	Scientific Inquiry	Design	*	*	
				Use of Evidence	*	*	
			Understanding the Nature of Science	Unifying Concepts and Processes	*	*	
				Core Scientific Content	Physical Science	*	*
					Life Science	*	*
			Applied Science	Earth and Space Science	*	*	
				Science and Technology	*	*	
	Science in Personal and Social Perspective	1.25	1.36				
Listening	1.85	1.95	Complexity of Communication	Content Complexity	1.48	1.64	
				Demands for Attention	1.85	1.95	
				Communication Indirectness	1.74	1.68	
			Barriers to Communication	Limitations on Interaction	1.77	1.67	
				Distractions	1.78	1.95	
Speaking	2.04	2.18	Complexity of Communication	Content Complexity	1.50	1.77	
				Tact and Sensitivity Required	1.96	2.14	
				Communication Indirectness	1.77	1.95	
			Context Demands	Diversity of Audience	2.42	2.41	
				Constraints on Preparation	2.00	2.18	
				Distractions	1.85	1.95	
				Listener Resistance	2.08	1.91	
Using Information & Communication Technology	1.64	1.59	Complexity of Technology Application	Complexity of Equipment or Technology	1.38	1.41	
				Complexity of Applications	1.54	1.45	
			Frequency of Technology Change	Training Time Constraints	1.58	1.57	
				New Learning Required	1.69	1.64	
Gathering & Analyzing Information	1.78	2.27	Difficulty of Information Gathering	Amount of Information	2.00	2.45	
				Number and Variety of Sources	1.70	2.27	
				Resourcefulness Needed	1.56	2.00	
			Complexity of Analysis	Complexity of Information and Analysis	1.59	2.00	
				Need to Evaluate Source Information	1.41	1.82	
	Lack of Analysis Guidelines	1.52	1.91				

****Overall Complexity Ratings** are the level of the knowledge/skill needed to perform this Critical Work Function.

Complexity Dimensions and Subdimensions are factors that affect the complexity of the knowledge/skill; the level of knowledge/skill needed based on these factors is reflected in the Complexity Subdimension Rating. **Ratings are 1 = low, 2 = moderate, and 3 = high.** For more detailed information about Academic and Employability Skill Scales, please refer to the NSSB publication titled *Skill Scales Companion Guide* in the Resources section.

*Indicates that this knowledge/skill is not required to perform this Critical Work Function.

Skill	Overall Complexity Rating**		Complexity Dimension	Complexity Subdimension	Complexity Subdimension Rating**	
	worker	supervisor			worker	supervisor
	W	S			W	S
Analyzing & Solving Problems	1.89	2.09	Problem Complexity	Problem Uniqueness or Difficulty	1.78	1.86
				Number and Range of Problems	1.78	2.05
			Solution Complexity	2.00	2.09	
Making Decisions & Judgments	1.69	2.09	Degree of Judgment or Inference Required	Lack of Guidance or Precedents	1.52	1.55
				Integration Difficulty	1.56	1.91
				Quantity or Ambiguity of Risks and Consequences	1.59	1.86
			Individual Decision-Making Responsibility	Accountability and Autonomy	1.85	2.23
				Absence of Rules or Policy Constraints	1.62	1.68
Organizing & Planning	1.78	2.38	Complexity of Plans	Goal Complexity or Ambiguity	1.74	2.09
				Flexibility Required	2.07	2.50
				Resource Coordination Required	1.63	2.14
				Scope and Effects of Planning	1.44	2.09
			Constraints on Planning	Lack of Guidelines	1.67	1.77
				Lack of Feedback	1.67	1.95
				Constraints on Resource Availability	1.63	1.81
Using Social Skills	2.41	2.38	Complexity of Social Interactions	Diversity	2.56	2.62
				Structure or Protocols Required	2.00	2.10
				Tact and Sensitivity Required	2.26	2.38
Adaptability	1.96	1.95	Degree of Adaptability Required Difficulty of Adapting	Frequency of Change	2.11	2.14
				Unpredictability of Change	1.67	1.95
				Lack of Support for Change	1.58	1.73
Working in Teams	1.52	1.80	Degree of Collaboration Required Team Member Heterogeneity Goal or Role Ambiguity	Task Interdependence	1.52	1.95
				Team Diversity	1.76	1.89
				Lack of Clarity or Support for Team Goals	1.25	1.35
				Lack of Clarity or Stability of Responsibilities	1.36	1.45
Leading Others	*	2.15	Work Challenges	Challenges to Goal Attainment	*	1.95
				Work Structuring Requirements	*	2.05
				Scope and Complexity of Leadership Responsibility	*	1.90
			People Challenges	Coaching or Mentoring Needs	*	1.95
				Conflict Management Needs	*	1.53
Building Consensus	1.70	1.85	Consensus Process Inhibitors	Numbers and Diversity of Stakeholders	1.56	1.80
				Ambiguity of Goals	1.40	1.40
				Lack of Organizational Support, Incentives or Consensus Leadership	1.42	1.40
				High Consensus Standards	1.65	1.75
			Difficulty of Issues Requiring Consensus	Complexity of Issues	1.72	1.80
				Contentiousness of Issues	1.88	1.80
				Lack of Support for Agreement	1.64	1.55
Self & Career Development	1.70	1.95	Need for Learning & Development Limitations on Learning & Development Opportunities	Self & Career Development Requirements	1.81	2.10
				Time, Resource, or Support Constraints	1.59	1.64
				Application Constraints	1.30	1.59

Develops and Implements a Sales Follow-up Plan

Occupational and Technical Knowledge and Skills

Category	Definition	Knowledge and Skill
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.	<ul style="list-style-type: none"> 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.
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.	<ul style="list-style-type: none"> 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.).
3 Client Needs and Expectations	The knowledge and skills needed to identify customer needs and expectations for products and services.	<ul style="list-style-type: none"> 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.
4 Goal Setting	The knowledge and skills needed to set and carry out professional goals that are consistent with company needs.	<ul style="list-style-type: none"> 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.
5 Initiating Product and Service Improvements	The knowledge and skills leading to an understanding of product and service improvements.	<ul style="list-style-type: none"> 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. H. Knowledge of company policy regarding special requests and extraordinary circumstances.

Category	Definition	Knowledge and Skill
6 Product and Service Awareness	<p>The knowledge and skills needed to understand and communicate the specifics of the company's products and services.</p>	<p>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.</p> <p>E. Knowledge of sources of relevant information regarding company products in order to respond to customer needs (e.g., packaging, product manuals, warranties, etc.).</p> <p>F. Knowledge of the health and safety regulations regarding the intended uses of different products and services.</p> <p>G. Knowledge of how product will perform in different circumstances.</p> <p>I. Knowledge of company's products and services that will soon become available.</p>
7 Company Policies and Procedures	<p>The knowledge and skills necessary to understand the conditions under which employee can conduct sales and service activities.</p>	<p>C. Knowledge of company policies and procedures for documenting and maintaining records.</p> <p>D. Knowledge of ethical standards and practices set by company (e.g., standards regarding the acceptance of tips, the designation of commissions, etc.).</p>
8 Sales Procedures and Techniques	<p>The knowledge and skills necessary to implement company sales systems.</p>	<p>A. Knowledge of relevant sales procedures (e.g., charge vs. cash vs. checks; special orders, drop shipments, returns, refunds and exchanges, etc.).</p> <p>B. Skill in negotiating agreements with customers based on company policies.</p> <p>C. Skill in using appropriate selling techniques, based on company policies, in order to complete a sale (e.g., suggestive selling).</p> <p>D. Knowledge of complementary and promotional products and services (e.g., add-ons and cross-selling).</p> <p>E. Skill at increasing customer base and generating repeat business.</p> <p>G. Skill in overcoming customer's objections when making a sale or serving a customer.</p>
9 Equipment and Tools	<p>The knowledge and skills necessary to utilize specialized equipment or tools in the performance of sales and service functions.</p>	<p>D. Skill at safely and appropriately operating company's equipment.</p> <p>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.).</p>



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