# COMPETENCY STANDARDS

# SALESMANSHIP LEVEL II



## RETAIL SECTOR

**TECHNICAL EDUCATION AND SKILLS DEVELOPMENT AUTHORITY**
East Service Road, South Luzon Expressway (SLEX), Taguig City, Metro Manila

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## RETAIL SECTOR
## SALESMANSHIP LEVEL II

# COMPETENCY STANDARDS FOR
# SALESMANSHIP LEVEL II

## SECTION 1  DEFINITION

The **SALESMANSHIP LEVEL II** consists of competencies that a person must apply when engaging with their customers, and using the appropriate knowledge and skills when offering products and services based on the customer's needs in different setting.

The Units of Competency comprising this Qualification include the following:

| Unit Code | BASIC COMPETENCIES |
|---|---|
| 400311210 | Participate in workplace communication |
| 400311211 | Work in a team environment |
| 400311212 | Solve/address general workplace problems |
| 400311213 | Develop career and life decisions |
| 400311214 | Contribute to workplace innovation |
| 400311215 | Present relevant information |
| 400311216 | Practice occupational safety and health policies and procedures |
| 400311217 | Exercise efficient and effective sustainable practices in the workplace |
| 400311218 | Practice entrepreneurial skills in the workplace |

| Unit Code | COMMON COMPETENCIES |
|---|---|
| CS-SOC514203 | Apply quality standards |
| CS-SOC522204 | Provide and build quality customer relations |

| Unit Code | CORE COMPETENCIES |
|---|---|
| CS-SOC522301 | Prospect in-store customers |
| CS-SOC522302 | Sell products and services to customers |

A person who has achieved this Qualification is competent to be a:

- ❏ Salesman
- ❏ Saleswoman
- ❏ Sales Assistant
- ❏ Sales Lady
- ❏ Sales Clerk
- ❏ Sales Agent
- ❏ Seller
- ❏ Sales Representative
- ❏ Sales Associate

# SECTION 2     COMPETENCY STANDARDS

This section gives the details of the contents of the units of competency required in **SALESMANSHIP LEVEL II.**

# BASIC COMPETENCIES

**UNIT OF COMPETENCY**     :     **PARTICIPATE IN WORKPLACE COMMUNICATION**

**UNIT CODE**     :     400311210

**UNIT DESCRIPTOR**     :     This unit covers the knowledge, skills, and attitude required to gather, interpret and convey information in response to workplace requirements.

| ELEMENT | PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables | REQUIRED KNOWLEDGE | REQUIRED SKILLS |
|---|---|---|---|
| 1. Obtain and convey workplace information | 1.1 Specific and relevant information is accessed from ***appropriate sources*** <br> 1.2 Effective questioning, active listening and speaking skills are used to gather and convey information <br> 1.3 Appropriate ***medium*** is used to transfer information and ideas <br> 1.4 Appropriate non- verbal communication is used <br> 1.5 Appropriate lines of communication with supervisors and colleagues are identified and followed <br> 1.6 Defined workplace procedures for the location and ***storage*** of information are used <br> 1.7 Personal interaction is carried out clearly and concisely | 1.1 Effective verbal and nonverbal communication <br> 1.2 Different modes of communication <br> 1.3 Medium of communication in the workplace <br> 1.4 Organizational policies <br> 1.5 Communication procedures and systems <br> 1.6 Lines of Communication <br> 1.7 Technology relevant to the enterprise and the individual's work responsibilities <br> 1.8 Workplace etiquette | 1.1 Following simple spoken language <br> 1.2 Performing routine workplace duties following simple written notices <br> 1.3 Participating in workplace meetings and discussions <br> 1.4 Preparing work- related documents <br> 1.5 Estimating, calculating and recording routine workplace measures <br> 1.6 Relating/ Interacting with people of various levels in the workplace <br> 1.7 Gathering and providing basic information in response to workplace requirements |

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|---|---|---|---|
| | | | 1.8 Applying basic business writing skills<br>1.9 Applying interpersonal skills in the workplace<br>1.10 Performing active-listening skills |
| 2. Perform duties following workplace instructions | 2.1 Written notices and instructions are read and interpreted in accordance with organizational guidelines<br>2.2 Routine written instruction is followed based on established procedures<br>2.3 Feedback is given to workplace supervisor-based instructions/ information received<br>2.4 **Workplace interactions** are conducted in a courteous manner<br>2.5 Where necessary, clarifications about routine workplace procedures and matters concerning conditions of employment are sought and asked from **appropriate sources**<br>2.6 Meetings outcomes are interpreted and implemented | 2.1 Effective verbal and non-verbal communication<br>2.2 Different modes of communication<br>2.3 Medium of communication in the workplace<br>2.4 Organizational/ workplace policies<br>2.5 Communication procedures and systems<br>2.6 Lines of communication<br>2.7 Technology relevant to the enterprise and the individual's work responsibilities<br>2.8 Effective questioning techniques (clarifying and probing)<br>2.9 Workplace etiquette | 2.1 Following simple spoken instructions<br>2.2 Performing routine workplace duties following simple written notices<br>2.3 Participating in workplace meetings and discussions<br>2.4 Completing work-related documents<br>2.5 Estimating, calculating and recording routine workplace measures<br>2.6 Relating/ Responding to people of various levels in the workplace<br>2.7 Gathering and providing information in response to workplace requirements<br>2.8 Applying basic questioning/ querying<br>2.9 Applying skills in reading for information<br>2.10 Applying skills in locating |
| 3. Complete relevant work related documents | 3.1 Range of **forms** relating to conditions of employment are completed accurately and legibly<br>3.2 Workplace data is recorded on standard | 3.1 Effective verbal and non-verbal communication<br>3.2 Different modes of communication<br>3.3 Workplace forms and documents | 3.1 Completing work-related documents<br>3.2 Applying operations of addition, subtraction, division and multiplication |

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|---|---|---|---|
| | workplace forms and documents<br>3.3 Errors in recording information on forms/ documents are identified and acted upon<br>3.4 Reporting requirements to supervisor are completed according to organizational guidelines | 3.4 Organizational/ Workplace policies<br>3.5 Communication procedures and systems<br>3.6 Technology relevant to the enterprise and the individual's work responsibilities | 3.3 Gathering and providing information in response to workplace requirements<br>3.4 Applying Effective record keeping skills |

**RANGE OF VARIABLES**

| VARIABLE | RANGE |
|---|---|
| 1. Appropriate sources | May include:<br>1.1. Team members<br>1.2. Supervisor/Department Head<br>1.3. Suppliers<br>1.4. Trade personnel<br>1.5. Local government<br>1.6. Industry bodies |
| 2. Medium | May include:<br>2.1. Memorandum<br>2.2. Circular<br>2.3. Notice<br>2.4. Information dissemination<br>2.5. Follow-up or verbal instructions<br>2.6. Face-to-face communication<br>2.7. Electronic media (disk files, cyberspace) |
| 3. Storage | May include:<br>3.1. Manual filing system<br>3.2. Computer-based filing system |
| 4. Workplace interactions | May include:<br>4.1. Face-to-face<br>4.2. Telephone<br>4.3. Electronic and two-way radio<br>4.4. Written including electronic means, memos, instruction and forms<br>4.5. Non-verbal including gestures, signals, signs and diagrams |
| 5. Forms | May include:<br>5.1. HR/Personnel forms, telephone message forms, safety reports |

## EVIDENCE GUIDE

| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:<br>1.1 Prepared written communication following standard format of the organization<br>1.2 Accessed information using workplace communication equipment/systems<br>1.3 Made use of relevant terms as an aid to transfer information effectively<br>1.4 Conveyed information effectively adopting formal or informal communication |
|---|---|
| 2. Resource Implications | The following resources should be provided:<br>2.1 Fax machine<br>2.2 Telephone<br>2.3 Notebook<br>2.4 Writing materials<br>2.5 Computer with Internet connection |
| 3. Methods of Assessment | Competency in this unit may be assessed through:<br>3.1 Demonstration with oral questioning<br>3.2 Interview<br>3.3 Written test<br>3.4 Third-party report |
| 4. Context for Assessment | 4.1 Competency may be assessed individually in the actual workplace or through an accredited institution |

**UNIT OF COMPETENCY** : **WORK IN A TEAM ENVIRONMENT**

**UNIT CODE** : 400311211

**UNIT DESCRIPTOR** : This unit covers the skills, knowledge and attitudes to identify one's roles and responsibilities as a member of a team.

| ELEMENT | PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables | REQUIRED KNOWLEDGE | REQUIRED SKILLS |
|---|---|---|---|
| 1. Describe team role and scope | 1.1 The *role and objective of the team* is identified from available *sources of information* <br> 1.2 Team parameters, reporting relationships and responsibilities are identified from team discussions and appropriate external sources | 1.1 Group structure <br> 1.2 Group development <br> 1.3 Sources of information | 1.1 Communicating with others, appropriately consistent with the culture of the workplace <br> 1.2 Developing ways in improving work structure and performing respective roles in the group or organization |
| 2. Identify one's role and responsibility within a team | 2.1 Individual roles and responsibilities within the team environment are identified <br> 2.2 Roles and objectives of the team is identified from available *sources of information* <br> 2.3 Team parameters, reporting relationships and responsibilities are identified based on team discussions and appropriate external sources | 2.1 Team roles and objectives <br> 2.2 Team structure and parameters <br> 2.3 Team development <br> 2.4 Sources of information | 2.1 Communicating with others, appropriately consistent with the culture of the workplace <br> 2.2 Developing ways in improving work structure and performing respective roles in the group or organization |
| 3. Work as a team member | 3.1 Effective and appropriate forms of communications are used and interactions undertaken with team members based on company practices <br> 3.2 Effective and appropriate contributions made to complement team activities and | 3.1 Communication Process <br> 3.2 Workplace communication protocol <br> 3.3 Team planning and decision making <br> 3.4 Team thinking <br> 3.5 Team roles <br> 3.6 Process of team development <br> 3.7 Workplace context | 3.1 Communicating appropriately, consistent with the culture of the workplace <br> 3.2 Interacting effectively with others <br> 3.3 Deciding as an individual and as a group using group think |

| | objectives, based on ***workplace context***<br>3.3 Protocols in reporting are observed based on standard company practices<br>3.4 Contribute to the development of team work plans based on an understanding of team's role and objectives | | strategies and techniques<br>3.4 Contributing to Resolution of issues and concerns |
|---|---|---|---|

**RANGE OF VARIABLES**

| VARIABLE | RANGE |
|---|---|
| 1. Role and objective of team | May include but not limited to:<br>1.1. Work activities in a team environment with enterprise or specific sector<br>1.2. Limited discretion, initiative and judgement maybe demonstrated on the job, either individually or in a team environment |
| 2. Sources of information | May include but not limited to:<br>2.1. Standard operating and/or other workplace procedures<br>2.2. Job procedures<br>2.3. Machine/equipment manufacturer's specifications and instructions<br>2.4. Organizational or external personnel<br>2.5. Client/supplier instructions<br>2.6. Quality standards<br>2.7. OHS and environmental standards |
| 3. Workplace context | May include but not limited to:<br>3.1. Work procedures and practices<br>3.2. Conditions of work environments<br>3.3. Legislation and industrial agreements<br>3.4. Standard work practice including the storage, safe handling and disposal of chemicals<br>3.5. Safety, environmental, housekeeping and quality guidelines |

**EVIDENCE GUIDE**

| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:<br>1.1　Worked in a team to complete workplace activity<br>1.2　Worked effectively with others<br>1.3　Conveyed information in written or oral form<br>1.4　Selected and used appropriate workplace language<br>1.5　Followed designated work plan for the job |
|---|---|
| 2. Resource Implications | The following resources should be provided:<br>2.1　Access to relevant workplace or appropriately simulated environment where assessment can take place<br>2.2　Materials relevant to the proposed activity or tasks |
| 3. Methods of Assessment | Competency in this unit may be assessed through:<br>3.1　Role play involving the participation of individual member to the attainment of organizational goal<br>3.2　Case studies and scenarios as a basis for discussion of issues and strategies in teamwork<br>3.3　Socio-drama and socio-metric methods<br>3.4　Sensitivity techniques<br>3.5　Written Test |
| 4. Context for Assessment | 4.1　Competency may be assessed in workplace or in a simulated workplace setting<br>4.2　Assessment shall be observed while task are being undertaken whether individually or in group |

**UNIT OF COMPETENCY** : **SOLVE/ADDRESS GENERAL WORKPLACE PROBLEMS**

**UNIT CODE** : 400311212

**UNIT DESCRIPTOR** : This unit covers the knowledge, skills and attitudes required to apply problem-solving techniques to determine the origin of problems and plan for their resolution. It also includes addressing procedural problems through documentation, and referral.

| ELEMENT | PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables | REQUIRED KNOWLEDGE | REQUIRED SKILLS |
|---|---|---|---|
| 1. Identify routine problems | 1.1 Routine ***problems or procedural problem*** areas are identified<br>1.2 Problems to be investigated are defined and determined<br>1.3 Current conditions of the problem are identified and documented | 1.1 Current industry hardware and software products and services<br>1.2 Industry maintenance, service and helpdesk practices, processes and procedures<br>1.3 Industry standard diagnostic tools<br>1.4 Malfunctions and resolutions | 1.1 Identifying current industry hardware and software products and services<br>1.2 Identifying current industry maintenance, services and helpdesk practices, processes and procedures.<br>1.3 Identifying current industry standard diagnostic tools<br>1.4 Describing common malfunctions and resolutions.<br>1.5 Determining the root cause of a routine malfunction |
| 2. Look for solutions to routine problems | 2.1 Potential solutions to problem are identified<br>2.2 Recommendations about possible solutions are developed, ***documented***, ranked and presented to ***appropriate person*** for decision | 2.1 Current industry hardware and software products and services<br>2.2 Industry service and helpdesk practices, processes and procedures<br>2.3 Operating systems<br>2.4 Industry standard diagnostic tools | 2.1 Identifying current industry hardware and software products and services<br>2.2 Identifying services and helpdesk practices, processes and procedures. |

| | | 2.5 Industry standard diagnostic tools<br>2.6 Malfunctions and resolutions<br>2.7 Root cause analysis | 2.3 Identifying operating system<br>2.4 Identifying current industry standard diagnostic tools<br>2.5 Describing common malfunctions and resolutions.<br>2.6 Determining the root cause of a routine malfunction |
|---|---|---|---|
| 3. Recommend solutions to problems | 3.1 Implementation of solutions are *planned*<br>3.2 Evaluation of implemented solutions are planned<br>3.3 Recommended solutions are documented and submit to appropriate person for confirmation | 3.1 Standard procedures<br>3.2 Documentation produce | 3.1 Producing documentation that recommends solutions to problems<br>3.2 Following established procedures |

**RANGE OF VARIABLES**

| VARIABLE | RANGE |
|---|---|
| 1. Problems/Procedural Problem | May include but not limited to:<br>1.1 Routine/non – routine processes and quality problems<br>1.2 Equipment selection, availability and failure<br>1.3 Teamwork and work allocation problem<br>1.4 Safety and emergency situations and incidents<br>1.5 Work-related problems outside of own work area |
| 2. Appropriate person | May include but not limited to:<br>2.1 Supervisor or manager<br>2.2 Peers/work colleagues<br>2.3 Other members of the organization |
| 3. Document | May include but not limited to:<br>3.1 Electronic mail<br>3.2 Briefing notes<br>3.3 Written report<br>3.4 Evaluation report |
| 4. Plan | May include but not limited to:<br>4.1 Priority requirements<br>4.2 Co-ordination and feedback requirements<br>4.3 Safety requirements<br>4.4 Risk assessment<br>4.5 Environmental requirements |

## EVIDENCE GUIDE

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|---|---|---|
| 1. | Critical Aspects of Competency | Assessment requires evidence that the candidate:<br>1.1 Determined the root cause of a routine problem<br>1.2 Identified solutions to procedural problems.<br>1.3 Produced documentation that recommends solutions to problems.<br>1.4 Followed established procedures.<br>1.5 Referred unresolved problems to support persons. |
| 2. | Resource Implications | 2.1. Assessment will require access to a workplace over an extended period, or a suitable method of gathering evidence of operating ability over a range of situations. |
| 3. | Methods of Assessment | Competency in this unit may be assessed through:<br>3.1 Case Formulation<br>3.2 Life Narrative Inquiry<br>3.3 Standardized test<br>The unit will be assessed in a holistic manner as is practical and may be integrated with the assessment of other relevant units of competency. Assessment will occur over a range of situations, which will include disruptions to normal, smooth operation. Simulation may be required to allow for timely assessment of parts of this unit of competency. Simulation should be based on the actual workplace and will include walk through of the relevant competency components. |
| 4. | Context for Assessment | 4.1 Competency may be assessed individually in the actual workplace or simulation environment in TESDA accredited institutions. |

**UNIT OF COMPETENCY** : DEVELOP CAREER AND LIFE DECISIONS

**UNIT CODE** : 400311213

**UNIT DESCRIPTOR** : This unit covers the knowledge, skills, and attitudes in managing one's emotions, developing reflective practice, and boosting self-confidence and developing self-regulation.

| ELEMENT | PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables | REQUIRED KNOWLEDGE | REQUIRED SKILLS |
|---|---|---|---|
| 1. Manage one's emotion | 1.1 ***Self-management strategies*** are identified<br>1.2 Skills to work independently and to show initiative, to be conscientious, and persevering in the face of setbacks and frustrations are developed<br>1.3 Techniques for effectively handling negative emotions and ***unpleasant situation*** in the workplace are examined | 1.1 Self-management strategies that assist in regulating behavior and achieving personal and learning goals (e.g. Nine self-management strategies according to Robert Kelley)<br>1.2 Enablers and barriers in achieving personal and career goals<br>1.3 Techniques in handling negative emotions and unpleasant situation in the workplace such as frustration, anger, worry, anxiety, etc. | 1.1 Managing properly one's emotions and recognizing situations that cannot be changed and accept them and remain professional<br>1.2 Developing self-discipline, working independently and showing initiative to achieve personal and career goals<br>1.3 Showing confidence, and resilience in the face of setback and frustrations and other negative emotions and unpleasant situations in the workplace |
| 2. Develop reflective practice | 2.1 Personal strengths and achievements, based on self-assessment strategies and teacher feedback are contemplated<br>2.2 Progress when seeking and responding to feedback from teachers to assist them in consolidating strengths, addressing weaknesses and fulfilling their potential are monitored | 2.1 Basic SWOT analysis<br>2.2 Strategies to improve one's attitude in the workplace<br>2.3 Gibbs' Reflective Cycle/Model (Description, Feelings, Evaluation, Analysis, Conclusion, and Action plan) | 2.1 Using the basic SWOT analysis as self-assessment strategy<br>2.2 Developing reflective practice through realization of limitations, likes/dislikes; through showing of self-confidence<br>2.3 Demonstrating self-acceptance and being able to accept challenges |

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|---|---|---|---|
| | 2.3 Outcomes of personal and academic challenges by reflecting on previous problem solving and decision-making strategies and feedback from peers and teachers are predicted | | |
| 3. Boost self-confidence and develop self-regulation | 3.1 Efforts for continuous self-improvement are demonstrated<br>3.2 Counter-productive tendencies at work are eliminated<br>3.3 Positive outlook in life are maintained | 3.1 Four components of self-regulation based on Self-Regulation Theory (SRT)<br>3.2 Personality development concepts<br>3.3 Self-help concepts (e. g., 7 Habits by Stephen Covey, transactional analysis, psycho-spiritual concepts) | 3.1 Performing effective communication skills – reading, writing, conversing skills<br>3.2 Showing affective skills – flexibility, adaptability, etc.<br>3.3 Self-assessment for determining one's strengths and weaknesses |

**RANGE OF VARIABLES**

| VARIABLE | RANGE |
|---|---|
| 1. Self-management strategies | May include but not limited to: <br> 1.1    Seeking assistance in the form of job coaching or mentoring <br> 1.2    Continuing dialogue to tackle workplace grievances <br> 1.3    Collective negotiation/bargaining for better working conditions <br> 1.4    Share your goals to improve with a trusted co-worker or supervisor <br> 1.5    Make a negativity log of every instance when you catch yourself complaining to others <br> 1.6    Make lists and schedules for necessary activities |
| 2. Unpleasant situation | May include but not limited to: <br> 2.1    Job burn-out <br> 2.2    Drug dependence <br> 2.3    Sulking |

**EVIDENCE GUIDE**

| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:<br>1.1 Express emotions appropriately<br>1.2 Work independently and show initiative<br>1.3 Consistently demonstrate self-confidence and self-discipline |
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| 2. Resource Implications | The following resources should be provided:<br>2.1. Access to workplace and resource s<br>2.2. Case studies |
| 3. Methods of Assessment | Competency in this unit may be assessed through:<br>3.1. Demonstration or simulation with oral questioning<br>3.2. Case problems involving work improvement and sustainability issues<br>3.3. Third-party report |
| 4. Context for Assessment | 4.1. Competency assessment may occur in workplace or any appropriately simulated environment |

**UNIT OF COMPETENCY : CONTRIBUTE TO WORKPLACE INNOVATION**

**UNIT CODE : 400311214**

**UNIT DESCRIPTOR : This unit covers the knowledge, skills and attitudes required to make a pro-active and positive contribution to workplace innovation.**

| ELEMENT | PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables | REQUIRED KNOWLEDGE | REQUIRED SKILLS |
|---|---|---|---|
| 1. Identify opportunities to do things better | 1.1 *Opportunities for improvement* are identified proactively in own area of work<br>1.2 *Information* are gathered and reviewed which may be relevant to ideas and which might assist in gaining support for idea | 1.1 Roles of individuals in suggesting and making improvements<br>1.2 Positive impacts and challenges in innovation<br>1.3 Types of changes and responsibility<br>1.4 Seven habits of highly effective people | 1.1 Identifying opportunities to improve and to do things better involvement<br>1.2 Identifying the positive impacts and the challenges of change and innovation<br>1.3 Identifying examples of the types of changes that are within and outside own scope of responsibility |
| 2. Discuss and develop ideas with others | 2.1 *People who could provide input* to ideas for improvements are identified<br>2.2 Ways of approaching people to begin sharing ideas are selected<br>2.3 Meeting is set with relevant people<br>2.4 Ideas for follow up are review and selected based on feedback<br>2.5 *Critical inquiry method* is used to discuss and develop ideas with others | 2.1 Roles of individuals in suggesting and making improvements<br>2.2 Positive impacts and challenges in innovation<br>2.3 Types of changes and responsibility<br>2.4 Seven habits of highly effective people | 2.1 Identifying opportunities to improve and to do things better. Involvement<br>2.2 Identifying the positive impacts and the challenges of change and innovation<br>2.3 Providing examples of the types of changes that are within and outside own scope of responsibility<br>2.4 Communicating ideas for change through small group discussions and meetings |
| 3. Integrate ideas for change in | 3.1 Critical inquiry method is used to integrate | 3.1 Roles of individuals in suggesting and | 3.1 Identifying opportunities to improve and to do |

| the workplace | different ideas for change of key people<br>3.2 Summarizing, analyzing and generalizing skills are used to extract salient points in the pool of ideas<br>3.3 **_Reporting skills_** are likewise used to communicate results<br>3.4 **_Current Issues and concerns_** on the systems, processes and procedures, as well as the need for simple innovative practices are identified | making improvements<br>3.2 Positive impacts and challenges in innovation<br>3.3 Types of changes and responsibility<br>3.4 Seven habits of highly effective people<br>3.5 Basic research skills | things better involvement<br>3.2 Identifying the positive impacts and the challenges of change and innovation<br>3.3 Providing examples of the types of changes that are within and outside own scope of responsibility<br>3.4 Communicating ideas for change through small group discussions and meetings<br>3.5 Demonstrating skills in analysis and interpretation of data |
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## RANGE OF VARIABLES

| VARIABLE | RANGE |
|---|---|
| 1. Opportunities for improvement | May include:<br>1.1 Systems<br>1.2 Processes<br>1.3 Procedures<br>1.4 Protocols<br>1.5 Codes<br>1.6 Practices |
| 2. Information | May include:<br>2.1 Workplace communication problems<br>2.2 Performance evaluation results<br>2.3 Team dynamics issues and concerns<br>2.4 Challenges on return of investment<br>2.5 New tools, processes and procedures<br>2.6 New people in the organization |
| 3. People who could provide input | May include:<br>3.1 Leaders<br>3.2 Managers<br>3.3 Specialists<br>3.4 Associates<br>3.5 Researchers<br>3.6 Supervisors<br>3.7 Staff<br>3.8 Consultants (external)<br>3.9 People outside the organization in the same field or similar expertise/industry<br>3.10 Clients |
| 4. Critical inquiry method | May include:<br>4.1 Preparation<br>4.2 Discussion<br>4.3 Clarification of goals<br>4.4 Negotiate towards a Win-Win outcome<br>4.5 Agreement<br>4.6 Implementation of a course of action<br>4.7 Effective verbal communication. See our pages Verbal Communication and Effective Speaking<br>4.8 Listening<br>4.9 Reducing misunderstandings is a key part of effective negotiation<br>4.10 Rapport Building<br>4.11 Problem Solving<br>4.12 Decision Making<br>4.13 Assertiveness<br>4.14 Dealing with Difficult Situations |
| 5. Reporting skills | May include:<br>5.1 Data management<br>5.2 Coding |

| | 5.3 Data analysis and interpretation<br>5.4 Coherent writing<br>5.5 Speaking |
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## EVIDENCE GUIDE

| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:<br>1.1 Identified opportunities to do things better<br>1.2 Discussed and developed ideas with others on how to contribute to workplace innovation<br>1.3 Integrated ideas for change in the workplace<br>1.4 Analyzed and reported rooms for innovation and learning in the workplace |
|---|---|
| 2. Resource Implications | The following resources should be provided:<br>2.1 Pens, papers and writing implements<br>2.2 White board<br>2.3 Manila papers |
| 3. Methods of Assessment | Competency in this unit may be assessed through:<br>3.1 Psychological and behavioral Interviews<br>3.2 Performance Evaluation<br>3.3 Life Narrative Inquiry<br>3.4 Review of portfolios of evidence and third-party workplace reports of on-the-job performance.<br>3.5 Sensitivity analysis<br>3.6 Organizational analysis<br>3.7 Standardized assessment of character strengths and virtues applied |
| 4. Context for Assessment | 4.1 Competency may be assessed individually in the actual workplace or simulation environment in TESDA accredited institutions |

**UNIT OF COMPETENCY** : **PRESENT RELEVANT INFORMATION**

**UNIT CODE** : 400311215

**UNIT DESCRIPTOR** : This unit of covers the knowledge, skills and attitudes required to present data/information appropriately.

| ELEMENT | PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables | REQUIRED KNOWLEDGE | REQUIRED SKILLS |
|---|---|---|---|
| 1. Gather data/ information | 1.1 Evidence, facts and information are collected<br>1.2 Evaluation, terms of reference and conditions are reviewed to determine whether data/information falls within project scope | 1.1 Organizational protocols<br>1.2 Confidentiality<br>1.3 Accuracy<br>1.4 Business mathematics and statistics<br>1.5 Data analysis techniques/procedures<br>1.6 Reporting requirements to a range of audiences<br>1.7 Legislation, policy and procedures relating to the conduct of evaluations<br>1.8 Organizational values, ethics and codes of conduct | 1.1 Describing organizational protocols relating to client liaison<br>1.2 Protecting confidentiality<br>1.3 Describing accuracy<br>1.4 Computing business mathematics and statistics<br>1.5 Describing data analysis techniques/ procedures<br>1.6 Reporting requirements to a range of audiences<br>1.7 Stating legislation, policy and procedures relating to the conduct of evaluations<br>1.8 Stating organizational values, ethics and codes of conduct |
| 2. Assess gathered data/ information | 2.1 Validity of data/ information is assessed<br>2.2 Analysis techniques are applied to assess data/ information<br>2.3 Trends and anomalies are identified | 2.1 Business mathematics and statistics<br>2.2 Data analysis techniques/ procedures<br>2.3 Reporting requirements to a range of audiences | 2.1 Computing business mathematics and statistics<br>2.2 Describing data analysis techniques/ procedures<br>2.3 Reporting requirements to a range of audiences |

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|---|---|---|---|
| | 2.4 *Data analysis techniques* and procedures are documented<br>2.5 Recommendations are made on areas of possible improvement | 2.4 Reporting requirements to a range of audiences<br>2.5 Legislation, policy and procedures relating to the conduct of evaluations<br>2.6 Organizational values, ethics and codes of conduct | 2.4 Reporting requirements to a range of audiences<br>2.5 Stating legislation, policy and procedures relating to the conduct of evaluations<br>2.6 Stating organizational values, ethics and codes of conduct |
| 3. Record and present information | 3.1 Studied data/information are recorded<br>3.2 Recommendations are analyzed for action to ensure they are compatible with the project's scope and terms of reference<br>3.3 Interim and final reports are analyzed and outcomes are compared to the criteria established at the outset<br>3.4 Findings are presented to stakeholders | 3.1 Data analysis techniques/ procedures<br>3.2 Reporting requirements to a range of audiences<br>3.3 Legislation, policy and procedures relating to the conduct of evaluations<br>3.4 Organizational values, ethics and codes of conduct | 3.1 Describing data analysis techniques/ procedures<br>3.2 Reporting requirements to a range of audiences<br>3.3 Stating legislation, policy and procedures relating to the conduct of evaluations<br>3.4 Stating organizational values, ethics and codes of conduct practices |

**RANGE OF VARIABLES**

| VARIABLE | RANGE |
|---|---|
| 1. Data analysis techniques | May include but not limited to:<br>1.1. Domain analysis<br>1.2. Content analysis<br>1.3. Comparison technique |

# EVIDENCE GUIDE

| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate: <br> 1.1 Determined data / information <br> 1.2 Studied and applied gathered data/information <br> 1.3 Recorded and studied data/information <br> These aspects may be best assessed using a range of scenarios what ifs as a stimulus with a walk through forming part of the response. These assessment activities should include a range of problems, including new, unusual and improbable situations that may have happened. |
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| 2. Resource Implications | Specific resources for assessment <br> 2.1 Evidence of competent performance should be obtained by observing an individual in an information management role within the workplace or operational or simulated environment. |
| 3. Methods of Assessment | Competency in this unit may be assessed through: <br> 3.1 Written Test <br> 3.2 Interview <br> 3.3 Portfolio <br> The unit will be assessed in a holistic manner as is practical and may be integrated with the assessment of other relevant units of competency. Assessment will occur over a range of situations, which will include disruptions to normal, smooth operation. Simulation may be required to allow for timely assessment of parts of this unit of competency. Simulation should be based on the actual workplace and will include walk through of the relevant competency components. |
| 4. Context for Assessment | 4.1 In all workplace, it may be appropriate to assess this unit concurrently with relevant teamwork or operation units. |

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| **UNIT OF COMPETENCY** | **:** | **PRACTICE OCCUPATIONAL SAFETY AND HEALTH POLICIES AND PROCEDURES** | |

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| **UNIT CODE** | **:** | 400311216 |

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| **UNIT DESCRIPTOR** | **:** | This unit covers the knowledge, skills and attitudes required to identify OSH compliance requirements, prepare OSH requirements for compliance, perform tasks in accordance with relevant OSH policies and procedures. |

| ELEMENT | PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables | REQUIRED KNOWLEDGE | REQUIRED SKILLS |
|---|---|---|---|
| 1. Identify OSH compliance requirements | 1.1 Relevant *OSH requirements, regulations, policies and procedures* are identified in accordance with workplace policies and procedures.<br>1.2 OSH activity non-conformities are conveyed to *appropriate personnel*.<br>1.3 *OSH preventive and control requirements* are identified in accordance with OSH work policies and procedures. | 1.1 OSH preventive and control requirements<br>1.2 Hierarchy of Controls<br>1.3 Hazard Prevention and Control<br>1.4 General OSH principles<br>1.5 Work standards and procedures<br>1.6 Safe handling procedures of tools, equipment and materials<br>1.7 Standard emergency plan and procedures in the workplace | 1.1 Applying communication skills<br>1.2 Applying interpersonal skills<br>1.3 Applying critical thinking skills<br>1.4 Applying observation skills |
| 2. Prepare OSH requirements for compliance | 2.1 OSH work activity material, tools and equipment requirements are identified in accordance with workplace policies and procedures.<br>2.2 Required OSH materials, tools and equipment are acquired in accordance with workplace policies and procedures.<br>2.3 Required OSH materials, tools and equipment are arranged/ placed in accordance with OSH work standards. | 2.1 Resources necessary to execute hierarchy of controls<br>2.2 General OSH principles<br>2.3 Work standards and procedures<br>2.4 Safe handling procedures of tools, equipment and materials<br>2.5 Different OSH control measures | 2.1 Applying Communication skills<br>2.2 Applying estimation skills<br>2.3 Applying interpersonal skills<br>2.4 Applying critical thinking skills<br>2.5 Applying observation skills<br>2.6 Identifying material, tool and equipment |

| 3. Perform tasks in accordance with relevant OSH policies and procedures | 3.1 Relevant OSH work procedures are identified in accordance with workplace policies and procedures.<br>3.2 Work Activities are executed in accordance with OSH work standards.<br>3.3 **Non-compliance work activities** are reported to appropriate personnel. | 3.1 OSH work standards<br>3.2 Industry related work activities<br>3.3 General OSH principles<br>3.4 OSH Violations<br>3.5 Non-compliance work activities | 3.1 Applying communication skills<br>3.2 Applying interpersonal skills<br>3.3 Applying troubleshooting skills<br>3.4 Applying critical thinking skills<br>3.5 Applying observation skills |
|---|---|---|---|

## RANGE OF VARIABLES

| VARIABLE | RANGE |
|---|---|
| 1. OSH Requirements, Regulations, Policies and Procedures | May include:<br>1.1 Clean Air Act<br>1.2 Building code<br>1.3 National Electrical and Fire Safety Codes<br>1.4 Waste management statutes and rules<br>1.5 Permit to Operate<br>1.6 Philippine Occupational Safety and Health Standards<br>1.7 Department Order No. 13 (Construction Safety and Health)<br>1.8 ECC regulations |
| 2. Appropriate Personnel | May include:<br>2.1 Manager<br>2.2 Safety Officer<br>2.3 EHS Offices<br>2.4 Supervisors<br>2.5 Team Leaders<br>2.6 Administrators<br>2.7 Stakeholders<br>2.8 Government Official<br>2.9 Key Personnel<br>2.10 Specialists<br>2.11 Himself |
| 3. OSH Preventive and Control Requirements | May include:<br>3.1 Resources needed for removing hazard effectively<br>3.2 Resources needed for substitution or replacement<br>3.3 Resources needed to establishing engineering controls<br>3.4 Resources needed for enforcing administrative controls<br>3.5 Personal Protective equipment |
| 4. Non OSH-Compliance Work Activities | May include non-compliance or observance of the following safety measures:<br>4.1 Violations that may lead to serious physical harm or death<br>4.2 Fall Protection<br>4.3 Hazard Communication<br>4.4 Respiratory Protection<br>4.5 Power Industrial Trucks<br>4.6 Lockout/Tag-out<br>4.7 Working at heights (use of ladder, scaffolding)<br>4.8 Electrical Wiring Methods<br>4.9 Machine Guarding<br>4.10 Electrical General Requirements<br>4.11 Asbestos work requirements<br>4.12 Excavations work requirements |

**EVIDENCE GUIDE**

| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:<br>1.1. Conveyed OSH work non-conformities to appropriate personnel<br>1.2. Identified OSH preventive and control requirements in accordance with OSH work policies and procedures<br>1.3. Identified OSH work activity material, tools and equipment requirements in accordance with workplace policies and procedures<br>1.4. Arranged/Placed required OSH materials, tools and equipment in accordance with OSH work standards<br>1.5. Executed work activities in accordance with OSH work standards<br>1.6. Reported OSH activity non-compliance work activities to appropriate personnel |
|---|---|
| 2. Resource Implications | The following resources should be provided:<br>2.1 Facilities, materials tools and equipment necessary for the activity |
| 3. Methods of Assessment | Competency in this unit may be assessed through:<br>3.1 Observation/Demonstration with oral questioning<br>3.2 Third party report |
| 4. Context for Assessment | 4.1 Competency may be assessed in the work place or in a simulated work place setting |

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| **UNIT OF COMPETENCY** : | **EXERCISE EFFICIENT AND EFFECTIVE SUSTAINABLE PRACTICES IN THE WORKPLACE** |
| **UNIT CODE** : | 400311217 |
| **UNIT DESCRIPTOR** : | This unit covers knowledge, skills and attitude to identify the efficiency and effectiveness of resource utilization, determine causes of inefficiency and/or ineffectiveness of resource utilization and convey inefficient and ineffective environmental practices. |

| ELEMENTS | PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables | REQUIRED KNOWLEDGE | REQUIRED SKILLS |
|---|---|---|---|
| 1. Identify the efficiency and effectiveness of resource utilization | 1.1 Required resource utilization in the workplace is measured using appropriate techniques.<br>1.2 Data are recorded in accordance with workplace protocol.<br>1.3 Recorded data are compared to determine the efficiency and effectiveness of resource utilization according to established *environmental work procedures.* | 1.1 Importance of environmental literacy<br>1.2 Environmental work procedures<br>1.3 Waste minimization<br>1.4 Efficient energy consumptions | 1.1 Recording skills<br>1.2 Writing skills<br>1.3 Applying innovation skills |
| 2. Determine causes of inefficiency and/or ineffectiveness of resource utilization | 2.1 Potential causes of inefficiency and/or ineffectiveness are listed.<br>2.2 Causes of inefficiency and/or ineffectiveness are identified through deductive reasoning.<br>2.3 Identified causes of inefficiency and/or ineffectiveness are validated thru established environmental procedures. | 2.1 Causes of environmental inefficiencies and ineffectiveness | 2.1 Applying deductive reasoning skills<br>2.2 Applying critical thinking<br>2.3 Applying problem solving skills<br>2.4 Applying observation skills |
| 3. Convey inefficient and ineffective environmental practices | 3.1 Efficiency and effectiveness of resource utilization are reported to *appropriate personnel.* | 3.1 Appropriate Personnel to address the environmental hazards | 3.1 Applying written and oral communication skills<br>3.2 Applying critical thinking |

| | 3.2 Concerns related resource utilization are discussed with appropriate personnel.<br>3.3 Feedback on information/ concerns raised are clarified with appropriate personnel. | 3.2 Environmental corrective actions | 3.3 Applying problem solving<br>3.4 Applying observation skills<br>3.5 Practicing environmental awareness |
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**RANGE OF VARIABLES**

| VARIABLE | RANGE |
|---|---|
| 1. Environmental Work Procedures | May include:<br>1.1 Utilization of Energy, Water, Fuel Procedures<br>1.2 Waster Segregation Procedures<br>1.3 Waste Disposal and Reuse Procedures<br>1.4 Waste Collection Procedures<br>1.5 Usage of Hazardous Materials Procedures<br>1.6 Chemical Application Procedures<br>1.7 Labeling Procedures |
| 2. Appropriate Personnel | May include:<br>2.1 Manager<br>2.2 Safety Officer<br>2.3 EHS Offices<br>2.4 Supervisors<br>2.5 Team Leaders<br>2.6 Administrators<br>2.7 Stakeholders<br>2.8 Government Official<br>2.9 Key Personnel<br>2.10 Specialists<br>2.11 Himself |

**EVIDENCE GUIDE**

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|---|---|
| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:<br>1.1 Measured required resource utilization in the workplace using appropriate techniques<br>1.2 Recorded data in accordance with workplace protocol<br>1.3 Identified causes of inefficiency and/or ineffectiveness through deductive reasoning<br>1.4 Validate the identified causes of inefficiency and/or ineffectiveness thru established environmental procedures<br>1.5 Report efficiency and effectives of resource utilization to appropriate personnel<br>1.6 Clarify feedback on information/concerns raised with appropriate personnel |
| 2. Resource Implications | The following resources should be provided:<br>2.1 Workplace<br>2.2 Tools, materials and equipment relevant to the tasks<br>2.3 PPE<br>2.4 Manuals and references |
| 3. Methods of Assessment | Competency in this unit may be assessed through:<br>3.1 Demonstration<br>3.2 Oral questioning<br>3.3 Written examination |
| 4. Context for Assessment | 4.1 Competency assessment may occur in workplace or any appropriately simulated environment<br>4.2 Assessment shall be observed while task are being undertaken whether individually or in-group |

**UNIT OF COMPETENCY** : **PRACTICE ENTREPRENEURIAL SKILLS IN THE WORKPLACE**

**UNIT CODE** : 400311218

**UNIT DESCRIPTOR** : This unit covers the outcomes required to apply entrepreneurial workplace best practices and implement cost-effective operations.

| ELEMENT | PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables | REQUIRED KNOWLEDGE | REQUIRED SKILLS |
|---|---|---|---|
| 1. Apply entrepreneurial workplace best practices | 1.1 ***Good practices*** relating to workplace operations are observed and selected following workplace policy.<br>1.2 Quality procedures and practices are complied with according to workplace requirements.<br>1.3 Cost-conscious habits in ***resource utilization*** are applied based on industry standards. | 1.1 Workplace best practices, policies and criteria<br>1.2 Resource utilization<br>1.3 Ways in fostering entrepreneurial attitudes:<br>  1.3.1 Patience<br>  1.3.2 Honesty<br>  1.3.3 Quality-consciousness<br>  1.3.4 Safety-consciousness<br>  1.3.5 Resourcefulness | 1.1 Applying communication skills<br>1.2 Complying with quality procedures |
| 2. Communicate entrepreneurial workplace best practices | 2.1 Observed good practices relating to workplace operations are communicated to ***appropriate person.***<br>2.2 Observed quality procedures and practices are communicated to appropriate person.<br>2.3 Cost-conscious habits in resource utilization are communicated based on industry standards. | 2.1 Workplace best practices, policies and criteria<br>2.2 Resource utilization<br>2.3 Ways in fostering entrepreneurial attitudes:<br>  2.3.1 Patience<br>  2.3.2 Honesty<br>  2.3.3 Quality-consciousness<br>  2.3.4 Safety-consciousness<br>  2.3.5 Resourcefulness | 2.1 Applying communication skills<br>2.2 Complying with quality procedures<br>2.3 Following workplace communication protocol |

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| 3. Implement cost-effective operations | 3.1 Preservation and optimization of workplace resources is implemented in accordance with enterprise policy.<br><br>3.2 Judicious use of workplace tools, equipment and materials are observed according to manual and work requirements.<br><br>3.3 Constructive contributions to office operations are made according to enterprise requirements.<br><br>3.4 Ability to work within one's allotted time and finances is sustained. | 3.1 Optimization of workplace resources<br><br>3.2 5S procedures and concepts<br><br>3.3 Criteria for cost-effectiveness<br><br>3.4 Workplace productivity<br><br>3.5 Impact of entrepreneurial mindset to workplace productivity<br><br>3.6 Ways in fostering entrepreneurial attitudes:<br>  3.6.1 Quality-consciousness<br>  3.6.2 Safety-consciousness | 3.1 Implementing preservation and optimizing workplace resources<br><br>3.2 Observing judicious use of workplace tools, equipment and materials<br><br>3.3 Making constructive contributions to office operations<br><br>3.4 Sustaining ability to work within allotted time and finances |

# RANGE OF VARIABLES

| VARIABLE | RANGE |
|---|---|
| 1. Good practices | May include:<br>1.1 Economy in use of resources<br>1.2 Documentation of quality practices |
| 2. Resources utilization | May include:<br>2.1 Consumption/ use of consumables<br>2.2 Use/Maintenance of assigned equipment and furniture<br>2.3 Optimum use of allotted /available time |

# EVIDENCE GUIDE

| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:<br>1.1 Demonstrated ability to identify and sustain cost-effective activities in the workplace<br>1.2 Demonstrated ability to practice entrepreneurial knowledge, skills and attitudes in the workplace. |
|---|---|
| 2. Resource Implications | The following resources should be provided:<br>2.1 Simulated or actual workplace<br>2.2 Tools, materials and supplies needed to demonstrate the required tasks<br>2.3 References and manuals<br>    2.3.1 Enterprise procedures manuals<br>    2.3.2 Company quality policy |
| 3. Methods of Assessment | Competency in this unit may be assessed through:<br>3.1 Interview<br>3.2 Third-party report |
| 4. Context of Assessment | 4.1 Competency may be assessed in workplace or in a simulated workplace setting<br>4.2 Assessment shall be observed while tasks are being undertaken whether individually or in-group |

# COMMON COMPETENCIES

**UNIT OF COMPETENCY** : APPLY QUALITY STANDARDS

**UNIT CODE** : CS-SOC514203

**UNIT DESCRIPTOR** : This unit covers the knowledge, skill, attitudes and value needed to apply quality standards in the workplace. The unit also includes the application of relevant safety procedures and regulations, organization procedures and customer requirements.

| ELEMENT | PERFORMANCE CRITERIA *Italicized* terms are elaborated in the Range of Variables | REQUIRED KNOWLEDGE | REQUIRED SKILLS |
|---|---|---|---|
| 1. Inspect quality of received products | 1.1 Work instruction is obtained and work is carried out in accordance with standard operating procedures.<br>1.2 Received products are checked against workplace standards and specifications.<br>1.3 *Faulty materials* related to work are identified and isolated.<br>1.4 *Faults* and any identified causes are recorded and/or reported to the supervisor concerned in accordance with workplace procedures.<br>1.5 *Faulty materials* are replaced in accordance with workplace procedures. | **TECHNOLOGY**<br>1.1 Relevant production processes, materials and products<br>1.2 Characteristics of materials, software and hardware used in production<br>**COMMUNICATION**<br>1.3 Quality checking procedures<br>1.4 Quality workplace procedures<br>1.5 Identification of faulty products related to work | 1.1 Reading skills required to interpret work instruction<br>1.2 Critical thinking<br>1.3 Interpreting work instructions |
| 2. Asses own work | 2.1 *Documentation* relative to quality within the company is identified and used in accordance with established procedures.<br>2.2 Completed work is checked against | **ENVIRONMENTAL**<br>2.1 Safety and environmental aspects of work processes<br>**COMMUNICATION**<br>2.2 Fault identification and reporting<br>2.3 Workplace | 2.1 Carrying out work in accordance with Occupational Health and Safety (OHS) policies and procedures<br>2.2 Reading skills |

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| | workplace standards relevant to the task undertaken.<br><br>2.3 *Errors* are identified and isolated in accordance with established procedures.<br><br>2.4 Information on the quality and other indicators or work performance are recorded in accordance with workplace procedures.<br><br>2.5 In case of deviations from specific *quality standards*, causes are documented and reported in accordance with the workplace's standard operating procedures. | procedure in documenting completed work<br><br>**SCIENCE**<br>2.4 Workplace quality indicators | required to interpret work instruction<br><br>2.3 Critical thinking<br>2.4 Interpret work instructions |
| 3. Engage in quality improvement | 3.1 Process improvement procedures are participated relative to workplace.<br><br>3.2 Work is carried out in accordance with process improvement procedures.<br><br>3.3 Performance of operation or quality of product to ensure customer satisfaction is monitored in accordance with established procedures. | **TECHNOLOGY**<br>3.1 Quality improvement processes<br>**COMMUNICATION**<br>3.2 Company customers defined | 3.1 Providing solution and decision-making<br>3.2 Practicing company process improvement procedure |

# RANGE OF VARIABLES

| VARIABLE | RANGE |
|---|---|
| 1. Faults | May include:<br>1.1 Product not to specification<br>1.2 Products contain incorrect/outdated information<br>1.3 Hardware defects<br>1.4 Materials that do not conform with any regulatory agencies |
| 2. Documentation | May include:<br>2.1 Organization work procedures<br>2.2 Manufacturer's instruction manual<br>2.3 Customer requirements<br>2.4 Forms |
| 3. Errors | May include:<br>3.1 Deviation from the requirements of the customer<br>3.2 Deviation from the requirements of the organization |
| 4. Quality Standards | May include:<br>4.1 Product<br>4.2 Materials<br>4.3 Hardware<br>4.4 Software<br>4.5 Customer service |

**EVIDENCE GUIDE**

| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:<br>1.1 Carried out work in accordance with the company's standard operating procedures<br>1.2 Performed task according to specification<br>1.3 Reported defects detected in accordance with standards operating procedures<br>1.4 Carried out work in accordance with the process improvement procedures |
|---|---|
| 2. Resource Implication | The following resources should be provided:<br>2.1 Materials, software and/or hardware to be used in a real or simulated situation<br>2.2 Tools, materials, and equipment appropriate for the unit of competency<br>2.3 Workplace environment appropriate for the unit of competency |
| 3. Method of Assessment | Competency in this unit may be assessed through:<br>3.1 Observation with questioning<br>3.2 Interview<br>3.3 Demonstration with questioning<br>3.4 Written test |
| 4. Context of Assessment | 4.1 Competency may be assessed in the actual workplace, in a simulated environment or at the designated TESDA Accredited Assessment Center. |

**UNIT OF COMPETENCY** : **PROVIDE AND BUILD QUALITY CUSTOMER RELATIONS**

**UNIT CODE** : CS-SOC522204

**UNIT DESCRIPTOR** : This unit of competency deals with the knowledge, skills and attitudes in providing effective and efficient service to customers. It includes personal presentation, knowledge of updated product information, addressing customer needs and building customer relations.

| ELEMENT | PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables | REQUIRED KNOWLEDGE | REQUIRED SKILLS |
|---|---|---|---|
| 1. Maintain a professional image | 1.1 *Personal presence* is maintained according to *employer standards* or venue requirements. <br> 1.2 *Interpersonal skills* are used to ensure that customer needs are accurately identified. <br> 1.3 Visible work area is kept tidy and uncluttered. <br> 1.4 Equipment and other resources are stored according to assignment requirements. | **COMMUNICATION** <br> 1.1 Interactive communication with others <br> 1.2 Interpersonal skills/social graces with sincerity <br> 1.3 Eye-to-Eye contact <br> 1.4 Maintain teamwork and cooperation <br> **ENVIRONMENTAL** <br> 1.5 Safe work practices <br> **SCIENCE** <br> 1.6 Personal hygiene <br> 1.7 Housekeeping <br> 1.8 Time Management | 1.1 Applying effective communication skills <br> 1.2 Applying non-verbal communication <br> 1.2.1 Body language <br> 1.3 Practicing good time management <br> 1.4 Ability to work calmly and unobtrusively effectively <br> 1.5 Ability to be attentive, patient and cordial |
| 2. Update knowledge of products and services | 2.1 Products to be marketed are identified, familiarized with and fully understood in accordance with established procedures. <br> 2.2 Information on programs is accessed in accordance with established procedures. <br> 2.3 Additional information on products, services and programs are identified in accordance with established procedures. | **SCIENCE** <br> 2.1 Customer's nature, motivation, expectations, and needs <br> 2.2 Customer needs and expectations related to the product and programs <br> **COMMUNICATION** <br> 2.3 Appropriate marketing and promotional strategies <br> 2.4 Company standards on how to interact with customers | 2.1 Applying effective oral communication skills <br> 2.2 Listening skills <br> 2.3 Motivational skills <br> 2.4 Interpersonal skills <br> 2.5 Presentation skills <br> 2.6 Computer literacy <br> 2.7 Understanding customer's nature, motivation, expectations, and needs <br> 2.8 Determining customer needs and expectations related to the |

| | | 2.5 Organization's vision, mission | product and programs |
|---|---|---|---|
| 3. Assess needs of new and existing customers | 3.1 Active listening is used to gather information from customers in accordance with established procedures.<br>3.2 Orientation on products, programs and policies are conducted in accordance with established procedures.<br>3.3 Provide customers with courteous and professional treatment throughout the interaction using *interactive communication.*<br>3.4 Inquiries, concerns and comments are responded to promptly and accurately in accordance with organization's policies.<br>3.5 Identified related or applicable needs of clients based on the products being offered. | **SCIENCE**<br>3.1 Customer's nature, motivation, expectations and needs<br>3.2 Customer needs and expectations related to the products<br>**COMMUNICATION**<br>3.3 Appropriate marketing and promotional strategies<br>3.4 Company standards on how to interact with customer<br>3.5 Organization's vision, mission, and values | 3.1 Applying effective oral communication skills<br>3.2 Listening skills<br>3.3 Motivational skills<br>3.4 Interpersonal skills<br>3.5 Presentation skills<br>3.6 Understanding customer's nature, motivation, expectations and needs<br>3.7 Determining customer needs and expectations related to the products<br>3.8 Applying commitment/dedication, love of work, competence, courtesy, honesty, sincerity, sensitivity to others, sense of responsibility, caring attitude/ compassion, and charity |
| 4. Build relations with customers | 4.1 Customer expectations on quality, efficiency, punctuality and appearance are met in accordance with established procedures.<br>4.2 Possible causes of customer dissatisfaction are identified, addressed and recorded according to employer policy.<br>4.3 Customers are fully informed of any relevant concerns in a timely manner and according to agreed reporting procedures. | **COMMUNICATION**<br>4.1 Interactive communication with others<br>4.2 Interpersonal skills/social graces with sincerity<br>4.3 Attitude<br>  4.3.1 Attentive, patient and cordial<br>  4.3.2 Eye-to-eye contact<br>  4.3.3 Maintain teamwork and cooperation<br>**TECHNOLOGY**<br>4.4 Communication devices<br>**ENVIRONMENT** | 4.1 Applying effective communication skills<br>4.2. Applying non-verbal communication<br>4.2.1 Body language<br>4.3 Practicing good time management<br>4.4 Ability to work calmly and unobtrusively effectively |

| | | 4.5 Safety practices<br>4.6 Safe work practices<br>**SCIENCE**<br>4.7 Personal hygiene | |
|---|---|---|---|

## RANGE OF VARIABLES

| VARIABLE | RANGE |
|---|---|
| 1.  Personal presence | May include:<br>1.1  Stance<br>1.2  Posture<br>1.3  Body language<br>1.4  Demeanor<br>1.5  Grooming<br>1.6  Dress code/attire |
| 2.  Employer standards | May include:<br>2.1  Organizational policy and procedures<br>2.2  Common and accepted practices in the industry |
| 3.  Interpersonal skills | May include:<br>3.1  Interactive communication<br>3.2  Public relations<br>3.3  Good working attitude<br>3.4  Sincerity<br>3.5  Pleasant disposition<br>3.6  Effective communication skills<br>3.7  Team player |
| 4.  Interactive communication | May include:<br>4.1  Information is gathered in courteous and professional manner<br>4.2  Probing skills<br>4.3  Skills in effective questioning<br>4.4  Consistent service quality for all types of customers<br>4.5  Avoiding controversial issues like politics and religion |

**EVIDENCE GUIDE**

| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:<br>1.1 Complied with industry practices and procedures<br>1.2 Used interactive communication with others<br>1.3 Promoted public relations<br>1.4 Complied with service manual standards<br>1.5 Demonstrated familiarity with company facilities, products and services<br>1.6 Received, assessed and respondent to customer needs<br>1.7 Applied organizational quality |
|---|---|
| 2. Resources implications | The following resources should be provided:<br>2.1 Communication devices<br>2.2 Tools, materials and equipment appropriate for the unit of competency<br>2.3 Complete information on products<br>2.4 Product brochures<br>2.5 Workplace environment appropriate for the unit of competency |
| 3. Methods of assessment | Competency in this unit may be assessed through:<br>3.1 Observation with questioning<br>3.2 Interview<br>3.3 Demonstration with questioning<br>3.4 Written test |
| 4. Context of Assessment | 4.1 Competency maybe assessed in actual workplace, in a simulated environment or at the designated TESDA Accredited Assessment Center. |

# CORE COMPETENCIES

**UNIT OF COMPETENCY** : **PROSPECT IN-STORE CUSTOMERS**

**UNIT CODE** : CS-SOC522301

**UNIT DESCRIPTOR** : This unit covers the knowledge, skills and attitudes needed to effectively prospect in-store customers and identify their needs so that products and services are offered to them according to their requirement. It includes engaging the customer, determining customer needs, and deciding what product to offer to the customer.

| ELEMENT | PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables | REQUIRED KNOWLEDGE | REQUIRED SKILLS |
|---|---|---|---|
| 1. Engage customer | 1.1 **Customer** is greeted in accordance with established procedures.<br>1.2 Customer's **verbal and non-verbal cues** are observed in order to get a better understanding of his/her needs and in accordance to established procedures.<br>1.3 Initial **communication** is undertaken with the customer in a clear, concise and courteous manner and in accordance to established procedures. | **SCIENCE**<br>1.1 Basic Behavioral Psychology<br>1.2 Personality Development<br>**MATHEMATICS**<br>1.3 Basic Mathematics (Addition, Subtraction, Multiplication and Division)<br>**COMMUNICATION**<br>1.4 Communication Procedures<br>1.5 Proper salesperson etiquette<br>1.6 Identify communication barriers<br>**LAWS AND ORDINANCES**<br>1.7 Health Protocols | 1.1 Interpersonal Skills<br>1.2 Attention to details<br>1.3 Communication Skills<br>1.4 Using communication equipment<br>1.5 Interpretation of Verbal and Non-Verbal Cues/Skills<br>1.6 Memorizing spiels<br>1.7 Developing personality<br>1.8 Probing Skills |
| 2. Determine customers' needs | 2.1 Communication is undertaken with the customer in a clear, concise and courteous manner and in accordance to established procedures.<br>2.2 Appropriate communication is | **SCIENCE**<br>2.1 Customer stereotypes<br>2.2 Basic Behavioral Psychology<br>**TECHNOLOGY**<br>2.3 Use of social media (FB, Viber, Twitter) | 2.1 Interpersonal Skills<br>2.2 Attention to details<br>2.3 Information gathering<br>2.4 Effective Communication Skills |

| | | 2.4 E-commerce principles | 2.5 Using communication sales tools |
|---|---|---|---|
| | provided to meet identified needs in accordance with procedures and protocols.<br>2.3 **Questions and clarifications** are addressed in accordance with established procedures.<br>2.4 **Selling opportunities** are identified and acted upon and in accordance to established procedures.<br>2.5 Customer response is evaluated in accordance with established procedures. | **COMMUNICATION**<br>2.5 Communication via SMS<br>2.6 Communication Process and Protocols<br>2.7 Identify communication barriers<br>2.8 Handling of Customer Queries and Concerns<br>2.9 Customer Product Requirements<br>2.10 Proper salesperson etiquette<br>2.11 Customer's purchasing capability<br>2.12 Customer service protocol<br>2.13 Conduct of Interview<br>2.14 Customer Service<br>2.15 Customer Feedback<br>**LAWS AND ORDINANCES**<br>2.16 Health protocols | 2.6 Using technological equipment/ devices<br>2.7 Empathetic listening<br>2.8 Profiling |
| 3. Decide what products and services to offer | 3.1 **Products and services** are recommended to the customer according to his/her requirements and preferences.<br>3.2 Customer is brought to the **product display/ showcase area** in accordance to established procedures. | **SCIENCE**<br>3.1 Products/Services Specifications<br>3.2 Basic Principles of Marketing and Merchandising<br>**MATHEMATICS**<br>3.3 Pricing, Discounts, Warranties<br>**COMMUNICATION**<br>3.4 Promotions after sales service<br>3.5 Proper salesperson etiquette<br>**LAWS AND ORDINANCES**<br>3.6 Health protocols | 3.1 Interpersonal Skills<br>3.2 Attention to detail<br>3.3 Shortlisting of products to offer<br>3.4 Effective Communication Skills<br>3.5 Using communication sales tools<br>3.6 Using technological equipment/ devices<br>3.7 Empathetic listening |

## RANGE OF VARIABLES

| VARIABLE | RANGE |
|---|---|
| 1. Customer | May include:<br>1.1  Old or Regular or Loyal<br>1.2  New |
| 2. Verbal and Non-Verbal cues | May include:<br>2.1  Physical appearance<br>2.2  Manner of speaking<br>2.3  Body language |
| 3. Communication | May include:<br>3.1  Verbal<br>3.2  Face to face<br>3.3  Via phone<br>3.4  Digital platform (social media) |
| 4. Questions and Clarifications | May include:<br>4.1  Price<br>4.2  Promotion<br>4.3  Discounts<br>4.4  Products Features, Benefits and Specifications<br>4.5  Warranty Period<br>4.6  Comparison and edge versus competition<br>4.7  Payment mode/terms<br>4.8  Delivery<br>4.9  After-sales service<br>4.10 Return policy<br>4.11 Proper product usage |
| 5.Selling Opportunities | May include:<br>5.1  Product/s Offers<br>5.2  Participation in Product Marketing Programs or Special Offers<br>5.3  Signing Membership<br>5.4  Use of Other Selling Platforms<br>5.5  Promotions |
| 6. Products | Products may be characterized by:<br>6.1  Type<br>6.2  Brand<br>6.3  Size<br>6.4  Customer needs<br>6.5  Color<br>6.6  Price<br>6.7  Features, Benefits and Specifications<br>6.8  Delivery lead time |
| 7. Services | May include:<br>7.1  Description/Types of service<br>7.2  Features, Benefits and Specifications<br>7.3  Delivery lead time |
| 8. Product Display/Showcase | May include:<br>8.1  Plan-o-gram |

| | 8.2 Location/visibility<br>8.3 Pricing |
|---|---|

## EVIDENCE GUIDE

| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate:<br>1.1 Engaged customer<br>1.2 Determined customers' needs<br>1.3 Decided what products and services to offer |
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| 2. Resource Implications | The following resources should be provided:<br>2.1 Tools, Materials and Equipment appropriate for the unit of competency<br>2.2 Workplace environment appropriate for the unit of competency |
| 3.Methods of Assessment | Competency in this unit may be assessed through:<br>3.1 Interview<br>3.2 Demonstration with Questioning<br>3.3 Observation<br>3.4 Written Examination |
| 4. Context of Assessment | 4.1 Competency may be assessed in the actual workplace or at the designated TESDA Accredited Assessment Center. |

**UNIT OF COMPETENCY** **:** **SELL PRODUCTS AND SERVICES TO CUSTOMERS**

**UNIT CODE** **:** CS-SOC522302

**UNIT DESCRIPTOR** **:** This unit covers the knowledge, skills and attitudes needed to sell products and services to customers. It includes making a sales presentation, handling inquiries and objections from the customer, discussing special offer, closing of the sale, assist customer to check-out counters, monitor delivery of products and services and to perform aftersales services.

| ELEMENT | PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables | REQUIRED KNOWLEDGE | REQUIRED SKILLS |
|---|---|---|---|
| 1. Make sales presentation | 1.1 Products and services are introduced to the customer based on his/her requirements.<br>1.2 Communication is undertaken with the customer in a clear, concise and courteous manner.<br>1.3 Appropriate communication is provided to meet identified needs in accordance with procedures and protocols.<br>1.4 Questions and clarifications are addressed in accordance with established procedures.<br>1.5 Selling opportunities are identified and acted upon as appropriate. | **SCIENCE**<br>1.1 Products and Services Specification<br>1.2 Basic Principles of Marketing and Merchandising<br>**TECHNOLOGY**<br>1.3 Basic computer software and hardware knowledge<br>**MATHEMATICS**<br>1.4 Pricing, Discounts, Warranties<br>**COMMUNICATION**<br>1.5 Promotions, After sales service<br>1.6 Communication procedures<br>1.7 Proper salesperson etiquette<br>**LAWS AND ORDINANCES**<br>1.8 Health protocols | 1.1 Interpersonal Skills<br>1.2 Attention to detail<br>1.3 Information gathering<br>1.4 Effective Communication Skills<br>1.5 Using communication sales tools<br>1.6 Using technological equipment/ devices<br>1.7 Basic math skills<br>1.8 Computer literacy<br>1.9 Empathetic listening |

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|---|---|---|---|
| 2. Handle inquiries and objections | 2.1 *Customer inquiries* are properly addressed in accordance with established procedures.<br>2.2 *Customer objections* are handled courteously and respectively and in accordance with established procedures.<br>2.3 Customer doubts/uncertainty are eliminated in accordance with established procedures. | **SCIENCE**<br>2.1 Basic Behavioral Psychology<br>2.2 Products and services specifications<br>2.3 Basic Principles of Marketing and Merchandising<br>**TECHNOLOGY**<br>2.4 Basic computing devices<br>**MATHEMATICS**<br>2.5 Basic Business Mathematics (Addition, Subtraction, Multiplication, Division)<br>**COMMUNICATION**<br>2.6 Promotions, after-sales service<br>**LAWS AND ORDINANCES**<br>2.7 Health protocols | 2.1 Interpersonal Skills<br>2.2 Attention to detail<br>2.3 Empathetic listening<br>2.4 Effective communication skills<br>2.5 Using communication devices<br>2.6 Interpretation of Verbal and Non-Verbal cues /skills<br>2.7 Using computing devices |
| 3. Discuss special offers | 3.1 Ongoing promotions are discussed to the customer in accordance with established procedures.<br>3.2 *Promotional items* are offered to the customer in accordance with established procedures. | **SCIENCE**<br>3.1 Products and services specification<br>3.2 Basic Principles of Marketing and Merchandising (sales offtake computation)<br>**TECHNOLOGY**<br>3.3 Basic computing devices<br>**MATHEMATICS**<br>3.4 Business Mathematics (Addition, Subtraction, Multiplication, Division, Percentage, Discounts computation)<br>**COMMUNICATION**<br>3.5 Promotions, after-sales service<br>**LAWS AND ORDINANCES**<br>3.6 Health protocols | 3.1 Interpersonal Skills<br>3.2 Attention to detail<br>3.3 Effective Communications Skills<br>3.4 Using communication devices<br>3.5 Interpretation of Verbal and Non – Verbal Cues/Skill<br>3.6 Using computing devices |

| | | 3.7 DTI and/or FDA permits | |
|---|---|---|---|
| 4. Close the sale | 4.1 Commitment to *purchase* was acquired from the customer in accordance with established procedures. <br> 4.2 *Order form* is completed in accordance with established procedures <br> 4.3 *Warranty conditions* are discussed with the customer in accordance with established procedures, as applicable. <br> 4.4 *Return policy* is discussed with the customer in accordance with established procedures. | **SCIENCE** <br> 4.1 Cues signaling potential to close sale <br> 4.2 Proper product handling and usage <br> **TECHNOLOGY** <br> 4.3 Mobile devices <br> **MATHEMATICS** <br> 4.4 Basic Business Mathematics (Addition, Subtraction, Multiplication, Division) <br> **COMMUNICATION** <br> 4.5 Communication devices (oral and written) <br> 4.6 Order processing requirements <br> **LAWS AND ORDINANCES** <br> 4.7 Health protocol <br> 4.8 RA 7394 – The Consumer Act of the Philippines - Provision on Returns and Price tag | 4.1 Identifying verbal and non-verbal cues <br> 4.2 Effective Communication Skills <br> 4.3 Accomplishing Order Forms <br> 4.4 Accomplishing Warranty Form |
| 5. Collect payments for products and services as appropriate | 5.1 *Payment* from the customer is collected in accordance with established procedures. | **TECHNOLOGY** <br> 5.1 Point of Sale (POS) Payment devices <br> 5.2 Communication devices (oral and written) | 5.1 Operating POS and other payment gateways <br> 5.6 Managing various modes of payment |
| 6. Assist customer to check out counters as appropriate | 6.1 *Terms and modes of payment* is explained to customer in accordance with established procedures. <br> 6.2 Product/service ordered is ensured correct before payment in accordance with established procedures. <br> 6.3 Customer is lead to cashier for payment | **SCIENCE** <br> 6.1 Types and modes of payment <br> **MATHEMATICS** <br> 6.2 Basic Mathematics (Addition, Subtraction, Multiplication, Division) <br> **COMMUNICATION** <br> 6.3 Spiels <br> **LAWS AND ORDINANCES** | 6.1 Interpersonal skills <br> 6.2 Effective communication skills <br> 6.3 Attention to detail |

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|---|---|---|---|
| | processing as appropriate.<br>6.4 Ensure *purchased product or service* is received by the customer in accordance with established procedures.<br>6.5 Gratitude is expressed in a courteous manner towards the customer for the purchase and invite him/her to come again in accordance with established procedures. | 6.4 Health Protocols<br>6.5 RA 7394 - The Consumer Act of the Philippines - Provision on Returns and Price Tag | |
| 7. Monitor delivery of products and services | 7.1 *Delivery* is monitored to ensure that purchased product or service is received by the customer in accordance with established procedures.<br>7.2 Gratitude is expressed in a courteous manner towards the customer for the purchase and invite him/her to come again in accordance with established procedures. | **SCIENCE**<br>  7.1 Basic Logistics<br>**TECHNOLOGY**<br>  7.2 Communication devices<br>  7.3 Computing devices<br>  7.4 Tracking devices<br>**MATHEMATICS**<br>  7.5 Computation of Delivery time<br>  7.6 Computation of Delivery distance<br>**COMMUNICATION**<br>  7.7 Communication procedures<br>  7.8 Proper phone etiquette<br>  7.9 Basic knowledge of administrative works<br>**LAWS AND ORDINANCES**<br>  7.10 Traffic and vehicle code of ordinances<br>  7.11 Freight charges<br>  7.12 Basic knowledge of transportation laws | 7.1 Effective communication skills<br>7.2 Distance-time computation<br>7.3 Computer skills<br>7.4 Administrative and Coordination Skills<br>7.5 Monitoring of delivery schedule |
| 8. Perform aftersales service | 8.1 *Condition* of the purchased product or service is checked with the customer and in accordance with established procedures. | **SCIENCE**<br>  8.1 After-sales service<br>  8.2 Basic Quality Assurance<br>**TECHNOLOGY**<br>  8.3 Electronic Communication devices | 8.1 Effective communication skills<br>8.2 Surveying skills<br>8.3 Accomplishing Customer Satisfaction Forms |

| | 8.2 Customer satisfaction survey with customer is conducted, if required.<br>8.3 Suggestive selling is conducted in accordance with established procedures. | **COMMUNICATION**<br>8.4 Spiels<br>8.5 Suggestive selling<br>8.6 Customer service<br>**LAWS AND ORDINANCES**<br>8.7 RA 7394 – The Consumer Act of the Philippines – Provision on Returns | 8.3.1 Online survey form<br>8.3.2 Manual survey form<br>8.4 Administrative and coordination skills |
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**RANGE OF VARIABLES**

| VARIABLE | RANGE |
|---|---|
| 1. Customer objections | May include:<br>1.1 Pricing<br>1.2 Discounts<br>1.3 Stock availability<br>1.4 Delivery schedule<br>1.5 Return policy<br>1.6 Warranty<br>1.7 Promotion<br>1.8 Customer service<br>1.9 After sales service<br>1.10 Product quality<br>1.11 Store environment and experience |
| 2. Customer inquiries | May include:<br>2.1 Pricing<br>2.2 Discounts<br>2.3 Stock availability<br>2.4 Delivery schedule<br>2.5 Return policy<br>2.6 Warranty<br>2.7 Promotion<br>2.8 Product specification<br>2.9 Product feature, advantages and benefit<br>2.10 Terms and Modes of payment |
| 3. Promotional Items | May include:<br>3.1 Freebies/ Gift with purchase (GWPs)<br>3.2 Rewards and perks<br>3.3 Price discount<br>3.4 Bundling<br>3.5 Gift Certificate and Vouchers<br>3.6 Deferred payment<br>3.7 Purchase with purchase<br>3.8 Free services |
| 4. Purchase | May include:<br>4.1 Payment terms<br>4.2 Mode of payment |
| 5. Order Form | May include:<br>5.1 Customer information<br>5.2 Product description<br>5.3 Quantity<br>5.4 Price<br>5.5 Order date<br>5.6 Discounts<br>5.7 Terms and conditions<br>5.8 Return policy<br>5.9 Warranty<br>5.10   Delivery details |

|  | 5.11   Signature of customer, as necessary |
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| 6.Warranty conditions | May include:<br>6.1 Warranty period<br>6.2 Terms and conditions<br>6.3 Indications of use<br>6.4 Customer service hotline<br>6.5 Service centers |
| 7.Return Policy | May include:<br>7.1 Return validity period<br>7.2 Return mechanics<br>7.3 Return and exchange receipt |
| 8.Terms of Payment | May include:<br>8.1 Straight payment<br>8.2 Installment payment<br>8.3 Deferred payment |
| 9. Modes of Payment | May include:<br>9.1 Cash/Cash On Delivery (COD)<br>9.2 Credit/Debit<br>9.3 Electronic payment<br>9.4 Check payment<br>9.5 GC and vouchers<br>9.6 Rewards points |
| 10. Purchased Product/Service | May include:<br>10.1 Physical item<br>10.2 Digital item<br>10.3 Services |
| 11. Delivery | May include:<br>11.1 Own fleet (In-house logistics)<br>11.2 3rd party logistics service |
| 12. Condition | May include:<br>12.1 Product defect<br>12.2 Delivery damage/Damaged goods<br>12.3 Contamination<br>12.4 Health-related concerns<br>12.5 Product shelf-life |

**EVIDENCE GUIDE**

| 1. Critical Aspects of Competency | Assessment requires evidence that the candidate: <br> 1.1 Made sales presentation <br> 1.2 Handled inquiries and objections <br> 1.3 Discussed special offers <br> 1.4 Closed the sale <br> 1.5 Collected payments for products and services as appropriate <br> 1.6 Assisted customer to check-out counters as appropriate <br> 1.7 Monitored delivery of products and services <br> 1.8 Performed aftersales service |
|---|---|
| 2. Resource Implications | The following resources should be provided: <br> 2.1 Tools, Materials and Equipment appropriate for the unit of competency <br> 2.2 Workplace environment appropriate for the unit of competency |
| 3. Methods of Assessment | Competency in this unit may be assessed through: <br> 3.1 Interview <br> 3.2 Demonstration with Questioning <br> 3.3 Written Examination |
| 4. Context of Assessment | 4.1 Competency may be assessed in the actual workplace or at the designated TESDA Accredited Assessment Center. |

# GLOSSARY OF TERMS

| | |
|---|---|
| **Administrative skills** | it involves dealing with customer request, providing quotations and information such as stock availability, delivery dates and prices. |
| **After-sales service** | is support provided to a customer after the product or service has already been purchased. |
| **Attention to detail** | the ability to complete a task by improving every interaction with customers in order for them to better understand the product offer. |
| **Behavioral Psychology** | the study and analysis of observable human behavior. |
| **Body language** | the process of communicating non verbally through conscious or unconscious gestures and movements. |
| **Bundling** | is a technique in which several products are grouped together and sold as a single unit for one price. |
| **Cash** | is one of the most common ways to pay for purchases. |
| **Check payment** | the amount on the check is a substitute for the same amount of physical currency. |
| **Client service** | represents the first point of contact for clients needing assistance with product and services. |
| **Collection** | the act of receiving payment for goods or services. |
| **Communication** | a means of exchanging information between the salesperson and customer to persuade a consumer to buy a product or service. |
| **Computer literacy** | as the knowledge and ability to use computers and related technology efficiently. |
| **Contamination** | the process of making something dirty or poisonous, or the state of containing unwanted or dangerous substances. |
| **Coordination skill** | is the integration, unification, synchronization of the efforts of the different department to provide unity of action for pursuing common goals. |
| **Credit card** | any card, plate, coupon book or other credit device existing for the purpose of obtaining money, property, labor or services on credit. |
| **Critical thinking** | the objective analysis and evaluation of an issue in order to form a judgement. |
| **Customer** | a person or organization that buys goods or services from a store or business. |
| **Customer feedback** | is information provided by customers about their experience with a product or service. |

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| **Customer information** | any information contained on a customer's application or other form and all non-public personal information about a customer that a party receives from the other party. |
| **Customer inquiry** | initial inquiry from the customer regarding potential purchase of products, which must set out any product specification. (the step a customer takes just before they become a true lead) |
| **Customer objection** | are the concerns that a prospect has which cause them to hesitate and abandon a purchase and making sure that they are purchasing a good product. |
| **Customer service** | is the support you offer your customers both before and after they buy and use the products and services that helps then have an easy and enjoyable experience with the service. |
| **Customer Survey Form** | are a method of collecting consumer feedback. They help companies assess customer satisfaction, measure customer engagement, perform market research and gauge expectations. The responses you receive will provide valuable insights into what motivates, excites and frustrates your customers. |
| **Damaged goods** | refer to the partial or complete damage to a shipment or part of a shipment. The term can also mean the loss of part or all of the shipment. |
| **Debit card** | an entry recorded for a payment made or owed. |
| **Deferred payment** | an agreement to pay for something at a later date. |
| **Delivery** | the action of delivering ordered product. |
| **Delivery Detail** | the requested details of delivery of the products set out in the purchase order, including details of delivery date, time, location and freight forwarder. |
| **Demeanor** | outward behavior or bearing. |
| **Digital item** | digital goods or e-goods are intangible goods that exist in digital form or media, such as e-books, downloadable music, internet radio and internet television. |
| **Digital platform** | is any electronic tool for communication including desktop, mobile, social and email software that covers websites and social media. |
| **Discount** | a deduction from the usual cost of something, typically given for prompt or advance payment or to a special category of buyers. |
| **Documentation** | material that provides official information or evidence or that serves as a record. |
| **Dress code** | is a set of rules, often written, with regards to what clothing groups of people must wear. |

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| **Effective oral communication** | is the process of exchanging ideas, thoughts, opinions, knowledge, and data so that the message is received and understood with clarity and purpose. It should be clear, relevant, tactful in forming phrases and tone, concise and informative. |
| **Electronic payment** | is a digital transaction between two parties, with e-payment types including ACH, e-bank transfers, digital wallets, mobile banking. |
| **Employer standard** | rules that explain how employers must treat, pay, protect their employees. |
| **Empathetic listening** | is the practice of being attentive and responsive to others' input during conversation. Listening empathically entails making an emotional connection with the other person and finding similarities between their experience and your own so you can give a more heartfelt response. |
| **Engage customer** | is the means by which a company creates a relationship with its customer base to foster brand loyalty and awareness. |
| **Errors** | the state or condition of being wrong. |
| **Eye-to-eye contact** | the act of looking directly in the eyes of another as the person looks at you. |
| **Freebie** | a thing given free of charge. |
| **Free Services** | any services or features made available to customer free of charge. |
| **Faults** | unsatisfactory features. |
| **Faulty materials** | means that the material is of a quality inferior to the presupposed standard. |
| **Gift certificate** | a voucher given as a present that is exchangeable for a specified cash value of goods or services from a particular place of business. |
| **Gift With Purchase (GWP's)** | is a promotion to attract customers and increase average order value. Retailers usually offer this in the form of a free item upon spending a certain amount. |
| **Good working attitude** | is a positive opinion or feeling about your work environment. |
| **Grooming** | refers to an art which helps individuals to clean and maintain their body parts. |
| **Health protocol** | a detailed plan or set of written instructions by the government to guide the care of the individuals against the spread of infectious diseases. |
| **Housekeeping** | the work or activity of cleaning and preparing rooms. |
| **Indications of use** | the conditions or reasons for using the purchased item. |
| **Information gathering** | the process of collecting information about something. |

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| **In – House logistics** | refers to the processing of materials and products purchased from a logistics partner. The work is usually performed on the company's premises using the company's systems. |
| **Interactive communication** | is an exchange of ideas where both participants, whether human, machine or art form, are active and can have an effect on one another. |
| **Installment payment** | refers to a customer paying a bill in small portions throughout a fixed period of time. |
| **Interpersonal skills** | are the behaviors and tactics a person uses to interact with other effectively. |
| **Listening skill** | skills that contribute to your ability to accurately receive information when communicating with others. |
| **Marketing** | is the social process by which individuals and groups obtain what they need and want through creating and exchanging products and value with others. It involves a range of activities from selling to distributing. |
| **Merchandising** | it is the proper manner of displaying and arranging of products in the selling area. |
| **Mode of payment** | a way of paying for something, such as cash, credit/debit cards or check. |
| **Motivational skill** | refer to the actions you take to elicit a desired outcome, response or behavior. These skills encourage you or others to achieve your workplace goals. |
| **Non-verbal cues** | all the communication between people that do not have a direct verbal translation. |
| **Order form** | a document that records one or more business transactions between buyer and seller. |
| **Organizational quality** | is the act of overseeing different activities and tasks within an organization to ensure that products and services offered, as well as the means used to provide them are consistent. |
| **Own Fleet** | operating a delivery service by using in-house staff and a fleet of vehicles to deliver all products or services to customers. It gives a complete control over how you operate and manage the delivery service. |
| **Payment** | money received from a customer. |
| **Payment device** | payment terminal, credit card terminal, EFTPOS terminal (or by the older term as PDQ terminal which stands for "Process Data Quickly"), is a device which interfaces with payment cards to make electronic funds transfers. |
| **Payment gateway** | is a merchant service provided by an e-commerce application service provider that authorizes credit card or |

| | direct payments processing for e-businesses, online retailers, bricks and clicks, or traditional brick and mortar. |
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| **Percentage** | is a forecasting tool that makes financial decisions and predictions based on product spending and savings. |
| **Personal hygiene** | are the behaviors that must be practice in daily life, starting from morning to sleep time to protect our health. |
| **Personal presence** | is the ability to connect authentically with others. |
| **Personality development** | a process of developing and enhancing one's personality. |
| **Pleasant disposition** | having pleasing or agreeable manners, appearance and habits. |
| **Physical item** | any item you sell to serve a customer's need or want. |
| **Plan-o-gram** | is a schematic tool used to plan a retail store layout. It is a place special attention on product placement and display as well as point-of-sale locations. |
| **Point of sale** | is the time and place where a retail transaction is completed. At the point of sale, the merchant calculates the amount owed by the customer, indicates that amount, may prepare an invoice for the customer, and indicates the options for the customer to make payment. |
| **Posture** | the position in which someone holds their body when standing or sitting. |
| **Presentation skill** | used to provide information about the product in a way that will be convincing and meaningful to the customer |
| **Pricing** | is the process whereby a business sets the price at which it will sell its products and services, and may be part of the business's marketing plan. |
| **Price tag** | any device, written, printed, affixed or attached to a consumer product or displayed in a consumer repair or service establishment for the purpose of indicating the retail price per unit or service. |
| **Probing skills** | is a technique of asking open-ended questions designed to encourage prospects to talk more about their situation. |
| **Process** | a series of actions or steps taken in order to achieve a particular end. |
| **Product** | is an object, or system, or service made available for consumer use as of the consumer demand; it is anything that can be offered to a market to satisfy the desire or need of a customer. |
| **Product display** | is a custom fixture in the store that is used to attract and entice customers. |
| **Product features** | are a product's traits or attributes that deliver value to end-users and differentiate a product in the market. |

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| **Product marketing programs** | bringing a product to market and overseeing its overall success by driving demand and usage. It involves promoting and selling a product to a customer and is the intermediary function between product development and increasing brand awareness. |
| **Product offer** | represents what is externally presented to the market for the market's use. |
| **Product Quality** | refers to how well a product satisfies customer needs, serves its purpose and meets industry standards. |
| **Product Shelf life** | as the length of time a product may be stored without becoming unsuitable for use or consumption. |
| **Product Showcase** | is one way you can display your most popular products for extra promotion |
| **Product specifications** | an important product document that outlines key requirements for building a new feature, functionality, or product. |
| **Profiling** | recording and analysis of a person's psychological and behavioral characteristics, so as to assess or predict their capabilities in a certain sphere or to assist in identifying a particular subgroup of people. |
| **Promotion** | a marketing strategy in which a business uses a temporary campaign or offer to increase interest or demand in its product or service. |
| **Promotional item** | are essentially customized items that companies can brand and offer to customers and other parties. |
| **Prospect** | a potential customer who fits your target market, has the means to buy your product and services and is authorized to make a buying decision. |
| **Protocol** | the official procedure or system of rules governing affairs of state or diplomatic occasions. |
| **Public relations** | the professional maintenance of a favorable public image by a company or other organization or a known person. |
| **Purchase** | a process through which a person gets the ownership of some goods or properties transferred in his name from another, on payment of money. |
| **Purchase with Purchase** | means to offer a discount on a second product on the condition that the customer buys the first product. |
| **Purchasing capability** | a skill set, experience and ability to perform and manage procurement tasks and activities. |
| **Quality Standard** | defined as documents that provide requirements, specifications, guidelines, or characteristics that can be used consistently to ensure that materials, products, processes and services are fit for their purpose. |

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| **Regular Customer** | a person who purchases products or services from a person or business frequently. |
| **Return policy** | are the rules a retailer creates to manage how customers return and exchange unwanted merchandise they purchased. |
| **Reward Points** | a type of incentive earned through making purchases in select categories. Points can be earned through bonus promotions or by making purchases in certain categories such as dining, travel gas and more. |
| **Safe work practices** | are generally written methods outlining how to perform a task with minimum risk to people, equipment, materials environment and processes. |
| **Sales presentation** | a short presentation of your solution to prospects or existing customers that aims to persuade them to make a purchase. |
| **Sales tools** | can be a device or document used to carry out a particular function. |
| **Salesperson** | a person whose job is to sell a product or service in a given territory, in a store, or by telephone. |
| **Salesperson etiquette** | the standards of conduct and behavior that should be observed when interacting with customers or with other members of the organization. |
| **Selling opportunities** | a source of potential business. |
| **Service** | aims at supporting new and old customers with a product they already have or use, in order to increase customer satisfaction. |
| **Service Center** | a place where a company provides help for customers who use its products or services. |
| **Shortlisting** | having a few good candidates who are eligible, qualified, and meet most of the requirements. |
| **Social graces** | a skill for dealing with people and society. |
| **Social media** | the means of interactions among people in which they create, share, and/or exchange information and ideas in virtual communities and networks. |
| **Software** | the programs and other operating information used by a computer. |
| **Special offer** | a product that is being sold for less than its usual price or the act of selling something for less than the usual price. |
| **Spiels** | one that is long and spoken quickly and is intended to persuade the customer about something. |
| **Stance** | the way in which someone stands or a person's posture. |
| **Stereotypes** | is a generalized belief about a particular category of people on the basis of sex, gender identity, race and ethnicity, nationality, age, socioeconomic status and language. |

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| **Straight payment** | happens when purchasing items or services on credit and pay the credited amount in full on the next billing |
| **Stock availability** | the extent to which a company has enough inventory to fulfill customer orders. |
| **Team player** | is someone who actively contributes to their group in order to complete tasks, meet goals or manage projects. Actively listen to their coworkers, respect ideas and aim to improve the product or process at hand. |
| **Technological equipment/devices** | Hardware as a service tools that assist agents with sales activities. |
| **Terms of Payment/Payment terms** | is a documentation that details how and when your customers pay for your goods or services. |
| **Third-party logistics service** | Is a partner or service that helps ecommerce merchants manage their supply chain. Services include warehouse and inventory management, order fulfillment, shipping coordination, retail distribution, exchanges and returns. |
| **Time management** | refers to making the best use of time as time is always limited. |
| **Verbal cue** | are conveyed through spoken language and elicit a response or action from the listener which can be direct or indirect. |
| **Vouchers** | a small printed piece of paper that entitles the holder to a discount, or that may be exchanged for goods or services. |
| **Warranty** | guarantee that a manufacturer offers to repair or replace a faulty product within a window of time after purchase. |
| **Warranty condition** | an event that should be performed before the completion of another action, is known as Condition. A warranty is an assurance given by the seller to the buyer about the state of the product, that the prescribed facts are genuine. |
| **Warranty form** | occurs when a stock equipment is sold to an end customer. |
| **Warranty Period** | is the period of time that warrant free repair and adjustment service in case of a malfunction occurred under normal use that has followed instruction manual. The period varies according to manufacturers, retailers and products. |

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