

SKILL STANDARDS FOR RETAIL, HOSPITALITY AND TOURISM: CUSTOMER SERVICE SPECIALISTS AND SUPERVISORS





**SKILL STANDARDS FOR RETAIL,
HOSPITALITY AND TOURISM:
CUSTOMER SERVICE SPECIALISTS
AND SUPERVISORS**

A cooperative effort by:

Merced College/Merced Community College District

and the

Washington State University Energy Program



Copyright © 2014
Merced College, Merced Community College District,
Central Region Consortium, and
Washington State University Energy Program

WSUEEP14-015

Photography:

All Yosemite photos used are © 2014 Kenny Karst, DNC Parks & Resorts at Yosemite, Inc.
Other photos were provided by Black Oak Casino Resort, Russo's Books, and other Skills Standards participants.
Some additional photos were purchased from iStock.com.
Cover: Yosemite Tours (© 2014 Kenny Karst)

Publication Information

For More Information:

Shelley Attix, RHTLE Deputy Sector Navigator (DSN)
Central Valley/Mother Lode Region
Merced College – Workplace Learning Resource Center, Merced, CA
209-386-6734, shelley.attix@mccd.edu

Terry Plett, RHTLE Sector Partner/Contracts Coordinator,
Merced College – Workplace Learning Resource Center, Merced, CA
209-386-6735, terry.plett@mccd.edu

Becky Barabé, Director of Business, Industry & Community Services,
Merced College, Merced, CA
209-386-6737, becky.barabe@mccd.edu

Document Credits

Project Director, **Alan Hardcastle**, Ph.D.
Washington State University Energy Program
360-956-2167, hardcast@wsu.edu

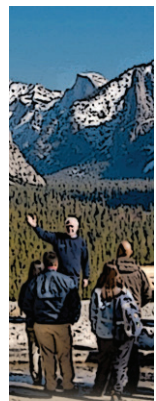
Research, facilitation and technical writing by
Terryll Bailey, The Allison Group
206-525-7175, tbailey@theallisongroup.com

Project Funding

This project was funded in-part by the Chancellor's Office-California Community Colleges [SB1070 EWD Grant Contract #13-161-001/RHTLE]; Merced College, Merced Community College District, Merced, California; and the Central Region Consortium [through funding from California Community Colleges Chancellor's Office], including the ICT/Digital Media and Small Business sectors of the Central Valley/Mother Lode Region.

Disclaimer

This report was prepared as an account of work sponsored by an agency of the United States Government. Neither the United States Government nor any agency thereof, nor any of their employees, makes any warranty, express or implied, or assumes any legal liability or responsibility for the accuracy, completeness, or usefulness of any information, apparatus, product, or process disclosed, or represents that its use would not infringe privately owned rights. Reference herein to any specific commercial product, process, or service by trade name, trademark, manufacturer, or otherwise does not necessarily constitute or imply its endorsement, recommendation, or favoring by the United States Government or any agency thereof. The views and opinions of authors expressed herein do not necessarily state or reflect those of the United States Government or any agency thereof.



Permission to Cite

General permission is granted for educators to photocopy and quote limited material from this document for noncommercial instructional or scholarly use. Permission must be sought from the Merced College Workplace Learning Resource Center in order to charge for photocopies, to quote material in advertising, or to reprint substantial portions of the document in other publications. Credit should always be given to the source of the photocopies or quotes by citing a complete reference.

Acknowledgements

This document is the result of a cooperative effort for California's Central Valley and Mother Lode Regions by:

- Merced College, Workplace Learning Resource Center
- The DOING WHAT MATTERS Campaign, Chancellors Office – California Community Colleges
- California Community Colleges - Central Region Consortium
- CCCCCO Retail, Hospitality and Tourism “Learn & Earn” (RHTELE) Industry Sector
- CCCCCO Information & Communication Technologies (ICT) / Digital Media Industry Sector
- CCCCCO Small Business [Small Business Assistance, Youth Entrepreneurship] Industry Sector
- Washington State University Energy Program

A special thanks to all who contributed, and especially to the employers and employees who participated in the focus groups. Their countless hours of work to help produce the skill standards are greatly appreciated.



Business and Industry Participants

The following business and industry partners contributed to these standards.

Retail (Storefront, E-Commerce)

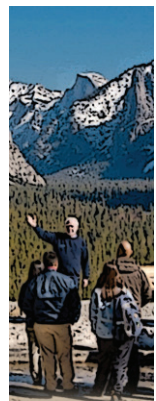
- Downtown Stockton Alliance
- Ebler's Leather & Saddlery Emporium
- Journeys Kidz
- Goodwill Industries
- Mainland Skate & Surf
- Maurices Fashions
- Merced Honda
- Office Depot
- Premium Outlets
- Russo's Books
- Stinson's Office Supply
- Urner's Appliances

Food Service & Recreation

- Applebee's
- Black Oak Casino Resort
- Butler Amusements
- Children's Museum of Stockton
- Fossil Discovery Center
- FunWorks
- Gallo Center for the Arts
- Kemper Sports Club – Creekside Golf Course
- Me-N-Ed's Pizzeria
- Pismo's Coastal Grill
- Starbuck's Coffee
- The State Theatre of Modesto
- Stevinson Ranch Golf Club
- Taher Campus Dining
- Toni's Courtyard Cafe

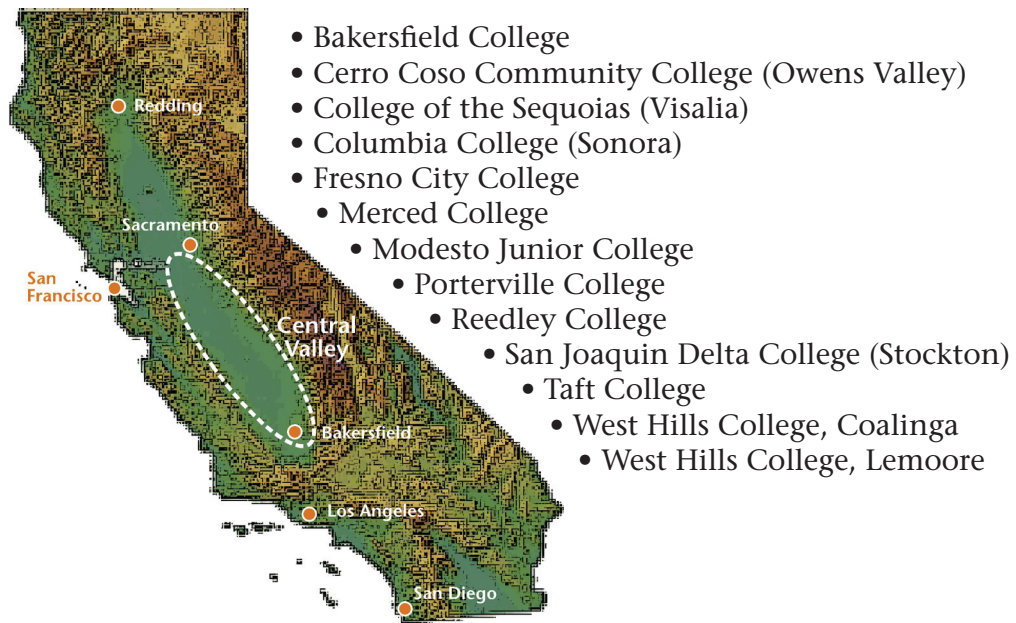
Hospitality & Tourism

- California Welcome Center – Merced
- Columbia State Park
- Delaware North Companies – Yosemite
- Doubletree Hilton – Modesto
- Fresno/Clovis Convention & Visitors Bureau
- Fresno Radisson Hotel & Conference Center
- Fresno Yosemite International Airport
- Hilmar Cheese Company, Inc.
- Homewood Suites by Hilton – Clovis
- Ironstone Vineyards
- Radisson Hotel & Conference Center – Fresno
- Sequoia-Kings Canyon National Park
- Stockton Convention & Visitors Bureau



Regional Colleges

The California Community Colleges served by the RHTLE DSN-EWD Grants are listed below.



IV

Project Development and Coordination

- Alan Hardcastle, WSU Energy Program
- Terryll Bailey, The Allison Group
- Sally Zeiger Hanson, Melinda Spencer and Gerry Rasmussen, WSU Energy Program

Advisory Committee

A RHTLE Sector Industry Advisory Group met on January 24, 2014, at the Merced College - Business Resource Center. The Advisory consisted of thirteen retail, hospitality and tourism managers who contributed to the startup phase of this Skills Standard project... contributing their many years of expertise to shaping a “Customer Service” framework. We wish to offer our thanks to the following industry leaders, for graciously contributing both time and resources, in support of this project:

- Dave Ackerman, Manager, Premium Outlets, Livermore, CA
- Ross Briles, Owner, FunWorks, Modesto, CA
- Toni Fiorenza, Owner, Toni’s Courtyard Café, Merced, CA
- Anna Hughes, Director of Revenue Management, Fresno Radisson Hotel & Convention Center, Fresno, CA
- Rhonda Jorn, Manager, Fresno-Yosemite International Airport, Fresno, CA
- Jennifer Kersten, Store Manager, Starbucks, Atwater, CA
- Wes Rhea, CEO, Stockton Convention & Visitors Bureau, Stockton, CA
- Mike Russo, Owner, Russo’s Books, Bakersfield, CA

- Ben Saldana, Recruiter, Delaware North Companies, CA
- Denise Skidmore, Marketing Manager, Hilmar Cheese Company, Inc., Hilmar, CA
- Amora Stevenot, Manager, Black Oak Casino Resort, Tuolumne, CA
- Scott Sunday, Manager, Black Oak Casino Resort, Tuolumne, CA
- Jeff Ward, Area Director, Applebee's, Fresno, CA



Some of the Focus Group participants (left to right): Morgan Long, Russo's Books; Michelle Palmer, Black Oak Casino Resort; Duane Palmer, Black Oak Casino Resort; Shelley Attix, RHTLE DSN; Karessa Mast, Hilmar Cheese Factory; and Joel Gonzalez, Starbucks.

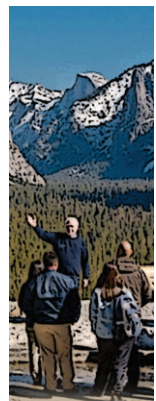
Focus Group Participants

Each focus group met over a two-day period at Fresno State University to determine the critical work functions and key activities performed while delivering excellent, personalized customer service. Participants then identified the performance indicators, technical knowledge, skills and abilities, and employability factors required to succeed within all three market sectors (including aligned SCANS). Three employers participated by phone.

Anonymously reported employee insights are an invaluable contribution to the skill standards process, helping to provide more specific details to the foundational framework provided by industry managers. Participating employees were nominated for their high quality of service:

Frontline Customer Service Specialists

- Morgan Long, Sales Associate, Russo's Books
- Duane Palmer, Bartender, Black Oak Casino Resort
- Michelle Palmer, Gaming Floor, Black Oak Casino Resort
- Joel Gonzalez, Barista, Starbucks
- Karessa Mast, Guide, Hilmar Cheese Company, Inc.
- Marisol Viveros, Executive & Catering Assistant, Doubletree by Hilton, Modesto



V

Customer Service Supervisors

- Justin Ashton, Manager, Applebee's
- Al Ramirez, Supervisor, Black Oak Casino Resort
- Tiffannie Raney, Manager, FunWorks
- Matthew Clark, Supervisor, Starbucks
- Morgan Long, Supervisor, Russo's Books
- Jeff Tracy, Supervisor, Black Oak Casino Resort
- Adriana Castaneda, Human Resources Director, Doubletree by Hilton Modesto
- Ernesto Huerta, Banquet Manager, Doubletree by Hilton Modesto
- Teariney Munoz, Store Manager, Maurices Fashions – Visalia
- Valerie Pillsbury, Kings Canyon District Interpreter, Sequoia-Kings Canyon National Park

Special Thanks

Special thanks to Black Oak Casino, Russo's Books, and Kenny Karst, DNC Parks & Resorts at Yosemite, Inc. for providing the photos of Customer Service professionals in action used throughout this document.

Acronyms Used in this Publication

CIS Computer Information System
NSSB National Skill Standards Board
RHT Retail, Hospitality and Tourism
SCANS Secretary's Commission on Achieving Necessary Skills
WSU Washington State University



Contents

Industry Perspectives	1
------------------------------------	---

Background on the 2014 Skill Standards Project

National Context	6
What Are Skill Standards?	6
Why Are Skill Standards Important?	6
Benefits and Uses of Skill Standards	7
Benefits for Employers	7
Benefits for Labor Unions	7
Benefits for Educators	8
Benefits for Government	8
Benefits for Students and Workers	9
Skill Standards to Training: A Continuous Development Process	10
A Model of Continuous Improvement for Economic Development: Using Skill Standards	10
Step 1: Skill Standards Identification	10
Step 2: Assessment	11
Step 3: Training and Curriculum Development	11
Step 4: Articulation	11
Pyramid of Competencies	12
Tier I	12
Tier II	12
Tier III	12

Skill Standards Development Process

Skill Standards Process	14
Initial Focus Group	14
Performance Criteria	14
Survey Verification	14
Employability Skills: SCANS Profile	15

Skill Standards Results:

Customer Service Specialists

Customer Service Specialist Sample Job Description	18
Summary	18
Primary Duties	18
Minimum Qualifications	18
Definitions	18
Critical Work Functions	18
Employability Skills	18
Key Activities	19
Level of Importance	19
Performance Indicators	19
Technical Skills, Knowledge, Abilities and Tools	19



Foundational Theories, Concepts and Technologies	19
Business	20
Economics	20
Psychology/Human Behavior.....	20
Computer/IT (Business Systems).....	20
Communications Principles.....	20

Critical Work Functions: Customer Service Specialists

Skill Standards for Customer Service Specialists	22
SCANS Survey Results: Customer Service Specialists	26
Customer Service Specialists: Results by Critical Work Function	30
Verification Survey Results	71

Scenarios: Customer Service Specialists

Routine Scenario.....	74
Crisis Scenario.....	76
Long-Term Scenario.....	78

Skill Standards Results: Customer Service Supervisors

Customer Service Supervisor Sample Job Description	82
Summary	82
Primary Duties.....	82
Education and Qualifications.....	82
Definitions	83
Critical Work Functions	83
Employability Skills.....	83
Key Activities	83
Level of Importance	83
Performance Indicators	83
Technical Skills, Knowledge, Abilities and Tools	83
Foundational Theories, Concepts and Technologies	84
Business/Management.....	84
Economics/Finance	84
Psychology/Human Behavior.....	84
Computer/IT: Types of Facilities with these Systems.....	85
Communications.....	85

Critical Work Functions: Customer Service Supervisors

Skill Standards for Customer Service Supervisors	88
SCANS Survey Results: Customer Service Supervisors	92
Customer Service Supervisors: Results by Critical Work Function.....	96
Verification Survey Results	134



Scenarios: Customer Service Supervisors

Routine Scenario.....	136
Crisis Scenario.....	138
Long-Term Scenario.....	140

Integration

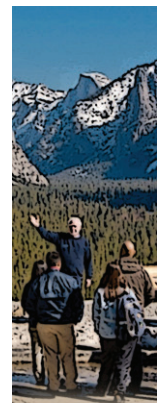
Assessment and Certification: A Vital Connection.....	144
Assessment Strategies.....	145

Tables

Table 1. Participation in Validation Surveys	15
Table 2. SCANS Skills	16
Table 3. Primary Tasks and Functions in Routine Scenario: Customer Service Specialists.....	75
Table 4. Primary Tasks and Functions in Crisis Scenario: Customer Service Specialists.....	77
Table 5. Primary Tasks and Functions in Long-Term Scenario: Customer Service Specialists.....	79
Table 6. Primary Tasks and Functions in Routine Scenario: Customer Service Supervisors.....	137
Table 7. Primary Tasks and Functions in Crisis Scenario: Customer Service Supervisors.....	139
Table 8. Primary Tasks and Functions in Long-Term Scenario: Customer Service Supervisors	141
Table 9. Assessment Design	146

Figures

Figure 1. Sample Survey Questions from the Workplace Standards Skill Inventory	16
Figure 2. Customer Service Specialist: Importance of Critical Work Functions	71
Figure 3. Customer Service Supervisor: Importance of Critical Work Functions.....	134
Figure 4. Integrating Skill Standards	145





CALIFORNIA COMMUNITY COLLEGES
Doing What MATTERS™
FOR JOBS AND THE ECONOMY

Our nation, state, and regions have issued a call to action to close the skills gap between what employers need and the workforce that we have. California's community colleges are answering the call with our focus on doing What Matters for Jobs and the Economy.

We want to work with partners who are also invested in the workforce of each region. They may include the region's economic development entities, workforce investment boards, employers

and industries, organized labor, K-12 and other educational systems, community based organization, and more.

Contact us now to inform discussions on Doing What Matters to Jobs and the Economy, especially as community colleges prioritize budgets, courses, and programs of study.

**More on California Community Colleges
can be found at
doingwhatmatters.cccco.edu**

WHAT IS
Doing What MATTERS™
FOR JOBS AND THE ECONOMY

The Opportunity

For community colleges to become essential catalysts to California's economic recovery and jobs creation at the local, regional and state levels.

The Strategy

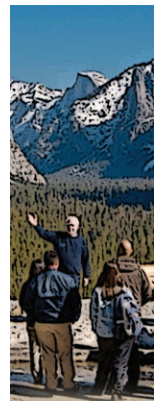
Doing What MATTERS for jobs and the economy is a four-pronged framework to respond to the call of our nation, state, and regions to close the skills gap. The four prongs are:

- Give Priority for jobs and the economy
- Make Room for jobs and the economy
- Promote Student Success
- Innovate for jobs and the economy

Industry Perspectives



© iStock



1



Black Oak Casino Resort is one of the largest employers in a rural community in Tuolumne County. We employ over 900 team members who work in a variety of hospitality guest service jobs. Black Oak Casino Resort employs table game dealers, food servers, maintenance technicians, human resource specialists, retail clerks, hotel attendants, valets and housekeepers, to name a few. Our rural location makes finding and retaining qualified team members one of our biggest challenges.

Securing team members with the commitment and drive to provide our guests with a “unique entertainment experience” and award-winning guest service is why we support educational programs like the Skill Standards Program.

Black Oak Casino Resort felt it worthwhile to participate in this endeavor to help create standard guidelines for a required skill set for all who seek employment in the hospitality, retail and tourism fields. It is through programs like this that the workforce in the hospitality industry will be enhanced.

Black Oak Casino Resort is a strong advocate of the pursuit of excellent guest service. Our job is to ensure that our guests have a great experience, every time. The Skill Standards Program mirrors Black Oak Casino Resort’s mission and values statement:

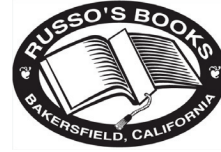
To provide an entertainment destination by offering a winning combination of our own unique brand of hospitality, community and teamwork. We believe in consistently creating a fun and unique experience in a professional atmosphere; promoting unity and strength through cooperation, communication and positive attitudes; and demonstrating compassion, respect, and dignity for all to bring about a sense of family and community”.

Our hope is that you will develop your own “unique brand of hospitality” and provide award-winning guest service to all of your guests. Best wishes to you, and thank you for taking part in the Skill Standards Program and becoming a valuable member of the guest service industry.

Ron Patel

General Manager
Black Oak Casino Resort
Tuolumne, California





In an era when technological advancements and efficiency measures seems to have trumped the human touch, the retail, hospitality and tourism industries remind us daily of the need for trained professional customer service representatives and quality front-line supervisors. This is as much an art as it is a science.

While each employer is sure to put their unique stamp on what they consider necessary duties and acceptable levels of service for their respective staffs, certain standards do exist. The information contained herein is an important step in having industry and education identify the skill set necessary to thrive in these occupations. By allowing both entry-level workers and new supervisors to gain a true appreciation of what is being asked of them and understanding how, in many cases, an entire company's reputation rests on their abilities and sensibilities, we begin to legitimize our employment opportunities as viable and meaningful professions.

And what of those technological advancements? Does the fact that we have websites and computer systems and automation diminish the need for skilled professionals? I would argue no. My business has gone from four physical stores to now selling exclusively online and via telephone. Perhaps more than ever my staff's ability to connect with customers on a personal level while still executing their procedural duties dictates our firm's ultimate success. If you've ever been on hold for 20 minutes only to be disconnected or told you had to call back and talk to someone else, you know of what I speak.

I applaud education's efforts to seek the true needs of industry and then, in turn, provide students with the baseline skills and knowledge necessary to compete in today's job market. I encourage my fellow employers to not only keep these channels of communication open, but to place real value on the certifications and training these applicants bring to the table.

Mike Russo

Owner
Russo's Books
Bakersfield, CA





The day-to-day interactions we have in society can be described in many different terms. Some call it customer service and others call it hospitality, but in the end it's all about the human connection.

A true connection is about honesty, consideration, generosity, knowledge and passion. The experience that happens between two people can never be replaced by technology, which in return makes it that

much greater. In our industry, consumers have many choices about product quality, brand recognition and fair value, to name just a few. All of these choices point to the need to develop a strong customer base.

I have found that what truly builds a "loyal customer" is excellent customer service and that special bond between our people and the people we serve. Those principles of honesty, consideration, generosity, knowledge and passion apply to supervisors and managers working with the staff they serve as leaders. It is infectious, and it develops loyal employees. In the end, your business sees the results, and so do your customers!

Being part of building a foundation that helps set our future generations up for success is an honor. My hope is that you will use this Skills Standard Report, and continue your journey in making that powerful human connection.

Jennifer Johnson

Manager

Applegate Starbucks

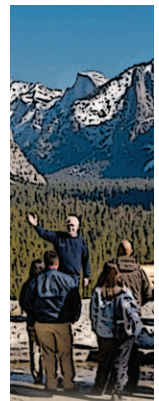
Atwater, California



Background on the 2014 Skill Standards Project



© iStock



5

National Context

The National Skill Standards Board (NSSB) was established by Congress in 1994 to encourage the creation and adoption of a national system of voluntary skill standards that would enhance the ability of the U.S. to compete effectively in a global economy. By the time the NSSB sunset in 2003, several national voluntary skill standards projects were developed by various industries in full partnership with education, organized labor and community-based organizations. The intent was to have voluntary skill standards that are flexible, portable, and continuously updated and improved.

Washington state was an early leader in the development and use of industry-defined skill standards, contributing to the development of a national model and creating skill standards to align the needs of industry with the provision of workforce education and training.

What Are Skill Standards?

Skill standards are performance specifications that identify the knowledge, skills and abilities an individual needs to succeed in the workplace. They are critical to improving workforce skills, raising living standards and improving the competitiveness of the U.S. economy. To be effective, skill standards must reflect the consensus of customer service professionals. Skill standards provide measurable benchmarks of skill and performance achievement. They answer two critical questions: What do workers need to know and be able to do to succeed in today's workplace? And how do we know when workers are performing well? Without this fundamental information, employers do not know whom to hire or where to focus their limited training dollars; employees and new entrants to the workforce do not know what they need to do to improve their performance; and educators do not know how to prepare students for the challenge of the workplace.

Why Are Skill Standards Important?

In today's workplaces, the only constant is change. Jobs that once were relatively simple now require high-performance work processes and enhanced skills. Because skill standards reflect changing workplace realities, they are a tool that can be used by applicants and employees to access greater career opportunities.

National recognition of skill standards in career fields provides a common basis for certifying achievement against those standards, thereby allowing for the portability of skills across geographic areas, companies and careers.

Updating skills and knowledge is now a lifelong endeavor, causing many employers and employees to spend more effort, time and money on education and training. Skill standards provide benchmarks for making education and training decisions, shaping curricula and directing funds toward highest value education and training investments.



Benefits and Uses of Skill Standards

Skill standards benefit all of the stakeholders – business, labor, educators, government, students and employees. The success of a skill standards development project and its usefulness to the community is dependent on the full participation and commitment of all stakeholders. These benefits can be used as a benchmark for evaluating the effectiveness of collaborative efforts.

Benefits for Employers

Employers can use skill standards to establish personnel qualification requirements. Interviews, performance reviews and productivity can be assessed to a higher degree of accuracy and efficacy. Employers can identify core competencies and workers' abilities to demonstrate competencies. By matching competencies to critical work functions and key activities, employers can significantly improve efficiencies and productivity. Performance-based skill standards also provide a vehicle for varying degrees of job certainty and the structure for establishing competency-based pay scales.

In addition, employers use skill standards to:

- Align personnel qualification requirements with nationally adopted certificates of competence.
- Modify employee training.
- Simplify measurement of employee training effectiveness.
- Assess employee skill levels based on industry standards.
- Match employee skills to the work needed.
- More easily document employee skills, training needs and performance criteria.
- Improve consumer satisfaction and confidence through better developed evaluation skills for customer contact personnel.
- Improve employee satisfaction and morale by clarifying expectations.
- Improve quality, productivity, time-to-market and competitiveness.
- Achieve business goals.
- Partner with education and labor in developing school-to-work initiatives.

Benefits for Labor Unions

Labor unions can use skill standards to gain support for company-sponsored worker training programs and to identify career paths for workers within companies and industries. Unions can provide this information to union members and develop strategies to improve career mobility and stability.



Skill standards help labor to:

- Improve member value to the company.
- Provide a greater worker voice in the company.
- Link skill standards to increased training and upward career mobility for union members.
- Help employers match employee skills to the work needed.
- Develop skills-based training and certification initiatives that complement union apprenticeship programs.
- Communicate effectively with employers about worker training and retraining needs.
- Cooperate with education and industry in developing school-to-work initiatives.

Benefits for Educators

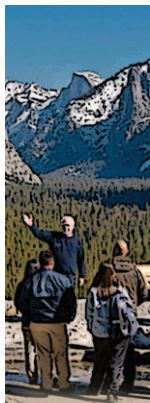
Educators can identify core competencies and assessments based on the skill standards and implement them in their curricula. Students can then be required to demonstrate competency throughout their coursework. Academia and industry can build a cohesive relationship through a like-minded expectation of student competencies and work readiness. This enhances an instructor's ability to teach information consistent with industry's entry-level expectations and needs.

Educators use skill standards to:

- Partner with business and labor in developing school-to-work initiatives.
- Provide effective, targeted instruction.
- Develop benchmarks for certificates of competence earned by students.
- Communicate what companies expect of employees.
- Develop new and evaluate existing curriculum and programs based on industry needs.
- Develop assessments to evaluate skills, knowledge, and abilities in classrooms and internships.
- Develop a common language on workforce preparation with business and labor.
- Improve relationships with local businesses, labor unions, other educators and agencies.
- Provide students with relevant career education and counseling.

Benefits for Government

Government can provide information that will ensure a better skill match between workers and employers and initiate education reform to better educate future members of the workforce. Skill standards better enable agencies to provide options for career and job mobility and link learning to the needs of the workplace.



Government can use skill standards to:

- Assist in the development of a highly skilled and competitive workforce.
- Evaluate the effectiveness of publicly funded education and training.
- Increase opportunities for under-represented populations by releasing the information that defines the skills required for success and by facilitating the national adoption of those definitions and their use.
- Support the creation of high-performance organizations that improve living standards for all members of the organization.
- Facilitate collaboration between educators and industry.
- Communicate the need and basis for education reform to business, education, labor, and the public at local and national levels.

Benefits for Students and Workers

Skill standards assist students in making career choices by providing industry expectations for success in the workplace. In addition, standards-based curriculum and assessments provide students with credentials that certify work-readiness. Work-ready students can anticipate being hired at higher rates of pay and can experience faster advancement in their chosen fields.

Workers can accurately assess their skills against those required for career advancement and plan effectively for their career pathways. They can determine the skills and abilities needed for advancement or transfer within industries, and determine the continuous learning and training they need to upgrade their skills.

Students and workers can use skill standards to:

- Achieve clarity regarding what they are expected to learn and how to prepare for work.
- Enter and re-enter the workforce with better understanding of the skills required to attain high-paying jobs.
- Accurately assess business expectations of the skills needed for positions and careers of their choice.
- Improve mobility and portability of their credentials.
- Obtain certification of competence of the skills they gain through experience, school, training, or self-study.
- Enhance their performance and achievement by self-evaluation against known standards.
- Be active contributors to the activities that make their organizations successful.



Skill Standards to Training: A Continuous Development Process

The skill standards generated in this project are designed to be used by:

- Participating retail, hospitality and tourism partners to develop or modify training modules; or
- Educators to develop curriculum at the high school and community college level.

By providing the necessary input from industry, this skill standards document is a first step in the development of training materials to serve the retail, hospitality and tourism industry in particular, and to demonstrate what can be done across industries.

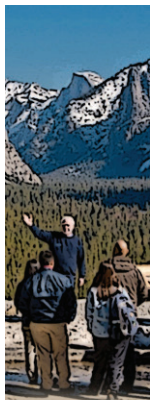
To keep current with a rapidly changing workplace, standards need to be re-evaluated and updated regularly, with full partner participation at each step. New technological developments impact how workers organize and apply their skills, including time management and interpersonal relationships. Increased technological complexity may simplify some of the job tasks but make others more intricate. Today's successful customer service representatives are challenged to acquire a broader range of decision-making and customer service skills, as well as keep current with emerging technologies. Ongoing changes like these must be reflected in curriculum to meet the needs of industry, where expectations for workers are evolving.

A Model of Continuous Improvement for Economic Development: Using Skill Standards

A continuous updating process is necessary: all partners must revise and verify skill standards regularly. For national economic development success, curriculum and current training methods must be updated to meet workplace standards. Individual workers must have access to clearly stated competency goals and direct access to skill development assistance. With cooperative effort on local and national levels, we can begin to resolve the current workforce skill shortages in the utility industry.

Step 1: Skill Standards Identification

- Compile and research existing standards in related jobs and careers.
- Conduct focus groups to identify critical work functions and key activities, define key activity performance indicators and identify technical knowledge, foundation skills and personal qualities.
- Conduct a survey of current workers to determine level of SCANS (Secretary's Commission on Achieving Necessary Skills) skills required for each job.
- Develop work-related scenarios to place the skill standards in the context of the work environment.
- Verify the data gathered from focus groups.
- Disseminate skill standards information to involved parties from industry, education and labor for their review and revision.



Step 2: Assessment

- Develop assessments through the collaboration of industry and education to reflect competent performance as defined by the skill standards.
- Collect evidence of a person's ability to perform at the levels determined by the skill standards.
- Determine present skill level through direct and indirect evidence by assessing a student, trainee, apprentice, prospective worker or worker seeking additional training.
- Use products and items produced by the person being assessed as direct evidence.
- Gather supporting information to use as indirect evidence.
- Assess results using the criteria of validity, currency, authenticity and sufficiency.
- Demonstrate validity using tangible items or records of action.
- Demonstrate authenticity by having the individual being assessed produce the item or specific piece of a team effort.
- Demonstrate sufficiency by providing enough evidence to match key tasks and performance criteria of the skill standards.

Step 3: Training and Curriculum Development

- Identify necessary competencies based on the skill standards information and assessments.
- Develop program outcomes for specific academic and training programs, including dual credit, two-year, pre-apprenticeship and apprenticeship programs.
- Perform gap analysis to determine changes or additions to be made to curriculum.
- Revise existing curriculum to better meet the current and future needs of the industry.
- Develop new curriculum and establish new training programs based on these competencies.

Step 4: Articulation

- Develop models to support the articulation of program outcomes and competencies between academic and training systems.
- Establish articulation agreements between existing programs to ensure portability of skills.
- Connect competencies and Certificates of Competence with benchmark documentation to build national portability systems.



Pyramid of Competencies

The Pyramid of Competencies is a depiction of skill standards in three broad skill categories.

Tier I

Tier I represents the broadest level of competencies, and is the set of employability (SCANS) skills, knowledge, abilities and personal qualities required of all workers to be successful in today's workplace. These are the universal skills that are needed to apply technical knowledge and tools effectively.

Tier II

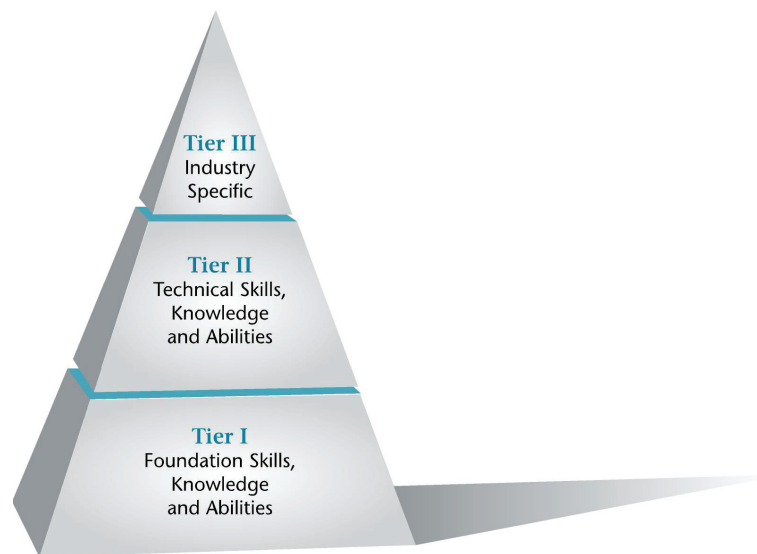
Tier II represents technical skills, knowledge and abilities common to jobs within a cluster across all industries or industry sectors.

Tier III

Tier III represents industry-specific technical skills, knowledge and abilities that are unique to individual jobs or clusters and are the most prone to rapid change. For example, many workers need to upgrade their skills based on sudden market shifts.



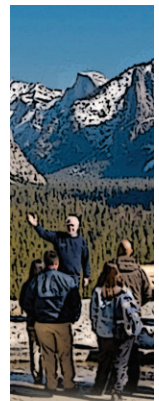
12



Skill Standards Development Process



© iStock



Skill Standards Process

Initial Focus Group

An advisory committee consisting of customer service managers and leaders from retail, hospitality and tourism companies across the region was convened by Alan Hardcastle of WSU to provide oversight to this project. The advisory committee nominated participants for the focus group process. Two focus groups with experienced retail, hospitality and tourism customer service professionals were conducted by The Allison Group, one for specialists and one for supervisors, each with six participants. There was broad diversity in terms of members' years of experience, type of company, gender, age and ethnicity.

The first step in the focus group process was to identify the primary functions and key activities that constitute the work of competent, entry-level retail, hospitality and tourism customer service specialists and supervisors. Working with a draft of sample critical work functions that was prepared from background research and input from the advisory committee, the group revised and adapted functions and tasks to meet the needs of specialists and supervisors across multiple types of companies. Participants freely made changes and recommendations, and crafted a thorough grouping of critical work functions with corollary key activities.

Performance Criteria

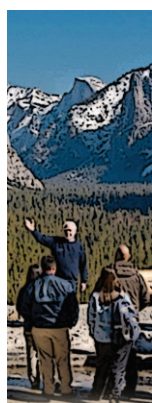
The second step was to identify the performance indicators for each key activity, answering the question: "How do you know when this is performed well?" The group also identified the tools, knowledge and foundation skills required to meet the performance criteria. The draft skill standards generated through the focus group process were reviewed by members of the advisory committee with respect to current industry trends and requirements.

Survey Verification

Third, a survey of SCANS skills and personal qualities for retail, hospitality and tourism customer service specialists and supervisors was administered to focus group members, and later to larger samples of Specialists and Supervisors in retail, hospitality and tourism across the region. SCANS are foundation employability skills required of workers in all occupations at varying levels specific to their jobs.* A total of 34 SCANS competency surveys were returned for specialists and 36 for supervisors; survey results are provided later in this report.

Finally, a verification survey of critical work functions and key activities derived from the standards was sent to retail, hospitality and tourism customer service specialists and supervisors across the region. All critical work functions and key activities were verified, and each key activity

* SCANS are foundation employability skills required of workers in all occupations at varying levels specific to their jobs. See: <http://wdr.doleta.gov/SCANS/whatwork/>



was rated for its level of importance. Response data were compiled and averaged to find the level of importance of each critical function. Surveys for Specialists were returned by 34 respondents from 27 employers and surveys from Supervisors were returned by 39 respondents from 29 employers (see Table 1). The results of all the focus groups, surveys and feedback were compiled and analyzed, and a draft of the document was reviewed by the advisory committee (see list of members on page IV).

Table 1.
Participants in Validation Surveys

Skills Surveys	Surveys Completed by	Surveys Recieved	Employers
Critical Work Functions	Frontline Specialists	34	27
	Supervisors	39	29
SCANS	Frontline Specialists	34	26
	Supervisors	36	28

Employability Skills: SCANS Profile

During the data-gathering process of this project, employability skills for Retail, Hospitality and Tourism Customer Service Specialists and Supervisors were identified. Employability, or workplace skills, are basic academic and foundation skills needed to build more advanced competencies. The foundation skills are based on broad workplace categories, known as SCANS (Secretary’s Commission on Achieving Necessary Skills, U.S. Department of Labor). This federal report issued in 1991 identifies 37 foundation and workplace competencies required for work readiness.

SCANS are comprised of a three-part foundation of skills and personal qualities and five workplace competencies needed for successful job performance in today’s workforce as listed in Table 2. Professionals currently working in the field were asked to identify the level of difficulty for each of the 37 SCANS skills most often required for successful workplace performance. The information in the charts was compiled by taking a weighted average of the responses. This summary information provides a general view of the key workplace skills deemed relevant and necessary for the front-line worker and supervisor in retail, hospitality and tourism customer service and defines the foundation for the employability skills within the skill standards.



Table 2.
SCANS Skills

Basic Skills	Thinking Skills	Personal Qualities	Worksite Competencies
Reading	Creative Thinking	Responsibility	Utilizing Resources
Writing	Decision Making	Self-Worth	Interpersonal Skills
Arithmetic	Problem Solving	Sociability	Utilizing Information
Mathematics	Visualization	Self-Management	Using Systems
Listening	Knows/Learns	Integrity/Honesty	Using Technology
Speaking	Reasoning		



The ADVANCE™ Workplace Standards Skill Inventory from Advanced Educational Spectrums, Inc., was used to capture industry views on foundation skills for specialists and supervisors. Industry professionals selected the level of difficulty required for each SCANS skill from “Not Important” to “Critical” (see Figure 1). The SCANS bar chart (Figure 2) shows the average survey scores for each skill area. This summary information provides a general view of the key foundation skills deemed relevant and necessary for retail, hospitality and tourism customer service specialists and supervisors.

Figure 1.
Sample Survey Questions from the Workplace Standards Skill Inventory

- Exhibiting Leadership**
- 1** Understands standards
Adheres to standards
 - 2** Encourages others to adopt new concepts
Demonstrates commitment to excellence
Leads by example
Interprets positions on issues
 - 3** Motivates others to extend their capabilities
Displays enthusiasm/positive attitudes
Develops minority/majority views
 - 4** Persuades others to reverse negative attitudes/behaviors
Maximizes strengths/minimizes limitations
Consolidates varied viewpoints/positions
 - 5** Empowers individuals/teams to achieve excellence
Judges leadership styles
Justifies positions/policies

Skill Standards Results: Customer Service Specialists



© iStock



17

Customer Service Specialist Sample Job Description

Summary

The customer service specialist (CSS) is an entry level position that works in a high performance, customer-focused team environment and is responsible for a number of customer-oriented tasks in a retail, hospitality or tourism environment. These responsibilities include responding to customer requests and inquiries, understanding company policies and determining the most effective resolution to customer issues.

Primary Duties

A CSS may perform any combination of the following tasks:

- Provide information to customers and potential customers about company programs, products and services.
- Provide information to customers about new services and/or products.
- Take action to resolve customer complaints and issues.
- Understand and implement company policies and practices including safety and loss prevention.
- Create a positive and customized experience for the customer.
- Build and maintain long term relationships with customers.
- Promote and handle sales transactions.
- Complete administrative tasks including protecting customer data, monitoring inventory and adhering to work schedules.

Minimum Qualifications

Typically requires a high school diploma or associates degree from an accredited institution with some customer service related work experience. Previous computer experience is often required. Strong communication (oral and written) and problem solving skills are needed. This position may require shift work.

Definitions

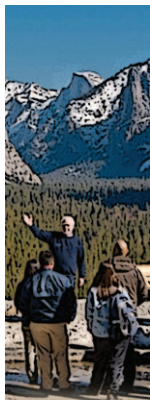
Each chart in the following skill standards template contains the following components:

Critical Work Functions

Critical work functions represent the general tasks that a fully competent Retail, Hospitality and Tourism Customer Service Specialist with at least one year of experience would perform.

Employability Skills

Employability skills are basic academic and personal skills that are needed to build more advanced competencies. They are required by all workers to obtain meaningful work and to participate in the modern workplace.



Key Activities

Key activities are the tasks related to the critical work functions, composed of work activities that are measurable and observable and that result in a decision, product or service.

Level of Importance

Professionals who are actively working in this occupation rated the level of importance for each critical work function and key activity, ranging from not important to critical. All critical work functions were rated as important, very important or critical.

Performance Indicators

Performance indicators are specific behavioral evidence of a worker's achievement of skills, knowledge and tasks. Performance indicators provide the standard of performance required to produce the necessary outcomes of key activities, and help answer the question: "How do we know when this key activity is performed well?"

Technical Skills, Knowledge, Abilities and Tools

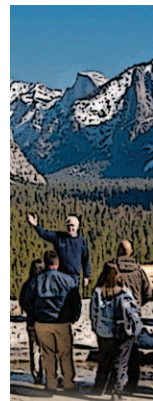
Technical skills, knowledge, abilities, and tools are those areas of expertise that workers must have in order to perform a given occupational task with excellence. A collection of skills, knowledge, abilities and tools comprise competencies.

- **Skills** refer to proficiency in an applied activity. This activity could be physical, mental or interpersonal in nature.
- **Knowledge** is information and skills acquired through experience or education; the theoretical or practical understanding of a subject.
- **Abilities** are broad human characteristics that result from natural talent, training or experience.
- **Tools** are materials, equipment and implements a worker must be able to use competently to meet the requirements of the job.

Foundational Theories, Concepts and Technologies

Focus group participants emphasized that the theoretical and conceptual knowledge taught in community college programs provides a critical foundation for customer service representatives entering the workplace. With this theoretical foundation in place, individuals are well-equipped to learn and practice the application of these concepts through on-the-job training. While both theory and application are important, for most companies it is difficult to also teach theoretical content within a production environment.

Foundational business concepts and theories essential to performing functions required of Retail, Hospitality and Tourism Customer Service Specialists are listed below, and are important supplements to the technical knowledge and skills listed with each key activity.





Business

- Branding: packaging, look and feel; how the image comes through in every step
- Adapting to change
- Lay out of the floor, product placement and display, merchandising
- Understanding of the concept of profits and profit margins
- Basic business operations and model: Revenue, profit, costs
- Sales of services versus sales of products, sales of experiences as part of sales of products.
- Concept of logistics and supply chain

Economics

- Supply and demand theory

Psychology/Human Behavior

- Entrepreneurial mindset
- Consumer behavior
- Personality styles, types and traits of individuals (for working with customers and co-workers);
- Pacing, Neurolinguistic Programming
- Maslow's hierarchy of needs

Computer/IT (Business Systems)

- Point-of sale register; credit cards and coupon scanners
- Point of sale scanner/inventory scanner
- Searching for information and discerning credible sources

Communications Principles

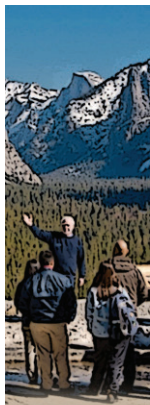
- Communication with co-workers
- Communication on organizational level and team or work unit level and individually
- Taking responsibility for communications/taking initiative
- Communication theory; what is effective and ineffective
- Understanding verbal and non-verbal communication (body language)

Critical Work Functions: Customer Service Specialists

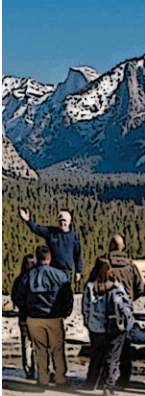


Skill Standards for Customer Service Specialists

Critical Work Functions	Key Activities		
A. Participate in continuous learning and improvement	A1 Participate in company-provided training, continuing education and follow-up to upgrade professional knowledge and skills	A2 Review written and multimedia material pertaining to products or services provided by employee's company, producer or trade organization	A3 Test and sample products or services
B. Create a positive and customized customer experience and relationship	B1 Engage and interact with the customer to establish personalized relationship	B2 Gather information from customer to assess and anticipate customer's current mood, needs and knowledge of products or services	B3 Respond to customer's needs, comments, questions and provide ongoing support
C. Educate and support the customer and skills	C1 Explain and demonstrate products or services and prices to customer	C2 Identify and offer alternative or additional products and services and/or change-out options for replacement to the customer (if applicable)	C3 Inform customer about service policies (returns, warranties, guarantees, service plans)



Key Activities			
<p>A4 Study competitors' products or services, including marketing materials (ads, fliers, TV commercials, web pages, etc.)</p>	<p>A5 Acquire and maintain industry certifications</p>	<p>A6 Achieve and maintain proficiency in current and new technologies, products and work processes</p>	<p>A7 Identify and communicate potential improvement ideas for the company</p>
<p>B4 Determine customer's price considerations</p>	<p>B5 Coordinate customer requests with designated vendors and other service providers</p>	<p>B6 Personally initiate, facilitate and attempt to resolve customer issues</p>	<p>B7 Provide extraordinary service to locate and deliver needed personal services and unique or hard-to-find products and services to customers</p>
<p>C4 Solicit supervisor or co-worker support and advice when necessary to meet customer needs</p>	<p>C5 Provide support for pre- and post-sale transactions with customers</p>		





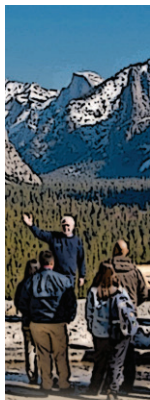
Critical Work Functions	Key Activities		
<p>D. Prepare for selling</p>	<p>D1 Review future sales goals</p>	<p>D2 Review and implement strategy for pricing and selling products or services</p>	<p>D3 Maintain, grow, and build long-term relationships with customers</p>
<p>E. Close the sale and enhance future business opportunities</p>	<p>E1 Engage in close-of-sale process to finalize purchase decisions</p>	<p>E2 Close and confirm sale with customer</p>	<p>E3 Handle sales transactions</p>
<p>F. Ensure a safe and secure work environment</p>	<p>F1 Implement safety procedures and training to ensure personal safety of customers, guests, co-workers and self</p>	<p>F2 Implement security policies / procedures to provide data confidentiality and security for customers and co-workers</p>	<p>F3 Implement security policies/ procedures to minimize chance of loss</p>
<p>G. Perform administrative and customer support functions</p>	<p>G1 Manage and protect data on customer accounts, interactions and transactions</p>	<p>G2 Communicate and coordinate with internal departments and vendors</p>	<p>G3 Review and adhere to staffing and scheduling plan</p>

Key Activities			
D4 Monitor and review information on customer and industry trends, products and services from materials, events, or the environment	D5 Maintain personal appearance and appearance of desk/ display/ merchandising/work environment and store	D6 Study, consider and incorporate the financial impact of pricing and costs on company profitability	
E4 Cross sell and up-sell other products and services	E5 Engage in post-sale communications and activities		
F4 Identify and report unsafe conditions and take corrective actions	F5 Participate in emergency drills	F6 Respond to emergency situations and needs	
G4 Document, maintain and protect internal company information	G5 Monitor inventory		

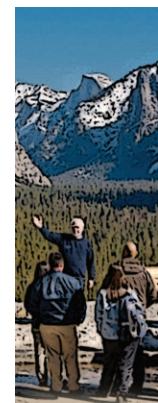


SCANS Survey Results: Customer Service Specialists

Foundation Skills and Personal Qualities	Key: 1 = Basic Competency Level; 5 = Advanced Competency Level.					Critical Competencies
	1	2	3	4	5	
Basic Skills						
Demonstrates Effective Reading Strategies						Identifies relevant details, facts, and specifications; follow set of instructions; probes to gain knowledge and qualifies/analyzes information.
Demonstrates Effective Writing Strategies						Completes forms, writes simple documents and summarized/paraphrases information.
Applies Arithmetic Processes						Performs basic computations; records and interprets numerical data.
Applies Mathematics Processes						Utilizes mathematical formulas and processes and summarizes and translates mathematical data.
Demonstrates Effective Listening Skills						Listens attentively, confirms information and interprets, clarifies and influences communication.
Demonstrates Effective Speaking Skills						Communications appropriate messages, presents complex ideas and information; analyzes individual response; poses critical questions.
Thinking Skills						
Applies Creative Thinking/Generates Ideas						Paraphrases/summarizes existing ideas; demonstrates creative thinking process while problem solving and develops creative solutions.
Applies Decision-Making Strategies						Applies rules and principles to the situation; gathers information and analyzes the situation and information.
Recognizes and Solves Problems						Understands and appropriately refers the complaint or discrepancy; examines information, analyzes possible causes and recommends action plan and generates/evaluates solutions.
Demonstrates Visualization						Applies appropriate principles to situations; uses previous training and experience to predict outcomes and uses imagination to visualize events/activities
Knows How to Learn						Draws upon experience and prior knowledge and interprets and applies new knowledge and experience.
Applies Reasoning Skills						Identifies facts, principles, problems; applies rules and principles to procedure and uses logic to draw conclusions.



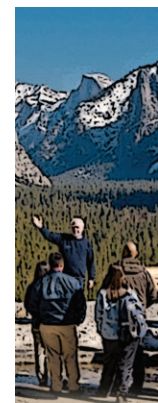
Foundation Skills and Personal Qualities	Key: 1 = Basic Competency Level; 5 = Advanced Competency Level.					Critical Competencies
	1	2	3	4	5	
Personal Qualities						
Demonstrates Responsibility						Performs assigned tasks; works with minimal supervision; pays attention to details; demonstrates enthusiasm, optimism and initiative.
Demonstrates Belief in Self Worth						Responds assertively and defends own beliefs and viewpoints; accepts constructive criticism and accepts responsibility for own behavior.
Demonstrates Sociability in Groups						Responds appropriately to others; willingly helps others and establishes rapport with co-workers and customers; modifies behavior to environment; shows understanding and empathy for others.
Demonstrates Self-Management						Maintains self-control; demonstrates commitment to self-improvement and applies self-management skills.
Demonstrates Integrity/Honesty						Demonstrates honesty and trustworthiness; accepts responsibility for own behavior; demonstrates commitment to personal improvement and recommends ethical course of action.
Management of Resources						
Manages Time						Starts on time; performs a given set of tasks, efficiently manages time, adjusts schedule as required by supervisor and prioritizes daily tasks.
Manages Money						Reconciles daily receipts and payments; performs routine recordkeeping.
Manages Materials/Facilities						Maintains, acquires and distributes job specific supplies and equipment.
Manages Human Resources						Recognizes job tasks, may analyze and distribute work assignments.





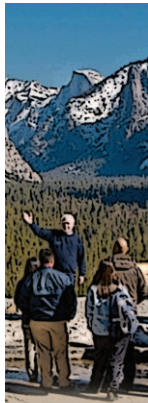
Foundation Skills and Personal Qualities	Key: 1 = Basic Competency Level; 5 = Advanced Competency Level.					Critical Competencies
	1	2	3	4	5	
Management / Use of Information						
Acquires and Evaluates Information						Selects and obtains information relevant to the task; predicts outcomes and analyzes data.
Organizes and Maintains Information						Interprets information and applies processes to new information.
Interprets and Communicates Information						Recognizes accuracy of information; interprets information and prepares basic summaries and reports.
Uses Computers to Process Information						Performs basic data entry; utilizes integrated/multiple software; locates information and retrieves stored data.
Interpersonal Skills						
Participates as Team Member						Actively participates in team activities and assists team members; demonstrates commitment and works to improve team skills.
Teaches Others						Models proper performance and attitudes; identifies training needs; conducts task specific training and coaches others to apply related concepts.
Serves Customers						Demonstrates sensitivity to customer concerns and complaints; analyzes customer needs and demonstrates commitment to customer; relates to customer fears and concerns; obtains additional resources to meet customer needs.
Exhibits Leadership						Adheres to standards; encourages others to adopt new concepts; demonstrates commitment to excellence; leads by example; motivates others to extend their capabilities and displays enthusiasm and positive attitudes.

Foundation Skills and Personal Qualities	Key: 1 = Basic Competency Level; 5 = Advanced Competency Level.					Critical Competencies
	1	2	3	4	5	
Interpersonal Skills (Continued)						
Negotiates Agreements						Understands negotiation process; identifies conflicts; demonstrates composure; interprets complaints and concerns.
Works with Diversity						Understands the legal aspects of discrimination; respects the rights of others; recognizes the value of diversity and supports a correct course of action.
Understanding / Management of Systems						
Understands Systems						Understands system principles and terminology; understands the system organization/hierarchy; follows processes and procedures and responds to system demands.
Monitors/ Corrects System Performance						Collects data, identifies system discrepancies and monitors system performance.
Improves/ Designs Systems						Understands continuous improvement process; suggests system modifications and improvements.
Use of Technology						
Selects Appropriate Technology						Knows available technology and understands requirements of the tasks and technological results.
Applies Technology to Task						Understands technology applications and follows proper procedures; understands the operation/interaction.
Maintains/ Troubleshoots Technology						Follow maintenance procedures, identifies symptoms, and corrects failures.



Customer Service Specialists: Results by Critical Work Function

A. Participate in continuous learning and improvement



<p style="text-align: center;"><i>Key Activity</i> A1 Participate in company-provided training, continuing education and follow-up to upgrade professional knowledge and skills</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Trainings are attended with full participation. • When applicable, attendance records show the employee has completed required training. • Documentation (test results, checklists, and instructor or manager evaluations) indicates satisfactory performance in trainings. • Participation in continuous learning opportunities is self-initiated. • Customer service instruction manuals, guides and website are reviewed as needed to meet customer needs. • Training needs and skill gaps are communicated and followed up with appropriate staff. • Foundational knowledge of customer/client/business behavior to understand what motivates decision-making is acquired. 	<ul style="list-style-type: none"> • Ability to locate schedule and access trainings offered by the organization. • Knowledge of location of customer service instruction manuals, guides and website and how to use them. • Knowledge of process to request new training classes. • Knowledge of the public website structure and how to locate information on it. 	<ul style="list-style-type: none"> • Identifies relevant details, facts, and specifications; follow set of instructions; probes to gain knowledge and qualifies/analyzes information. • Listens attentively, confirms information and interprets, clarifies and influences communication. • Performs basic data entry; utilizes integrated/multiple software; locates information and retrieves stored data. • Recognizes accuracy of information; interprets information and prepares basic summaries and reports. • Selects and obtains information relevant to the task; predicts outcomes and analyzes data.

Key Activity

A2

Review written and multimedia material pertaining to products or services provided by employee's company, producer or trade organization

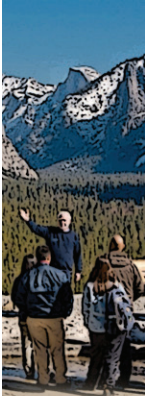
Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Relevant sources of information (e.g. articles in trade magazines, popular media, company policy manuals or guidelines) are referenced. • New product, service and process instruction manuals and guides are reviewed as needed to stay current and proficient. • Information on products, services and processes is maintained and kept current. • Location of product, service and process information is kept current. • Materials pertaining to products, services and processes are reviewed on a regular basis and as needed. 	<ul style="list-style-type: none"> • Knowledge of sources of information about new and existing products and services, changes to competitors' products and services, and changes to the industry at large. • Knowledge of location of new product, service and process manuals and guides and how to use them. • Knowledge of the underlying purpose of processes. 	<ul style="list-style-type: none"> • Performs basic data entry; utilizes integrated/multiple software; locates information and retrieves stored data. • Paraphrases/summarizes existing ideas; demonstrates creative thinking process while problem solving and develops creative solutions. • Applies rules and principles to the situation; gathers information and analyzes the situation and information. • Performs assigned tasks; works with minimal supervision; pays attention to details; demonstrates enthusiasm, optimism and initiative. • Recognizes accuracy of information; interprets information and prepares basic summaries and reports.





<p style="text-align: center;"><i>Key Activity</i> A3 Test and sample products or services</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Sufficient information is obtained to be able to communicate about and demonstrate products or services for customers in a competent, knowledgeable and safe manner. • Knowledge of all relevant features of products or services is obtained. 	<ul style="list-style-type: none"> • Knowledge of company policies and procedures regarding testing and sampling of products or services. • Ability to apply knowledge gained from testing and sampling to demonstrating products or services for customers. 	<ul style="list-style-type: none"> • Demonstrates sensitivity to customer concerns and complaints; analyzes customer needs and demonstrates commitment to customer; relates to customer fears and concerns; obtains additional resources to meet customer needs. • Identifies relevant details, facts, and specifications; follow set of instructions; probes to gain knowledge and qualifies/ analyzes information. • Maintains, acquires and distributes job specific supplies and equipment.

<p style="text-align: center;"><i>Key Activity</i></p> <p style="text-align: center;">A4</p> <p style="text-align: center;">Study competitors' products or services, including marketing materials (ads, fliers, TV commercials, web pages, etc.)</p>		
Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Sufficient information is obtained to be able to compare products and services offered by the company with those offered by competitors. • Understanding of all relevant features of competitor products or services is obtained. • Understanding of why the company's products or services are unique, different or better than those of competitors is obtained. 	<ul style="list-style-type: none"> • Knowledge of company policies and procedures regarding obtaining information on competitors' products or services. • Ability to apply knowledge gained from study of competitors' products and services to providing information to customers. 	<ul style="list-style-type: none"> • Identifies relevant details, facts, and specifications; follow set of instructions; probes to gain knowledge and qualifies/analyzes information. • Selects and obtains information relevant to the task; predicts outcomes and analyzes data. • Recognizes accuracy of information; interprets information and prepares basic summaries and reports. • Identifies facts, principles, problems; applies rules and principles to procedure and uses logic to draw conclusions. • Knows available technology and understands requirements of the task and technological results.





<p style="text-align: center;"><i>Key Activity</i> A5 Acquire and maintain industry certifications</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Mandatory trainings are attended as required. • Tests are taken and passed as required. • Documentation of certification is available as needed. 	<ul style="list-style-type: none"> • Ability to pass certification exams. • Knowledge of certification documentation procedures. 	<ul style="list-style-type: none"> • Identifies relevant details, facts, and specifications; follow set of instructions; probes to gain knowledge and qualifies/analyzes information. • Recognizes accuracy of information; interprets information and prepares basic summaries and reports. • Actively participates in team activities and assists team members; demonstrates commitment and works to improve team skills. • Selects and obtains information relevant to the task; predicts outcomes and analyzes data. • Performs assigned tasks; works with minimal supervision; pays attention to details; demonstrates enthusiasm, optimism and initiative.

Key Activity

A6

Achieve and maintain proficiency in current and new technologies, products and work processes

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Technical trainings are attended with full participation. • Initiative is demonstrated to participate in continuous learning opportunities. • Technical instruction manuals, guides and websites are reviewed as needed to stay current and proficient. • Training needs are communicated to the supervisor. • Materials pertaining to current and new technologies are reviewed on a regular basis. 	<ul style="list-style-type: none"> • Ability to access training provided by the organization. • Knowledge of location of technology manuals and guides and how to use them. • Knowledge of the public website structure and how to locate information on it. • Ability to perform on-line research. • Knowledge of credible sources of information. 	<ul style="list-style-type: none"> • Follows maintenance procedures, identifies symptoms and corrects failures. • Interprets information and applies processes to new information. • Understands technology applications and follows proper procedures; understands the operation/interaction. • Draws upon experience and prior knowledge and interprets and applies new knowledge and experience. • Understands and appropriately refers the complaint or discrepancy; examines information, analyzes possible causes and recommends action plan and generates/evaluates solutions. • Paraphrases/summarizes existing ideas; demonstrates creative thinking process while problem solving and develops creative solutions.



Key Activity

A7

Identify and communicate potential improvement ideas for the company

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Improvement ideas are communicated to appropriate personnel effectively and in a timely manner. • Improvement ideas are well-thought through and align with existing products and services and company policies and procedures. • Improvement ideas meet customer needs and preferences. • Feedback is sought on the ideas prior to formally submitting them. 	<ul style="list-style-type: none"> • Knowledge of employee options for improving or helping to improve products and services. • Knowledge of techniques used to determine if process changes improve services. • Knowledge of company policies and procedures for proposing or suggesting improvements. • Ability to obtain feedback from customer about performance through available and appropriate mechanisms. • Knowledge of appropriate follow-up actions designed to improve products and services. • Knowledge of how product will perform in different circumstances. • Knowledge of health and safety regulations regarding the intended uses of different products and services. 	<ul style="list-style-type: none"> • Understands and appropriately refers the complaint or discrepancy; examines information, analyzes possible causes and recommends action plan and generates/evaluates solutions. • Applies rules and principles to the situation; gathers information and analyzes the situation and information. • Identifies facts, principles, problems; applies rules and principles to procedure and uses logic to draw conclusions. • Paraphrases/summarizes existing ideas; demonstrates creative thinking process while problem solving and develops creative solutions. • Applies appropriate principles to situations; uses previous training and experience to predict outcomes and uses imagination to visualize events/activities. • Listens attentively, confirms information and interprets, clarifies and influences communication. • Selects and obtains information relevant to the task; predicts outcomes and analyzes data.



Customer Service Specialists – Critical Work Function:
B. Create a Positive and Customized Customer Experience and Relationship

<i>Key Activity</i> B1 Engage and interact with the customer to establish personalized relationship		
Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • 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. • Using small talk/polite conversation, the common ground between the sales person and the customer is discovered and used as a connecting link for personalized relationship. • Rapport with the customer is maintained. • Customer is asked if there is anything else they can be helped with. • Tone of voice and pace are monitored to ensure that trust is built. • Regular customers are acknowledged in an appropriate manner. • Communication devices are utilized competently in accordance with customer preferences and etiquette protocols are followed. 	<ul style="list-style-type: none"> • Knowledge of pacing and leading techniques. • Knowledge of paraphrasing and active listening techniques. • Knowledge of techniques to identify customer needs. • Knowledge of diverse cultural backgrounds and their communications styles. • Knowledge of communication styles within a variety of generations/ages. • Ability to use communication devices in a variety of ways such as voice, email, text and social media. • Knowledge of business etiquette in electronic communication. 	<ul style="list-style-type: none"> • Listens attentively, confirms information and interprets, clarifies and influences communication. • Communications appropriate messages, presents complex ideas and information; analyzes individual response; poses critical questions. • Responds appropriately to others; willingly helps others and establishes rapport with co-workers and customers; modifies behavior to environment; shows understanding and empathy for others. • Demonstrates sensitivity to customer concerns and complaints; analyzes customer needs and demonstrates commitment to customer; relates to customer fears and concerns; obtains additional resources to meet customer needs. • Understands the legal aspects of discrimination; respects the rights of others; recognizes the value of diversity and supports a correct course of action.





<p style="text-align: center;"><i>Key Activity</i> B2 Gather information from customer to assess and anticipate customer’s current mood, needs and knowledge of products or services</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • 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). • Information on how the customer plans to use the product or service is collected. • Effective written and verbal communications are polite, clear and completed in a timely manner. • Company policies and procedures are followed. • Information is gathered in a courteous, professional manner. • Approach is tailored to meet the needs of customers with different demographic characteristics (e.g., age, cultural background, and disability status), moods and personalities. • Customer’s objectives and concerns related to the product or service are identified. • Outdated and inaccurate information or impressions related to the company’s product or service are identified as needed. • Communication devices are utilized competently in accordance with customer preferences and etiquette protocols are followed. 	<ul style="list-style-type: none"> • Ability to use appropriate selling techniques in order to complete a sale. • Knowledge of company standards regarding how to interact with customers (e.g. company protocols for addressing and communicating with customers). • Knowledge of body language and how it is an indicator of mood. • Knowledge of techniques to identify customer needs. • Knowledge of diverse cultural backgrounds and their communications styles. • Knowledge of communication styles within a variety of generations/ages. • Ability to use communication devices in a variety of ways such as voice, email, text and social media. • Knowledge of business etiquette in electronic communication. 	<ul style="list-style-type: none"> • Listens attentively, confirms information and interprets, clarifies and influences communication. • Demonstrates sensitivity to customer concerns and complaints; analyzes customer needs and demonstrates commitment to customer; relates to customer fears and concerns; obtains additional resources to meet customer needs. • Selects and obtains information relevant to the task; predicts outcomes and analyzes data. • Interprets information and applies processes to new information. • Recognizes accuracy of information; interprets information and prepares basic summaries and reports.

Key Activity

B3

Respond to customer's needs, comments, and questions, and provide ongoing support

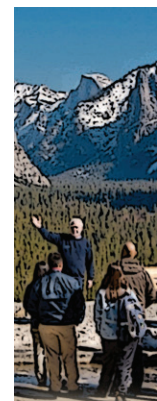
Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Courteous, complete attention is provided to customer. • Customer's comments, questions, requests, concerns, and objections are welcomed, recognized, acknowledged (e.g., restated back to the customer) with clear, direct, accurate and timely responses. • Appropriate explanation/ solutions/options are determined for the customer's situation and communicated to appropriate personnel effectively and in a timely manner • Actions and effective written and verbal communications and completed in a timely manner. • Company policies and procedures are followed. • Customer requests are communicated to supervisor or advice is solicited from appropriate departmental staff when necessary to meet customer needs. • Customer feedback indicates satisfaction with employee actions and behavior. • Employee demonstrates composure. • Outdated and inaccurate information or impressions related to the company's product or service are addressed as needed. • Advice based on accurate information regarding transportation, services or entertainment is provided. • Communication devices are utilized competently in accordance with customer preferences and etiquette protocols. 	<ul style="list-style-type: none"> • Ability to negotiate agreements with customers based on company policies. • Ability to use appropriate selling techniques based on company policies to complete a sale. • Ability to match solutions to customer situations. • Ability to determine when and how to consult with appropriate departmental staff and escalate when necessary. • Knowledge of products, services and solutions available to customer and sources of information for staying current about them. • Knowledge of paraphrasing and active listening techniques. • Knowledge of company policies and procedures regarding communication with customers. • Ability to identify customers' underlying issues. • Knowledge of credible sources of information. • Ability to access online sources of information. • Ability to cultivate and maintain a network of individuals with specialized information. • Ability to use communication devices in a variety of ways such as voice, email, text and social media. • Knowledge of business etiquette in electronic communication. • Knowledge of company's products and service lines including benefits to customers—how they work, how much they cost, service policies, warranties, follow-up commitments, etc. 	<ul style="list-style-type: none"> • Understands and appropriately refers the complaint or discrepancy; examines information, analyzes possible causes and recommends action plan and generates/ evaluates solutions. • Identifies facts, principles, problems; applies rules and principles to procedure and uses logic to draw conclusions. • Understands technology applications and follows proper procedures; understands the operation/interaction. • Paraphrases/summarizes existing ideas; demonstrates creative thinking process while problem solving and develops creative solutions. • Demonstrates sensitivity to customer concerns and complaints; analyzes customer needs and demonstrates commitment to customer; relates to customer fears and concerns; obtains additional resources to meet customer needs.





<p style="text-align: center;"><i>Key Activity</i> B4 Determine customer's price considerations</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Customer is presented with products of varying price ranges to gauge specific price limits. • Customer is queried courteously about price range considerations. • Customer's approximate desired price range is correctly ascertained and verified. 	<ul style="list-style-type: none"> • Ability to use appropriate selling techniques, in order to determine price considerations. • Knowledge of company standards regarding how to interact with customers (e.g. company protocols for addressing and communicating with customers). • Knowledge of body language and how it is an indicator of mood. • Knowledge of diverse cultural backgrounds and their communications styles. • Knowledge of pacing and leading techniques. • Knowledge of paraphrasing and active listening techniques. • Knowledge of company products and services and price ranges. 	<ul style="list-style-type: none"> • Listens attentively, confirms information and interprets, clarifies and influences communication. • Utilizes mathematical formulas and processes and summarizes and translates mathematical data. • Performs basic computations; records and interprets numerical data. • Understands the legal aspects of discrimination; respects the rights of others; recognizes the value of diversity and supports a correct course of action. • Selects and obtains information relevant to the task; predicts outcomes and analyzes data.

<p style="text-align: center;"><i>Key Activity</i> B5 Coordinate customer requests with designated vendors and other service providers</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Information is timely, accurate and appropriate to the situation. • Customer requests are accurately and thoroughly discussed and solutions are defined. • Proper terminology is used to communicate with internal and external organizations and personnel. • Appropriate staff members are informed of customer interactions, requests and complaints as required. • When applicable, company policies and terms of service are clearly communicated and supported with the customer. • Delivery of product or service is expedited in a timely manner to meet customer needs. • Company policies and procedures are followed. • Customer information is kept confidential and secured in accordance with applicable policies and procedures and laws and regulations. • Oral and written communication is concise, courteous and completed in a timely manner. 	<ul style="list-style-type: none"> • Knowledge of other services, departments and vendors and their roles regarding delivery of products or services. • Knowledge of industry, department, vendor and personnel terminology. • Knowledge of company policies and procedures regarding communication and transactions with other services, departments, and vendors. • Ability to locate and use communications devices. • Knowledge of procedures to identify and report customer issues. • Knowledge of procedures to identify and report customer requests. 	<ul style="list-style-type: none"> • Understands system principles and terminology; understands the system organization / hierarchy; follows processes and procedures and responds to system demands. • Knows available technology and understands requirements of the task and technological results. • Performs basic data entry; utilizes integrated/multiple software; locates information and retrieves stored data. • Demonstrates honesty and trustworthiness; accepts responsibility for own behavior; demonstrates commitment to personal improvement and recommends ethical course of action. • Completes forms, writes simple documents and summarized/paraphrases information. • Performs assigned tasks; works with minimal supervision; pays attention to details; demonstrates enthusiasm, optimism and initiative.



Key Activity

B6

Personally initiate, facilitate and attempt to resolve customer issues

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Company policies and procedures are followed. • Steps are taken to confirm the resolution. • Information provided is accurate. • Customer communications are confirmed to acknowledge issues and ensure that understanding. • Customer issues are accurately and thoroughly discussed and solutions are defined. • Communication is respectful and relevant. • Action items are carried out in a timely manner. • Customer requests are communicated to supervisor or advice is solicited from appropriate departmental staff when necessary to meet customer needs. • Customer receives clear and accurate information regarding resolution procedures and when additional follow up is required, a clear explanation is provided to the customer of how and when follow up or call back will occur. • Customer feedback indicates satisfaction with employee actions and behavior. • Composure is demonstrated. • Supervisor, co-worker or lead support is solicited when necessary to meet customer needs. 	<ul style="list-style-type: none"> • Knowledge of the company-approved negotiation process and how to confirm the resolution. • Knowledge of paraphrasing, active listening and negotiation techniques. • Knowledge of company policies and procedures regarding communication with customers. • Knowledge of credible sources of information. • Knowledge of conflict resolution processes. • Ability to identify underlying issues. • Ability to determine when and how to consult with appropriate departmental staff and escalate when necessary. 	<ul style="list-style-type: none"> • Listens attentively, confirms information and interprets, clarifies and influences communication. • Understands and appropriately refers the complaint or discrepancy; examines information, analyzes possible causes and recommends action plan and generates/ evaluates solutions. • Applies appropriate principles to situations; uses previous training and experience to predict outcomes and uses imagination to visualize events/activities. • Demonstrates sensitivity to customer concerns and complaints; analyzes customer needs and demonstrates commitment to customer; relates to customer fears and concerns; obtains additional resources to meet customer needs. • Understands negotiation process; identifies conflicts; demonstrates composure; interprets complaints and concerns. • Reconciles daily receipts and payments; performs routine recordkeeping.



Key Activity

B7

Provide extraordinary service to locate and deliver needed personal services and unique or hard-to-find products and services to customers

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Special services such as pick up and delivery of items or arrangement for taxi, limousine or car rentals are provided. • When possible, co-workers are located to provide interpretation for customers who speak other than English. • Extraordinary service is provided within legal and ethical guidelines. • Delivery of product or service is expedited in a timely manner to meet customer needs. • Company policies and procedures are followed. • Customer information is kept confidential and secured in accordance with applicable policies and procedures and laws and regulations. • Oral and written communication is concise, courteous and completed in a timely manner. 	<ul style="list-style-type: none"> • Knowledge of ways to establish rapport and bridge communication/language barriers. • Knowledge of diverse cultural backgrounds and their communications styles. • Knowledge of vendors and their roles regarding personal services. • Knowledge of industry, department, vendor and personnel terminology. • Knowledge of company policies regarding communication with vendors and confidentiality of customer information. • Knowledge of procedures to identify and report customer issues. • Knowledge of company policy regarding special requests and extraordinary circumstances 	<ul style="list-style-type: none"> • Selects and obtains information relevant to the task; predicts outcomes and analyzes data. • Adheres to standards; encourages others to adopt new concepts; demonstrates commitment to excellence; leads by example; motivates others to extend their capabilities and displays enthusiasm and positive attitudes. • Paraphrases/summarizes existing ideas; demonstrates creative thinking process while problem solving and develops creative solutions. • Applies rules and principles to the situation; gathers information and analyzes the situation and information. • Understands and appropriately refers the complaint or discrepancy; examines information, analyzes possible causes and recommends action plan and generates/evaluates solutions.



Customer Service Specialists – Critical Work Function:
C. Educate and Support the Customer



<p style="text-align: center;"><i>Key Activity</i> C1 Explain and demonstrate products or services and prices to customer</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Clear, accurate and complete explanations of products or services are provided to customers. • Information about the complete range of products or services appropriate for the customer is provided. • Research protocols are followed and are completed in a timely manner. • Electronic systems are used in a competent manner when applicable to effectively serving customers. • Supplemental documentation or resources (brochures, links, etc.) are provided when applicable. • Effective written and verbal communications are polite, clear and completed in a timely manner. • Communications are carried out with correct grammar and proper use of terminology, appropriate to the audience. • Company policies and procedures regarding demonstration and explanation of products, services and prices are followed. • Customer requests are communicated to supervisor or advice is solicited from appropriate departmental staff when necessary to meet customer needs. 	<ul style="list-style-type: none"> • Knowledge of research protocols and ability to use them efficiently. • Ability to demonstrate proficiency with electronic systems when serving customers. • Knowledge of company computer technology and ability to use technology proficiently. • Knowledge of procedures to obtain support from staff. • Knowledge of supplemental documentation and resources available and procedures for providing them to customers. • Knowledge of company policies and procedures regarding demonstration and explanation of products services and prices. • Ability to determine when and how to refer issues and consult with appropriate departmental staff. • Knowledge of products and services and relevant options and rates available to customer. • Knowledge of credible sources of information. 	<ul style="list-style-type: none"> • Communications appropriate messages, presents complex ideas and information; analyzes individual response; poses critical questions. • Demonstrates sensitivity to customer concerns and complaints; analyzes customer needs and demonstrates commitment to customer; relates to customer fears and concerns; obtains additional resources to meet customer needs. • Understands technology applications and follows proper procedures; understands the operation/interaction. • Knows available technology and understands requirements of the task and technological results. • Applies rules and principles to the situation; gathers information and analyzes the situation and information. • Selects and obtains information relevant to the task; predicts outcomes and analyzes data.

Key Activity

C2

Identify and offer alternative or additional products and services and/or change-out options for replacement to the customer (if applicable)

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Clear, accurate and complete explanations of products or services are provided to customers as appropriate. • Credible and applicable resources are selected and used. • Effective written and verbal communications are polite, clear and completed in a timely manner. • Company policies and procedures are followed. • Customer requests are communicated to supervisor or advice is solicited from appropriate departmental staff when necessary to meet customer needs. • Research protocols are followed and are completed in a timely manner. • Electronic systems are used in a competent manner when applicable to effectively serving customers. • Alternatives and additional products or services are offered that meet customer needs and preferences. 	<ul style="list-style-type: none"> • Ability to demonstrate proficiency with electronic systems when serving customers. • Knowledge of company computer technology and ability to use technology proficiently. • Knowledge of credible sources of information regarding company products and services. • Knowledge of company policies and procedures regarding offering alternative, additional and replacement products and/or services. • Ability to determine when and how to consult with appropriate departmental staff and refer customer requests when necessary. • Knowledge of research protocols and ability to use them efficiently. • Ability to analyze information provided by customers and draw conclusions about the customer's needs. • Ability to generate several alternative solutions that will meet a customer's needs. 	<ul style="list-style-type: none"> • Paraphrases/summarizes existing ideas; demonstrates creative thinking process while problem solving and develops creative solutions. • Understands and appropriately refers the complaint or discrepancy; examines information, analyzes possible causes and recommends action plan and generates/ evaluates solutions. • Performs basic data entry; utilizes integrated/multiple software; locates information and retrieves stored data. • Recognizes accuracy of information; interprets information and prepares basic summaries and reports. • Listens attentively, confirms information and interprets, clarifies and influences communication.





<p style="text-align: center;"><i>Key Activity</i> C3 Inform customer about service policies (returns, warranties, guarantees, service plans)</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Industry rules and regulations and company policies and procedures are followed. • Clear, accurate and complete explanations of product or service policies are provided to customers. • Complete and accurate information about federal and state rules pertaining to service plans is provided when necessary. • Customer requests are communicated to supervisor or advice is solicited from appropriate departmental staff when necessary to meet customer needs • Effective written and verbal communications are polite, clear and completed in a timely manner. • Communications are carried out with correct grammar and proper use of terminology, appropriate to the audience, Research protocols are followed and are completed in a timely manner. • Electronic systems are used in a competent manner when applicable to effectively serving customers. 	<ul style="list-style-type: none"> • Knowledge of industry rules and regulations and company policies and procedures. • Knowledge of services and policies and relevant service plans and options available to customer. • Knowledge of research protocols and ability to use them efficiently. • Ability to demonstrate proficiency with electronic systems when serving customers • Knowledge of company computer technology and ability to use technology proficiently. • Ability to determine when and how to consult with appropriate departmental staff and refer customer requests when necessary. • Knowledge of credible sources of information. 	<ul style="list-style-type: none"> • Understands technology applications and follows proper procedures; understands the operation/interaction. • Performs basic data entry; utilizes integrated/multiple software; locates information and retrieves stored data. • Communications appropriate messages, presents complex ideas and information; analyzes individual response; poses critical questions. • Identifies relevant details, facts, and specifications; follow set of instructions; probes to gain knowledge and qualifies/ analyzes information. • Performs assigned tasks; works with minimal supervision; pays attention to details; demonstrates enthusiasm, optimism and initiative.

Key Activity

C4

**Solicit supervisor or co-worker support and advice
when necessary to meet customer needs**

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none">• Situation is properly assessed.• Referral/escalation procedures are followed.• Information about the issues is communicated in a concise and timely manner and includes all relevant, available information concerning the customer and the service.• When additional follow up is required, a clear explanation is provided to the customer of how and when follow up or call back will occur.• Every effort has been made in an effective manner to meet customer needs without supervisor or co-worker support.	<ul style="list-style-type: none">• Knowledge of industry and company terminology.• Ability to accurately describe customer situation.• Knowledge of referral procedures.• Knowledge of follow up actions and how they take place.	<ul style="list-style-type: none">• Understands system principles and terminology; understands the system organization/hierarchy; follows processes and procedures and responds to system demands.• Recognizes job tasks, may analyze and distribute work assignments.• Responds appropriately to others; willingly helps others and establishes rapport with co-workers and customers; modifies behavior to environment; shows understanding and empathy for others.• Paraphrases/summarizes existing ideas; demonstrates creative thinking process while problem solving and develops creative solutions.• Applies rules and principles to the situation; gathers information and analyzes the situation and information.





<p style="text-align: center;"><i>Key Activity</i> C5 Provide support for pre- and post-sale transactions with customers</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Necessary documentation is provided post sale. • Customers are signed up for email or notification lists. • Customers are informed about how to sign up for email lists, newsletters, etc. • Feedback is requested of customers in accordance with company policies and procedures. • Incentives for feedback are clearly communicated. • Customers are encouraged to provide feedback regarding their experience. • Sampling strategies are correctly implemented. • Customers are informed about upcoming sales events in accordance with company policies. 	<ul style="list-style-type: none"> • Knowledge of smart devices. • Knowledge of social networking. • Ability to generate repeat business. • Ability to elicit feedback from customers. • Knowledge of feedback incentive programs provided by the company. • Knowledge of sampling strategies and programs. • Knowledge of post-sale documentation. • Knowledge of procedures for signing up customers for lists, newsletters, etc. 	<ul style="list-style-type: none"> • Understands technology applications and follows proper procedures; understands the operation/interaction. • Interprets information and applies processes to new information. • Collects data, identifies system discrepancies and monitors system performance. • Demonstrates sensitivity to customer concerns and complaints; analyzes customer needs and demonstrates commitment to customer; relates to customer fears and concerns; obtains additional resources to meet customer needs. • Adheres to standards; encourages others to adopt new concepts; demonstrates commitment to excellence; leads by example; motivates others to extend their capabilities and displays enthusiasm and positive attitudes.

**Customer Service Specialists – Critical Work Function:
D. Prepare for Selling**

<p style="text-align: center;"><i>Key Activity</i> D1 Review future sales goals</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • When applicable, sales quotas/targets are prepared based on past and current sales goals, activities, advertising and promotions and other relevant information about company and/ or store goals. • Where applicable, individual sales performance is reviewed and evaluated according to company policies and procedures for measuring and tracking sales goals. • Sales goals are discussed with supervisor/manager in a timely manner to obtain approval and support. 	<ul style="list-style-type: none"> • Knowledge of how, changes (e.g. seasonal, economic, trends and markets) affect the needs of customers and the products or services offered. • Ability to develop professional goals that align with company goals and mission. • Knowledge of company goals, objectives, rewards and incentives. 	<ul style="list-style-type: none"> • Reconciles daily receipts and payments; performs routine recordkeeping. • Performs assigned tasks; works with minimal supervision; pays attention to details; demonstrates enthusiasm, optimism and initiative. • Selects and obtains information relevant to the task; predicts outcomes and analyzes data. • Recognizes accuracy of information; interprets information and prepares basic summaries and reports. • Utilizes mathematical formulas and processes and summarizes and translates mathematical data. • Performs basic computations; records and interprets numerical data. • Identifies relevant details, facts, and specifications; follow set of instructions; probes to gain knowledge and qualifies/ analyzes information.



Key Activity

D2

Review and implement strategy for pricing and selling products or services

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • 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. • Company pricing strategies, policies, and current prices, as well as sources for that information, are described accurately. • Sales presentation and answers to customer questions demonstrate knowledge of pricing policies (e.g., policy on price adjustments) and how • Pricing translates to customer value. 	<ul style="list-style-type: none"> • Knowledge of how to determine customer needs and expectations related to the products or services, the company or the employee. • Ability to identify and use sales techniques, based on company policies, to implement strategies for pricing and sale of products or services. • Knowledge of complementary and promotional products and services. • Ability to present and demonstrate products and services that meet customer needs and help to close the sale. • Knowledge of how pricing strategies complement sales strategies. • Ability to monitor and recognize progress toward meeting sales targets. 	<ul style="list-style-type: none"> • Utilizes mathematical formulas and processes and summarizes and translates mathematical data. • Demonstrates sensitivity to customer concerns and complaints; analyzes customer needs and demonstrates commitment to customer; relates to customer fears and concerns; obtains additional resources to meet customer needs. • Understands negotiation process; identifies conflicts; demonstrates composure; interprets complaints and concerns. • Demonstrates honesty and trustworthiness; accepts responsibility for own behavior; demonstrates commitment to personal improvement and recommends ethical course of action. • Reconciles daily receipts and payments; performs routine recordkeeping. • Paraphrases/summarizes existing ideas; demonstrates creative thinking process while problem solving and develops creative solutions. • Applies rules and principles to the situation; gathers information and analyzes the situation and information.

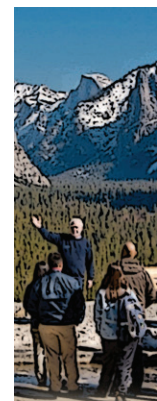


Key Activity

D3

Maintain, grow, and build long-term relationships with customers

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • The effectiveness of prospecting methods, sales strategies and marketing / merchandising plans are analyzed and necessary adjustments are made. • Potential customers with the target market area are correctly identified and prioritized in a way that is consistent with company and/or store sales strategies. • 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. • Potential new customers are identified through walk-ins and referrals (including other customers, associates, and friends). • As new and old customers are contacted, updated information is incorporated into customer information database. 	<ul style="list-style-type: none"> • Knowledge of prospecting methods, sales strategies and marketing / merchandising plans as related to customers in the target market area. • Ability to contact customers and potential customers and enhance the relationship with them. • Ability to recognize potential new customers. • Ability to generate referrals and repeat business. • Knowledge of customer documentation procedures and ability to update the customer information database • Ability to prioritize prospects and customers with respect to their sales potential. 	<ul style="list-style-type: none"> • Listens attentively, confirms information and interprets, clarifies and influences communication. • Communications appropriate messages, presents complex ideas and information; analyzes individual response; poses critical questions. • Responds appropriately to others; willingly helps others and establishes rapport with co-workers and customers; modifies behavior to environment; shows understanding and empathy for others. • Demonstrates honesty and trustworthiness; accepts responsibility for own behavior; demonstrates commitment to personal improvement and recommends ethical course of action. • Models proper performance and attitudes; identifies training needs; conducts task specific training and coaches others to apply related concepts. • Demonstrates sensitivity to customer concerns and complaints; analyzes customer needs and demonstrates commitment to customer; relates to customer fears and concerns; obtains additional resources to meet customer needs. • Understands the legal aspects of discrimination; respects the rights of others; recognizes the value of diversity and supports a correct course of action.





<p style="text-align: center;"><i>Key Activity</i> D4 Monitor and review information on consumer and industry trends, products and services from materials, events, or the environment</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Relevant sources of information (e.g. articles in trade magazines, popular media, company policy manuals or guidelines) are referenced. • New product, service and process instruction manuals and guides are reviewed as needed to stay current and proficient. • Information on products, services and trends is kept current and in its proper location. • Materials pertaining to products, services and industry trends are reviewed on a regular basis and as needed. 	<ul style="list-style-type: none"> • Knowledge of sources of information about new and existing products and services, changes to competitors' products and services, and changes to the industry at large. • Knowledge of location of new product, service and process manuals and guides and how to use them. • Ability to filter and identify credible sources of information. 	<ul style="list-style-type: none"> • Maintains, acquires and distributes job specific supplies and equipment. • Selects and obtains information relevant to the task; predicts outcomes and analyzes data. • Interprets information and applies processes to new information. • Recognizes accuracy of information; interprets information and prepares basic summaries and reports. • Performs basic data entry; utilizes integrated/multiple software; locates information and retrieves stored data.

Key Activity

D5

Maintain personal appearance and appearance of desk/display/merchandising/work environment and store

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Work environment and merchandizing displays are kept organized in order to meet customer needs and maximize sales. • Personal appearance is appropriate to the sales environment and the target audience. • Point-of-sale and front-of-the-house spaces are maintained to meet the needs and preferences of target audience and customer loyalty programs. 	<ul style="list-style-type: none"> • Knowledge of merchandising principles. • Knowledge of company pre and post-sale promotions. • Knowledge of the needs and preferences of the target audience. 	<ul style="list-style-type: none"> • Responds assertively and defends own beliefs and viewpoints; accepts constructive criticism and accepts responsibility for own behavior. • Maintains, acquires and distributes job specific supplies and equipment. • Demonstrates sensitivity to customer concerns and complaints; analyzes customer needs and demonstrates commitment to customer; relates to customer fears and concerns; obtains additional resources to meet customer needs. • Identifies facts, principles, problems; applies rules and principles to procedure and uses logic to draw conclusions. • Paraphrases/summarizes existing ideas; demonstrates creative thinking process while problem solving and develops creative solutions. • Applies rules and principles to the situation; gathers information and analyzes the situation and information.





<p style="text-align: center;"><i>Key Activity</i> D6 Study, consider and incorporate the financial impact of pricing and costs on company profitability</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Participation in continuous learning opportunities regarding the impact of pricing structure and costs on profitability is self-initiated. • Costs are considered in all actions. • Initiative is taken to locate information on pricing and costs. 	<ul style="list-style-type: none"> • Ability to conduct research and identify credible sources of information on pricing and costs. • Knowledge of the company business model and pricing structure. • Ability to translate information on pricing and costs to business performance. 	<ul style="list-style-type: none"> • Utilizes mathematical formulas and processes and summarizes and translates mathematical data. • Reconciles daily receipts and payments; performs routine recordkeeping. • Draws upon experience and prior knowledge and interprets and applies new knowledge and experience. • Identifies facts, principles, problems; applies rules and principles to procedure and uses logic to draw conclusions. • Applies appropriate principles to situations; uses previous training and experience to predict outcomes and uses imagination to visualize events/activities. • Performs basic data entry; utilizes integrated/multiple software; locates information and retrieves stored data.

Customer Service Specialists – Critical Work Function:
E. Close the Sale and Enhance Future Business Opportunities

<i>Key Activity</i> E1 Engage in close-of-sale process to finalize purchase decisions		
Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Company policies and procedures are followed. • Steps are taken to confirm the purchase. • Information provided is accurate. • Customer communications are confirmed to acknowledge issues and ensure understanding of customer issue. • Questions and requests are accurately and thoroughly discussed and purchase options are defined. • Communication is clear, respectful and relevant. • Action items are carried out in a timely manner. • Customer requests are communicated to supervisor or advice is solicited from appropriate departmental staff when necessary to meet customer needs. 	<ul style="list-style-type: none"> • Knowledge of the company-approved closing procedures to influence purchasing decisions. • Knowledge of paraphrasing and active listening techniques. • Knowledge of company policies and procedures regarding communication with customers. • Ability to determine when and how to consult with appropriate departmental staff and escalate when necessary. 	<ul style="list-style-type: none"> • Demonstrates sensitivity to customer concerns and complaints; analyzes customer needs and demonstrates commitment to customer; relates to customer fears and concerns; obtains additional resources to meet customer needs. • Listens attentively, confirms information and interprets, clarifies and influences communication. • Performs assigned tasks; works with minimal supervision; pays attention to details; demonstrates enthusiasm, optimism and initiative. • Responds appropriately to others; willingly helps others and establishes rapport with co-workers and customers; modifies behavior to environment; shows understanding and empathy for others. • Actively participates in team activities and assists team members; demonstrates commitment and works to improve team skills.





Key Activity E2 Close and confirm sale with customer		
Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Judgments take both verbal signals and body language into consideration. • Judgments about customer intentions (e.g., whether they are ready to complete a sale, whether they will definitely not make a purchase) are accurate. • 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 the sales process. • 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 encouraged to shop again with the company, if the sale is unsuccessful. • Suggestion to complete the sale is made at appropriate time. 	<ul style="list-style-type: none"> • Ability to communicate cost/benefits/value to customer based on expectations and needs. • Ability to help customer select from alternative solutions that will meet a customer’s needs. • Knowledge of relevant sales procedures. • Ability to negotiate agreements with customers based on company policies. • Ability to use appropriate selling techniques, based on company policies, in order to complete the sale. • Knowledge of complementary and promotional products and services. • Ability to overcome customer’s objections when making a sale or serving a customer. • Skill in responding to exceptional situations (e.g., requests to bargain for a product when it is typically sold at a fixed price). • Knowledge of company policies regarding closing and documenting the sale. 	<ul style="list-style-type: none"> • Listens attentively, confirms information and interprets, clarifies and influences communication. • Communications appropriate messages, presents complex ideas and information; analyzes individual response; poses critical questions. • Paraphrases/summarizes existing ideas; demonstrates creative thinking process while problem solving and develops creative solutions. • Identifies facts, principles, problems; applies rules and principles to procedure and uses logic to draw conclusions. • Starts on time; performs a given set of tasks, efficiently manages time, adjusts schedule as required by supervisor and prioritizes daily tasks. • Understands negotiation process; identifies conflicts; demonstrates composure; interprets complaints and concerns.

Key Activity
E3
Handle sales transactions

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • All paperwork is completed accurately and submitted in a timely manner. • 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 and returns (e.g., personal checks, credit cards, etc.) are provided to customer. • Merchandise is properly handled for the customer (e.g., deactivate security, remove ink tags, and provide boxes, bags). • Customer receives a gesture of appreciation (e.g., thank you, complimentary gift, invitation to come back soon). • 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. 	<ul style="list-style-type: none"> • Knowledge of how to handle business transactions when equipment and tools are inoperable. • Ability to operate point-of-sale equipment. • Knowledge of the steps in the sales transaction. • Knowledge of documentation requirements for the sales transaction. • Knowledge of company policies regarding payment. • Ability to deactivate security devices. • Knowledge of information and materials to be provided to customer as a part of the sales transaction. • Knowledge of return policies and procedures. 	<ul style="list-style-type: none"> • Utilizes mathematical formulas and processes and summarizes and translates mathematical data. • Understands technology applications and follows proper procedures; understands the operation/interaction. • Follows maintenance procedures, identifies symptoms and corrects failures. • Demonstrates honesty and trustworthiness; accepts responsibility for own behavior; demonstrates commitment to personal improvement and recommends ethical course of action. • Reconciles daily receipts and payments; performs routine recordkeeping. • Maintains, acquires and distributes job specific supplies and equipment



Key Activity

E4

Cross-sell and up-sell other products and services

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Clear, accurate and complete explanations of products or services are provided to customers as appropriate. • Information about the complete range of products or services appropriate for the customer is provided. • Information about how additional products and services may be necessary or desirable is offered. • Research protocols are followed and are completed in a timely manner. • When serving customers in-person, on the phone or electronically, systems are comfortably and competently utilized. • Supplemental documentation or resources (brochures, links, etc.) are provided when applicable. • Effective written and verbal communications are polite, clear and completed in a timely manner. • Communications are carried out with correct grammar and proper use of terminology, appropriate to the audience. • Company policies and procedures regarding cross-selling and up-selling are followed. • Customer requests are referred or advice is solicited from appropriate departmental staff when necessary to meet customer needs. 	<ul style="list-style-type: none"> • Knowledge of complementary and promotional products and services. • Knowledge of the company products and services lines including benefits to customers—how they work, how much they cost, service policies, warranties, follow-up commitments, etc. • Ability to use appropriate selling techniques, based on company policies in order to complete the sale. • Knowledge of research protocols and ability to use them efficiently. • Knowledge of supplemental documentation and resources available and procedures for providing them to customers. • Knowledge of company policies and procedures regarding cross-selling and up-selling. • Ability to determine when and how to refer customer requests and consult with appropriate departmental staff. • Knowledge of credible sources of information. 	<ul style="list-style-type: none"> • Applies rules and principles to the situation; gathers information and analyzes the situation and information. • Communications appropriate messages, presents complex ideas and information; analyzes individual response; poses critical questions. • Performs basic computations; records and interprets numerical data. • Interprets information and applies processes to new information. • Applies appropriate principles to situations; uses previous training and experience to predict outcomes and uses imagination to visualize events/activities. • Performs assigned tasks; works with minimal supervision; pays attention to details; demonstrates enthusiasm, optimism and initiative. • Responds assertively and defends own beliefs and viewpoints; accepts constructive criticism and accepts responsibility for own behavior.



Key Activity

E5

Engage in post-sale communications and activities

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Necessary documentation is provided post sale. • Customers are signed up for email or notification lists. • Customers are informed about how to sign up for email lists, newsletters, etc. • Customers are encouraged to provide feedback in accordance with company policies and procedures. • Incentives for feedback are clearly communicated. • When applicable, customers are encouraged to sign up for the online store/apps. 	<ul style="list-style-type: none"> • Knowledge of smart devices/ mobile devices. • Knowledge of social networking for businesses. • Knowledge of the procedures to sign up for and use apps and online store. • Ability to generate repeat business. • Ability to elicit feedback from customers. • Knowledge of feedback incentive programs provided by the company. • Knowledge of sampling strategies and programs. • Knowledge of post-sale documentation. • Knowledge of procedures for signing up customers for lists, newsletters, etc. • Skill in responding to exceptional situations (e.g., customer finds the item at a lower price and asks it to be met). 	<ul style="list-style-type: none"> • Adheres to standards; encourages others to adopt new concepts; demonstrates commitment to excellence; leads by example; motivates others to extend their capabilities and displays enthusiasm and positive attitudes. • Understands technology applications and follows proper procedures; understands the operation/interaction. • Interprets information and applies processes to new information. • Demonstrates sensitivity to customer concerns and complaints; analyzes customer needs and demonstrates commitment to customer; relates to customer fears and concerns; obtains additional resources to meet customer needs. • Communications appropriate messages, presents complex ideas and information; analyzes individual response; poses critical questions.



Customer Service Specialists – Critical Work Function:
F. Ensure a Safe and Secure Work Environment



<i>Key Activity</i> F1 Implement safety procedures and training to ensure personal safety of customers, guests, co-workers and self		
Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Safety and sanitation policies and procedures and all applicable laws and regulations are supported and followed. • As required, safety training is attended with full participation. • Safety violations are recorded and filed with appropriate offices in accordance with company policies and in a timely manner. • Hazard and injury prevention practices are followed. • Illegal and inappropriate behaviors are avoided and reported. • Work environment is scanned for potential hazards on a regular basis. • Policies of bio-hazards are thoroughly followed. • Potential hazards are communicated to appropriate personnel effectively and in a timely manner. 	<ul style="list-style-type: none"> • Ability to identify unsafe conditions. • Knowledge of safety, sanitation and bio-hazard laws and regulations. • Knowledge of safety training requirements. • Knowledge of procedures for reporting safety violations and illegal activities. • Knowledge of ethical guidelines and company policies and legal consequences related to aiding or participating in illegal or inappropriate behavior. • Knowledge of location of safety instruction manuals, guides and equipment and how to use them. • Knowledge of ergonomic needs and injury prevention practices. 	<ul style="list-style-type: none"> • Actively participates in team activities and assists team members; demonstrates commitment and works to improve team skills. • Maintains self-control; demonstrates commitment to self-improvement and applies self-management skills. • Maintains, acquires and distributes job specific supplies and equipment. • Identifies relevant details, facts, and specifications; follow set of instructions; probes to gain knowledge and qualifies/analyzes information. • Draws upon experience and prior knowledge and interprets and applies new knowledge and experience.

<p style="text-align: center;"><i>Key Activity</i></p> <p style="text-align: center;">F2</p> <p style="text-align: center;">Implement security policies/procedures to provide data confidentiality and security for customers and co-workers</p>		
Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Proper protocols regarding access to customer information are followed. • Company policies regarding information assurance are followed. • Breaches of customer/employee/company confidentiality and company policy are promptly and accurately reported to appropriate personnel. • Suspicious or illegal behavior on the part of customers or employees is promptly and accurately reported to appropriate personnel. • Security and confidentiality of customer information is ensured. • Ethical standards and guidelines are followed. • Discussion of confidential customer information is avoided at all times unless required to serve the customer. 	<ul style="list-style-type: none"> • Knowledge of company policies regarding deterring and preventing unauthorized access to, use or theft of property or resources. • Knowledge of privacy laws and company standards for obtaining, using and protecting information obtained from a customer or another employee. • Knowledge of reporting requirements and procedures regarding breaches of customer confidentiality and company security policy. • Ability to identify suspicious behavior. • Knowledge of ethical standards and guidelines, company policies and legal consequences related to aiding or participating in illegal or inappropriate behavior. 	<ul style="list-style-type: none"> • Demonstrates honesty and trustworthiness; accepts responsibility for own behavior; demonstrates commitment to personal improvement and recommends ethical course of action. • Collects data, identifies system discrepancies and monitors system performance. • Understands technology applications and follows proper procedures; understands the operation/interaction. • Performs basic data entry; utilizes integrated/multiple software; locates information and retrieves stored data.





<p style="text-align: center;"><i>Key Activity</i> F3 Implement security policies/procedures to minimize chance of loss</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Company policies and procedures regarding loss prevention are followed. • Suspicious and illegal behavior on the part of customers or employees is promptly and accurately reported to appropriate personnel. • Security procedures such as regular inspections are carried out in an effective manner. 	<ul style="list-style-type: none"> • Knowledge of company policies and procedures regarding loss prevention. • Knowledge of shop-lifting prevention measures. • Knowledge of ethical guidelines and company policies and legal consequences related to aiding or participating in illegal or inappropriate behavior. • Ability to identify suspicious behavior on the part of customers or employees. • Knowledge of location of loss prevention instruction manuals and guides and how to use them. • Ability to carry out loss prevention measures. 	<ul style="list-style-type: none"> • Identifies relevant details, facts, and specifications; follow set of instructions; probes to gain knowledge and qualifies/analyzes information. • Performs assigned tasks; works with minimal supervision; pays attention to details; demonstrates enthusiasm, optimism and initiative. • Collects data, identifies system discrepancies and monitors system performance. • Understands continuous improvement process; suggests system modifications and improvements. • Understands system principles and terminology; understands the system organization/hierarchy; follows processes and procedures and responds to system demands.

Key Activity

F4

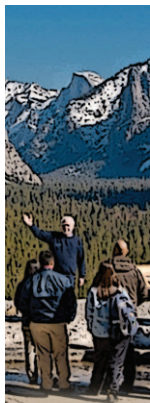
Identify and report unsafe conditions and take corrective actions

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Conditions that present a threat to health and safety are corrected and documented immediately where possible and, if not, identified and reported. • Appropriate parties are consulted about corrective actions. • Follow-up procedures are conducted and documented 	<ul style="list-style-type: none"> • Ability to identify unsafe conditions. • Knowledge of corrective actions. • Ability to implement corrective actions. • Knowledge of documentation and reporting procedures for unsafe conditions. • General knowledge of roles and responsibilities of offices, organizations and personnel at the company. 	<ul style="list-style-type: none"> • Recognizes job tasks, may analyze and distribute work assignments. • Actively participates in team activities and assists team members; demonstrates commitment and works to improve team skills. • Models proper performance and attitudes; identifies training needs; conducts task specific training and coaches others to apply related concepts. • Performs assigned tasks; works with minimal supervision; pays attention to details; demonstrates enthusiasm, optimism and initiative. • Responds assertively and defends own beliefs and viewpoints; accepts constructive criticism and accepts responsibility for own behavior.



Key Activity
F5
Participate in emergency drills

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Emergency response complies with company and regulatory policies and procedures. • Full participation is demonstrated. 	<ul style="list-style-type: none"> • Knowledge of emergency policies and procedures. • Knowledge of emergency response protocols. • Knowledge of location of emergency phone numbers and address/locations within facilities. 	<ul style="list-style-type: none"> • Actively participates in team activities and assists team members; demonstrates commitment and works to improve team skills. • Models proper performance and attitudes; identifies training needs; conducts task specific training and coaches others to apply related concepts. • Draws upon experience and prior knowledge and interprets and applies new knowledge and experience. • Listens attentively, confirms information and interprets, clarifies and influences communication.

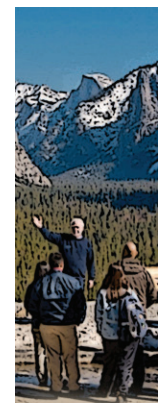


Key Activity

F6

Respond to emergency situations and needs

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none">• The emergency situation is accurately assessed.• Company policies and procedures are followed regarding emergency situations.• The situation is clearly communicated in a timely manner to appropriate personnel.	<ul style="list-style-type: none">• Knowledge of company policies and procedures regarding emergency situations.• Knowledge of types of emergency situations.• Knowledge of emergency terminology.	<ul style="list-style-type: none">• Adheres to standards; encourages others to adopt new concepts; demonstrates commitment to excellence; leads by example; motivates others to extend their capabilities and displays enthusiasm and positive attitudes.• Identifies relevant details, facts, and specifications; follow set of instructions; probes to gain knowledge and qualifies/analyzes information.• Performs assigned tasks; works with minimal supervision; pays attention to details; demonstrates enthusiasm, optimism and initiative.• Draws upon experience and prior knowledge and interprets and applies new knowledge and experience.• Applies rules and principles to the situation; gathers information and analyzes the situation and information.



Customer Service Specialists – Critical Work Function:
G. Perform Administrative and Customer Support Functions



<p style="text-align: center;"><i>Key Activity</i> G1 Manage and protect data on customer accounts, interactions and transactions</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Documentation is accurate and complete. • Documentation is filed in the proper location. • Records are submitted in a timely manner to appropriate personnel and departments. • Records are maintained in accordance with policies. • Security and retention protocols are accurately followed. • Information is completely verified with customer. 	<ul style="list-style-type: none"> • Knowledge of and ability to use company computer system. • Knowledge of reporting requirements. • Knowledge of policies regarding documentation and records. • Knowledge of security and retention protocols. • Knowledge of verification procedures. 	<ul style="list-style-type: none"> • Understands technology applications and follows proper procedures; understands the operation/interaction. • Selects and obtains information relevant to the task; predicts outcomes and analyzes data. • Performs basic data entry; utilizes integrated/multiple software; locates information and retrieves stored data. • Demonstrates honesty and trustworthiness; accepts responsibility for own behavior; demonstrates commitment to personal improvement and recommends ethical course of action. • Draws upon experience and prior knowledge and interprets and applies new knowledge and experience.

Key Activity

G2

Communicate and coordinate with internal departments and vendors

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Information provided to internal departments is timely, accurate and appropriate to the situation. • Customer issues are accurately and thoroughly discussed and solutions are defined. • Oral and written communication is concise, courteous and completed in a timely manner. • Proper terminology is used to communicate with internal and external organizations and personnel. • Appropriate staff members are informed of customer interactions, requests and complaints as required. • Company policies and procedures are clearly communicated and supported. 	<ul style="list-style-type: none"> • Knowledge of other services, departments and vendors and their roles regarding delivery of products or services. • Knowledge of industry, department, vendor and personnel terminology. • Knowledge of company policies regarding communication with other services, departments, and vendors. • Ability to locate and use communication devices. • Knowledge of procedures to identify and report customer issues. • Knowledge of credible sources of information. 	<ul style="list-style-type: none"> • Maintains self-control; demonstrates commitment to self-improvement and applies self-management skills. • Completes forms, writes simple documents and summarized/paraphrases information. • Responds appropriately to others; willingly helps others and establishes rapport with co-workers and customers; modifies behavior to environment; shows understanding and empathy for others. • Actively participates in team activities and assists team members; demonstrates commitment and works to improve team skills. • Knows available technology and understands requirements of the task and technological results.





<p style="text-align: center;"><i>Key Activity</i> G3 Review and adhere to staffing and scheduling plan</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Scheduling plan is followed and all shifts are started on time. • Absences are minimized, and supervisor is informed as early as possible when absence is required. • Company policies and procedures are followed regarding staffing schedule. 	<ul style="list-style-type: none"> • Knowledge of company staffing and scheduling plan, policies and procedures. 	<ul style="list-style-type: none"> • Maintains self control; demonstrates commitment to self-improvement and applies self-management skills. • Performs assigned tasks; works with minimal supervision; pays attention to details; demonstrates enthusiasm, optimism and initiative. • Starts on time; performs a given set of tasks, efficiently manages time, adjusts schedule as required by supervisor and prioritizes daily tasks. • Demonstrates honesty and trustworthiness; accepts responsibility for own behavior; demonstrates commitment to personal improvement and recommends ethical course of action. • Completes forms, writes simple documents and summarized/paraphrases information.

Key Activity
G4

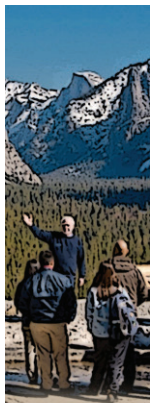
Document, maintain and protect internal company information

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Proper protocols regarding access to company information are followed. • Company policies regarding information assurance are followed. • Breaches of company confidentiality and company policy are promptly and accurately reported to appropriate personnel. • Security and confidentiality of company information is ensured. • Ethical standards and guidelines are followed. • Discussion of confidential company information is avoided at all times unless approved. 	<ul style="list-style-type: none"> • Knowledge of company policies regarding deterring and preventing unauthorized access to, use or theft of property or resources. • Knowledge of privacy laws and company standards for obtaining, using and protecting information obtained from a customer or another employee. • Knowledge of reporting requirements and procedures regarding breaches of company confidentiality and company security policy. • Ability to identify suspicious behavior. • Knowledge of ethical standards and guidelines, company policies and legal consequences related to aiding or participating in illegal or inappropriate behavior. 	<ul style="list-style-type: none"> • Demonstrates honesty and trustworthiness; accepts responsibility for own behavior; demonstrates commitment to personal improvement and recommends ethical course of action. • Models proper performance and attitudes; identifies training needs; conducts task specific training and coaches others to apply related concepts. • Adheres to standards; encourages others to adopt new concepts; demonstrates commitment to excellence; leads by example; motivates others to extend their capabilities and displays enthusiasm and positive attitudes. • Performs assigned tasks; works with minimal supervision; pays attention to details; demonstrates enthusiasm, optimism and initiative. • Applies appropriate principles to situations; uses previous training and experience to predict outcomes and uses imagination to visualize events/activities.



Key Activity
G5
Monitor inventory

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Products are returned to the correct locations. • Company inventory policies and procedures are followed with respect to product stocking. • Inventory, when taken, is accurate. • Inventory activities are carried out safely. • All discrepancies are communicated to proper parties. • Damaged and out-of-date products are handled in accordance with company policies and procedures. • Stock rooms are kept organized. 	<ul style="list-style-type: none"> • Knowledge of company policies regarding inventory control, out-of-date products and record keeping procedures. • Ability to use computerized inventory databases and smart devices. • Knowledge of the security procedures for inventory control to reduce loss. • Knowledge of special handling requirements and procedures for high value items. • Knowledge of the inventory in stock. • Knowledge of how to verify items to ensure that the item on the paper work is the same item that was received. • Skill in reconciling inventory counts. • Knowledge of the safety procedures used in taking inventory. • Knowledge of how to conduct an on-site inventory. • Knowledge of the minimum inventory levels. • Knowledge of the stock room and its organizational structure. 	<ul style="list-style-type: none"> • Demonstrates honesty and trustworthiness; accepts responsibility for own behavior; demonstrates commitment to personal improvement and recommends ethical course of action. • Performs basic data entry; utilizes integrated/multiple software; locates information and retrieves stored data. • Collects data, identifies system discrepancies and monitors system performance. • Interprets information and applies processes to new information. • Performs basic computations; records and interprets numerical data.

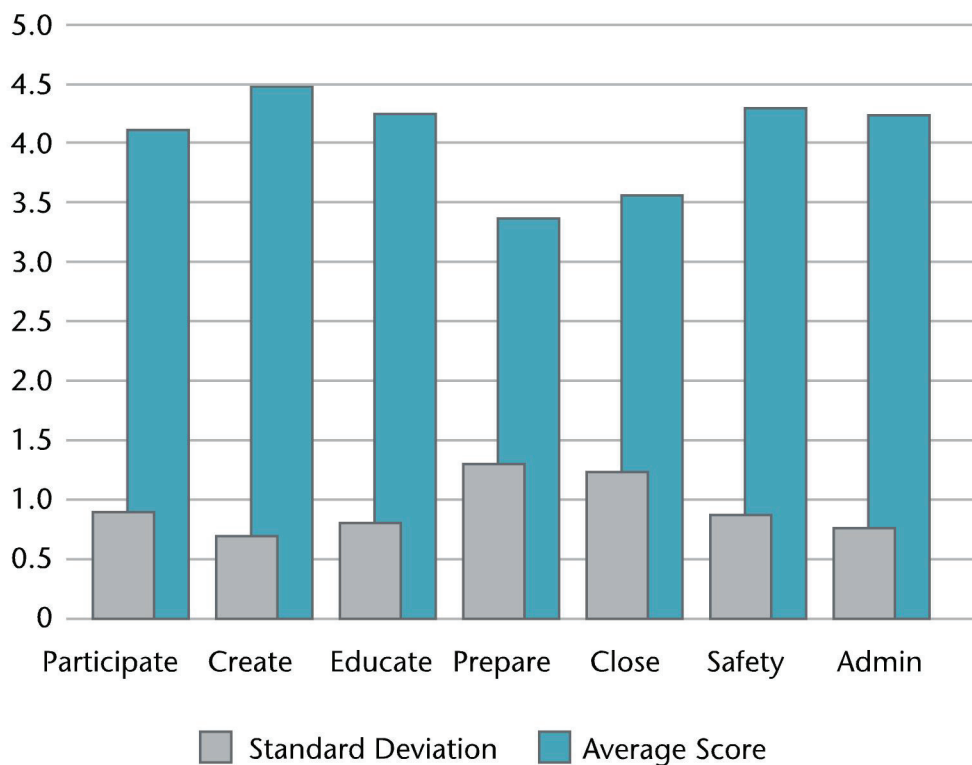


Verification Survey Results

Figure 2 shows the average importance and standard deviation (variation) among each function, rated on a scale from 0 (not important) to 4 (critical). These results generally verify that the critical work functions included in the skill standards document are relevant to the industry at large. The results show that **Critical Work Function B, Create a Positive and Customized Customer experience and Relationship** (4.50) and **Critical Work Function F, Ensure a Safe and Secure Work Environment** (4.35), had the highest average scores among all critical work functions.

The lowest-rated critical work function was **D, Prepare for Selling** (3.42). The standard deviation scores for all items show a modest amount of variation among respondents. It should be noted that no critical work function had an average value of less than 3.42, which confirms that respondents viewed all six of the critical work functions as important or very important to the work of retail, hospitality and tourism customer service specialists.

Figure 2.
**Customer Service Specialist:
Importance of Critical Work Functions**





72



Scenarios: Customer Service Specialists



© iStock



73

Routine Scenario

I work at a coffee shop, and when I arrive at work, I check in with my supervisor to get my work assignment. Today, I'll be working at the front of the store to help customers, make sure there is enough coffee, and stock pastries. If I have extra time, I'll do a "spin" around the coffee shop, wiping off tables, checking the presentation of merchandise, and checking the temperature of the milk at the carafe table.

The day ends by communicating with the next shift team members to let them know about any issues. If the coffee shop is closing, I'll make sure the shop and equipment are cleaned and close the till. The last step of the day is to have a closing conversation with the supervisor to make sure everything is complete.

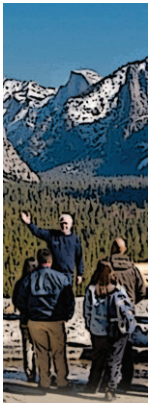


Table 3.
**Primary Tasks and Functions in Routine Scenario:
 Customer Service Specialists**

Critical Work Functions	Key Activities						
A. Participate in continuous learning and improvement	A1 Participate in company provided training, continuing education and follow-up to upgrade professional knowledge and skills	A2 Review written and multimedia material pertaining to products or services provided by employee's company, producer or trade organization	A3 Test and sample products or services	A4 Study competitors' products or services, including marketing materials (ads, fliers, TV commercials, web pages, etc.)	A5 Acquire and maintain industry certifications	A6 Achieve and maintain proficiency in current and new technologies, products and work processes	A7 Identify and communicate potential improvement ideas for the company
B. Create a positive and customized customer experience and relationship	B1 Engage and interact with the customer to establish personalized relationship	B2 Gather information from customer to assess and anticipate customer's current mood, needs and knowledge of products or services	B3 Respond to customer's needs, comments, questions and provide ongoing support	B4 Determine customer's price considerations	B5 Coordinate customer requests with designated vendors and other service providers	B6 Personally initiate, facilitate and attempt to resolve customer issues	B7 Provide extraordinary service to locate and deliver needed personal services and unique or hard-to-find products and services to customers
C. Educate and support the customer and skills	C1 Explain and demonstrate products or services and prices to customer	C2 Identify and offer alternative or additional products and services and/or change-out options for replacement to the customer (if applicable)	C3 Inform customer about service policies (returns, warranties, guarantees, service plans)	C4 Solicit supervisor or co-worker support and advice when necessary to meet customer needs	C5 Provide support for pre- and post-sale transactions with customers		
D. Prepare for selling	D1 Review future sales goals	D2 Review and implement strategy for pricing and selling products or services	D3 Maintain, grow, and build long term relationships with customers	D4 Monitor and review information on customer and industry trends, products and services from materials, events, or the environment	D5 Maintain personal appearance and appearance of desk/display/merchandising/work environment and store	D6 Study, consider and incorporate the financial impact of pricing and costs on company profitability	
E. Close the sale and enhance future business opportunities	E1 Engage in close-of-sale process to finalize purchase decisions	E2 Close and confirm sale with customer	E3 Handle sales transactions	E4 Cross sell and up-sell other products and services	E5 Engage in post-sale communications and activities		
F. Ensure a safe and secure work environment	F1 Implement safety procedures and training to ensure personal safety of customers, guests, co-workers and self	F2 Implement security policies / procedures to provide data confidentiality and security for customers and co-workers	F3 Implement security policies/ procedures to minimize chance of loss	F4 Identify and report unsafe conditions and take corrective actions	F5 Participate in emergency drills	F6 Respond to emergency situations and needs	
G. Perform administrative and customer support functions	G1 Manage and protect data on customer accounts, interactions and transactions	G2 Communicate and coordinate with internal departments and vendors	G3 Review and adhere to staffing and scheduling plan	G4 Document, maintain and protect internal company information	G5 Monitor inventory		



Crisis Scenario

One aspect of working in retail, hospitality and tourism is loss prevention. At least once per month, customers take merchandise without paying for it. I can't always see it coming, and sometimes it is done by a regular customer. This activity puts those of us who are in customer service in an awkward position. I must ask the person what they're doing without accusing them. If I don't confront the situation, I'm enabling the theft, and this comes back to me in my role as a front-line employee. The most difficult situations are those in which the individual is elderly (may be on a fixed income) or the person takes offense at being asked.

To succeed in this exchange, I rely on my confidence and maturity. I make an effort to have a pleasant demeanor, and to be diplomatic and tactful. I'm also safety minded, and rely on the customer service team to provide backup if needed. Even though it is difficult, I engage with the customer with the goal of having a productive exchange about the need to pay for merchandise, which usually improves the situation.



Table 4.
**Primary Tasks and Functions in Crisis Scenario:
 Customer Service Specialists**

Critical Work Functions	Key Activities						
A. Participate in continuous learning and improvement	A1 Participate in company provided training, continuing education and follow-up to upgrade professional knowledge and skills	A2 Review written and multimedia material pertaining to products or services provided by employee's company, producer or trade organization	A3 Test and sample products or services	A4 Study competitors' products or services, including marketing materials (ads, fliers, TV commercials, web pages, etc.)	A5 Acquire and maintain industry certifications	A6 Achieve and maintain proficiency in current and new technologies, products and work processes	A7 Identify and communicate potential improvement ideas for the company
B. Create a positive and customized customer experience and relationship	B1 Engage and interact with the customer to establish personalized relationship	B2 Gather information from customer to assess and anticipate customer's current mood, needs and knowledge of products or services	B3 Respond to customer's needs, comments, questions and provide ongoing support	B4 Determine customer's price considerations	B5 Coordinate customer requests with designated vendors and other service providers	B6 Personally initiate, facilitate and attempt to resolve customer issues	B7 Provide extraordinary service to locate and deliver needed personal services and unique or hard-to-find products and services to customers
C. Educate and support the customer and skills	C1 Explain and demonstrate products or services and prices to customer	C2 Identify and offer alternative or additional products and services and/or change-out options for replacement to the customer (if applicable)	C3 Inform customer about service policies (returns, warranties, guarantees, service plans)	C4 Solicit supervisor or co-worker support and advice when necessary to meet customer needs	C5 Provide support for pre- and post-sale transactions with customers		
D. Prepare for selling	D1 Review future sales goals	D2 Review and implement strategy for pricing and selling products or services	D3 Maintain, grow, and build long term relationships with customers	D4 Monitor and review information on customer and industry trends, products and services from materials, events, or the environment	D5 Maintain personal appearance and appearance of desk/display/merchandising/work environment and store	D6 Study, consider and incorporate the financial impact of pricing and costs on company profitability	
E. Close the sale and enhance future business opportunities	E1 Engage in close-of-sale process to finalize purchase decisions	E2 Close and confirm sale with customer	E3 Handle sales transactions	E4 Cross sell and up-sell other products and services	E5 Engage in post-sale communications and activities		
F. Ensure a safe and secure work environment	F1 Implement safety procedures and training to ensure personal safety of customers, guests, co-workers and self	F2 Implement security policies / procedures to provide data confidentiality and security for customers and co-workers	F3 Implement security policies/ procedures to minimize chance of loss	F4 Identify and report unsafe conditions and take corrective actions	F5 Participate in emergency drills	F6 Respond to emergency situations and needs	
G. Perform administrative and customer support functions	G1 Manage and protect data on customer accounts, interactions and transactions	G2 Communicate and coordinate with internal departments and vendors	G3 Review and adhere to staffing and scheduling plan	G4 Document, maintain and protect internal company information	G5 Monitor inventory		



Long-Term Scenario

The company formed a committee to improve guest service across 14 locations, and I'm on that committee. Management gathered information on the service delivered from each position, which we used for ongoing training and to recognize outstanding guest service. The committee rotated to all of the stores to monitor guest service at all locations and to attain consistent quality across the company. The committee meets once per month to gather information and share ideas about promoting great guest service. At the end of the year, all 800 employees attend a training on improving guest service and rewarding employees who demonstrate excellence. In this way, we engage in best practices and continuous improvement of guest service at all locations.

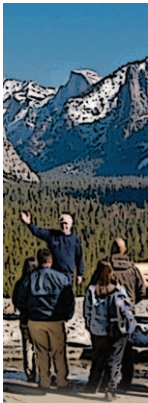


Table 5.
Primary Tasks and Functions in Long-Term Scenario:
Customer Service Specialists

Critical Work Functions	Key Activities						
A. Participate in continuous learning and improvement	A1 Participate in company provided training, continuing education and follow-up to upgrade professional knowledge and skills	A2 Review written and multimedia material pertaining to products or services provided by employee's company, producer or trade organization	A3 Test and sample products or services	A4 Study competitors' products or services, including marketing materials (ads, fliers, TV commercials, web pages, etc.)	A5 Acquire and maintain industry certifications	A6 Achieve and maintain proficiency in current and new technologies, products and work processes	A7 Identify and communicate potential improvement ideas for the company
B. Create a positive and customized customer experience and relationship	B1 Engage and interact with the customer to establish personalized relationship	B2 Gather information from customer to assess and anticipate customer's current mood, needs and knowledge of products or services	B3 Respond to customer's needs, comments, questions and provide ongoing support	B4 Determine customer's price considerations	B5 Coordinate customer requests with designated vendors and other service providers	B6 Personally initiate, facilitate and attempt to resolve customer issues	B7 Provide extraordinary service to locate and deliver needed personal services and unique or hard-to-find products and services to customers
C. Educate and support the customer and skills	C1 Explain and demonstrate products or services and prices to customer	C2 Identify and offer alternative or additional products and services and/or change-out options for replacement to the customer (if applicable)	C3 Inform customer about service policies (returns, warranties, guarantees, service plans)	C4 Solicit supervisor or co-worker support and advice when necessary to meet customer needs	C5 Provide support for pre- and post-sale transactions with customers		
D. Prepare for selling	D1 Review future sales goals	D2 Review and implement strategy for pricing and selling products or services	D3 Maintain, grow, and build long term relationships with customers	D4 Monitor and review information on customer and industry trends, products and services from materials, events, or the environment	D5 Maintain personal appearance and appearance of desk/display/merchandising/work environment and store	D6 Study, consider and incorporate the financial impact of pricing and costs on company profitability	
E. Close the sale and enhance future business opportunities	E1 Engage in close-of-sale process to finalize purchase decisions	E2 Close and confirm sale with customer	E3 Handle sales transactions	E4 Cross sell and up-sell other products and services	E5 Engage in post-sale communications and activities		
F. Ensure a safe and secure work environment	F1 Implement safety procedures and training to ensure personal safety of customers, guests, co-workers and self	F2 Implement security policies / procedures to provide data confidentiality and security for customers and co-workers	F3 Implement security policies/ procedures to minimize chance of loss	F4 Identify and report unsafe conditions and take corrective actions	F5 Participate in emergency drills	F6 Respond to emergency situations and needs	
G. Perform administrative and customer support functions	G1 Manage and protect data on customer accounts, interactions and transactions	G2 Communicate and coordinate with internal departments and vendors	G3 Review and adhere to staffing and scheduling plan	G4 Document, maintain and protect internal company information	G5 Monitor inventory		





80



Skill Standards Results: Customer Service Supervisors



© iStock



Customer Service Supervisor Sample Job Description

Summary

The Customer Service Supervisor position is responsible for planning, organizing, and directing associates to deliver excellent and high-standard customer service support to the organization's customers.

Primary Duties

A customer service supervisor may perform any combination of the following tasks:

- Provide feedback and follow up on the performance of customer service specialists.
- Provide recognition and motivation for the team of customer service specialists.
- Educate team to drive sales through using suggestive selling skills and promotions.
- Maintain records in an accurate and timely manner
- Execute store contests and creating incentives to encourage associates and increase sales.
- Support Customer Service Specialists in taking action to resolve customer concerns and complaints.
- Screen Customer Service Specialist candidates and conduct interviews as needed.
- Complete new hire paperwork, and providing functional and orientation training for all potential customer service associates.
- Execute all safety and emergency operating procedures and processes as appropriate.
- Practice and ensure compliance with all the organization's policies and procedures.
- Supervise and train associates in customer service, safety and loss prevention policies.

Education and Qualifications

Typically requires two to four years of successful customer service experience in addition to an associate's degree from an accredited institution. Strong communication (oral and written), computer and problem solving skills are needed.



Definitions

Each chart in the following skill standards template contains the following components:

Critical Work Functions

Critical work functions represent the general tasks that a fully competent Retail, Hospitality and Tourism Customer Service Supervisor with at least one year of experience would perform.

Employability Skills

Employability skills are basic academic and personal skills that are needed to build more advanced competencies. They are required by all workers to obtain meaningful work and to participate in the modern workplace.

Key Activities

Key activities are the tasks related to the critical work functions, composed of work activities that are measurable and observable and that result in a decision, product or service.

Level of Importance

Professionals who are actively working in this occupation rated the level of importance for each critical work function and key activity, ranging from not important to critical. All critical work functions were rated as important, very important or critical.

Performance Indicators

Performance indicators are specific behavioral evidence of a worker's achievement of skills, knowledge and tasks. Performance indicators provide the standard of performance required to produce the necessary outcomes of key activities, and help answer the question: "How do we know when this key activity is performed well?"

Technical Skills, Knowledge, Abilities and Tools

Technical skills, knowledge, abilities, and tools are those areas of expertise that workers must have in order to perform a given occupational task with excellence. A collection of skills, knowledge, abilities and tools comprise competencies.

- **Skills** refer to proficiency in an applied activity. This activity could be physical, mental or interpersonal in nature.
- **Knowledge** is information and skills acquired through experience or education; the theoretical or practical understanding of a subject.
- **Abilities** are broad human characteristics that result from natural talent, training or experience.
- **Tools** are materials, equipment and implements a worker must be able to use competently to meet the requirements of the job.



Foundational Theories, Concepts and Technologies

Focus group participants indicated for Supervisors, because of the nuanced nature of many of their functions, it is particularly important to have knowledge of underlying theory and concepts.

Foundational business concepts and theories essential to performing functions required of retail, hospitality and tourism customer service supervisors are listed below, and are important supplements to the technical knowledge and skills listed with each key activity.

Business/Management

- Management theory
- Leadership theory
- Basic understanding of business law and regulations: Hipaa, OSHA regulations, tax law, employment law, drugs in the workplace, sexual harassment
- Certifications, especially for food handlers
- Payroll
- How to read basic business documents

Economics/Finance

- Understanding trends in the industry
- Understanding markets and business cycles
- Balancing out registers, reconciling discrepancies

Psychology/Human Behavior

- Understanding personality types'
- Understanding of interpersonal relationships and communication
- Team building
- Understanding the different styles of leadership
- Generational differences in communication preferences

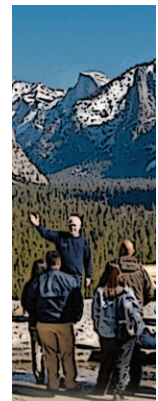


Computer/IT: Types of Facilities with these Systems

- Proprietary IT systems require technical capability to repair registers, game consoles
- What to do if the phones go down
- Basic IT knowledge and basic problem solving
- Use of point-of-sale systems
- Use of email systems
- Use of basic word processing and spread sheet programs
- Use of cloud and other technologies and databases for scheduling, taking orders, etc.
- Using social media to stay current with customers

Communications

- Clear, concise, precise communications
- Communicating structure, roles and expectations to orchestrate customer service
- Active listening
- How to send a proper business email

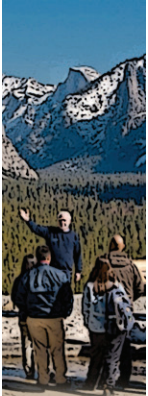




86



Critical Work Functions: Customer Service Supervisors

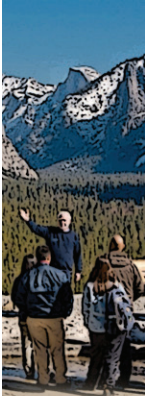


Skill Standards for Customer Service Supervisors

Critical Work Functions	Key Activities		
A. Directly supervise customer service staff	A1 Coordinate and direct activities of staff in the accomplishment of the company mission, performance standards, and objectives	A2 Review productivity reports and provide daily feedback to staff	A3 Manage employee scheduling, personnel records and files
B. Monitor quality, performance and productivity	B1 Ensure performance/ sales goals are met and customer service tasks are completed	B2 Evaluate data to identify systemic and/or individual problems and solutions	B3 Plan, schedule, assign and monitor workload and coordinate work activity
C. Provide training opportunities to staff	C1 Provide and/or schedule sales and service training and technical assistance	C2 Coach and mentor staff	C3 Determine appropriate training and coaching for customer service and sales staff



Key Activities			
A4 Coordinate and communicate with staff from other departments, external partners, and management	A5 Take or support disciplinary/ corrective action as required	A6 Coach and mentor staff	A7 Provide direct customer service as needed to meet demand
B4 Monitor and organize workplace displays, products/ services and environment	B5 Check and verify availability of product	B6 Apply continuous quality improvement principles to ensure customer satisfaction	
C4 Provide support for career enhancement of customer service and sales staff			





Critical Work Functions	Key Activities		
<p>D. Address and resolve challenging customer complaints and issues</p>	<p>D1 Interface with challenging customers and defuse and de-escalate difficult situations; elevate to next level as appropriate</p>	<p>D2 Interpret and explain complex processes, policies and procedures to customers</p>	<p>D3 Assess and anticipate customer attitudes and behaviors about product/ service issues and gaps</p>
<p>E. Pursue professional development and training for skills development</p>	<p>E1 Participate in company-provided training and continuing education</p>	<p>E2 Achieve and maintain proficiency in current and new technologies, management systems and tools</p>	<p>E3 Stay abreast of new products, services, competitors, and industry trends</p>
<p>F. Perform administrative duties</p>	<p>F1 Monitor labor and product</p>	<p>F2 Prepare reports and submit to manager</p>	<p>F3 Document, verify and maintain information and reports</p>
<p>G. Ensure a safe and secure work environment</p>	<p>G1 Implement safety procedures and training to ensure personal safety of customers, guests, co-workers and self</p>	<p>G2 Implement security policies / procedures to provide data confidentiality and security for customers and co-workers (data)</p>	<p>G3 Implement security policies / procedures to minimize chance of loss (property)</p>

Key Activities			
D4 Capture and apply customer feedback on resolution			
E4 Acquire and maintain industry certifications	E5 Serve on committees and other groups to improve performance		
F4 Access and keep current on company policies and procedures, laws and regulations	F5 Order or verify materials	F6 Interview and recommend employees for job openings	
G4 Identify and report unsafe conditions and take corrective actions	G5 Participate in emergency drills	G6 Respond to emergency situations and needs	

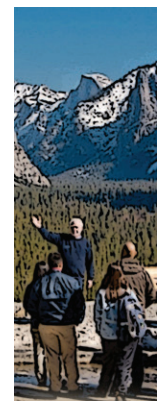


SCANS Survey Results: Customer Service Supervisors

Foundation Skills and Personal Qualities	Key: 1 = Basic Competency Level; 5 = Advanced Competency Level.					Critical Competencies
	1	2	3	4	5	
Basic Skills						
Demonstrates Effective Reading Strategies						Identifies relevant details, facts, and specifications; follow set of instructions; probes to gain knowledge and qualifies/analyzes information.
Demonstrates Effective Writing Strategies						Completes forms, writes simple documents; Summarizes/paraphrases information; Composes/edits correspondence.
Applies Arithmetic Processes						Performs basic computations, interprets numerical data and predicts arithmetic results.
Applies Mathematics Processes						Utilizes mathematical formulas and processes and summarizes and translates mathematical data.
Demonstrates Effective Listening Skills						Interprets, clarifies and influences communication and compares multiple viewpoints.
Demonstrates Effective Speaking Skills						Communications appropriate messages, presents complex ideas and information; analyzes individual response; poses critical questions.
Thinking Skills						
Applies Creative Thinking/Generates Ideas						Demonstrates creative thinking process while problem solving; develops creative solutions and applies them to new situations.
Applies Decision-Making Strategies						Applies rules and principles to the situation, analyzes the situation and information, considers risks and implications, compiles multiple viewpoints and generates alternative solutions.
Recognizes and Solves Problems						Analyzes possible causes; generates/evaluates solutions; devises/implements plan of action.
Demonstrates Visualization						Applies appropriate principles to situations; uses previous training and experience to predict outcomes and visually analyzed relationship between process and procedure.
Knows How to Learn						Interprets and applies new knowledge and experience and analyzes application of learning tools.
Applies Reasoning Skills						Analyzes logic/rule/principle; examines information/data for relevance and accuracy and uses logic to draw conclusions.



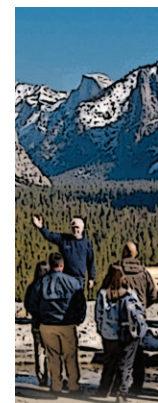
Foundation Skills and Personal Qualities	Key: 1 = Basic Competency Level; 5 = Advanced Competency Level.					Critical Competencies
	1	2	3	4	5	
Personal Qualities						
Demonstrates Responsibility						Pays attention to details, demonstrates initiative, monitors performance standards and follows up on assigned tasks.
Demonstrates Belief in Self Worth						Defends own viewpoints, accepts responsibility for own behavior and understands own impact on others.
Demonstrates Sociability in Groups						Responds appropriately to others; willingly helps others and establishes rapport with co-workers and customers; modifies behavior to environment; shows understanding and empathy for others and encourages cooperation and negotiation.
Demonstrates Self-Management						Demonstrates commitment to self-improvement, applies self-management skills, appropriately modifies goals and aggressively pursues goal attainment.
Demonstrates Integrity/Honesty						Recommends ethical course of action and responsibly challenges unethical practices/decisions.
Management of Resources						
Manages Time						Effectively manages time; prepares and organizes multiple schedules and manages timelines.
Manages Money						Performs routine recordkeeping, reconciles accounts and develops budget proposals.
Manages Materials/Facilities						Maintains inventory, monitors safe and efficient utilization of materials and identifies future material needs.
Manages Human Resources						Analyzes work assignments, assesses individual knowledge and skills, determines workload and monitors performance.





Foundation Skills and Personal Qualities	Key: 1 = Basic Competency Level; 5 = Advanced Competency Level.					Critical Competencies
	1	2	3	4	5	
Management / Use of Information						
Acquires and Evaluates Information						Analyzes data; Integrates multiple items of data; contrasts conflicting data.
Organizes and Maintains Information						Interprets information, applies processes to new information and analyzes organization of information.
Interprets and Communicates Information						Recognizes accuracy of information; interprets information and prepares basic summaries and report; selects methods of communication.
Uses Computers to Process Information						Utilizes integrated software, utilizes networks and manipulates information.
Interpersonal Skills						
Participates as Team Member						Works to improve team skills, encourages team members, assumes responsibility for accomplishing team goals, and resolves conflicts.
Teaches Others						Provides constructive feedback and reinforcement and develops appropriate training procedures.
Serves Customers						Analyzes customer needs; demonstrates commitment to customer; relates to customers fears/concerns; obtains additional resources to meet customer needs and makes exceptional effort on behalf of customer.
Exhibits Leadership						Leads by example, motivates others to extend their capabilities, develops minority/majority views and persuades others to reverse negative attitudes and behaviors.

Foundation Skills and Personal Qualities	Key: 1 = Basic Competency Level; 5 = Advanced Competency Level.					Critical Competencies
	1	2	3	4	5	
Interpersonal Skills (Continued)						
Negotiates Agreements						Moderates discussion, interprets complaints and concerns, analyzes group dynamics, and detects underlying issues.
Works with Diversity						Recognizes the value of diversity and responsibly challenges discriminatory practices and procedures.
Understanding / Management of Systems						
Understands Systems						Understands the system organization and hierarchy, follows processes and procedures, and recognizes the organizational system strengths and weaknesses.
Monitors/Corrects System Performance						Monitors system performance, analyzes system operation, distinguishes trends in performance and diagnoses performance deviations
Improves/ Designs Systems						Determines system components to modify and improve; examines proposed modifications, improvements; analyzes goals and constraints.
Use of Technology						
Selects Appropriate Technology						Knows available technology and understands requirements of the task and technological results.
Applies Technology to Task						Understands technology applications and follows proper procedures; understands the operation/interaction.
Maintains/ Troubleshoots Technology						Follows maintenance procedures, identifies symptoms and corrects failures.



Customer Service Supervisors: Results by Critical Work Function

A. Directly Supervise Customer Service Staff

<p style="text-align: center;"><i>Key Activity</i> A1 Coordinate and direct activities of staff in the accomplishment of the company mission, performance standards and objectives</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Staff conflicts are mediated and coaching is provided. • Staff compliance with company policies and procedures is ensured. • Recognition is provided to staff in an effective manner. • Team cohesion is developed among staff members and maintained as new members are added. • Tools and technologies needed by customer service staff are maintained. • Troubleshooting and problem solving regarding products and company systems is provided to the customer service staff. • Information is disseminated to ensure staff is current with products, services, policies and procedures. • Team vision and goals are continuously communicated to staff members in an effective manner. 	<ul style="list-style-type: none"> • Knowledge of mediation procedures and coaching techniques. • Knowledge of company policies and procedures and ability to support staff to operate in compliance with them. • Knowledge of all resources available in the company recognition program. • Ability to develop a cohesive team and develop team vision and goals. • Knowledge of sources of tools and technologies for the customer service staff. • Knowledge of company products, services and systems. • Ability to work across departments and personnel to solve problems. • Knowledge of credible sources of information regarding products, services, policies and procedures. 	<ul style="list-style-type: none"> • Recognizes accuracy of information; interprets information and prepares basic summaries and report; selects methods of communication. • Communications appropriate messages, presents complex ideas and information; analyzes individual response; poses critical questions. • Responds appropriately to others; willingly helps others and establishes rapport with co-workers and customers; modifies behavior to environment; shows understanding and empathy for others and encourages cooperation and negotiation. • Interprets, clarifies and influences communication and compares multiple viewpoints. • Works to improve team skills, encourages team members, assumes responsibility for accomplishing team goals, and resolves conflicts.



Key Activity
A2

Review productivity reports and provide daily feedback to staff

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Performance and conduct are consistently assessed, and strengths and weaknesses are communicated to direct reports in an effective manner. • Expectations for performance and conduct are clearly and accurately identified and concisely communicated. • Elements of fairness and consistency are applied in the feedback process and in accordance with company policies and procedures. • Areas for improvement are addressed in an effective manner. • Successes are recognized and rewarded. • Feedback is provided in a courteous and respectful manner. • As appropriate, management is informed of performance and conduct issues. • Discretion is exercised when providing employee feedback to maintain confidentiality. 	<ul style="list-style-type: none"> • Knowledge of tasks, objectives and procedures for customer service. • Knowledge of the difference between performance and conduct. • Ability to observe and assess job skill performance and conduct. • Ability to identify clear expectations for customer service performance and conduct. • Knowledge of company policies and procedures regarding feedback to direct reports • Knowledge of all resources available in the company recognition program • Knowledge of disciplinary procedures and policies. 	<ul style="list-style-type: none"> • Provides constructive feedback and reinforcement and develops appropriate training procedures. • Analyzes data; integrates multiple items of data; contrasts conflicting data. • Identifies relevant details, facts, and specifications; follow set of instructions; probes to gain knowledge and qualifies/analyzes information. • Communications appropriate messages, presents complex ideas and information; analyzes individual response; poses critical questions. • Analyzes logic/rule/principle; examines information/data for relevance and accuracy and uses logic to draw conclusions.





<p style="text-align: center;"><i>Key Activity</i> A3 Manage employee scheduling, personnel records and files</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Staff leave is accurately tracked and properly approved. • Accurate timekeeping and attendance records of staff are ensured. • Documentation of employee information is performed according to company policies and procedures and all applicable laws and regulations. • Documents and appropriate files are input into database, filed, or distributed to correct parties. • Files are accurately updated to reflect employee performance and/or conduct. • Documentation of employee information is accurate, legible, succinct and complete and is completed in a timely manner. 	<ul style="list-style-type: none"> • Knowledge of policies, procedures, laws and regulations for documenting employee performance, conduct and work activities. • Knowledge of how documentation is used by other company departments and employees. • Ability to develop and coordinate employees work schedule and personnel records. 	<ul style="list-style-type: none"> • Analyzes work assignments, assesses individual knowledge and skills, determines workload and monitors performance. • Interprets information, applies processes to new information and analyzes organization of information. • Utilizes integrated software, utilizes networks and manipulates information. • Recommends ethical course of action and responsibly challenges unethical practices/decisions. • Understands the system organization and hierarchy, follows processes and procedures, and recognizes the organizational system strengths and weaknesses.

Key Activity

A4

Coordinate and communicate with staff from other departments, external partners and management

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Appropriate staff members and management are informed of events and customer interactions, requests and complaints as required. • Policies, goals and targets are clearly communicated and supported in all communications. • Managers are consulted on personnel and budget matters. • Customer requests and responses are communicated in an accurate, thorough and timely manner. • Recommendations are made in an effective manner to improve company customer service policies and procedures • An open-communication work environment is created. • Leadership meetings are attended. • Customer information is kept confidential and secured in accordance with applicable policies and procedures and laws and regulations. 	<ul style="list-style-type: none"> • Knowledge of company policies, goals and targets. • Ability to determine when and how to consult with manager and co-workers. • Ability to prepare reports and shift to shift documents and communications. • Knowledge of roles, functions and terminology of company departments. • Ability to apply communications strategies and tools. 	<ul style="list-style-type: none"> • Communications appropriate messages, presents complex ideas and information; analyzes individual response; poses critical questions. • Completes forms, writes simple documents; Summarizes/paraphrases information; Composes/edits correspondence. • Analyzes data; integrates multiple items of data; contrasts conflicting data. • Utilizes mathematical formulas and processes and summarizes and translates mathematical data. • Leads by example, motivates others to extend their capabilities, develops minority/majority views and persuades others to reverse negative attitudes and behaviors.





<p style="text-align: center;"><i>Key Activity</i> A5 Take or support disciplinary/corrective action as required</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Serious violations of performance or conduct are communicated to the manager. • Expectations of the manager are obtained regarding supervision of employees. • Expectations for performance and conduct of subordinates are clearly and accurately identified and concisely communicated. • Disciplinary action is appropriate to the situation and in accordance with company policies and procedures. • Disciplinary actions are appropriately documented and adhere to all laws and regulations. 	<ul style="list-style-type: none"> • Knowledge of disciplinary actions available based on company policies and procedures. • Ability to discern which violations need to be reported to manager. • Ability to identify and communicate expectations and consequences for unacceptable performance and conduct. • Knowledge of laws and regulations concerning disciplinary action. 	<ul style="list-style-type: none"> • Interprets and applies new knowledge and experience and analyzes application of learning tools. • Applies rules and principles to the situation, analyzes the situation and information, considers risks and implications, compiles multiple viewpoints and generates alternative solutions. • Defends own viewpoints, accepts responsibility for own behavior and understands own impact on others. • Pays attention to details, demonstrates initiative, monitors performance standards and follows up on assigned tasks. • Leads by example, motivates others to extend their capabilities, develops minority/majority views and persuades others to reverse negative attitudes and behaviors. • Moderates discussion, interprets complaints and concerns, analyzes group dynamics, and detects underlying issues.

Key Activity
A6
Coach and mentor staff

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Coaching/mentoring provided is accurate, relevant and timely. • Questions are answered in a courteous and respectful manner. • Receptivity and support are provided to all mentees to help them advance. • Proficiency in subject matter is maintained. • Coaching/mentoring has defined objectives which are based on job tasks. • Follow up training and re training is provided to individuals as needed. • Excellent delivery of timely, accurate and high quality customer service is modeled. • Coaching/mentoring is customized to fit the needs of each individual staff member. • The learning curve is taken into account. 	<ul style="list-style-type: none"> • Ability to create OJT (On-the-job Training) opportunities. • Ability to track progress of mentee and identify staff's needs. • Knowledge of subject matter. • Ability to demonstrate proper customer service practices. • Ability to teach and mentor others. • Ability to recognize quality performance and provide recognition. • Ability to recognize gaps in knowledge or skill and provide mentoring or coaching to support the individual. 	<ul style="list-style-type: none"> • Interprets and applies new knowledge and experience and analyzes application of learning tools. • Communications appropriate messages, presents complex ideas and information; analyzes individual response; poses critical questions. • Provides constructive feedback and reinforcement and develops appropriate training procedures. • Applies appropriate principles to situations; uses previous training and experience to predict outcomes and visually analyzed relationship between process and procedure. • Demonstrates creative thinking process while problem solving; develops creative solutions and applies them to new situations.

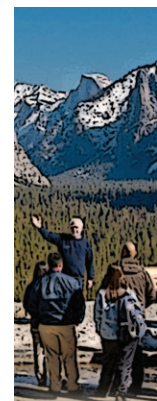




<p style="text-align: center;"><i>Key Activity</i> A7 Provide direct customer service as needed to meet demand</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Excellent delivery of timely, accurate and high quality customer service is modeled. • Customer engagement and interactions establish an ongoing, personalized relationship. • Accurate and relevant information from customer is gathered to anticipate needs. • Customer needs, comments, questions and complaints are responded to in an effective and timely manner. • When needed, extraordinary service and support is provided to locate and deliver needed personal services and unique or hard-to-find products and services to customers. • Products and services are explained and demonstrated to customers effectively and in a timely manner. • Support for pre- and post-sale transactions with customer is provided in an effective manner. • Alternative or additional products and services and/or change-out options for replacement (if applicable) are offered. • Customer is completely informed of service policies. • The sale is closed and confirmed with the customer. 	<ul style="list-style-type: none"> • Knowledge of pacing and leading, active listening and paraphrasing techniques. • Knowledge of diverse cultural and generational/ age backgrounds and their communications styles. • Ability to use communication devices, such as voice, email, text and social media, in a variety of ways. • Ability to use appropriate selling techniques to identify customer needs and pricing considerations, and to complete a sale. • Knowledge of company standards regarding how to interact with customers. • Knowledge of body language and how it can indicate mood. • Ability to match solutions to customer situations. • Knowledge of company policies regarding communication with vendors and confidentiality of customer information. • Knowledge of company policies and procedures regarding offering alternative, additional and replacement products and/or services. • Knowledge of services and policies and relevant service plans and options available to customer. • Ability to help customer select from alternative solutions that will meet a customer’s needs. • Ability to generate repeat business. • Ability to elicit feedback from customers. • Ability to perform all roles/ positions of staff under supervision. • Ability to maintain composure and stamina throughout the shift. 	<ul style="list-style-type: none"> • Interprets, clarifies and influences communication and compares multiple viewpoints. • Recognizes the value of diversity and responsibly challenges discriminatory practices and procedures. • Analyzes possible causes; generates/evaluates solutions; devises/implements plan of action. • Analyzes customer needs; demonstrates commitment to customer; relates to customers fears/ concerns; obtains additional resources to meet customer needs and makes exceptional effort on behalf of customer. • Demonstrates commitment to self-improvement, applies self-management skills, appropriately modifies goals and aggressively pursues goal attainment. • Communications appropriate messages, presents complex ideas and information; analyzes individual response; poses critical questions.

Customer Service Supervisors – Critical Work Function:
B. Monitor Quality, Performance and Productivity

<p style="text-align: center;"><i>Key Activity</i> B1 Ensure performance/sales goals are met and customer service tasks are completed</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Customer service and sales techniques are consistently assessed, and strengths and weaknesses are communicated to direct reports in an effective manner. • Areas for improvement are addressed in an effective manner. • Successes are recognized and rewarded. • Customer service staff are observed and feedback is provided on a regular basis. • Customer service staff time is properly allocated between customer service and assigned tasks. 	<ul style="list-style-type: none"> • Knowledge of tasks, objectives, procedures and the time it takes to complete them for sales and customer service. • Ability to observe and assess customer service techniques. • Knowledge of all resources available in the company recognition program. • Knowledge of disciplinary process. • Ability to motivate staff to meet sales and performance goals 	<ul style="list-style-type: none"> • Effectively manages time; prepares and organizes multiple schedules and manages timelines. • Demonstrates commitment to self-improvement, applies self-management skills, appropriately modifies goals and aggressively pursues goal attainment. • Applies appropriate principles to situations; uses previous training and experience to predict outcomes and visually analyzed relationship between process and procedure. • Provides constructive feedback and reinforcement and develops appropriate training procedures. • Leads by example, motivates others to extend their capabilities, develops minority/majority views and persuades others to reverse negative attitudes and behaviors.





<p style="text-align: center;"><i>Key Activity</i> B2 Evaluate data to identify systemic and/or individual problems and solutions</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Required documentation and sensitive documents are secured in accordance with company policies and procedures. • The required information is obtained in a timely manner. • Out-of-range data, trends and performance problems are correctly identified. • Outcomes of the data evaluation are communicated to appropriate personnel. • Analysis is thorough such that unknown hidden problems are discovered and corrected in a timely manner. • Appropriate tools are used to analyze data. • Correct conclusions and recommendations for solutions are drawn from analysis. 	<ul style="list-style-type: none"> • Knowledge of documentation and sensitive documents protocols, policies and procedures. • Knowledge of and ability to use data analysis tools such as software and calculators. • Ability to identify out-of-range data, trends and performance problems. • Knowledge of data summary, documentation, and archive procedures. • Knowledge of data analysis procedures and protocols for drawing conclusions. • Ability to identify data sets and match them to the analysis being performed. • Ability to identify questionable data integrity and errors. • Knowledge of sales goals and ability to use them as benchmarks against which to compare data. 	<ul style="list-style-type: none"> • Identifies relevant details, facts, and specifications; follow set of instructions; probes to gain knowledge and qualifies/analyzes information. • Interprets and applies new knowledge and experience and analyzes application of learning tools. • Utilizes integrated software, utilizes networks and manipulates information. • Recognizes accuracy of information; interprets information and prepares basic summaries and report; selects methods of communication. • Interprets information, applies processes to new information and analyzes organization of information.

Key Activity

B3

Plan, schedule, assign and monitor workload and coordinate work activity

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Individual skill sets and competences are matched to the requirements of the position. • Schedules are updated and distributed to appropriate personnel. • Assignments are made so as to maximize customer service while providing cross-training opportunities to staff. • Sufficient supply of appropriate personnel is ensured for all shifts. • Scheduling includes adequate breaks for customer service staff. • Scheduling is completed in accordance with all applicable laws and regulations. 	<ul style="list-style-type: none"> • Knowledge of skills required for all positions under supervision. • Ability to observe and assess job skill performance within different positions. • Knowledge of process to coordinate with other departments or locations to obtain personnel when necessary. • Knowledge of manpower requirements for various dates and shifts. • Knowledge of state and federal labor laws. 	<ul style="list-style-type: none"> • Understands the system organization and hierarchy, follows processes and procedures, and recognizes the organizational system strengths and weaknesses. • Pays attention to details, demonstrates initiative, monitors performance standards and follows up on assigned tasks. • Analyzes logic/rule/principle; examines information/data for relevance and accuracy and uses logic to draw conclusions. • Communications appropriate messages, presents complex ideas and information; analyzes individual response; poses critical questions. • Monitors system performance, analyzes system operation, distinguishes trends in performance and diagnoses performance deviations.





<p style="text-align: center;"><i>Key Activity</i> B4 Monitor and organize workplace displays, products/services and environment</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Displays are set up in accordance with company strategies and protocols. • Displays are organized to maximize sales. • Displays are kept current. • Customer service areas, desks and counters are well maintained. • Back office spaces are well maintained and organized to maximize efficiency. 	<ul style="list-style-type: none"> • Knowledge of company sales strategies and protocols. • Knowledge of display strategies. • Knowledge of customer preferences. • Ability to set up and maintain efficient front-end and back-end spaces (e.g., sales floor and office). 	<ul style="list-style-type: none"> • Analyzes logic/rule/principle; examines information/data for relevance and accuracy and uses logic to draw conclusions. • Demonstrates commitment to self-improvement, applies self-management skills, appropriately modifies goals and aggressively pursues goal attainment. • Interprets and applies new knowledge and experience and analyzes application of learning tools. • Understands the system organization and hierarchy, follows processes and procedures, and recognizes the organizational system strengths and weaknesses. • Applies rules and principles to the situation, analyzes the situation and information, considers risks and implications, compiles multiple viewpoints and generates alternative solutions.

Key Activity
B5
Check and verify availability of product

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Inventory, when taken, is accurate. • Corrections are accurate and minimal. • Inventory activities are carried out safely. • All discrepancies are communicated to proper parties. • Availability of product is maintained on an ongoing basis. • Damaged and out-of-date products are handled in accordance with company policies and procedures. • Company inventory policies and procedures are followed with respect to product stocking. 	<ul style="list-style-type: none"> • Ability to use computerized inventory databases and smart devices. • Knowledge of special handling requirements and procedures for high value items. • Knowledge of the inventory in stock. • Knowledge of how to verify items to ensure that the item on the paper work is the same item that was received. • Skill in reconciling inventory counts and identifying discrepancies. • Knowledge of the safety procedures used in taking inventory. • Knowledge of how to conduct an on-site inventory. • Knowledge of the minimum inventory needed to meet customer needs. • Knowledge of documentation and communication procedures. 	<ul style="list-style-type: none"> • Follows maintenance procedures, identifies symptoms and corrects failures. • Knows available technology and understands requirements of the task and technological results. • Identifies relevant details, facts, and specifications; follow set of instructions; probes to gain knowledge and qualifies/analyzes information. • Analyzes data; integrates multiple items of data; contrasts conflicting data. • Maintains inventory, monitors safe and efficient utilization of materials and identifies future material needs.

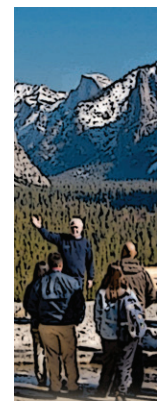




Key Activity B6 Apply continuous quality improvement principles to ensure customer satisfaction		
Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Reviews of all aspects customer service and sales procedures are conducted to determine effectiveness of staff in satisfying customers. • Problems are anticipated, correctly recognized, and corrective actions, including training and coaching, are implemented in a timely manner. • Suggestions for improvements are generated through observation and data analysis and are communicated in an effective manner to appropriate personnel. • Criticality of problems is determined and minor adjustments are made as soon as possible. • Problems, solutions and implications of problems are communicated with appropriate people in a timely manner and documented. • Suggestions from customer service staff are not ignored due to status or hierarchy. 	<ul style="list-style-type: none"> • Knowledge of all aspects of customer service and sales processes and procedures. • Knowledge of company policies and procedures regarding customer service and sales activities and tasks. • Ability to assess criticality of problems, and to make adjustments. • Knowledge of problem and solution documentation and communication procedures. • Knowledge of corrective actions for specific problems. • Knowledge of continuous quality improvement processes. 	<ul style="list-style-type: none"> • Analyzes possible causes; generates/evaluates solutions; devises/implements plan of action. • Analyzes logic/rule/principle; examines information/data for relevance and accuracy and uses logic to draw conclusions. • Determines system components to modify and improve; examines proposed modifications, improvements; analyzes goals and constraints. • Pays attention to details, demonstrates initiative, monitors performance standards and follows up on assigned tasks. • Interprets information, applies processes to new information and analyzes organization of information.

Customer Service Supervisors – Critical Work Function:
C. Provide Training Opportunities to Staff

<p style="text-align: center;"><i>Key Activity</i> C1 Provide and/or schedule sales and service training and technical assistance</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Training provided is accurate, relevant and timely. • Questions are answered in a courteous and respectful manner. • Receptivity and support are provided to all trainees to help them advance. • Proficiency in subject matter is maintained. • Training has defined objectives which are based on job tasks. • All training materials are accessible. • Training follows customer service procedures, processes, policies, rules, laws and regulations. • Training follows human resources and safe and secure workplace concepts, such as safety, time management and sexual harassment prevention. • Appropriate training is provided or recommended for customer service and sales staff. • Follow-up training and re-training are provided as needed. 	<ul style="list-style-type: none"> • Knowledge of trainings and HR resources available to customer service staff. • Ability to assess job performance and identify skill gaps • Ability to create OJT (On-the-Job-Training) opportunities. • Knowledge of subject matter. • Ability to demonstrate proper customer service and time management practices. • Ability to track progress of staff and identify individual training needs. 	<ul style="list-style-type: none"> • Analyzes work assignments, assesses individual knowledge and skills, determines workload and monitors performance. • Interprets information, applies processes to new information and analyzes organization of information. • Understands the system organization and hierarchy, follows processes and procedures, and recognizes the organizational system strengths and weaknesses. • Pays attention to details, demonstrates initiative, monitors performance standards and follows up on assigned tasks.



Key Activity
C2
Coach and mentor staff

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Coaching/mentoring provided is accurate, relevant and timely. • Questions are answered in a courteous and respectful manner. • Receptivity and support are provided to all mentees to help them advance. • Proficiency in subject matter is maintained. • Coaching/mentoring has defined objectives which are based on job tasks. • Follow up training and re training is provided to individuals as needed. • Excellent delivery of timely, accurate and high quality customer service is modeled. • Coaching/mentoring is customized to fit the needs of each individual staff member. 	<ul style="list-style-type: none"> • Ability to create OJT (On-the-Job Training) opportunities. • Ability to track progress of mentee and identify staff's needs. • Knowledge of subject matter. • Ability to demonstrate proper customer service practices. • Ability to teach and mentor others. • Ability to recognize quality performance and provide recognition. • Ability to recognize gaps in knowledge or skill and provide mentoring or coaching to support the individual. 	<ul style="list-style-type: none"> • Leads by example, motivates others to extend their capabilities, develops minority/majority views and persuades others to reverse negative attitudes and behaviors. • Provides constructive feedback and reinforcement and develops appropriate training procedures. • Responds appropriately to others; willingly helps others and establishes rapport with co-workers and customers; modifies behavior to environment; shows understanding and empathy for others and encourages cooperation and negotiation. • Communications appropriate messages, presents complex ideas and information; analyzes individual response; poses critical questions. • Recognizes accuracy of information; interprets information and prepares basic summaries and report; selects methods of communication.



Key Activity

C3

**Determine appropriate training/
coaching for customer service and sales staff**

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none">• Assessment of employees is conducted on a continuous basis to ensure ability to perform job functions.• Self-assessment of skill gaps is encouraged.• Skill gaps are communicated to the individual in an effective and timely manner.• Skill gaps are identified based on observation of the individual's work.• Training is planned and discussed with the individual.• Reports of skill gaps from other workers are appropriately investigated.	<ul style="list-style-type: none">• Knowledge of trainings and HR resources available to customer service staff.• Ability to assess job performance and identify skill gaps.• Ability to coordinate training to meet the needs of the team and scheduling.	<ul style="list-style-type: none">• Analyzes work assignments, assesses individual knowledge and skills, determines workload and monitors performance.• Recognizes accuracy of information; interprets information and prepares basic summaries and report; selects methods of communication.• Communications appropriate messages, presents complex ideas and information; analyzes individual response; poses critical questions.• Responds appropriately to others; willingly helps others and establishes rapport with co-workers and customers; modifies behavior to environment; shows understanding and empathy for others and encourages cooperation and negotiation.• Provides constructive feedback and reinforcement and develops appropriate training procedures.





<p style="text-align: center;"><i>Key Activity</i> C4 Provide support for career enhancement of customer services and sales staff</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Relevant training and development opportunities are accurately explained to customer service staff in a timely manner. • Mentoring is provided to customer service staff in an effective manner. • Plans to support career goals and close skill gaps are made with customer service staff in accordance with company policies and procedures. • Customer service staff is assisted in setting appropriate career goals. 	<ul style="list-style-type: none"> • Knowledge of mentoring opportunities for customer service staff. • Knowledge of sources of information for training and development opportunities. • Knowledge of customer service career pathways. • Ability to assess individual skills and abilities and provide guidance as to career direction to support staff to be successful. 	<ul style="list-style-type: none"> • Leads by example, motivates others to extend their capabilities, develops minority/majority views and persuades others to reverse negative attitudes and behaviors. • Provides constructive feedback and reinforcement and develops appropriate training procedures. • Responds appropriately to others; willingly helps others and establishes rapport with co-workers and customers; modifies behavior to environment; shows understanding and empathy for others and encourages cooperation and negotiation. • Applies appropriate principles to situations; uses previous training and experience to predict outcomes and visually analyzed relationship between process and procedure. • Recognizes accuracy of information; interprets information and prepares basic summaries and report; selects methods of communication.

**Customer Service Supervisors – Critical Work Function:
D. Address and Resolve Challenging Customer Issues**

<p style="text-align: center;"><i>Key Activity</i> D1 Interface with challenging customers and defuse and de-escalate difficult situations; elevate to next level as appropriate</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Customer expectations for resolution are exceeded. • Appropriate actions and tools are used to resolve the customer's problem to their satisfaction. • Staff is empowered, equipped and expected to create a successful resolution and to refer the situation to the supervisor as needed. • Situation and associated resolution are communicated to other staff to support continuous improvement and training. • Company policies and procedures are followed. • Information provided is accurate. • Customer issues are acknowledged and accurately and thoroughly discussed; appropriate actions are taken to identify and confirm solutions. • Communication is respectful and relevant, and action items are carried out in a timely manner. • Customer receives clear and accurate information regarding resolution procedures; when additional follow up is required, a clear explanation is provided to the customer about how and when follow up or call back will occur. • Customer feedback indicates satisfaction with supervisor actions and behavior. • Composure is demonstrated, and responses are appropriate to the situation and not based on emotions. • Manager support is solicited when necessary to meet customer needs. 	<ul style="list-style-type: none"> • Knowledge of the company-approved negotiation process and how to confirm the resolution. • Knowledge of paraphrasing, active listening and negotiation techniques. • Knowledge of company policies and procedures regarding communication with customers. • Knowledge of credible sources of information. • Knowledge of conflict resolution processes and ability to maintain composure. • Ability to identify underlying issues. • Ability to determine when and how to consult with appropriate departmental staff and refer to manager when necessary. • Ability to motivate and empower customer service staff to work with customers. 	<ul style="list-style-type: none"> • Communications appropriate messages, presents complex ideas and information; analyzes individual response; poses critical questions. • Interprets, clarifies and influences communication and compares multiple viewpoints. • Analyzes customer needs; demonstrates commitment to customer; relates to customers fears/concerns; obtains additional resources to meet customer needs and makes exceptional effort on behalf of customer. • Analyzes possible causes; generates/evaluates solutions; devises/implements plan of action. • Moderates discussion, interprets complaints and concerns, analyzes group dynamics, and detects underlying issues.





<p style="text-align: center;"><i>Key Activity</i> D2 Interpret and explain complex processes, policies and procedures to customers</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Clear, accurate and complete explanations of products, services, and company policies and procedures are provided to customers. • Supplemental documentation or resources (brochures, links, etc.) are provided when applicable. • Effective written and verbal communications are polite, clear and completed in a timely manner. • Company policies and procedures regarding demonstration and explanation of products, services and prices are followed. • Customer requests are communicated to manager or advice is solicited from appropriate departmental staff when necessary to meet customer needs. 	<ul style="list-style-type: none"> • Knowledge of company computer technology and ability to use technology proficiently. • Knowledge of procedures to obtain support from staff. • Knowledge of supplemental documentation and resources available and procedures for providing them to customers. • Knowledge of company policies and procedures regarding demonstration and explanation of products services and prices. • Ability to determine when and how to refer issues and consult with appropriate departmental staff. • Knowledge of products and services and relevant options and prices available to customer. 	<ul style="list-style-type: none"> • Analyzes data; integrates multiple items of data; contrasts conflicting data. • Recognizes accuracy of information; interprets information and prepares basic summaries and report; selects methods of communication. • Understands the system organization and hierarchy, follows processes and procedures, and recognizes the organizational system strengths and weaknesses. • Identifies relevant details, facts, and specifications; follow set of instructions; probes to gain knowledge and qualifies/ analyzes information. • Analyzes customer needs; demonstrates commitment to customer; relates to customers fears/concerns; obtains additional resources to meet customer needs and makes exceptional effort on behalf of customer.

Key Activity

D3

Assess and anticipate customer attitudes and behaviors about product/service issues and gaps

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • The most effective and appropriate interviewing techniques are selected and used when gathering information from customers (e.g., open vs. close-ended questions, knowing when to use follow-up questions). • Information on how the customer plans to use the product or service is collected. • Effective written and verbal communications are polite, clear and completed in a timely manner. • Company policies and procedures are followed. • Information is gathered in a courteous, professional manner. • Approach is tailored to meet the needs of customers with different demographic characteristics, moods and personalities. • Customer’s objectives and concerns related to the product or service are identified. • Outdated and inaccurate information or impressions related to the company’s product or service are identified and rectified as needed. • Communication devices are utilized competently in accordance with customer preferences and etiquette protocols are followed. 	<ul style="list-style-type: none"> • Ability to use appropriate selling techniques in order to identify customer needs and complete a sale. • Knowledge of company standards regarding how to interact with customers (e.g. company protocols for addressing and communicating with customers). • Knowledge of body language and how it is an indicator of mood. • Knowledge of diverse cultural backgrounds and their communications styles. • Ability to use communication devices in a variety of ways such as voice, email, text and social media. • Knowledge of business etiquette in electronic communication. • Knowledge of current information on all company products and services. • Knowledge of credible sources of information. 	<ul style="list-style-type: none"> • Demonstrates creative thinking process while problem solving; develops creative solutions and applies them to new situations. • Analyzes possible causes; generates/evaluates solutions; devises/implements plan of action. • Applies appropriate principles to situations; uses previous training and experience to predict outcomes and visually analyzed relationship between process and procedure. • Analyzes data; integrates multiple items of data; contrasts conflicting data. • Responds appropriately to others; willingly helps others and establishes rapport with co-workers and customers; modifies behavior to environment; shows understanding and empathy for others and encourages cooperation and negotiation.





<p style="text-align: center;"><i>Key Activity</i> D4 Capture and apply customer feedback on resolution</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Feedback is requested of customers in accordance with company protocols or policies and procedures. • Incentives for feedback are clearly communicated. • Customer feedback is communicated to management and other staff for purposes of continuous improvement and training. • Customer demeanor and actions are observed as an indication of level of satisfaction with product or service. 	<ul style="list-style-type: none"> • Knowledge of company protocols or policies and procedures regarding customer feedback. • Knowledge of incentive programs for feedback. • Knowledge of customer demeanor when satisfied and when not satisfied. • Ability to communicate areas of opportunity derived from feedback to management and other staff. 	<ul style="list-style-type: none"> • Recognizes accuracy of information; interprets information and prepares basic summaries and report; selects methods of communication. • Interprets and applies new knowledge and experience and analyzes application of learning tools. • Determines system components to modify and improve; examines proposed modifications, improvements; analyzes goals and constraints. • Interprets, clarifies and influences communication and compares multiple viewpoints. • Analyzes customer needs; demonstrates commitment to customer; relates to customers fears/concerns; obtains additional resources to meet customer needs and makes exceptional effort on behalf of customer.

Customer Service Supervisors – Critical Work Function:
E. Pursue Professional Development and Training for Skills Development

<i>Key Activity</i> E1 Participate in company-provided training and continuing education		
Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Trainings are attended with full participation. • Documentation (test results, checklists, and instructor or manager evaluations. attendance records) indicates satisfactory performance in trainings. • Participation in continuous learning opportunities is self-initiated. • Customer service instruction manuals, guides and website are reviewed as needed to meet customer needs. • Training needs and skill gaps are communicated and followed up with appropriate staff. • Knowledge of customer / client / business behavior to understand what motivates decision-making is acquired. 	<ul style="list-style-type: none"> • Ability to locate, schedule and access trainings offered by the organization and knowledge of process to request new training classes offered outside the organization • Knowledge of location of customer service instruction manuals, guides and internal website and how to use them. • Knowledge of the public website structure and how to locate information on it. 	<ul style="list-style-type: none"> • Interprets, clarifies and influences communication and compares multiple viewpoints. • Defends own viewpoints, accepts responsibility for own behavior and understands own impact on others. • Recommends ethical course of action and responsibly challenges unethical practices/ decisions. • Interprets and applies new knowledge and experience and analyzes application of learning tools. • Demonstrates commitment to self-improvement, applies self-management skills, appropriately modifies goals and aggressively pursues goal attainment.





<p style="text-align: center;"><i>Key Activity</i> E2 Achieve and maintain proficiency in current and new technologies, management systems and tools</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Technical trainings are attended with full participation. • Initiative is demonstrated to participate in continuous learning opportunities. • Technical instruction manuals, guides and websites are reviewed as needed to stay current and proficient. • Training needs are communicated to management. • Materials pertaining to current and new technologies are reviewed regularly. 	<ul style="list-style-type: none"> • Ability to access training provided by the organization. • Knowledge of location of technology manuals and guides and how to use them. • Knowledge of the public website structure and how to locate information on it. • Ability to perform on-line research. • Knowledge of credible sources of information. 	<ul style="list-style-type: none"> • Utilizes integrated software, utilizes networks and manipulates information. • Knows available technology and understands requirements of the task and technological results. • Understands technology applications and follows proper procedures; understands the operation/interaction. • Follows maintenance procedures, identifies symptoms and corrects failures. • Analyzes data; integrates multiple items of data; contrasts conflicting data.

Key Activity

E3

Stay abreast of new products, services, competitors, and industry trends

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Relevant sources of information (e.g. articles in trade magazines, popular media, company policy manuals or guidelines) are referenced. • New product, service and process instruction manuals and guides are reviewed as needed to stay current and proficient. • Information on products, services, processes and trends is maintained and kept current. • Materials pertaining to products, services and processes are reviewed on a regular basis and as needed. • Sufficient information is obtained to be able to understand and compare products and services offered by the company with those offered by competitors. 	<ul style="list-style-type: none"> • Knowledge of sources of information about new and existing products and services, changes to competitors' products and services, and changes to the industry at large. • Knowledge of company policies and procedures regarding obtaining information on competitors' products or services. • Ability to apply knowledge gained from study of competitors' products and services to providing information to customers. 	<ul style="list-style-type: none"> • Analyzes data; integrates multiple items of data; contrasts conflicting data. • Interprets and applies new knowledge and experience and analyzes application of learning tools. • Utilizes integrated software, utilizes networks and manipulates information. • Interprets information, applies processes to new information and analyzes organization of information. • Identifies relevant details, facts, and specifications; follow set of instructions; probes to gain knowledge and qualifies/analyzes information.



Key Activity
E4
Acquire and maintain industry certifications

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Mandatory trainings are attended as required. • Tests are taken and passed as required. • Documentation of certification is available as needed. 	<ul style="list-style-type: none"> • Ability to pass certification exams. • Knowledge of certification documentation procedures. 	<ul style="list-style-type: none"> • Interprets and applies new knowledge and experience and analyzes application of learning tools. • Completes forms, writes simple documents; Summarizes/paraphrases information; composes/edits correspondence. • Identifies relevant details, facts, and specifications; follow set of instructions; probes to gain knowledge and qualifies/ analyzes information. • Utilizes mathematical formulas and processes and summarizes and translates mathematical data. • Performs basic computations, interprets numerical data and predicts arithmetic results.

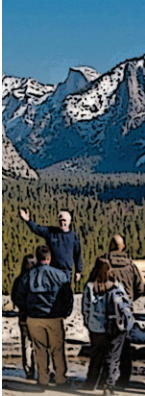


Key Activity

E5

Serve on committees and other groups to improve performance

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Meetings are chaired and/or attended with proactive participation and advance preparation. • Information is accurately given and received. • Issues are accurately and thoroughly discussed and solutions are defined. • Communication is courteous and respectful. • Communication is clear, relevant and concise. • Action items are carried out in a timely manner. • Meetings and discussions are properly documented, reviewed and submitted. 	<ul style="list-style-type: none"> • Knowledge of company and industry terminology. • Knowledge of the roles and responsibilities of personnel, work groups and departments. • Knowledge of company ethics and diversity policies. • Knowledge of company goals, processes and procedures • Ability to work with diverse groups with conflicting views and priorities. 	<ul style="list-style-type: none"> • Monitors system performance, analyzes system operation, distinguishes trends in performance and diagnoses performance deviations. • Responds appropriately to others; willingly helps others and establishes rapport with co-workers and customers; modifies behavior to environment; shows understanding and empathy for others and encourages cooperation and negotiation. • Works to improve team skills, encourages team members, assumes responsibility for accomplishing team goals, and resolves conflicts. • Interprets, clarifies and influences communication and compares multiple viewpoints. • Communications appropriate messages, presents complex ideas and information; analyzes individual response; poses critical questions.



Customer Service Supervisors – Critical Work Function:
F. Perform Administrative Duties



<p style="text-align: center;"><i>Key Activity</i> F1 Monitor labor and product</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Managers are consulted on matters of personnel and budget. • Staffing, overtime, training and materials expenditures are managed so as to minimize costs and maximize efficiency. • Variances from planned expenditure are justified, documented and submitted to management. • Expenditures are kept in line with budget guidelines. • Cost and revenue concepts and decisions are communicated to customer service staff in an effective manner. 	<ul style="list-style-type: none"> • Knowledge of company policies, mission, vision, goals and targets. • Ability to determine when to consult with manager regarding budget issues. • Knowledge of company expenditure constraints and priorities and techniques to meet them. • Knowledge of accounting and payroll functions. • Knowledge of revenue and cost reports and how to interpret them. • Ability to justify variances from planned expenditure • Ability to explain cost and revenue concepts and decisions to customer service staff. 	<ul style="list-style-type: none"> • Analyzes work assignments, assesses individual knowledge and skills, determines workload and monitors performance. • Interprets information, applies processes to new information and analyzes organization of information. • Analyzes logic/rule/principle; examines information/data for relevance and accuracy and uses logic to draw conclusions. • Recognizes accuracy of information; interprets information and prepares basic summaries and report; selects methods of communication. • Understands the system organization and hierarchy, follows processes and procedures, and recognizes the organizational system strengths and weaknesses

Key Activity
F2
Prepare reports and submit to manager

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Company and manager requirements for reports are met. • Reports are clearly written, accurate and complete, and filed in the proper location. • Reports are submitted in a timely manner to manager and departments. • Oral reports are concise, courteous and completed in a timely manner. • Manager is informed of customer interactions, requests and complaints as required. • Sensitive documents are secured in accordance with company policies and procedures. • Electronic records / database are updated in an accurate and timely manner. 	<ul style="list-style-type: none"> • Ability to demonstrate proficiency with electronic systems to prepare and submit reports. • Knowledge of policies and procedures regarding documentation, security and retention protocols and reporting requirements. 	<ul style="list-style-type: none"> • Completes forms, writes simple documents; Summarizes and/or paraphrases information; Composes/edits correspondence. • Analyzes logic/rule/principle; examines information/data for relevance and accuracy and uses logic to draw conclusions. • Effectively manages time; prepares and organizes multiple schedules and manages timelines. • Communications appropriate messages, presents complex ideas and information; analyzes individual response; poses critical questions. • Analyzes data; integrates multiple items of data; contrasts conflicting data.





<p style="text-align: center;"><i>Key Activity</i> F3 Document, verify and maintain information and reports</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Records and reports are accurate, legible up-to-date and filed in proper locations. • Electronic data system is reviewed and updated in a timely manner on a regular basis. • Source documentation is reviewed for credibility and data integrity. • Records, information and reports are maintained in accordance with company policies and procedures. 	<ul style="list-style-type: none"> • Knowledge of policies and procedures regarding documentation, security and retention protocols and reporting requirements • Knowledge of electronic data system and ability to use it as needed. • Knowledge of contents of source documentation. • Ability to identify elements of data integrity. • Knowledge of ethical standards and guidelines, company policies and legal consequences related to aiding or participating in illegal or inappropriate behavior. 	<ul style="list-style-type: none"> • Analyzes logic/rule/principle; examines information/data for relevance and accuracy and uses logic to draw conclusions. • Interprets and applies new knowledge and experience and analyzes application of learning tools. • Pays attention to details, demonstrates initiative, monitors performance standards and follows up on assigned tasks. • Identifies relevant details, facts, and specifications; follow set of instructions; probes to gain knowledge and qualifies/analyzes information. • Recognizes accuracy of information; interprets information and prepares basic summaries and report; selects methods of communication.

Key Activity

F4

Access and keep current on company policies and procedures, laws and regulations

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Information on company policies and procedures and laws and regulations are disseminated to staff in a timely manner. • Relevant sources of information on company policies and procedures are referenced. • New product, service and process instruction manuals and guides are reviewed as needed to stay current and proficient. • Materials pertaining to products, services processes, company policies and procedures and laws and regulations are reviewed on a regular basis and as needed 	<ul style="list-style-type: none"> • Ability to demonstrate proficiency with electronic systems to prepare and submit reports. • Knowledge of policies and procedures regarding documentation, security and retention protocols and reporting requirements • Knowledge of sources of information on company products and services, policies and procedures and laws and regulations and the ability to verify the information is current. 	<ul style="list-style-type: none"> • Understands technology applications and follows proper procedures; understands the operation/interaction. • Analyzes logic/rule/principle; examines information/data for relevance and accuracy and uses logic to draw conclusions. • Completes forms, writes simple documents; Summarizes/paraphrases information; composes/ edits correspondence. • Communications appropriate messages, presents complex ideas and information; analyzes individual response; poses critical questions. • Recognizes accuracy of information; interprets information and prepares basic summaries and report; selects methods of communication.



Key Activity
F5
Order or verify materials

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Products are stocked to ensure that inventory is always available in accordance with company guidelines. • Stock and supply documentation is properly maintained. • Expired materials and items are discarded or reprocessed in accordance with established procedures. • Periodic inventory of stock and supplies is taken in accordance with established procedures. • Supplies are ordered on a timely basis. • The proper work order is used to create a material request. 	<ul style="list-style-type: none"> • Knowledge of ethical standards and guidelines, company policies and legal consequences related to aiding or participating in illegal or inappropriate behavior. • Knowledge of requirements regarding stocks such as usage rates and supply documentation. • Ability to identify expired materials. • Knowledge of discard and reprocessing procedures. • Knowledge of stock and supply inventory techniques and ordering procedures, including how to fill out and verify a work order. • Knowledge of the minimum inventory needed to meet customer needs. • Knowledge of how to verify items to ensure that the item on the paper work is the same item that was received. 	<ul style="list-style-type: none"> • Analyzes logic/rule/principle; examines information/data for relevance and accuracy and uses logic to draw conclusions. • Understands the system organization and hierarchy, follows processes and procedures, and recognizes the organizational system strengths and weaknesses. • Understands technology applications and follows proper procedures; understands the operation/interaction. • Pays attention to details, demonstrates initiative, monitors performance standards and follows up on assigned tasks.



Key Activity

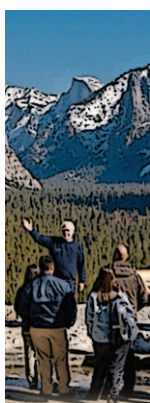
F6

Interview and recommend employees for job openings

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • The resume/portfolio of the interviewee is reviewed prior to the interview. • The interview is conducted in accordance with company policies and procedures and state and federal employment law. • Interview questions are prepared in advance and the interview questioning protocols are followed. • The interview is rooted in practical, job-related skills and information. • Where applicable, questions that require the interviewee to think on their feet are asked (i.e., scenarios, work situations). • Recommendations for job openings are made in accordance with company policies and procedures. • Results of the interview are documented and reported to appropriate personnel. 	<ul style="list-style-type: none"> • Knowledge of company policies and procedures regarding interviews and recommendations for job openings. • Knowledge of state and federal employment law. • Ability to design or follow interview question protocols. • Ability to keep the interview on-track. • Knowledge of the skills the job requires. • Knowledge of requirements for documenting interview results. 	<ul style="list-style-type: none"> • Analyzes work assignments, assesses individual knowledge and skills, determines workload and monitors performance. • Communications appropriate messages, presents complex ideas and information; analyzes individual response; poses critical questions. • Identifies relevant details, facts, and specifications; follow set of instructions; probes to gain knowledge and qualifies/analyzes information. • Completes forms, writes simple documents; summarizes/paraphrases information; composes/edits correspondence. • Responds appropriately to others; willingly helps others and establishes rapport with co-workers and customers; modifies behavior to environment; shows understanding and empathy for others and encourages cooperation and negotiation.



**Customer Service Supervisors – Critical Work Function:
G. Ensure a Safe and Secure Work Environment**



<p style="text-align: center;"><i>Key Activity</i> G1 Implement safety procedures and training to ensure personal safety of customers, guests and co-workers</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Safety and sanitation policies and procedures and all applicable laws and regulations are supported, posted and followed. • As required, safety training is attended with full participation. • Safety violations are recorded and filed with appropriate offices in accordance with company policies and in a timely manner. • Hazard and injury prevention practices are followed. • Illegal and inappropriate behaviors are avoided and reported. • Work environment is scanned for potential hazards on a regular basis. • Policies of bio-hazards are thoroughly followed. • Potential hazards are communicated to appropriate personnel effectively and in a timely manner. • Personal protective equipment is worn as required. 	<ul style="list-style-type: none"> • Ability to identify unsafe conditions. • Knowledge of safety, sanitation and bio-hazard laws and regulations. • Knowledge of safety training requirements. • Knowledge of procedures for reporting safety violations and illegal activities. • Knowledge of ethical guidelines and company policies and legal consequences related to aiding or participating in illegal or inappropriate behavior. • Knowledge of location of safety instruction manuals (e.g., MSDS, PPE, etc.), guides and equipment and how to use them. • Knowledge of ergonomic needs and injury prevention practices and personal protective equipment. • Knowledge of emergency evacuation plans and safety equipment. 	<ul style="list-style-type: none"> • Analyzes possible causes; generates/evaluates solutions; devises/implements plan of action. • Pays attention to details, demonstrates initiative, monitors performance standards and follows up on assigned tasks. • Leads by example, motivates others to extend their capabilities, develops minority/majority views and persuades others to reverse negative attitudes and behaviors. • Recognizes accuracy of information; interprets information and prepares basic summaries and report; selects methods of communication. • Completes forms, writes simple documents; summarizes/paraphrases information; composes/edits correspondence.

Key Activity

G2

Implement security policies/procedures to provide data confidentiality and security for customers and co-workers (data)

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Proper protocols regarding access to customer information are followed. • Company policies regarding information assurance are followed. • Breaches of customer/ employee/company confidentiality and company policy are promptly and accurately reported to appropriate personnel. • Suspicious or illegal behavior on the part of customers or employees is promptly and accurately reported to appropriate personnel. • Security and confidentiality of customer information is ensured. • Ethical standards and guidelines are followed. • Discussion of confidential customer information is avoided at all times unless required to serve the customer. 	<ul style="list-style-type: none"> • Knowledge of company policies regarding deterring and preventing unauthorized access to, use or theft of property or resources. • Knowledge of privacy laws and company standards for obtaining, using and protecting information obtained from a customer or another employee. • Knowledge of reporting requirements and procedures regarding breaches of customer confidentiality and company security policy. • Ability to identify suspicious / illegal behavior and parties to report it to appropriate parties. • Knowledge of ethical standards and guidelines, company policies and legal consequences related to aiding or participating in illegal or inappropriate behavior. 	<ul style="list-style-type: none"> • Pays attention to details, demonstrates initiative, monitors performance standards and follows up on assigned tasks. • Understands the system organization and hierarchy, follows processes and procedures, and recognizes the organizational system strengths and weaknesses. • Analyzes data; integrates multiple items of data; contrasts conflicting data. • Recognizes accuracy of information; interprets information and prepares basic summaries and report; selects methods of communication. • Identifies relevant details, facts, and specifications; follow set of instructions; probes to gain knowledge and qualifies/ analyzes information.





<p style="text-align: center;"><i>Key Activity</i></p> <p style="text-align: center;">G3</p> <p style="text-align: center;">Implement security policies/procedures to minimize chance of loss (property)</p>		
<p>Performance Indicators – <i>How do we know when the task is performed well?</i></p>	<p>Technical Knowledge – <i>Skills, Abilities, Tools</i></p>	<p>Employability Skills – <i>SCANS Skills and Foundational Abilities</i></p>
<ul style="list-style-type: none"> • Company policies and procedures regarding loss prevention are followed. • Suspicious and illegal behavior on the part of customers or employees is promptly and accurately reported to appropriate personnel. • Security procedures such as regular inspections are carried out in an effective manner and are properly documented when necessary. • Proper cash-handling procedures are followed. 	<ul style="list-style-type: none"> • Knowledge of company policies and procedures regarding loss prevention. • Knowledge of shop-lifting prevention measures. • Knowledge of ethical guidelines and company policies and legal consequences related to aiding or participating in illegal or inappropriate behavior. • Ability to identify suspicious behavior on the part of customers or employees. • Knowledge of location of loss prevention instruction manuals and guides and how to use them. • Ability to carry out loss prevention measures and execute cash-handling procedures. 	<ul style="list-style-type: none"> • Performs routine record-keeping, reconciles accounts and develops budget proposals. • Pays attention to details, demonstrates initiative, monitors performance standards and follows up on assigned tasks. • Maintains inventory, monitors safe and efficient utilization of materials and identifies future material needs. • Understands the system organization and hierarchy, follows processes and procedures, and recognizes the organizational system strengths and weaknesses. • Utilizes mathematical formulas and processes and summarizes and translates mathematical data.

Key Activity

G4

Identify and report unsafe conditions and take corrective actions

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Conditions that present a threat to health and safety are corrected and documented immediately where possible and, if not, identified and reported. • Appropriate parties are consulted about corrective actions. • Follow-up procedures are conducted and documented. • Personal protective equipment is worn as required. 	<ul style="list-style-type: none"> • Ability to identify unsafe conditions. • Knowledge of corrective actions and ability to implement them. • Knowledge of documentation and reporting procedures for unsafe conditions. • General knowledge of roles and responsibilities of offices, organizations and personnel at the company. • Knowledge of PPE (Personal Protective Equipment). 	<ul style="list-style-type: none"> • Analyzes data; integrates multiple items of data; contrasts conflicting data. • Recognizes accuracy of information; interprets information and prepares basic summaries and report; selects methods of communication. • Pays attention to details, demonstrates initiative, monitors performance standards and follows up on assigned tasks.' • Monitors system performance, analyzes system operation, distinguishes trends in performance and diagnoses performance deviations. • Completes forms, writes simple documents; Summarizes/paraphrases information; composes/ edits correspondence.



Key Activity
G5
Participate in emergency drills

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • Emergency response complies with company and regulatory policies and procedures. • Full participation is demonstrated. 	<ul style="list-style-type: none"> • Knowledge of emergency response plans, policies and procedures and protocols. • Knowledge of location of emergency phone numbers and address/locations within facilities. 	<ul style="list-style-type: none"> • Works to improve team skills, encourages team members, assumes responsibility for accomplishing team goals, and resolves conflicts. • Understands the system organization and hierarchy, follows processes and procedures, and recognizes the organizational system strengths and weaknesses. • Analyzes data; integrates multiple items of data; contrasts conflicting data. • Provides constructive feedback and reinforcement and develops appropriate training procedures.



Key Activity

G6

Respond to emergency situations and needs

Performance Indicators – <i>How do we know when the task is performed well?</i>	Technical Knowledge – <i>Skills, Abilities, Tools</i>	Employability Skills – <i>SCANS Skills and Foundational Abilities</i>
<ul style="list-style-type: none"> • The emergency situation is accurately assessed. • Company policies and procedures are followed regarding emergency situations. • The situation is clearly communicated in a timely manner to appropriate personnel. 	<ul style="list-style-type: none"> • Knowledge of company policies and procedures regarding emergency situations. • Knowledge of types of emergency situations. • Knowledge of emergency terminology. 	<ul style="list-style-type: none"> • Demonstrates commitment to self-improvement, applies self-management skills, appropriately modifies goals and aggressively pursues goal attainment. • Pays attention to details, demonstrates initiative, monitors performance standards and follows up on assigned tasks. • Leads by example, motivates others to extend their capabilities, develops minority/majority views and persuades others to reverse negative attitudes and behaviors. • Applies rules and principles to the situation, analyzes the situation and information, considers risks and implications, compiles multiple viewpoints and generates alternative solutions. • Effectively manages time; prepares and organizes multiple schedules and manages timelines. • Recognizes accuracy of information; interprets information and prepares basic summaries and report; selects methods of communication.

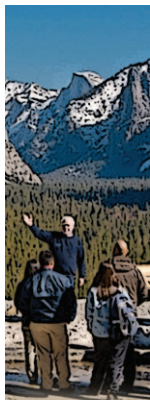


Verification Survey Results

Figure 3 shows the average importance and standard deviation (variation) among each function, rated on a scale from 0 (not important) to 4 (critical). These results generally verify that the critical work functions included in the skill standards document are relevant to the industry at large.

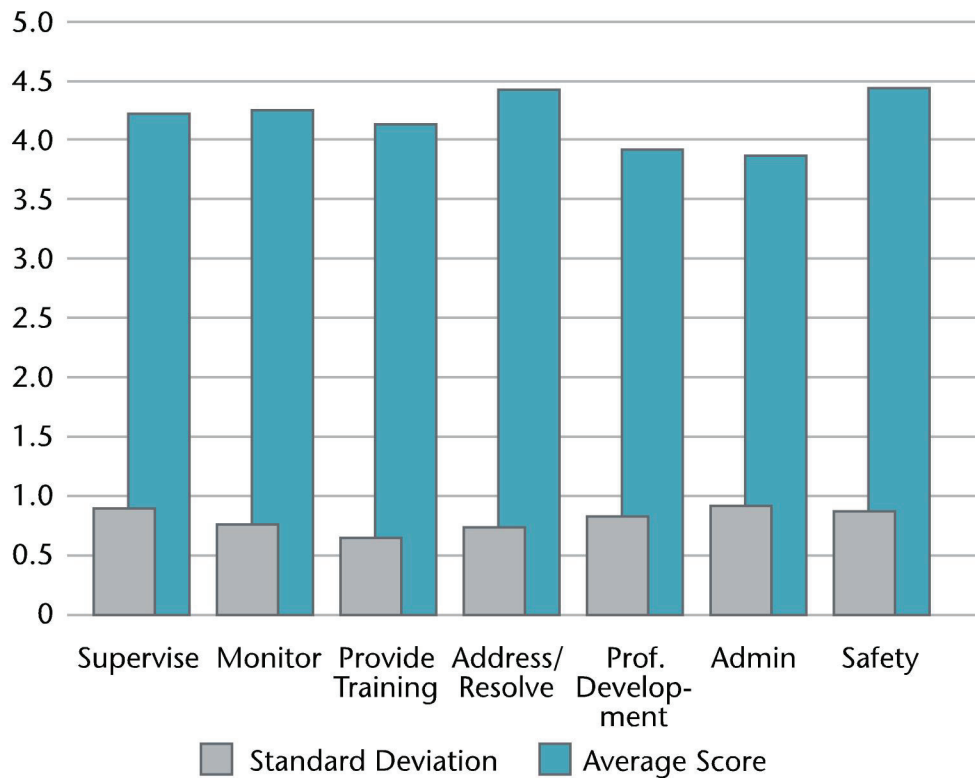
The results show that Critical Work Function D, Address and Resolve Challenging Customer Complaints and Issues (4.45) and Critical Work Function G, Ensure a Safe and Secure Work Environment (4.47), had the highest average scores among all critical work functions.

The lowest-rated critical work function was F, Perform Administrative Duties (3.89). The standard deviation scores for all items show a modest amount of variation among respondents. It should be noted that no critical work function had an average value of less than 3.89, which confirms that respondents viewed all six of the critical work functions as important or very important to the work of retail, hospitality and tourism customer service supervisors.



134

Figure 3.
**Customer Service Supervisor:
Importance of Critical Work Functions**



Scenarios: Customer Service Supervisors



Routine Scenario

A typical day has a wide variety of situations and tasks that must be performed. My day usually starts with reviewing the customer service team schedule and breaks, and calculating whether we have enough staff for the day. To do this, I review department staffing reports, including percentage of staffing filled and report of days missed. If additional staff is needed, I make calls to see if someone is available to come in to work.

Once the schedule is finalized, I go to each department to ensure that staff is on task. This includes resolving minor issues as they arise and monitoring loss prevention. I observe customer interaction and guest satisfaction with the timeliness of answering phone calls and filling orders, and provide feedback to customer service staff. I also fill in where needed, cover while staff is on break and make cash drops. In addition, I monitor inventory and place orders to maintain sufficient supply of product.

Toward the end of the day, I review the clock in/clock out of all employees and complete reports on staff attendance, feedback and training provided, and praise given for exceptional performance. I also complete reports on any incidents that occurred, safety concerns and on reconciliation of the tills/registers.

No two days are alike and I must be prepared for all kinds of situations with staff and customers.



Table 6.

**Primary Tasks and Functions in Routine Scenario:
Customer Service Supervisors**

Critical Work Functions	Key Activities						
A. Directly supervise customer service staff	A1 Coordinate and direct activities of staff in the accomplishment of the company mission, performance standards, and objectives	A2 Review productivity reports and provide daily feedback to staff	A3 Manage employee scheduling, personnel records and files	A4 Coordinate and communicate with staff from other departments, external partners, and management	A5 Take or support disciplinary/ corrective action as required	A6 Coach and mentor staff	A7 Provide direct customer service as needed to meet demand
B. Monitor quality, performance and productivity	B1 Ensure performance/ sales goals are met and customer service tasks are completed	B2 Evaluate data to identify systemic and/or individual problems and solutions	B3 Plan, schedule, assign and monitor workload and coordinate work activity	B4 Monitor and organize workplace displays, products/ services and environment	B5 Check and verify availability of product	B6 Apply continuous quality improvement principles to ensure customer satisfaction	
C. Provide training opportunities to staff	C1 Provide and/ or schedule sales and service training and technical assistance	C2 Coach and mentor staff	C3 Determine appropriate training and coaching for customer service and sales staff	C4 Provide support for career enhancement of customer service and sales staff			
D. Address and resolve challenging customer complaints and issues	D1 Interface with challenging customers and defuse and de-escalate difficult situations; elevate to next level as appropriate	D2 Interpret and explain complex processes, policies and procedures to customers	D3 Assess and anticipate customer attitudes and behaviors about product/ service issues and gaps	D4 Capture and apply customer feedback on resolution			
E. Pursue professional development and training for skills development	E1 Participate in company-provided training and continuing education	E2 Achieve and maintain proficiency in current and new technologies, management systems and tools	E3 Stay abreast of new products, services, competitors, and industry trends	E4 Acquire and maintain industry certifications	E5 Serve on committees and other groups to improve performance		
F. Perform administrative duties	F1 Monitor labor and product	F2 Prepare reports and submit to manager	F3 Document, verify and maintain information and reports	F4 Access and keep current on company policies and procedures, laws and regulations	F5 Order or verify materials	F6 Interview and recommend employees for job openings	
G. Ensure a safe and secure work environment	G1 Implement safety procedures and training to ensure personal safety of customers, guests, co-workers and self	G2 Implement security policies / procedures to provide data confidentiality and security for customers and co-workers (data)	G3 Implement security policies / procedures to minimize chance of loss (property)	G4 Identify and report unsafe conditions and take corrective actions	G5 Participate in emergency drills	G6 Respond to emergency situations and needs	



Crisis Scenario

I am on the retail shop floor one afternoon when an area power failure occurs, sending the store into total darkness. The lights are out but we can still see because daylight is coming in from the front windows. The bigger problem is the cash registers: we cannot use them to ring-out the customers who are now standing in line with baskets full of their selections.

Thinking fast, I clearly announce that the store will need to close due to the power outage. I apologize and ask the customers to please come forward if they would like us to hold the merchandise they would like to purchase. While the customer service specialists are working with the customers, I secure the tills and partially lock the front door. I attach a sign (pre-made for such emergencies) to the front door so people who are just arriving at the store understand why we are closed. The sign reads:

“We are very sorry for any inconvenience.
Our store is currently closed due to a ____ (fill in the blank).
We hope to re-open by ____ (fill in the blank).
We appreciate your patronage.”

I usher those customers who have put their selections on hold or who are not planning to make a purchase out the front door and check the aisles. I then turn my attention to customers who were in the middle of their shopping trip and may not know what to do. I understand that our unexpected closure will inevitably distress some new customers (who may never return) and may cause others who are mid-way through their shopping to abandon their planned purchases, so I offer them an incentive (such as a coupon for a percentage discount) to return at a later date and offer to store their basket in a secure space for a specified period of time (which depends on the space available).

I know that it is much more cost-effective to keep a returning customer than to attract new customers by paying for more advertising, and that unhappy customers will tell at least ten people about their experience, so I do whatever I can to make sure the customers who are in the store during this crisis know that we value their patronage. I also know that the store owner will support my decision to offer incentives to the customers because we've discussed customer service policies with our team and empower team members to take certain actions to “make it right” for our customers.



Table 7.
Primary Tasks and Functions in Crisis Scenario:
Customer Service Supervisors

Critical Work Functions	Key Activities						
A. Directly supervise customer service staff	A1 Coordinate and direct activities of staff in the accomplishment of the company mission, performance standards, and objectives	A2 Review productivity reports and provide daily feedback to staff	A3 Manage employee scheduling, personnel records and files	A4 Coordinate and communicate with staff from other departments, external partners, and management	A5 Take or support disciplinary/corrective action as required	A6 Coach and mentor staff	A7 Provide direct customer service as needed to meet demand
B. Monitor quality, performance and productivity	B1 Ensure performance/sales goals are met and customer service tasks are completed	B2 Evaluate data to identify systemic and/or individual problems and solutions	B3 Plan, schedule, assign and monitor workload and coordinate work activity	B4 Monitor and organize workplace displays, products/services and environment	B5 Check and verify availability of product	B6 Apply continuous quality improvement principles to ensure customer satisfaction	
C. Provide training opportunities to staff	C1 Provide and/or schedule sales and service training and technical assistance	C2 Coach and mentor staff	C3 Determine appropriate training and coaching for customer service and sales staff	C4 Provide support for career enhancement of customer service and sales staff			
D. Address and resolve challenging customer complaints and issues	D1 Interface with challenging customers and defuse and de-escalate difficult situations; elevate to next level as appropriate	D2 Interpret and explain complex processes, policies and procedures to customers	D3 Assess and anticipate customer attitudes and behaviors about product/service issues and gaps	D4 Capture and apply customer feedback on resolution			
E. Pursue professional development and training for skills development	E1 Participate in company-provided training and continuing education	E2 Achieve and maintain proficiency in current and new technologies, management systems and tools	E3 Stay abreast of new products, services, competitors, and industry trends	E4 Acquire and maintain industry certifications	E5 Serve on committees and other groups to improve performance		
F. Perform administrative duties	F1 Monitor labor and product	F2 Prepare reports and submit to manager	F3 Document, verify and maintain information and reports	F4 Access and keep current on company policies and procedures, laws and regulations	F5 Order or verify materials	F6 Interview and recommend employees for job openings	
G. Ensure a safe and secure work environment	G1 Implement safety procedures and training to ensure personal safety of customers, guests, co-workers and self	G2 Implement security policies / procedures to provide data confidentiality and security for customers and co-workers (data)	G3 Implement security policies / procedures to minimize chance of loss (property)	G4 Identify and report unsafe conditions and take corrective actions	G5 Participate in emergency drills	G6 Respond to emergency situations and needs	



Long-Term Scenario

It is important that I maintain quality relationships with front-line staff so I'm approachable by employees and they are willing to engage in initial conversations on all kinds of matters. For example, a front-line customer service team member expresses a desire to advance to supervisor. This person has shown drive and ambition in their current position, and I provide information about the process for advancement, starting with the skill levels that the team member needs to demonstrate. I assess the team member's current skill levels and help to set learning goals. These goals include developing a greater understanding of company processes, taking necessary classes and obtaining necessary certifications.

We develop a timetable for completing these goals, and set up meetings to review progress. I also provide coaching and mentoring for the employee. The team member engages with the learning process and, toward the end of the timetable, we evaluate if the team member is ready to move into a supervisory role.



Table 8.
Primary Tasks and Functions in Long-Term Scenario:
Customer Service Supervisors

Critical Work Functions	Key Activities						
A. Directly supervise customer service staff	A1 Coordinate and direct activities of staff in the accomplishment of the company mission, performance standards, and objectives	A2 Review productivity reports and provide daily feedback to staff	A3 Manage employee scheduling, personnel records and files	A4 Coordinate and communicate with staff from other departments, external partners, and management	A5 Take or support disciplinary/ corrective action as required	A6 Coach and mentor staff	A7 Provide direct customer service as needed to meet demand
B. Monitor quality, performance and productivity	B1 Ensure performance/sales goals are met and customer service tasks are completed	B2 Evaluate data to identify systemic and/or individual problems and solutions	B3 Plan, schedule, assign and monitor workload and coordinate work activity	B4 Monitor and organize workplace displays, products/ services and environment	B5 Check and verify availability of product	B6 Apply continuous quality improvement principles to ensure customer satisfaction	
C. Provide training opportunities to staff	C1 Provide and/or schedule sales and service training and technical assistance	C2 Coach and mentor staff	C3 Determine appropriate training and coaching for customer service and sales staff	C4 Provide support for career enhancement of customer service and sales staff			
D. Address and resolve challenging customer complaints and issues	D1 Interface with challenging customers and defuse and de-escalate difficult situations; elevate to next level as appropriate	D2 Interpret and explain complex processes, policies and procedures to customers	D3 Assess and anticipate customer attitudes and behaviors about product/ service issues and gaps	D4 Capture and apply customer feedback on resolution			
E. Pursue professional development and training for skills development	E1 Participate in company-provided training and continuing education	E2 Achieve and maintain proficiency in current and new technologies, management systems and tools	E3 Stay abreast of new products, services, competitors, and industry trends	E4 Acquire and maintain industry certifications	E5 Serve on committees and other groups to improve performance		
F. Perform administrative duties	F1 Monitor labor and product	F2 Prepare reports and submit to manager	F3 Document, verify and maintain information and reports	F4 Access and keep current on company policies and procedures, laws and regulations	F5 Order or verify materials	F6 Interview and recommend employees for job openings	
G. Ensure a safe and secure work environment	G1 Implement safety procedures and training to ensure personal safety of customers, guests, co-workers and self	G2 Implement security policies / procedures to provide data confidentiality and security for customers and co-workers (data)	G3 Implement security policies / procedures to minimize chance of loss (property)	G4 Identify and report unsafe conditions and take corrective actions	G5 Participate in emergency drills	G6 Respond to emergency situations and needs	





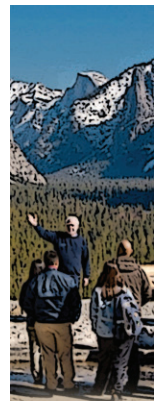
142



Integration



© iStock



143

Assessment and Certification: A Vital Connection

Skill standards, while useful on their own, are just one part of a much larger equation. Skill standards establish the standard of competent performance, but they do not tell a person if he or she has succeeded in meeting that standard.

For this reason, developing skill standards does not end with publishing these standards. Next steps should include developing voluntary assessments and certifications, which will make it possible for students, workers and any interested persons to determine their strengths and weaknesses based on the standards, and to earn certification showing that they can perform work competently as established by the skill standards.

In today's fast-moving technological economy, assessments and certification are crucial. The demand for both technical and employability skills are escalating as work becomes more complex. The workforce is more mobile, with workers moving freely between jobs and industries. This job mobility requires that workers can effectively communicate their qualifications to potential employers. They must keep up with technological change through continuous learning and worker retraining, and must be able to prove they have kept pace. All of these factors mean more training and education for individuals, and the ability to show evidence that this training translates to performance on the job.

Voluntary assessments and certifications based on skill standards will help us address these needs because of the guiding principles upon which skill standards are based, and because of the stakeholders – employers, labor, educators, workers, students and government – who have needs that skill standards are designed to meet.

A step toward a statewide system of assessments and certifications is developing assessments that measure an individual's ability to perform work competently as defined by the skill standards. Once these assessments are developed, curricula can be reviewed to determine that all necessary topics and practicums sufficiently cover the items in the assessment. As gaps are identified, learning activities and content adjustments can be made, and post/summative assessments can be administered.

Finally, it is critical that industry be involved every step of the way, and that standards are continuously reviewed and updated. Figure 4 provides a summary of this process.

Note: To ensure that the use of standards and related assessments and certifications do not contradict U.S. employment law, employers will need to conduct an internal validation of the standards before using the skill standards to make hiring and promotion decisions. The purpose of this validation is to ensure that the knowledge, skills and performance described by the standards are needed for competent



performance in an employer's organization. The need to validate the standards internally is a key requirement of U.S. employment law, which seeks to protect individuals from discrimination in hiring and promotion.

Assessment Strategies

Upon completion of skill standards development, performance assessments can be created to assess the criteria identified (Table 9). Sample assessments and standards may be distributed to instructors and curriculum developers who will be educated on the skill standards elements.

Assessments based on the skill standards may include pre- and post-evaluations of the student to measure skill progression and to track the success rate of obtaining certification, where applicable.

Within a skill standards or competency-based system, assessment is the generation and collection of evidence of performance that can be matched to specified, explicit standards that reflect expectations of performance in the workplace. There are two main forms of evidence: actual performance, and underpinning knowledge, skills and abilities.

The types of evidence may vary and will include:

- Direct evidence (products and items produced by the performer)
- Indirect evidence (supporting evidence and information about the performer)

Evidence can be collected in a wide variety of educational or business settings. The range of opportunities available for demonstration will usually determine the most appropriate setting, but it is often difficult to actually perform the task in the authentic work setting. In this case, evidence generated during an educational course or in-house training session can be collected by individuals and added to their portfolios.

Figure 4.
Integrating Skill Standards



Table 9.
Assessment Design

Type of Authentic Assessment	Description of Authentic Assessment Strategies
Project	Hands-on demonstration of knowledge, skills and attitudes that reveals a student's ability to plan, organize and create a product or an event.
	Documentation of process of development from initial steps to final presentation.
Portfolio	Collection of pieces of evidence of a student's knowledge, skills and attitudes.
	Showcase of best work, work-in-progress.
	Record of student's progress over time.
	Content selection by student in collaboration with the teacher.
On-Demand Demonstrations	Centerpiece for parent conferences.
	Hands-on performance by a student, which illustrates level of knowledge, skills and attitudes.
	Typically involve a "real life" problem or situation to solve.
Case Studies	Focus on the application of knowledge and skills learned in one situation as it connects to a new and different one.
	Analysis of events and individuals in light of established criteria.
Paper/Pencil Tests	Synthesis of evidence to support generalizations based on individual cases.
	Multiple-choice, essay, true-false questions that rely on extended responses to further clarify a student's understanding of the knowledge being assessed.
Structured Observation	Graphic representations that reveal a student's understanding of connections among ideas.
	Observation of events, groups and individuals that focuses on the salient traits of the skill or attitude being observed.
Scenarios	A problematic or challenging situation presented in the context of a career-technical perspective.
	Study required to analyze or evaluate a situation.
	Apply relevant knowledge or skills.
Critical Incident	Prepare and justify a reasonable solution.
	An interview where the assessee is asked to describe past experiences that demonstrate skill standards.

From Center for Occupational Research and Development, November 1996, and Skill Standards Volume 2: Assessment, 1999, Washington State Board for Community and Technical Colleges.



By requesting that the student or trainee produce tangible results in the form of take-away products (videos, tapes, paper and electronic products), the participant will have created real evidence, which can be shown to human resource personnel, hiring managers, supervisors or assessors. When assessing these products, the trained assessor will seek validity, currency, authenticity and sufficiency.

Therefore, when designing a skill standards-based assessment for an educational course or training session, the assessment process and results will meet four criteria:

- **Validity:** The assessment instrument/process clearly relates to the relevant standards.
- **Currency:** The assessment instrument/process calls for a demonstration of the current standards in the industry.
- **Authenticity:** The individual being assessed produces the assessment results; it is his or her own work. Team activities will be useful to demonstrate the skills and abilities to work effectively with others, but not necessarily the end results. The individual can, if possible, identify his or her part of the team project to demonstrate evidence of his or her own results.
- **Sufficiency:** Enough evidence is collected to match the key task and the performance criteria included in the skill standards.

When designing and revising the curriculum for professional and technical careers, students will be assisted in generating high-quality evidence of performance or of underpinning skills, knowledge and abilities, which will help them to be successfully assessed as fully competent.

The preceding section was adapted from *Skill Standards Volume 2: Assessment*, 1999, Washington State Board for Community and Technical Colleges, and *Designing Competency-Based Training*, Shirley Fletcher, 1991, Pfiffer & Company, pp. 86-88.





148



Notes



A series of horizontal blue lines for writing notes, spanning the width of the page below the "Notes" header.



Business and Industry Participants

The following business and industry partners in the Central Valley and Mother Lode regions contributed to this Retail, Hospitality and Tourism Customer Service Skill Standards:

