COMPETENCY STANDARDS

ENTREPRENEURSHIP PQF LEVEL IV

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
ENTREPRENEURSHIP PQF LEVEL IV

COMPETENCY STANDARDS FOR ENTREPRENEURSHIP PQF LEVEL IV

SECTION 1 DEFINITION

The **ENTREPRENEURSHIP PQF LEVEL IV** consists of competencies that a person must achieved assessing market opportunities, undertaking small business proposals, develop and review business plans, manage finances and sell products and services.

The Units of Competency comprising this Qualification include the following:

Unit Code	BASIC COMPETENCIES
500311401	Utilize specialized communication skills
500311402	Develop and lead teams
500311403	Perform higher-order thinking processes and apply techniques in the workplace
500311404	Contribute to the practice of social justice in the workplace
500311405	Manage innovative work instructions
500311406	Manage and evaluate usage of information
500311407	Lead in improvement of Occupational Safety and Health (OSH) programs, policies and procedures
500311408	Lead towards improvement of environment work programs, policies and procedures
500311409	Sustain entrepreneurial skills

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

Unit Code	CORE COMPETENCIES
CS-SOC243301	Assess market opportunities
CS-SOC243302	Develop business plan
CS-SOC243303	Manage finances
CS-SOC243304	Sell products and services to customers

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

❑ Entrepreneur

SECTION 2   COMPETENCY STANDARDS

This section details the contents of the basic, common and core units of competency required in **ENTREPRENEURSHIP PQF LEVEL IV.**

BASIC COMPETENCIES

UNIT OF COMPETENCY : **UTILIZE SPECIALIZED COMMUNICATION SKILLS**

UNIT CODE : 500311404

UNIT DESCRIPTOR : This unit covers the knowledge, skills and attitudes required to use specialized communication skills to meet specific needs of internal and internal clients, conduct interviews, facilitate discussion with groups, and contribute to the development of communication strategies.

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
1. Meet common and specific communication needs of clients and colleagues	1.1 Specific communication needs of clients and colleagues are identified and met 1.2 Different approaches are used to meet communication needs of clients and colleagues 1.3 Conflict is addressed promptly in a manner which does not compromise the organization	1.1 Communication processes 1.2 Dynamics of groups and different styles of group leadership 1.3 Communication skills relevant to client groups 1.4 Flexibility in communication	1.1 Full range of communication techniques including: 1.1.1 Effective communication process 1.1.2 Active listening 1.1.3 Giving/receiving feedback 1.1.4 Interpretation of information 1.1.5 Role boundaries setting 1.1.6 Negotiation 1.1.7 Establising empathy 1.1.8 Conduct seminars 1.1.9 Public speaking 1.2 Communication skills required to fulfill job roles as specified by the organization

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
2. Contribute to the development of communication strategies	2.1 *Strategies* for internal and external dissemination of information are developed, promoted, implemented and reviewed as required 2.2 Channels of communication are established and reviewed regularly 2.3 Coaching in effective communication is provided 2.4 Work related network and relationship are maintained 2.5 Negotiation and conflict resolution strategies are used where required 2.6 Communication with clients and colleagues is performed appropriate to individual needs and organizational objectives	2.1 Communication process 2.2 Dynamics of groups and different stules of group leadership 2.3 Openness and flexibility in communication 2.4 Communication skills relevant to client groups	2.1 Full range of communication techniques including: 2.2.1 Effective communication process 2.2.2 Active listening 2.2.3 Giving/receiving feedback 2.2.4 Interpretation of information 2.2.5 Role boundaries setting 2.2.6 Negotiation 2.2.7 Establising empathy 2.2.8 Conduct seminars 2.2.9 Public speaking 2.2 Communication skills required to fulfill job roles as specified by the organization
3. Deliver a technical presentation	3.1 Presentation is delivered clearly, sequential and delivered within allotted time 3.2 Utilize appropriate media to enhance presentation 3.3 Differences in views/opinions are respected	3.1 Communication process 3.2 Dynamics of groups and different stules of group leadership 3.3 Openness and flexibility in communication 3.4 Communication skills relevant to client groups	3.1 Full range of communication techniques including: 3.1.1 Effective communication process 3.1.2 Active listening 3.1.3 Giving/receiving feedback 3.1.4 Interpretation of information

	3.4 Questions during fora are responded in a manner consistent with organizational standard		3.1.5 Role boundaries setting 3.1.6 Negotiation 3.1.7 Establising empathy 3.1.8 Openness and flexibility in communication 3.2 Communication skills required to fulfill job roles as specified by the organization

4. Represent the organization	4.1 When participating in internal or external forums, presentation is relevant, appropriately researched and presented in a manner to promote the organization
	4.2 Presentation is clear and sequential and delivered within a predetermined time
	4.3 Utilize appropriate media to enhance presentation
	4.4 Differences in views are respected
	4.5 Written communication is consistent with organizational standards
	4.6 Inquiries are responded in a manner consistent with organizational standard
	4.7 Consolidate ideas and suggestions
		4.1 Communication process
		4.2 Dynamics of groups and different styles of group leadership
		4.3 Openness and flexibility in communication
		4.4 Communication skills relevant to client groups
			4.1 Full range of communication techniques including:
			  4.1.1 Effective communication process
			  4.1.2 Active listening
			  4.1.3 Giving/ receiving feedback
			  4.1.4 Interpretation of information
			  4.1.5 Role boundaries setting
			  4.1.6 Negotiation
			  4.1.7 Establishing empathy
			  4.1.8 Openness and flexibility in communication
			
			4.2 Communication skills required to fulfill job roles as specified by the organization

	4.8 Generalize and summarize all ideas and suggestions		
5. Facilitate group discussion	5.1 Mechanisms which enhance **effective group interaction** is defined and implemented 5.2 Strategies which encourage all group members to participate are used routinely 5.3 Objectives and agenda for meetings and discussions are routinely set and followed 5.4 Relevant information is provided to group to facilitate outcomes 5.5 Evaluation of group communication strategies is undertaken to promote participation of all parties 5.6 Specific communication needs of individuals are identified and addressed	5.1 Communication process 5.2 Dynamics of groups and different styles of group leadership 5.3 Openness and flexibility in communication 5.4 Communication skills relevant to client groups	5.1 Full range of communication techniques including: 5.1.1 Effective communication process 5.1.2 Active listening 5.1.3 Giving/ receiving feedback 5.1.4 Interpretation of information 5.1.5 Role boundaries setting 5.1.6 Negotiation 5.1.7 Establishing empathy 5.1.8 Openness and flexibility in communication 5.2 Communication skills required to fulfill job roles as specified by the organization
6. Conduct interview	6.1 A range of appropriate communication strategies are employed in **interview situations** 6.2 Records of interviews are made and maintained in accordance with organizational procedures	6.1 Communication process 6.2 Dynamics of groups and different styles of group leadership 6.3 Effective questioning techniques 6.4 Communication skills relevant to client groups	6.1 Full range of communication techniques including: 6.1.1 Effective communication process 6.1.2 Active listening 6.1.3 Giving/ receiving feedback 6.1.4 Interpretation of information

	6.3 Effective questioning, listening and nonverbal communication techniques are used to ensure that required message is communicated		6.1.5 Role boundaries setting 6.1.6 Negotiation 6.1.7 Establishing empathy 6.2 Effective clarifying and probing techniques (questioning skills) 6.3 Communicataion skills required to fulfill job roles as specified by the organization

RANGE OF VARIABLES

VARIABLE	RANGE
1. Strategies	May include: 1.1. Recognizing own limitations 1.2. Referral to specialists 1.3. Utilizing techniques and aids 1.4. Providing written drafts 1.5. Verbal and non verbal communication
2. Effective Group Interaction	May include: 2.1. Identifying and evaluating what is occurring within an interaction in a non judgmental way 2.2. Using active listening 2.3. Making decision about appropriate words, behavior 2.4. Putting together response which is culturally appropriate 2.5. Expressing an individual perspective 2.6. Expressing own philosophy, ideology and background and exploring impact with relevance to communication 2.7. Openness and flexibility in communication
3. Types of Interview	May include: 3.1. Related to staff issues 3.2. Routine 3.3. Confidential 3.4. Evidential 3.5. Non disclosure 3.6. Disclosure
4. Interview Situations	May include: 4.1. Establish rapport 4.2. Elicit facts and information 4.3. Facilitate resolution of issues 4.4. Develop action plans 4.5. Diffuse potentially difficult situation

EVIDENCE GUIDE

1. Critical Aspects of Competency	Assessment requires evidence that the candidate: 1.1 Demonstrated effective communication skills with clients accessing service and work colleagues 1.2 Adopted relevant communication techniques and strategies to meet client particular needs and difficulties
2. Resource Implications	2.1 Access to appropriate workplace whre assessment can take place
3. Methods of Assessment	Competency in this unit may be assessed through: 3.1 Case Study 3.2 Interview 3.3 Portfolio 3.4 Written Test 3.5 Role Play
4. Context for Assessment	4.1 This unit should be assessed on the job through simulation

UNIT OF COMPETENCY   :   DEVELOP AND LEAD TEAMS

UNIT CODE   :   500311402

UNIT DESCRIPTOR   :   This unit covers the skills, knowledge and attitudes required to determine individual and team development needs and facilitate the development of the workgroup.

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
1. Foster individual growth	1.1 *Learning and development needs* of team members are systematically identified in line with *organizational requirements* 1.2 Development plan to meet individual needs is collaboratively developed and implemented 1.3 Individuals are encouraged to self - evaluate performance and identify areas for improvement 1.4 *Feedback on performance* of team members is collected from relevant sources and compared with established team learning process	1.1 Effective workplace communication, coaching and mentoring principles 1.2 Feedback principles and procedures 1.3 Working interdependently: strategies and techniques 1.4 Leadership Concepts: • Types of Decision Teams Make • Team Responsibilities • Problems that Affect Teams • Building Strong Team Communication • Expressing Yourself on a Team • Team Problem Solving	1.1 Ability to read and understand a variety of texts, prepare general information and documents according to target audience; spell with accuracy; use grammar and punctuation effective relationships and conflict management 1.2 Coaching and mentoring skills to provide support to colleagues 1.3 Communication skills including receiving feedback and reporting, maintaining effective relationships and conflict management 1.4 Ability to relate to people from a range of social, cultural, physical and mental backgrounds

			1.5 Planning skills to organize required resources and equipment to meet learning needs
			1.6 Reporting skills to organize information; assess information for relevance and accuracy; identify and elaborate on learning outcomes
			1.7 Facilitation skills to conduct small group training sessions
2. Foster individual and team growth	2.1 Learning and development program goals and objectives are identified to match the specific knowledge and skills requirements of competency standards 2.2 **Learning delivery methods** are appropriate to the learning goals, the learning style of participants and availability of equipment and resources 2.3 Workplace learning opportunities and coaching/ mentoring assistance are provided to facilitate individual and team achievement of competencies 2.4 Resources and timelines required for	2.1 Advanced coaching and mentoring techniques 2.2 Performance evaluation concepts 2.3 Training and development techniques	2.1 Instructional planning and delivery skills 2.2 Monitoring and evaluation skills 2.3 Mentoring and coaching skills

	learning activities are identified and approved in accordance with organizational requirements		
3. Monitor and evaluate workplace learning	3.1 Feedback from individuals or teams is used to identify and implement improvements in future learning arrangements 3.2 Outcomes and performance of individuals/teams are assessed and recorded to determine the effectiveness of development programs and the extent of additional support 3.3 Modifications to learning plans are negotiated to improve the efficiency and effectiveness of learning 3.4 Records and reports of competency are maintained within organizational requirement	3.1 Types and levels of learning evaluation 3.2 Learning styles and strategies 3.3 Training and development approaches	3.1 Instructional planning and delivery skills 3.2 Monitoring and evaluation skills 3.3 Mentoring and coaching skills
4. Develop team commitment and cooperation	4.1 Open communication processes to obtain and share information is used by team 4.2 Decisions are reached by the team in accordance with its agreed roles and responsibilities 4.3 Mutual concern and camaraderie are developed in the team 4.4 Career planning for each member are monitored	4.1 Career development for group members 4.2 Principles of team commitment and cooperation 4.3 Team dynamics and performance	4.1 Instructional planning and delivery skills 4.2 Monitoring and evaluation skills 4.3 Mentoring and coaching skills

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
5. Facilitate accomplishment of team goals	5.1 Team members actively participated in team activities and communication processes 5.2 Teams members developed individual and joint responsibility for their actions 5.3 Collaborative efforts are sustained to attain organizational goals	5.1 Group Development Process and Principles as applied in the workplace 5.2 Principles of organizational development 5.3 Collaboration principles and procedures	5.1 Instructional planning and delivery skills 5.2 Monitoring and evaluation skills 5.3 Mentoring and coaching skills 5.4 Organizational leadership

RANGE OF VARIABLES

VARIABLE	RANGE
1. Learning and Development Needs	May include: 1.1 Coaching, mentoring and/or supervision 1.2 Formal/informal learning program 1.3 Internal/external training provision 1.4 Work experience/exchange/opportunities 1.5 Personal study 1.6 Career planning/development 1.7 Performance appraisals 1.8 Workplace skills assessment 1.9 Recognition of prior learning 1.10 Job design and enrichment
2. Organizational Requirements	May include: 2.1 Quality assurance and/or procedures manuals 2.2 Goals, objectives, plans, systems and processes 2.3 Legal and organizational policy/guidelines and requirements 2.4 Safety policies, procedures and programs 2.5 Confidentiality and security requirements 2.6 Business and performance plans 2.7 Ethical standards 2.8 Quality and continuous improvement processes and standards
3. Feedback on Performance	May include: 3.1 Formal/informal performance appraisals 3.2 Obtaining feedback from supervisors and Colleagues 3.3 Obtaining feedback from clients 3.4 Personal and reflective behavior strategies 3.5 Routine and organizational methods for monitoring service delivery
4. Learning Delivery Methods	May include: 4.1 On the job coaching or mentoring 4.2 Problem solving 4.3 Presentation/demonstration 4.4 Formal course participation 4.5 Work experience 4.6 Involvement in professional networks 4.7 Conference and seminar attendance 4.8 Induction

EVIDENCE GUIDE

1. Critical Aspects of Competency	Assessment requires evidence that the candidate: 1.1. Identified and implemented learning opportunities for others 1.2. Gave and received feedback constructively 1.3. Facilitated participation of individuals in the work of the team 1.4. Negotiated learning plans to improve the effectiveness of learning 1.5. Prepared learning plans to match skill needs 1.6. Accessed and designated learning opportunities	
2. Resource Implications	The following resources should be provided: 2.1. Access to relevant workplace or appropriately simulated environment where assessment can take place 2.2. Materials relevant to the proposed activity or tasks	
3. Methods of Assessment	Competency in this unit may be assessed through: 3.1. Observation of work activities of the individual member in relation to the work activities of the group 3.2. Observation of simulation and or role play involving the participation of individual member to the attainment of organizational goal 3.3. Case studies and scenarios as a basis for discussion of issues and strategies in teamwork	
4. Context for Assessment	4.1. Competency may be assessed in workplace or in a simulated workplace setting 4.2. Assessment shall be observed while tasks are	

UNIT OF COMPETENCY : **PERFORM HIGHER-ORDER THINKING PROCESSES AND APPLY TECHNIQUES IN THE WORKPLACE**

UNIT CODE : 500311403

UNIT DESCRIPTOR : This unit of covers the knowledge, skills and attitudes required to use fundamental critical thinking skills in the workplace.

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
1. Evaluate effectiveness and efficiency of the workplace systems, processes and procedures.	1.1 ***Effectiveness and efficiency*** of workplace standards and procedures are examined. 1.2 Usage of inquiry and dialogue to communicate evaluation measures and results are implemented. 1.3 Evaluation reports are prepared and communicated to team members.	1.1 Systems, standards, procedures and protocols in the workplace. 1.2 Different methods of critical and appreciative inquiry and their relevance to different situations 1.3 Techniques to assist in forming the habit of asking questions and taking responsibility for answers. 1.4 Why questions are important and the benefits of asking good questions for individuals, businesses and communities (the importance of critical thinking).	1.1 Using range of analytical techniques (e.g., planning, attention, simultaneous and successive processing of information). 1.2 Communicating to actively listen and to ask questions of others in a constructive way. 1.3 Using critical thinking pathway to formulate and ask relevant questions and come up with appropriate answers. 1.4 Performing assimilation and accommodation skills to interpret and distil key information of relevance to a given situation. 1.5 Assessing and measuring the extent of

			effectiveness and efficiency of the systems, processes and procedures in the workplace.
2. Foster the habit of critical inquiry and curiosity in the workplace	2.1 Issues and situations are reflected on and wondered about. 2.2 Issues and problems in the workplace particularly in the policies, procedures and protocols are discussed and evaluated between and among teams. 2.3 Evaluation of efficiency and effectiveness of workplace policies, procedures and protocols are documented, communicated and agreed upon between and among teams. 2.4 Growth mindset and positive relationship and communication is applied in the context of *curiosity and critical inquiry* in the workplace.	2.1 Different methods of critical and appreciative inquiry and their relevance to different situations. 2.2 Techniques to assist in forming the habit of asking questions and taking responsibility for answers. 2.3 Why questions are important and the benefits of asking good questions for individuals, businesses and communities (the importance of critical thinking). 2.4 Growth mindset and positive communication and relationship strategies and techniques.	2.1 Using range of analytical techniques (e.g., planning, attention, simultaneous and successive processing of information). 2.2 Communicating to actively listen and to ask questions of others in a constructive way. 2.3 Using critical thinking pathway to formulate and ask relevant questions and come up with appropriate answers. 2.4 Performing assimilation and accommodation skills to interpret and distil key information of relevance to a given situation. 2.5 Assessing and measuring the extent of effectiveness and efficiency of the systems, processes and procedures in the workplace. 2.6 Communicating insights on

			workplace effectiveness and efficiency.
3. Develop practical action plans for improving workplace conditions.	3.1 Evaluation of efficiency and effectiveness of workplace policies, procedures and protocols are documented, communicated to stakeholders. 3.2 *Practical action plans* in improving workplace conditions are formulated, presented and negotiated with stakeholders. 3.3 Proposed changes and directions are inquired, processed and negotiated between and among teams, and stakeholders as well of the organization. 3.4 Commitment to continuous improvement and change is highlighted. 3.5 Passion and dedication for changing and adapting to the demands of the 21st century workplace are considered.	3.1 Different methods of critical and appreciative inquiry and their relevance to different situations. 3.2 Techniques to assist in forming the habit of asking questions and taking responsibility for answers. 3.3 Why questions are important and the benefits of asking good questions for individuals, businesses and communities (the importance of critical thinking). 3.4 Growth mindset and positive communication and relationship strategies and techniques. 3.5 Creative negotiation skills. 3.6 Change management and continuous improvement concepts.	3.1 Using range of analytical techniques (e.g., planning, attention, simultaneous and successive processing of information). 3.2 Communicating to actively listen and to ask questions of others in a constructive way. 3.3 Using critical thinking pathway to formulate and ask relevant questions and come up with appropriate answers. 3.4 Performing assimilation and accommodation skills to interpret and distil key information of relevance to a given situation. 3.5 Assessing and measuring the extent of effectiveness and efficiency of the systems, processes and procedures in the workplace. 3.6 Communicating practical insights on improving workplace conditions.

RANGE OF VARIABLES

VARIABLE	RANGE
1. Effectiveness and Efficiency	May include but not limited to: 1.1 Developing a more efficient way of doing something 1.2 Developing a new idea 1.3 Developing and improving products and services 1.4 Enhancing skills and career opportunities 1.5 Enhancing the physical environment 1.6 Financial benefit 1.7 Greater personal satisfaction 1.8 Improving interpersonal relationships 1.9 Evaluating overall workplace conditions
2. Curiosity and Critical Inquiry	May include but not limited to: 2.1 Accuracy 2.2 Breadth 2.3 Clarity 2.4 Depth 2.5 Emotion 2.6 Fairness 2.7 Logic 2.8 Meaning 2.9 Planning 2.10 Attention 2.11 Precision 2.12 Relevance 2.13 Significance 2.14 Social engagement 2.15 Society 2.16 Style 2.17 Growth mindset 2.18 Positive communication 2.19 Positive negotiation 2.20 Workplace conditions 2.21 Appreciative inquiry methods
3. Practical Action Plans	May include but not limited to: 3.1 Insights on continuous improvement 3.2 Creative strategies and techniques for becoming better at work and real life 3.3 Career plans 3.4 Challenging workplace policies, procedures and protocols 3.5 Specifying plans for change and adapting to the demands of the contemporary workforce 3.6 Challenges in negotiating with stakeholders and teams 3.7 Change management, innovation and knowledge creation 3.8 Contractual agreements

	3.9 Extreme time pressure or non-negotiable deadlines
	3.10 Financial limitations
	3.11 Procedures determined by laws or other regulations
	3.12 Safety issues
	3.13 When others are totally closed to new ideas
	3.14 Acknowledging shared responsibility
	3.15 Adopting a positive 'can do' attitude
	3.16 Following up on practical details
	3.17 Pro-actively seeking information
	3.18 Suggesting a new approach
	3.19 Talking to others about possible answers
	3.20 Constraints of the broader context and environment
	3.21 Overall goal - what needs to be achieved
	3.22 Personal hopes and expectations

EVIDENCE GUIDE

1. Critical Aspects of Competency	Assessment requires evidence that the candidate:
	1.1 Evaluated the effectiveness and efficiency of workplace systems, processes and procedures.
	1.2 Modelled the conscious process of critical inquiry to get new insights that s/he can get in formulating action plans on continuous improvement in the workplace and real-life
	1.3 Practiced the habit of critical inquiry and curiosity in the workplace
	1.4 Shown a thorough knowledge and understanding of how critical thinking impacts on individual lives, the broader community and work situations.
	1.5 Developed practical action plans for improving workplace conditions
2. Resource Implications	2.1. Interactions with specific challenges and situations to demonstrate the application of critical thinking (this would usually involve interactions with others).
3. Methods of Assessment	Competency in this unit may be assessed through:
	3.1 Direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate
	3.2 Evaluation of a candidate blog exploring different ideas and questions
	3.3 Review of candidate response to scenarios that allow the candidate to apply critical thinking techniques to a life or work situation, and to demonstrate ability to portray curiosity and exploration of new concepts
	3.4 Evaluation of candidate response to the challenge of adopting different perspectives on a situation, and ability to both develop and respond to questions from those perspectives
	3.5 Observation of the candidate participating in a group problem-solving session
	3.6 Oral or written questioning to assess knowledge of typical blockers to the critical thinking process.
	3.7 Life Narrative Inquiry to reflect life stories that reflect how critical thinking and problem solving is applied in the lives.
4. Context for Assessment	4.1 In all workplace, it may be appropriate to assess this unit concurrently with relevant teamwork or operation units.

UNIT OF COMPETENCY : **CONTRIBUTE TO THE PRACTICE OF SOCIAL JUSTICE IN THE WORKPLACE**

UNIT CODE : 500311404

UNIT DESCRIPTOR : This unit covers ways and means to assume active roles in resolving local and global challenges and to become proactive contributors to a more peaceful and sustainable world.

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
1. Update self on local, national and global trends/ issues in the workplace	1.1 *Media* are regularly *scanned/ monitored* for trends and issues relevant to human rights, gender equality, promotion of culture of peace and non-violence, global citizenship and appreciation of cultural diversity. 1.2 Knowledge and understanding of local, national and global issues and their interconnectedness and interdependency are acquired. 1.3 Notable issues and trends are critically examined and discussed with peers, colleagues, or family members.	1.1 Local, national and global systems and structures 1.2 Issues affecting interaction and connectedness of communities at local, national and global levels 1.3 Underlying assumptions and power dynamics (politics, understanding political system, social structures, labor laws, labor relations, human right)	1.1 Monitoring trends and issues relevant to human rights, gender equality, culture of peace, global citizenship, and cultural diversity using different media platforms 1.2 Analyzing trends and issues relevant to human rights, gender equality, culture of peace, global citizenship, and cultural diversity 1.3 Engaging in discourse about the local, national and global issues
2. Relate local and global trends to workplace context	2.1 Local events are reflected on for implications in one's own situation and in the external global environment. 2.2 Sense of belonging to a common	2.1 Different levels of human identity according to Amber Mayer (2015) 2.2 Different communities people belong to	2.1 Recognizing differences and commonalities among people 2.2 Strengthening attitudes of empathy, solidarity and

	humanity, sharing values and responsibilities are developed. 2.3 Attitudes of empathy, solidarity and respect for differences and diversity are strengthened	and how these are connected 2.3 Difference and respect for cultural diversity	respect for diversity 2.3 Connecting local issues to global trends, and vice versa.
3. Engage and take actions on workplace issues and concerns	3.1 Effective and responsible actions at local, national and global levels are identified. 3.2 Motivation and willingness to take necessary actions are developed. 3.3 Attitude of "thinking globally and acting locally" is practiced.	3.1 Actions that can be taken individually and collectively 3.2 Ethically responsible behaviour 3.3 Importance and benefits of civic engagement 3.4 Strategies and techniques of "thinking globally and acting locally	3.1 Employing appropriate actions to address workplace issues involving national and global trends 3.2 Showing concern and willingness to take part in the development efforts to discuss workplace issues and concerns 3.3 Applying the attitude of "thinking globally and acting locally" in the workplace

RANGE OF VARIABLES

VARIABLE	RANGE
1. Media	May include but not limited to: 1.1 Print media 1.2 Broadcast media 1.3 Internet and social media
2. Scanning/Monitoring	May include but not limited to: 2.1 Sourcing from key informants 2.2 Conversation with clients 2.3 Man-on-the-street conversation 2.4 Scanning print and broadcast media
3. Local, National and Global Issues	May include but not limited to: 3.1 Poverty 3.2 Unemployment 3.3 Global warming 3.4 Safety, security, and well-being

EVIDENCE GUIDE

1. Critical Aspects of Competency	Assessment requires evidence that the candidate: 1.1 Express emotions appropriately 1.2 Demonstrated ability to think and act based on one's principles and values 1.3 Demonstrated a holistic/global outlook on internal and external events in the workplace
2. Resource Implications	The following resources should be provided: 2.1. Access to workplace and resources 2.2. Case studies
3. Methods of Assessment	Competency in this unit may be assessed through: 3.1. Demonstration or simulation with oral questioning 3.2. Case problems involving global and local issues 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 **: MANAGE INNOVATIVE WORK INSTRUCTIONS**

UNIT CODE **:** 500311405

UNIT DESCRIPTOR **:** This unit covers the knowledge, skills and attitudes required to sustain and develop a workplace environment in which improvement, innovation and learning are promoted and reinforced.

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
1. Review and analyze existing workplace practices	1.1 Current instructions and strategies to perform tasks in the workplace are reviewed 1.2 Climate for ***innovation*** at the organizational level is defined 1.3 Innovation drivers in the workplace are identified	1.1 Four drivers of innovation according to Gallup Management Journal (2007) 1.2 Contextual variables related to innovative practices in the organization 1.3 The nine dimensions of innovation climate (Isaksen & Isaksen, 2018) 1.4 Types of Innovation identified by Gopalakrishnan and Dama	1.1 Investigating the organizational needs in the innovation process 1.2 Defining current organizational innovative practices 1.3 Linking innovation to contextual variables in the organization
2. Examine opportunities for continuous improvement and innovation of practices in the workplace	2.1 Effectiveness of innovative practices in the workplace is determined 2.2 ***Innovative behaviors*** of leaders or managers in the organization are assessed 2.3 Driving principles of innovation are discussed	2.1 Determinants of innovative behavior by Scott and Bruce (1992) 2.2 Four principles of innovation according to Gallup Management Journal (2007)	2.1 Evaluating organizational innovative practices 2.2 Gauging innovative behaviors of the leaders and managers in the organization 2.3 Deliberating opportunities and challenges in implementing innovation

| 3. Implement innovative ways in the conduct of usual workplace practices | 3.1 Innovative behaviors in the workplace are performed
3.2 Innovative climate in the workplace is maintained
3.3 Adoption or modification of new ideas relevant to the organizational needs is achieved | 3.1 Determinants of innovative behavior by Scott and Bruce (1992)
3.2 The nine dimensions of innovation climate (Isaksen & Isaksen, 2018)
3.3 Techniques in implementing innovative change in the workplace | 3.1 Developing risk management techniques and control systems
3.2 Evaluating impact of changes and developing action plans
3.3 Demonstrating strategies and techniques in managing changes in the workplace |

RANGE OF VARIABLES

VARIABLE	RANGE
1. Innovation	May include: 1.1 Products versus processes 1.2 Radical versus incremental 1.3 Technical versus administrative
2. Innovative Behaviors	May include: 2.1 Always generate creative ideas or new solutions 2.2 Exploring and secure funds or resources required for implementing new ideas 2.3 Establishing adequate plans and schedules for implementing new ideas 2.4 Contributing suggestions or approaches for others' creative ideas

EVIDENCE GUIDE

1. Critical Aspects of Competency	Assessment requires evidence that the candidate: 1.1 Analyzed and evaluated systems and performance in key areas of the organization and identify opportunities for improvement, seeking advice from experts as appropriate 1.2 Promoted the value of creativity, innovation and sustainability and recognize successes 1.3 Supported the testing and trialing of new ideas and undertake risk management and cost-benefit analysis for options 1.4 Planned for and implemented improvements using organization's processes for approvals, project management and change management 1.5 Facilitated effective contributions to and communications about continuous improvement and innovation 1.6 Captured insights, experiences and ideas for improvements and incorporate them into the organization's knowledge management systems and future planning
2. Resource Implications	The following resources should be provided: 2.1 Impact evaluation materials (guide and form)
3. Methods of Assessment	Competency in this unit may be assessed through: 3.1 Interview 3.2 Written Evaluation 3.3 Case Analysis
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   :   **MANAGE AND EVALUATE USAGE OF INFORMATION**

UNIT CODE   :   500311406

UNIT DESCRIPTOR   :   This unit of competency covers the knowledge, skills and attitudes required to support

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
1. Review information needs and sources	1.1 The *information* needs of individuals/teams are determined and the sources are identified. 1.2 Information held by the organisation is reviewed to determine suitability and accessibility. 1.3 Plans are prepared to obtain information that is not available or accessible within the organization.	1.1 Analysis and display techniques 1.2 Information evaluation issues 1.3 Information storage requirements and methods 1.4 Reporting procedures of the organisation	1.1 Analysing record information 1.2 Communicating effectively 1.3 Disseminating information 1.4 Presenting information
2. Collect and analyze information	2.1 *Collection of information* is interpreted timely and relevant to the needs of individuals/teams. 2.2 Information is collected in formal suitable for *analysis*, interpretation and dissemination. 2.3 Information is analyzed to identify relevant trends and developments in terms of the needs for which is acquired.	2.1 Information collection, collation 2.2 Analysis and display techniques 2.3 Information evaluation issues 2.4 Information storage requirements and methods 2.5 Reporting procedures of the organisation	2.1 Collecting and collating information 2.2 Analysing record information 2.3 Communicating effectively 2.4 Disseminating information 2.5 Presenting information

3. Use management information systems	3.1 *Management information systems* are used to store and retrieve data for decision making. 3.2 Technology available in the work area/ organisation is used to manage information. 3.3 Recommendations for improving the information system are submitted to designated persons/ groups.	3.1 Analysis and display techniques 3.2 Information collection, collation 3.3 Information evaluation issues 3.4 Information storage requirements and methods 3.5 Reporting procedures of the organisation	3.1 Analysing record information 3.2 Collecting and collating information 3.3 Communicating effectively 3.4 Disseminating information 3.5 Presenting information 3.6 Using management information systems to store and retrieve data

RANGE OF VARIABLES

VARIABLE	RANGE
1. Information	May include but not limited to: 1.1. Routine and complex reports and submissions 1.2. Briefing notes 1.3. Ministerial 1.4. Proposals 1.5. Project plans 1.6. Articles and promotional material
2. Collection Techniques or Methods	2.1 Collection techniques may include: 2.1.1 Research 2.1.2 Surveys 2.1.3 Literature search 2.1.4 Interviews 2.1.5 Data bases 2.1.6 Observation 2.2 Collection methods may include: 2.2.1 Indexing 2.2.2 linking 2.2.3 Sorting 2.2.4 Comparing 2.2.5 Categorizing 2.2.6 Integrating
3. Analysis	May include: 3.1. application of statistical methods 3.2. mathematical calculations 3.3. critical analysis 3.4. problem solving
4. Management Information Systems	May include: 4.1. Computers 4.2. Communication channels 4.3. Records management 4.4. Procedures 4.5. Manuals 4.6. Protocol 4.7. Legislation 4.8. Guidelines and awards 4.9. Organizational 4.10. Legal and policy materials

EVIDENCE GUIDE

1. Critical Aspects of Competency	Assessment requires evidence that the candidate: 1.1 Identified information needs and sources 1.2 Collected and analyzed information 1.3 Determined the correct / preventive action 1.4 Used management information systems 1.5 Record and support information 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.
2. Resource Implications	Specific resources for assessment 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: 3.1 Written Test 3.2 Interview 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.

UNIT OF COMPETENCY : **LEAD IN IMPROVEMENT OF OCCUPATIONAL SAFETY AND HEALTH (OSH) PROGRAMS, POLICIES AND PROCEDURES**

UNIT CODE : 500311407

UNIT DESCRIPTOR : This unit covers the knowledge, skills and attitudes required to assess Occupational Safety and Health (OSH) practices and programs, recommend OSH program improvement initiatives, and implement recommended improvements on Occupational Safety and Health (OSH) Programs, Procedures and Policies

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
1. Assess Occupational Safety and Health (OSH) practices and programs	1.1 ***OSH practices and programs*** are reviewed based on workplace policies and procedures 1.2 Appropriate personnel or ***OSH reference guides*** are consulted for proper guidance based on workplace policies and procedures 1.3 Current practices and programs are evaluated based on acceptable level of OSH work standards	1.1 OSH practices and programs workplace policies and procedures 1.2 OSH reference guides 1.3 OSH work standards	1.1 Critical thinking skills 1.2 Evaluating skills
2. Recommend OSH program improvement initiatives	2.1 OSH work improvement initiatives are identified that are relevant with the workplace scenario 2.2 OSH program improvement plans are organized based on workplace policies and procedures 2.3 OSH program improvement plans are presented based on workplace policies and procedures	2.1 OSH Programs 2.2 OSH work improvement initiatives	2.1 Presentation Skills 2.2 Communication skills 2.3 Collaborating skills 2.4 Critical thinking skills 2.5 Observation skills

3. Implement recommended improvements on Occupational Safety and Health (OSH) Programs, Procedures and Policies	3.1 Approved improvements on OSH work improvement initiatives are communicated based on workplace policies and procedures 3.2 Concern personnel are guided in accordance with workplace policies and procedures 3.3 Implementation of the approved OSH initiatives are monitored in accordance with workplace policies and procedures 3.4 Implementation of approved OSH initiatives are evaluated based on workplace policies and procedures	3.1 Coaching Concepts 3.2 OSH work improvement initiatives 3.3 Supervisory Concepts	3.1 Monitoring Skills 3.2 Evaluation Skills 3.3 Auditing Skills 3.4 Coaching Skills 3.5 Supervisory Skills

RANGE OF VARIABLES

VARIABLE	RANGE
1. OSH Practices and Programs	May include but not limited to: 1.1 Planning, implementation and maintenance of manufacturing plants 1.2 Work-physiological, psychological, ergonomic and hygienic practices and programs 1.3 First aid within the workplace 1.4 Safety inspection practices
2. OSH Reference Guides	May include but not limited to: 2.1 Occupational Safety and Health Standards Book 2.2 OSHA Safety Bulletins and Magazines 2.3 Equipment Safety Operating Instructions 2.4 Established National Safety Management Books 2.5 Credible OSH Web-sites 2.6 Safety Solution Guide Books and Handbooks
3. OSH Work Improvement Initiatives	May include but not limited to: 3.1 Eliminate the hazard altogether (i.e., get rid of the dangerous machine) 3.2 Isolate the hazard from anyone who could be harmed (i.e., keep the machine in a closed room and operate it remotely; barricade an unsafe area off) 3.3 Substitute the hazard with a safer alternative (i.e., replace the machine with a safer one) 3.4 Use administrative controls to reduce the risk (i.e., train workers how to use equipment safely; train workers about the risks of harassment; issue signage) 3.5 Use engineering controls to reduce the risk (i.e., attach guards to the machine to protect users) 3.6 Use personal protective equipment (i.e., wear gloves and goggles when using the machine)

EVIDENCE GUIDE

1. Critical Aspects of Competency	Assessment requires evidence that the candidate:
	1.1. Consult appropriate personnel or OSH reference guides for proper guidance based on workplace policies and procedures
	1.2. Evaluate current practices and programs based on acceptable level of OSH work standards
	1.3. Identify OSH work improvement initiatives that are relevant with the workplace scenario
	1.4. Present OSH program improvement plans based on workplace policies and procedures
	1.5. Communicate approved improvements on OSH work program initiatives based on workplace policies and procedures
	1.6. Monitor implementation of the approved OSH initiatives in accordance with workplace policies and procedures
	1.7. Evaluate implementation of approved OSH initiatives based on workplace policies and procedures
2. Resource Implications	The following resources should be provided:
	2.1 Workplace or assessment location
	2.2 OSH personal records
	2.3 PPE
	2.4 Health records
3. Methods of Assessment	Competency in this unit may be assessed through:
	3.1 Portfolio Assessment
	3.2 Interview
	3.3 Case Study/Situation
	3.4 Observation/Demonstration and oral questioning
4. Context for Assessment	4.1 Competency may be assessed in the work place or in a simulated work place setting

UNIT OF COMPETENCY : LEAD TOWARDS IMPROVEMENT OF ENVIRONMENTAL WORK PROGRAMS, POLICIES AND PROCEDURES

UNIT CODE : 500311408

UNIT DESCRIPTOR : This unit covers the knowledge, skills and attitudes required in assessing environmental work practices and standards, recommending environmental work improvement initiatives and implementing recommended environmental improvements

ELEMENTS	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
1. Assess environmental work practices and programs	1.1 Environmental practices and programs are reviewed based on workplace policies 1.2 Appropriate personnel or environmental reference guides are consulted for proper guidance based on workplace policies* 1.3 Current practices and programs are evaluated based on acceptable level of environmental work standards*	1.1 Environmental Practices 1.2 Environmental Reference Guides 1.3 Corrective Action and Follow-up 1.4 Relevant environmental experts 1.5 Re-Training Needs 1.6 Energy and Healthy Habits	1.1 Critical thinking 1.2 Problem solving 1.3 Observation Skills 1.4 Training Delivery Skills
2. Recommend environmental program improvements initiatives	2.1 Environment practices opportunities are Identified that are relevant with the workplace scenario 2.2 Environmental program improvement plans are organized based on workplace policies and procedures* 2.3 Environmental program improvement plans are presented based on workplace policies and procedures*	2.1 Environmental Practices and Standards 2.2 Mitigation Requirements	2.1 Presentation Skills 2.2 Critical thinking 2.3 Problem Solving 2.4 Observation Skills 2.5 Training Delivery Skills 2.6 Cost-Benefit Analysis

3. Implement recommended improvements on environmental programs, policies and procedures	3.1 Approved improvements on environmental work program initiatives are promoted based on workplace policies and procedures 3.2 Implementation of the approved environmental initiatives are monitored in accordance with workplace policies and procedures 3.3 Implementation of approved environmental initiatives are evaluated based on workplace policies and procedures	3.1 Environmental Work Initiatives 3.2 Communication Strategies 3.3 Environmental inspection and Monitoring Techniques 3.4 Notification Requirements	3.1 Inspection Skills 3.2 Critical thinking 3.3 Problem Solving 3.4 Observation Skills

RANGE OF VARIABLES

VARIABLE	RANGE
1. Environmental Practices and Programs	May include: 1.1 Utilization of Energy, Water 1.2 Segregation Practices 1.3 Waste Disposal and Reuse 1.4 Saving Resources 1.5 Waste Collection 1.6 Usage of Hazardous Materials 1.7 Chemical Application 1.8 Equipment Operation 1.9 Dewatering and Discharging 1.10 Surface Disturbance 1.11 Periodic Inspection 1.12 Resource Storage and Handling
2. Environmental Reference Guides	May include: 2.1 Air Emission and Ambient Air Quality Guidelines 2.2 Energy Conservation Guidelines 2.3 Wastewater and Ambient Water Quality Guidelines 2.4 Water Conservation Guidelines 2.5 Hazardous Materials Management 2.6 Waste Management 2.7 Noise 2.8 Contaminated Land 2.9 Cultural Conservation Guides
3. Environmental Work Program Initiatives	May include: 3.1 Low Energy Lighting 3.2 Water Reduction Initiatives 3.3 Holding Employee Awareness event 3.4 Recycling Waste Materials 3.5 Unplugging power converters overnight 3.6 Tree-Planting 3.7 Wild-life conservation

EVIDENCE GUIDE

1. Critical Aspects of Competency	Assessment requires evidence that the candidate: 1.1 Consulted appropriate personnel or environmental reference guides for proper guidance based on workplace policies* 1.2 Evaluated current practices and standards based acceptable level of environmental work standards 1.3 Organized environmental standard improvement plans based on workplace policies and procedures 1.4 Presented environmental standard improvement plans based on workplace policies and procedures* 1.5 Promoted approved environmental work initiatives based on workplace policies and procedures 1.6 Evaluated the implementation of approved environmental improvements based on workplace policies and procedures
2. Resource Implications	The following resources should be provided: 2.1 Workplace/Assessment location 2.2 Legislation, policies, procedures, protocols and local ordinances relating to environmental protection 2.3 Case studies/scenarios relating to environmental protection
3. Methods of Assessment	Competency in this unit may be assessed through: 3.1 Written/ Oral Examination 3.2 Interview/Third Party Reports 3.3 Portfolio (citations/awards from GOs and NGOs, certificate of training – local and abroad) 3.4 Simulations and role-plays
4. Context for Assessment	4.1 Competency may be assessed in actual workplace or at the designated TESDA Center.

UNIT OF COMPETENCY : **SUSTAIN ENTREPRENEURIAL SKILLS**

UNIT CODE : 500311409

UNIT DESCRIPTOR : This unit covers the outcomes required to update and continue one's professional development along entrepreneurship, including applying such growth in skills toward expanding the enterprise and developing its work force.

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
1. Enhance one's business skills	1.1 ***Entrepreneurial skills*** development needs are identified and responded to promptly. 1.2 Market trends are monitored, anticipated and taken advantage of where feasible. 1.3 New technologies, products and processes are included/utilized where advantageous to the enterprise. 1.4 Constant dialog/linkages with other entrepreneurs/peers and stakeholders are maintained 1.5 Circulation and participation in business fora, meetings, conventions and exhibits are maintained.	1.1 Business models and strategies 1.2 Types and categories of businesses 1.3 Business internal controls 1.4 Market Trends 1.5 Relevant national and local legislation and regulations 1.6 Basic quality control and assurance concepts	1.1 Basic bookkeeping/ accounting skills 1.2 Communication skills 1.3 Building relations with customer and employees 1.4 Building competitive advantage of the enterprise 1.5 Networking and Linkaging skills
2. Manage entrepreneurial practices	2.1 Ideas and comments for improvements	2.1 Public relations concepts 2.2 Basic product promotion strategies	2.1 Building customer relations

	are sought from workers and clients. 2.2 Staff/workers are encouraged and supported in their skills development and enhancement. 2.3 A culture of **_continuous improvement_** is fostered within the enterprise. 2.4 Innovations on the existing lines of products and services are encouraged	2.3 Basic market and feasibility studies 2.4 Basic business ethics	2.2 Individual marketing skills 2.3 Using basic advertising (posters/ tarpaulins, flyers, social media, etc.)
3. Expand markets and clientele	3.1 Enterprise is built up and sustained through judicious control of cash flows. 3.2 Profitability of enterprise is ensured though appropriate internal controls. 3.3 Unnecessary or lower-priority expenses and purchases are avoided. 3.4 New markets and clients are identified based on current market trends	3.1 Basic cost benefit analysis 3.2 Basic financial management 3.3 Basic financial accounting 3.4 Business internal controls	3.1 Setting business priorities and strategies 3.2 Interpreting basic financial statements 3.3 Preparing business plans

RANGE OF VARIABLES

VARIABLE	RANGE
1. Entrepreneurial Skills	May include: 1.1 Financial management skills 1.2 People management skills 1.3 Operations management skills 1.4 Business acumen
2. Business Operations	May include: 2.1 Purchasing 2.2 Accounting/Administrative work 2.3 Production/Operations/Sales
3. Internal Controls	May include: 3.1 Accounting systems 3.2 Financial statements/reports 3.3 Cash management 3.4 Managing property, plant and equipment
4. Continuous Improvement	May include: 4.1 Quality management systems (PDCA, ISO 9001,TQM, Six-Sigma, etc.) 4.2 Client feedback systems 4.3 Quality assurance/Quality control systems

EVIDENCE GUIDE

1. Critical Aspects of Competency	Assessment requires evidence that the candidate: 1.1 Demonstrated enhancement of one's entrepreneurial skills through performace of business, supervisor evaluation, worker and client testimony
2. Resource Implications	The following resources should be provided: 2.1 Interview guide for entrepreneurs, enterprise workers and third parties 2.2 Materials and location relevant to the proposed activity and tasks
3. Methods of Assessment	Competency in this unit may be assessed through: 3.1 Written report 3.2 Written examination 3.3 Demonstration/observation with oral questioning 3.4 Portfolio assessment with interview 3.5 Third-party report
4. Context of Assessment	4.1 Competency may be assessed in workplace or in a simulated workplace setting 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. 1.2 Received products are checked against workplace standards and specifications. 1.3 ***Faulty materials*** related to work are identified and isolated. 1.4 ***Faults*** and any identified causes are recorded and/or reported to the supervisor concerned in accordance with workplace procedures. 1.5 ***Faulty materials*** are replaced in accordance with workplace procedures.	1.1 Relevant production processes, materials and products 1.2 Characteristics of materials, software and hardware used in production 1.3 Quality checking procedures 1.4 Quality workplace procedures 1.5 Identification of faulty products related to work	1.1 Reading skills required to interpret work instruction 1.2 Critical thinking 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. 2.2 Completed work is checked against workplace standards	2.1 Safety and environmental aspects of work processes 2.2 Fault identification and reporting 2.3 Workplace procedure in documenting completed work	2.1 Carrying out work in accordance with Occupational Health and Safety (OHS) policies and procedures 2.2 Reading skills required to

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

RANGE OF VARIABLES

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

EVIDENCE GUIDE

1. Critical Aspects of Competency	Assessment requires evidence that the candidate: 1.1 Carried out work in accordance with the company's standard operating procedures 1.2 Performed task according to specification 1.3 Reported defects detected in accordance with standards operating procedures 1.4 Carried out work in accordance with the process improvement procedures
2. Resource Implication	The following resources should be provided: 2.1 Materials, software and/or hardware to be used in a real or simulated situation 2.2 Tools, materials, and equipment appropriate for the unit of competency 2.3 Workplace environment appropriate for the unit of competency
3. Method of Assessment	Competency in this unit may be assessed through: 3.1 Observation with questioning 3.2 Interview 3.3 Demonstration with questioning 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. 1.2 *Interpersonal skills* are used to ensure that customer needs are accurately identified. 1.4 Visible work area is kept tidy and uncluttered. 1.5 Equipment and other resources are stored according to assignment requirements.	1.1 Interactive communication with others 1.2 Interpersonal skills/social graces with sincerity 1.3 Eye-to-Eye contact 1.4 Maintain teamwork and cooperation 1.5 Safe work practices 1.6 Personal hygiene 1.7 Housekeeping 1.8 Time Management	1.1 Applying effective communication skills 1.2 Applying non-verbal communication 1.2.1 Body language 1.3 Practicing good time management 1.4 Ability to work calmly and unobtrusively effectively 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. 2.2 Information on programs is accessed in accordance with established procedures. 2.3 Additional information on products, services and programs are identified in accordance with established procedures.	2.1 Customer's nature, motivation, expectations, and needs 2.2 Customer needs and expectations related to the product and programs 2.3 Appropriate marketing and promotional strategies 2.4 Company standards on how to interact with customers 2.5 Organization's vision, mission	2.1 Applying effective oral communication skills 2.2 Listening skills 2.3 Motivational skills 2.4 Interpersonal skills 2.5 Presentation skills 2.6 Computer literacy 2.7 Understanding customer's nature, motivation, expectations, and needs 2.8 Determining customer needs and expectations related to the

			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. 3.2 Orientation on products, programs and policies are conducted in accordance with established procedures. 3.3 Provide customers with courteous and professional treatment throughout the interaction using *interactive communication.* 3.4 Inquiries, concerns and comments are responded to promptly and accurately in accordance with organization's policies. 3.5 Identified related or applicable needs of clients based on the products being offered.	3.1 Customer's nature, motivation, expectations and needs 3.2 Customer needs and expectations related to the products 3.3 Appropriate marketing and promotional strategies 3.4 Company standards on how to interact with customer 3.5 Organization's vision, mission, and values	3.1 Applying effective oral communication skills 3.2 Listening skills 3.3 Motivational skills 3.4 Interpersonal skills 3.5 Presentation skills 3.6 Understanding customer's nature, motivation, expectations and needs 3.7 Determining customer needs and expectations related to the products 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.
	4.2 Possible causes of customer dissatisfaction are identified, addressed and recorded according to employer policy.
	4.3 Customers are fully informed of any relevant concerns in a timely manner and according to agreed reporting procedures.
		4.1 Interactive communication with others
		4.2 Interpersonal skills/social graces with sincerity
		4.3 Attitude
		  4.3.1 Attentive, patient and cordial
		  4.3.2 Eye-to-eye contact
		  4.3.3 Maintain teamwork and cooperation
		4.4 Communication devices
		4.5 Safety practices
		4.6 Safe work practices
		4.7 Personal hygiene
			4.1 Applying effective communication skills
			4.2. Applying non-verbal communication
			4.2.1 Body language
			4.3 Practicing good time management
			4.4 Ability to work calmly and unobtrusively effectively

RANGE OF VARIABLES

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

EVIDENCE GUIDE

1. Critical Aspects of Competency	Assessment requires evidence that the candidate:
	1.1 Complied with industry practices and procedures
	1.2 Used interactive communication with others
	1.3 Promoted public relations
	1.4 Complied with service manual standards
	1.5 Demonstrated familiarity with company facilities, products and services
	1.6 Received, assessed and respondent to customer needs
	1.7 Applied organizational quality
2. Resources Implications	The following resources should be provided:
	2.1 Communication devices
	2.2 Tools, materials and equipment appropriate for the unit of competency
	2.3 Complete information on products
	2.4 Product brochures
	2.5 Workplace environment appropriate for the unit of competency
3. Methods of Assessment	Competency in this unit may be assessed through:
	3.1 Observation with questioning
	3.2 Interview
	3.3 Demonstration with questioning
	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 : ASSESS MARKETING OPPORTUNITIES

UNIT CODE : CS-SOC243301

UNIT DESCRIPTOR : This unit covers the knowledge, skills and attitudes needed to identify marketing opportunities and to analyse and evaluate opportunities according to organisational marketing objectives.

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
1. Identify marketing opportunities	1.1 **Target market** is selected according to task requirements and in consultation with required personnel 1.2 **Marketing objectives**, **organisational structure**, and business and **marketing plans** are established according to task and organisational requirements 1.3 Existing **marketing clients** and **external environment** are reviewed for gaps and opportunities 1.4 **Marketing opportunities** are researched and documented according to target market	**SCIENCE** 1.1 Marketing Opportunities 1.2 Target Market 1.3 Task Requirements 1.4 Required Personnel 1.5 Marketing Objectives 1.6 Organizational Structure 1.7 Business and Marketing Plans 1.8 Marketing Clients 1.9 External Environment 1.10 Research and Document Marketing Opportunities **TECHNOLOGY** 1.1 Use of Digital Technology **MATHEMATICS** 1.1 Basic Mathematics **COMMUNICATION** 1.1 Communication Procedures 1.2 Report Forms 1.3 Relevant Sources of Information **LAWS AND ORDINANCES** 1.1 Health Protocols	1.1 Interpersonal Skills 1.2 Attention to details 1.3 Communication Skills 1.4 Using communication equipment 1.5 Interpretation of Verbal and Non-Verbal Cues/Skills 1.6 Memorizing spiels 1.7 Developing personality 1.8 Probing Skills

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
2. Analyse opportunities	2.1 *Market segmentation* is performed according to task requirements 2.2 Relevant *marketing factors* is identified for analysis of market segmentation according to task requirements 2.3 Market segments are reviewed against identified marketing factors 2.4 Opportunities are identified for focus of marketing efforts	**SCIENCE** 2.1 Market Segmentation 2.2 Marketing Factors for Analysis **TECHNOLOGY** 1.2 Use of Digital Technology **MATHEMATICS** 1.2 Basic Mathematics **COMMUNICATION** 1.4 Communication Procedures 1.5 Report Forms 1.6 Relevant Sources of Information **LAWS AND ORDINANCES** 1.1 Health Protocols	2.1 Interpersonal Skills 2.2 Attention to details 2.3 Communication Skills 2.4 Using communication equipment 2.5 Interpretation of Verbal and Non-Verbal Cues/Skills 2.6 Memorizing spiels 2.7 Developing personality 2.8 Probing Skills
3. Evaluate opportunities	3.1 Opportunities are analyzed against marketing objectives 3.2 Preferred marketing opportunities are selected in consultation with relevant personnel 3.3 Opportunities are documented for presentation to management	**SCIENCE** 3.1 Requirements of legislation affecting marketing roles 3.2 Data collection and analysis techniques 3.3 Marketing industry knowledge, including: 3.4 Components of marketing mix 3.5 Elements of marketing planning 3.6 Marketing communications concepts and processes	3.1 Interpersonal Skills 3.2 Attention to details 3.3 Communication Skills 3.4 Using communication equipment 3.5 Interpretation of Verbal and Non-Verbal Cues/Skills 3.6 Memorizing spiels 3.7 Developing personality 3.8 Probing Skills

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
		3.7 Organisational structures, roles, responsibilities, business and marketing plans 3.8 Relevant product and service standards 3.9 Best practice techniques related to marketing 3.10 Relevant statistical terms used **TECHNOLOGY** 1.3 Use of Digital Technology **MATHEMATICS** 1.3 Basic Mathematics **COMMUNICATION** 1.7 Communication Procedures 1.8 Report Forms 1.9 Relevant Sources of Information **LAWS AND ORDINANCES** 1.1 Health Protocols 1.2 Appropriate Statutory Requirements	

RANGE OF VARIABLES

VARIABLE	RANGE
1. Target Market	May include: 1.1 Old or Regular or Loyal 1.2 New
2. Marketing Objectives	May include: 2.1 Increase brand awareness 2.2 Launch product/service 2.3 Increase leads 2.4 Promote new services or products 2.5 Enhance customer relationshios 2.6 Target new customers
3. Organizational Structure	May include: 3.1 Hierarchial Org Structure 3.2 Functional Org Structure 3.3 Horizontal or Flat Structure 3.4 Divisional Org Structure 3.5 Matrix Org Structure 3.6 Team-Based Structure 3.7 Network Org Structure 3.8 Processed-Based Structure 3.9 Circular Structure 3.10 Line Structure
4. Marketing Plans	May include: 4.1 Target Market 4.2 Value Proposition of the Brand or Product 4.3 Campaigns To Be Initiated 4.4 Metrics to be used to assess the effectiveness of marketing initiatives
5. Marketing Clients	May include: 5.1 Loyal Customers 5.2 Impulsive Customers 5.3 Discount Customers 5.4 Need-Based Customers 5.5 Wandering Customers
6. External Environment	May include: 6.1 Economic Factors 6.2 Political Factors 6.3 Legal Factors 6.4 Global Factors 6.5 Technological Factors 6.6 Social Factors 6.7 Domographic Factors 6.8 Taxation

VARIABLE	RANGE
7. Marketing Opportunities	May include: 1.3 Consumer Segmentation 1.4 Content Creation 1.5 Product 1.6 Target Customers 1.7 Environment Analysis 1.8 Direct Competitors 1.9 Promotion 1.10 Internet Marketing 1.11 Foreign Markets 1.12 Price 1.13 Purchasing Situations
8. Market Segmentation	May include: 2.7 Geographic 2.8 Demographic 2.9 Customer Profitability 2.10 Marketing Analytics 2.11 Income 2.12 Social Status 2.13 Behavioral
9. Marketing Factors	May include: 9.1 Political Factors 9.2 Customers 9.3 Legal Factors 9.4 Cultural Environment 9.5 Technological 9.6 Competitors 9.7 Social and Cultural 9.8 Price 9.9 Promotion 9.10 Environmental Factors 9.11 Demographic 9.12 Social Factors 9.13 Product 9.14 Economic 9.15 Suppliers

EVIDENCE GUIDE

1. Critical Aspects of Competency	Assessment requires evidence that the candidate: 1.1 Identified marketing opportunities 1.2 Analyzed opportunites 1.3 Evaluated opportunities
2. Resource Implications	The following resources should be provided: 2.1 Tools, materials and equipment appropriate for the unit of competency 2.2 Workplace environment appropriate for the unit of competency
3.Methods of Assessment	Competency in this unit may be assessed through: 3.1 Interview 3.2 Demonstration with Questioning 3.3 Observation 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 : DEVELOP BUSINESS PLAN

UNIT CODE : CS-SOC243302

UNIT DESCRIPTOR : This unit covers the knowledge, skills and attitudes needed to needed to develop a business plan. It includes identifying elements of the business plan, developing the business plan, developing strategies for minimizing risks, documenting and reviewing business plan.

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
1. Identify elements of the business plan	1.1 Purpose of the *business plan* is identified in accordance with established procedures. 1.2 The essential components of the business is identified and reviewed in accordance with established procedures. 1.3 *Business goals and objectives* are identified and documented as a basis for measuring business performance	**SCIENCE** 1.1 Business Plan 1.2 Purpose of the Business Plan 1.3 Components of the Business Plan 1.4. Business Goals and Objectives **TECHNOLOGY** 1.4 Use of Digital Technology **MATHEMATICS** 1.4 Basic Mathematics **COMMUNICATION** 1.10 Communication Procedures 1.11 Report Forms 1.12 Relevant Sources of Information **LAWS AND ORDINANCES** 1.1 Health Protocols 1.2 Appropriate Statutory Requirements	1.1 Interpersonal skills 1.2 Attention to detail 1.3 Information gathering 1.4 Effective Communication Skills 1.5 Using communication sales tools 1.6 Using technological equipment/ devices 1.7 Basic math skills 1.8 Computer literacy 1.9 Empathetic listening

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
2. Develop a business plan	2.1 Resources, legal and compliance requirements, are researched specifically in relation to ***Occupational Safety and Health*** (***OSH***), in accordance with business goals and objectives. 2.2 Market needs, and market size and potential are researched in accordance with established procedures. 2.3 Sources and costs of finance, from the ***financial plan***, are identified to provide required liquidity and profitability for the business. 2.4 Methods, from the ***marketing strategies***, are identified to promote the market exposure of the business. 2.5 Methods/means of production/operation from the ***production*/*operations plan*** are identified to conform with business goals and objectives.	**SCIENCE** 2.1 Resources, Legal and Compliance Requirements 2.2 Occupational Health and Safety 2.3 Market Needs, Market Size and Potential 2.4 Financial Plan 2.5 Marketing Strategies 2.6 Production/Operations Plan 2.7 Staffing Requirements 2.8 Specialist services 2.9 Legislative Requirements **TECHNOLOGY** 2.1 Use of Digital Technology **MATHEMATICS** 2.1 Basic Mathematics **COMMUNICATION** 2.1 Communication Procedures 2.2 Report Forms 2.3 Relevant Sources of Information **LAWS AND ORDINANCES** 2.1 Health Protocols 2.2 Appropriate Statutory Requirements	2.1 Interpersonal skills 2.2 Attention to detail 2.3 Information gathering 2.4 Effective Communication Skills 2.5 Using communication sales tools 2.6 Using technological equipment/ devices 2.7 Basic math skills 2.8 Computer literacy 2.9 Empathetic listening

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
	2.6 ***Staffing requirements*** are identified to effectively produce/deliver products/services. 2.7 Identify ***specialist services*** and sources of advice, where required, and cost in accordance with resources available.		
3. Develop strategies for minimising risks	3.1 Specific interests and objectives of ***relevant people*** are identified and sought and confirmed their support of the planned business direction. 3.2 ***Risk management strategies*** are identified and developed according to business goals and objectives, and relevant legal requirements. 3.3 ***Contingency plan*** is developed to address possible areas of non-conformance with the plan.	**SCIENCE** 3.1 Specific Interests and Objectives of Relevant People 3.2 Risk Management Strategies 3.3 Contingency Plan 3.4 Enterprise Requirements 3.5 Legislative Requirements **TECHNOLOGY** 3.1 Use of Digital Technology **MATHEMATICS** 3.1 Basic Mathematics **COMMUNICATION** 3.1 Communication Procedures 3.2 Report Forms 3.3 Relevant Sources of Information **LAWS AND ORDINANCES** 3.1 Health Protocols 3.2 Appropriate Statutory Requirements	3.1 Interpersonal skills 3.2 Attention to detail 3.3 Information gathering 3.4 Effective Communication Skills 3.5 Using communication sales tools 3.6 Using technological equipment/ devices 3.7 Basic math skills 3.8 Computer literacy 3.9 Empathetic listening

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
4. Document and review business plan	4.1 The business plan is developed in accordance with established procedures 4.2 Financial and operational systems that enhance performance management and suit enterprise requirements are incorporated in accordance with established procedures. 4.3 Business plan is communicated to relevant parties in accordance with established procedures. 4.4 Performance is monitored against the business plan to identify strengths, weaknesses and areas for improvement. 4.5 Recommendations are made to improve the business plan and associated systems	**SCIENCE** 4.1 Business Plan 4.2 Financial and Operational Sysytems 4.3 Performance Management 4.4 Enterprise Requirements 4.5 Legislative Requirements **TECHNOLOGY** 4.1 Use of Digital Technology **MATHEMATICS** 4.1 Basic Mathematics **COMMUNICATION** 4.1 Communication Procedures 4.2 Report Forms 4.3 Relevant Sources of Information **LAWS AND ORDINANCES** 4.1 Health Protocols 4.2 Appropriate Statutory Requirements	4.1 Interpersonal skills 4.2 Attention to detail 4.3 Information gathering 4.4 Effective Communication Skills 4.5 Using communication sales tools 4.6 Using technological equipment/ devices 4.7 Basic math skills 4.8 Computer literacy 4.9 Empathetic listening

RANGE OF VARIABLES

VARIABLE	RANGE
1. Business Plan	May include: 1.1 Business opportunities 1.2 Amount and types of finance available 1.3 Expected financial viability 1.4 Skills of operator 1.5 details of ownership/management 1.6 Finance, expenditure statement, balance sheet and cash flow forecast, projections for the initial years of operation assumptions underlying the business plan, expected level of inflation and taxation, expected trend of interest rate, capital expenditure and its timing, stock turnover, debtors collection period, creditor payment period, return on investment 1.7 Level of risk involved, risk assessment and management 1.8 Market focus of the business 1.9 Marketing requirements 1.10 Need to raise finance and requirements of lenders 1.11 Organisation/operational arrangements 1.12 Proposed size and scale of the business recognition of any seasonal or cyclical (time-based) elements which are crucial to the success of the business 1.13 Resources required and available 1.14 Sources of funding 1.15 Specialist services and sources of advice that may be required 1.16 Staffing 1.17Stages in the business development
2. Business Goals and Ojectives	May include: 2.1 Customer needs/marketing projections 2.2 Family or community benefits 2.3 Financial projections 2.4 Goals, objectives, plans, systems and processes 2.5 Lifestyle issues 2.6 Market focus of the business 2.7 Proposed size and scale of the business 2.8 Short-, medium- or long-term goals 2.9 Social responsibility

VARIABLE	RANGE
3. Occupational Safety and Health (OSH)	May include: 3.1 Identification of specific hazard issues such as occupational violence, security, manual handling, equipment and hazardous substances 3.2 Management of the organisation and operation of OSH as part of the business plan 3.3 Procedures for managing hazards in the workplace (identify, assess and control) 3.4 Provisions for ensuring safety of members of the public and contractors visiting the premises/worksite
4. Financial Plan	May include: 4.1 Analysis of sales by product/service, identifying where they were sold and to whom 4.2 Cash flow estimates for each forward period 4.3 Current financial state of the enterprise (or owner/operator) 4.4 Estimates of profit and loss projections for each forward period 4.5 Financial performance to date (if applicable) 4.6 Likely return on investment 4.7 Monthly, quarterly or annual returns 4.8 Non-recurrent assets calculations 4.9 Profit, turnover, capital and equity targets 4.10 Projected profit targets, pricing strategies, margins 4.11 Projections of likely financial results (budgeting) 4.12 Projections, which may vary depending on the importance of such information and the stage in the life of the business 4.13 Resources required to implement the proposed marketing and production strategies (staff, materials, plant and equipment) 4.14 Review of financial inputs required (sources and forms of finance) 4.15 Risks and measures to manage or minimise risks 4.16 Working, fixed, debt and equity capital

VARIABLE	RANGE
5. Marketing Strategies	May include: 5.1 Achieving lower costs of production and distribution than competitors 5.2 Creating a very different product line or service so that the business becomes a class leader in the industry distribution 5.3 Pricing, presentation and display of products/services 5.4 Product design and packaging 5.5 Product range and mix 5.6 Promotion and advertising 5.7 Pursuing cost leadership and/or product differentiation within a specialist market segment
6. Production/Operations Plan	May include: 6.1 Customer requirements, market expectations, budgetary constraints 6.2 Industrial relations climate and quality assurance considerations 6.3 Means of supply and distribution 6.4 Operational targets and action plan, which may include short-, medium- or long-term goals 6.5 Options for production, delivery, technical and customer service and support
7. Staffing Requirements	May include: 7.1 Full-time, part-time staff, permanent, temporary or casual staff 7.2 Owner/operator 7.3 Sub-contractors or external advisers/consultants
8. Specialist Services	May include: 8.1 Accountants 8.2 Business advisors and consultants 8.3 Business brokers 8.4 Contractors 8.5 Government agencies 8.6 Industry/trade associations 8.7 Lawyers and providers of legal advice 8.8 Mentors 8.9 Online gateways
9. Relevant People	May include: 9.1 Clients 9.2 Family Members 9.3 Franchise agency 9.4 Owner/operator, partners, financial backers 9.5 Regulatory bodies 9.6 Suppliers 9.6 Trade or industry associations

VARIABLE	RANGE
10. Risk Management Strategies	May include: 10.1 Breach of contract, product liability 10.2 Knowledge management 10.3 Measures to manage risk including professional indemnity, securing appropriate insurance to cover loss of earnings through sickness/accidents, drought, flood, fire, theft 10.4 Security systems to provide physical security of premises, plant, equipment, goods and services security of intellectual property 10.5 OSH requirements
11. Contingency Plan	May include: 11.1 Disturbances to cash flow, supply and/or distribution 11.2 Sickness or personal considerations

EVIDENCE GUIDE

1. Critical Aspects of Competency	Assessment requires evidence that the candidate: 1.1 Identified elements of the business plan 1.2 Developed a business plan 1.3 Developed strategies for minimising risks 1.4 Documented and reviewed business plan 1.5 Overcame objections 1.6 Closed sales 1.7 Maximized sales opportunities
2. Resource Implications	The following resources should be provided: 2.1 Tools, Materials and Equipment appropriate for the unit of competency 2.2 Workplace environment appropriate for the unit of competency
3.Methods of Assessment	Competency in this unit may be assessed through: 3.1 Interview 3.2 Demonstration with Questioning 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.

UNIT OF COMPETENCY : MANAGE FINANCES

UNIT CODE : CS-SOC243303

UNIT DESCRIPTOR : This unit covers the knowledge, skills and attitudes needed to manage finances. It includes planning for financial management, establishing budgets and allocating funds, implementing budgets, and reporting on finances.

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
1. Plan for financial management	1.1 Existing *software* or *manual bookkeeping procedures* and its suitability for financial management is reviewed in accordance with established procedures. 1.2 Previous *financial data* is reviewed and analyzed to establish areas which have generated a profit or loss. 1.3 Research undertaken to review reasons for previous profit and loss. 1.4 Business plan is reviewed to establish critical dates and initiatives that will require or generate resources in the next financial cycle. 1.5 *Cash flow* trends are analyzed in accordance with established procedures. 1.6 *Statutory requirements* are reviewed for compliance and liabilities for tax.	**SCIENCE** 1.1 Financial Data 1.2 Business Plan 1.3 Cash Flow Trends 1.4 Statutory Requirements for Tax 1.5 Income and Expenditures **TECHNOLOGY** 1.1 Use of Digital Technology **MATHEMATICS** 1.1 Basic Mathematics **COMMUNICATION** 1.1 Communication Procedures 1.2 Report Forms 1.3 Relevant Sources of Information **LAWS AND ORDINANCES** 1.1 Health Protocols 1.2 Appropriate Statutory Requirements	1.1 Interpersonal skills 1.2 Attention to detail 1.3 Information gathering 1.4 Effective Communication Skills 1.5 Using communication sales tools 1.6 Using technological equipment/ devices 1.7 Basic math skills 1.8 Computer literacy 1.9 Empathetic listening

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
2. Establish budgets and allocate funds	2.1 Previous financial data is used to determine allocations for resources 2.2 Informed estimates of new items are made for inclusion in budget 2.3 **Budgets** are prepared in accordance with organisational requirements and statutory requirements	**SCIENCE** 2.1 Financial Data 2.2 Informed Estimates of New Items 2.3 Budgets **TECHNOLOGY** 2.1 Use of Digital Technology **MATHEMATICS** 2.1 Basic Mathematics **COMMUNICATION** 2.1 Communication Procedures 2.2 Report Forms 2.3 Relevant Sources of Information **LAWS AND ORDINANCES** 2.1 Health Protocols	2.1 Interpersonal skills 2.2 Attention to detail 2.3 Information gathering 2.4 Effective Communication Skills 2.5 Using communication sales tools 2.6 Using technological equipment/ devices 2.7 Basic math skills 2.8 Computer literacy 2.9 Empathetic listening
3. Implement budgets	3.1 Budgets circulated and managers supervisors, business owners are ensured about budgets, reporting requirements and financial delegations are clear and in accordance with established procedures. 3.2 Risks are managed by checking there are no opportunities for misappropriation of funds and that systems are in place to properly record all **financial transactions**.	**SCIENCE** 3.1 Budgets 3.2 Reporting Requirements 3.3 Financial Transactions and Delegations 3.4 Profit and Loss Statements 3.5 Cash Flow 3.6 Budget 3.7 Audit Trails **TECHNOLOGY** 3.1 Use of Digital Technology **MATHEMATICS** 3.1 Basic Mathematics	3.1 Interpersonal skills 3.2 Attention to detail 3.3 Information gathering 3.4 Effective Communication Skills 3.5 Using communication sales tools 3.6 Using technological equipment/ devices 3.7 Basic math skills 3.8 Computer literacy 3.9 Empathetic listening

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
	3.3 *Profit and loss statements*, cash flows and ageing summaries are reviewed in accordance with established procedures. 3.2 Budgets are revised, as required, to deal with contingencies. 3.3 *Audit trails* are maintained to ensure accurate tracking and to identify discrepancies between agreed and actual allocations. 3.4 Compliance with due diligence is ensured at all times.	**COMMUNICATION** 3.1 Communication Procedures 3.5 Report Forms 3.6 Relevant Sources of Information **LAWS AND ORDINANCES** 3.1 Health Protocols 3.2 Appropriate Statutory Requirements	
4. Report on finances	4.1 *Structure and format of reports* are ensured so that it will be clear and conform to organisational and statutory requirements. 4.2 Significant issues in statements are identified and prioritized, including comparative financial performances for review and decision making. 4.3 Recommendations are prepared to ensure financial viability of the organisation 4.4 The effectiveness of *financial management processes* is evaluated as appropriate.	**SCIENCE** 4.1 Structure and Format of Reports 4.2 Statutory Requirements 4.3 Financial Management Requirements **TECHNOLOGY** 4.1 Use of Digital Technology **MATHEMATICS** 4.1 Basic Mathematics **COMMUNICATION** 4.1 Communication Procedures 4.2 Report Forms 4.3 Relevant Sources of Information **LAWS AND ORDINANCES** 4.1 Health Protocols	4.1 Interpersonal skills 4.2 Attention to detail 4.3 Information gathering 4.4 Effective Communication Skills 4.5 Using communication sales tools 4.6 Using technological equipment/ devices 4.7 Basic math skills 4.8 Computer literacy 4.9 Empathetic listening

RANGE OF VARIABLES

VARIABLE	RANGE
1. Software	May include: 1.1 Applications 1.2 Scripts 1.3 Programs
2. Manual Bookkeeping	May include: 2.1 Journalize transactions 2.2 Post transactions 2.3 Prepare trial balance 2.4 Prepare financial reports 2.5 Review internal control system
3. Financial Data	May include: 3.1 Income 3.2 Expenses 3.3 Assets 3.4 Liabilities 3.5 Cash Flow
4. Cash Flow	May include: 4.1 Cash made by the business through operations, investment, and financing 4.2 Transactions from all operational business activities
5. Statutory Requirements	May include: 5.1 Law 5.2 Proclamation 5.3 Rule 5.4 Regulation 5.5 Order 5.6 Resolution 5.7 Notice 5.8 Rule of Court 5.9 Other instruments made under or by virtue of any law of any local authority
6. Software	May include: 6.1 Applications 6.2 Scripts 6.4 Programs
7. Budget	May include: 7.1 Projected Revenue 7.2 Fixed Costs 7.3 Variable Costs 7.4 Profits
7 Financial Transactions	May include: 7.1 Cash Receipts 7.2 Deposit Corrections 7.3 Requisitions 7.4 Purchase Orders 7.5 Invoices

	7.6 Travel Expense Reports
	7.7 Journal Entries
8. Profit and Loss Statements	May include:
	8.1 Net Sales
	8.2 Costs of Goods Sold
	8.3 Gross Margin
	8.4 Selling and Administrative Expense(or operating expense)
	8.5 Net Profit
9. Audit Trails	May include:
	9.1 What events occurred
	9.2 Who caused the events
	9.3 When did the event happened
	9.4 Where did it happened
	9.5 How did it happened
10. Structure and Format of Reports	May include:
	10.1 Headings
	10.2 Sub-Headings
	10.3 Numbered Sections
	10.4 Bullet Point Text
	10.5 Graphics (e.g. Flow Charts, Diagrams or Graphs)
11. Financial Management Processes	May include:
	11.1 Accounting
	11.2 Fixed-Asset Management
	11.3 Revenue Recognition
	11.4 Payment Processing

EVIDENCE GUIDE

1. Critical Aspects of Competency	Assessment requires evidence that the candidate: 1.1 Planned for financial management 1.2 Established budgets and allocated funds 1.3 Implemented budgets 1.4 Reported on finances
2. Resource Implications	The following resources should be provided: 2.3 Tools, Materials and Equipment appropriate for the unit of competency 2.4 Workplace environment appropriate for the unit of competency
3.Methods of Assessment	Competency in this unit may be assessed through: 3.1 Interview 3.2 Demonstration with Questioning 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.

UNIT OF COMPETENCY : SELL PRODUCTS AND SERVICES TO CUSTOMERS

UNIT CODE : CS-SOC243304

UNIT DESCRIPTOR : This unit covers the knowledge, skills and attitudes needed to sell products and services in a retail environment. It involves the use of sales techniques and encompasses the key selling skills from approaching the customer to closing the sale. It requires a basic level of product knowledge.

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
1. Apply product knowledge	1.1 Demonstrate knowledge of the use and application of relevant products and services according to *store policy* and *legislative requirements/appropriate statutory requirements* . 1.2 Develop *product knowledge* by accessing *relevant sources of information*.	**SCIENCE** 1.1 Product Knowledge 1.2 Store Policy 1.3 Legislative Requirements **TECHNOLOGY** 1.5 Use of Digital Technology **MATHEMATICS** 3.6 Basic Mathematics **COMMUNICATION** 3.7 Communication Procedures 3.8 Report Forms 3.9 Relevant Sources of Information **LAWS AND ORDINANCES** 1.1 Health Protocols	1.1 Interpersonal skills 1.2 Attention to detail 1.3 Information gathering 1.4 Effective Communication Skills 1.5 Using communication sales tools 1.6 Using technological equipment/ devices 1.7 Basic math skills 1.8 Computer literacy 1.9 Empathetic listening

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
8 Approach customers	2.1 *Customer* approach is determined and timing applied in customer approach. 2.2 Effective *sales* approach is identified and applied. 2.3 A positive impression is conveyed to arouse customer interest. 2.4 Knowledge of customer buying behavior is demonstrated in accordance with established procedures	**SCIENCE** 2.1 Customer Types and Needs 2.2 Customer Buying Motives 2.3 Customer Behavior and Cues 2.4 Effective Sales Approach 2.5 Individual and Cultural Differences 2.6 Store Merchandise and Range **MATHEMATICS** 2.1 Basic Mathematics **COMMUNICATION** 2.1 Communication Procedures 2.2 Report Forms **LAWS AND ORDINANCES** 2.1 Health Protocols 2.2 Relevant Legislation and Statutory Requirements	2.1 Interpersonal skills 2.2 Attention to detail 2.3 Information gathering 2.4 Effective Communication Skills 2.5 Using communication sales tools 2.6 Using technological equipment/ devices 2.7 Basic math skills 2.8 Computer literacy 2.9 Empathetic listening

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
~~9~~ Gather information	3.1 Questioning techniques applied to determine customer buying motives. 3.2 Listening skills used to determine customer requirements. 3.3 Non-verbal cues interpreted and clarified. 3.4 Customers names identified where possible. 3.5 Customer is directed to specific merchandise in accordance with established procedures 3.6 Guidelines on Data Privacy Act is applied as appropriate.	**SCIENCE** 3.1 Customer Types and Needs 3.2 Customer Buying Motives 3.3 Customer Behavior and Cues 3.4 Individual and Cultural Differences 3.5 Questioning Techniques 3.6 Store Merchandise and Range **MATHEMATICS** 3.1 Basic Mathematics **COMMUNICATION** 3.1 Communication Procedures 3.2 Report Forms 3.3 Non-Verbal Cues **LAWS AND ORDINANCES** 3.1 Health Protocols 3.2 Relevant Legislation and Statutory Requirements	3.1 Interpersonal skills 3.2 Attention to detail 3.3 Information gathering 3.4 Effective Communication Skills 3.5 Using communication sales tools 3.6 Using technological equipment/ devices 3.7 Basic math skills 3.8 Computer literacy 3.9 Empathetic listening

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
~~10~~ Sell benefits	4.1 Customer needs are matched to appropriate products and services. 4.2 Knowledge of products features and benefits is communicated clearly to customers. 4.3 Product use and safety requirements is described to customers. 4.4 Customers are referred to appropriate product specialist as required. 4.5 *Routine customer questions* about merchandise are answered accurately and honestly or refer to senior sales staff.	**SCIENCE** 4.1 Customer Types and Needs 4.2 Customer Buying Motives 4.3 Customer Behavior and Cues 4.4 Individual and Cultural Differences 4.5 Store Merchandise and Range 4.6 Product Knowledge **MATHEMATICS** 4.1 Basic Mathematics **COMMUNICATION** 4.1 Communication Procedures 4.2 Report Forms **LAWS AND ORDINANCES** 4.1 Health Protocols 4.2 Relevant Legislation and Statutory Requirements	4.1 Interpersonal skills 4.2 Attention to detail 4.3 Information gathering 4.4 Effective Communication Skills 4.5 Using communication sales tools 4.6 Using technological equipment/ devices 4.7 Basic math skills 4.8 Computer literacy 4.9 Empathetic listening

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
11 Overcome objections	5.1 Customer objections are identified and accepted. 5.2 Objections into price, time and merchandise characteristics are categorized. 5.3 Solutions are offered according to store policy. 5.4 ***Problem solving*** is applied to overcome customer objections.	**SCIENCE** 5.1 Customer Types, Needs, Handling 5.2 Customer Buying Motives 5.3 Customer Behavior and Cues 5.4 Customer Objections 5.5 Individual and Cultural Differences 5.6 Store Merchandise and Range **MATHEMATICS** 5.1 Basic Mathematics **COMMUNICATION** 5.1 Communication Procedures 5.2 Report Forms **LAWS AND ORDINANCES** 5.1 Health Protocols 5.2 Relevant Legislation and Statutory Requirements	5.1 Interpersonal skills 5.2 Attention to detail 5.3 Information gathering 5.4 Effective Communication Skills 5.5 Using communication sales tools 5.6 Using technological equipment/ devices 5.7 Handling of customers/clients 5.7 Basic math skills 5.8 Computer literacy 5.9 Empathetic listening

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
12 Close sale	6.1 Appropriately monitored, identified and responded to customer buying signals. 6.2 Customer is encouraged to make purchase decisions. 6.3 Appropriate method is selected and applied to closing sale.	**SCIENCE** 6.1 Customer Types and Needs 6.2 Customer Buying Motives 6.3 Customer Behavior and Cues 6.4 Individual and Cultural Differences 6.5 Store Merchandise and Range **MATHEMATICS** 6.1 Basic Mathematics **COMMUNICATION** 6.1 Communication Procedures 6.2 Report Forms **LAWS AND ORDINANCES** 6.1 Health Protocols 6.2 Relevant Legislation and Statutory Requirements	6.1 Interpersonal skills 6.2 Attention to detail 6.3 Information gathering 6.4 Effective Communication Skills 6.5 Using communication sales tools 6.6 Using technological equipment/ devices 6.7 Basic math skills 6.8 Computer literacy 6.9 Empathetic listening

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
13 Perform aftersales service	13.1 *Condition* of the purchased product or service is checked with the customer and in accordance with established procedures. 13.2 Customer satisfaction survey with customer is conducted, if required 13.3 Suggestive selling is conducted in accordance with established procedures	**SCIENCE** 13.1 After-Sales Service 13.2 Basic Quality Assurance **TECHNOLOGY** 13.1 Electronic Communication Devices **COMMUNICATION** 13.1 Spiels 13.2 Suggestive Selling 13.3 Customer Service **LAWS AND ORDINANCES** 13.1 Health Protocols 13.2 Relevant Legislation and Statutory Requirements	6.1 Interpersonal skills 6.2 Attention to detail 6.3 Information gathering 6.4 Effective Communication Skills 6.5 Using communication sales tools 6.6 Using technological equipment/ devices 6.7 Basic math skills 6.8 Computer literacy 6.9 Empathetic listening 6.10 Accomplishing Customer Satisfaction Forms 　6.10.1 Online Survey Form 　6.10.2 Manual Survey Form 6.11 Administration and Coordination Skills

ELEMENT	PERFORMANCE CRITERIA *Italicized terms* are elaborated in the Range of Variables	REQUIRED KNOWLEDGE	REQUIRED SKILLS
14 Maximize sales opportunities.	7.1 Opportunities are recognised and applied for making additional sales. 7.2 Customer is advised of complementary products or services according to customer's identified need. 7.3 Personal sales outcomes are reviewed to maximise future sales.	**SCIENCE** 7.1 Customer Types and Needs 7.2 Customer Buying Motives 7.3 Customer Behavior and Cues 7.4 Individual and Cultural Differences 7.5 Store Merchandise and Range 7.6 Personal Sales Outomes **MATHEMATICS** 7.1 Basic Mathematics **COMMUNICATION** 7.1 Communication Procedures 7.2 Report Forms **LAWS AND ORDINANCES** 7.1 Health Protocols 7.2 Relevant Legislation and Statutory Requirements	7.1 Interpersonal skills 7.2 Attention to detail 7.3 Information gathering 7.4 Effective Communication Skills 7.5 Using communication sales tools 7.6 Using technological equipment/ devices 7.7 Basic math skills 7.8 Computer literacy 7.9 Empathetic listening

RANGE OF VARIABLES

VARIABLE	RANGE
1. Store Policy	May include: 1.1 Interaction with customers 1.2 Selling products and services
2. Legislative Requirements	May include: 2.1 Trade Practices and Fair Trading Acts 2.2 Tobacco Laws 2.3 Liquor Laws 2.4 Lottery Legislations 2.5 Industry Codes of Practices 2.6 Occupational Safety and Health 2.7 Sale of Second-Hand Goods 2.8 Trading Hours 2.9 Product feature, advantages and benefit 2.10 Transport, Storage and Handling of Goods
3. Product Knowledge	May include: 3.1 Warranties 3.2 Features and Benefits 3.3 Use-by Dates 3.4 Handling and Storage Requirements 3.5 Stock Availability 3.6 Safety Features 3.7 Price
4. Relevant Sources of Information	May include: 4.1 Internet 4.2 Staff Members 4.3 Store or Supplier Product Manuals 4.4 Product Profiles 4.5 Videos 4.6 Demonstrations 4.7 Labels
5. Customers	May include: 5.1 New or Repeat Contacts 5.2 External and Internal Contacts 5.3 Customers with routine or special requests 5.4 People from a range of social, cultural and ethnic backgrounds and with varying physical and mental abilities
6. Sales	May include: 6.1 Face to Face 6.2 Over the Phone 6.3 Online

VARIABLE	RANGE
7. Routine Customer Questions	May include: 7.1 Price and Price Reductions 7.2 Quality 7.3 Availability 7.4 Features and Benefits
8. Problem Solving	May include: 8.1 Store Policies and Procedures 8.2 Resource Implications

EVIDENCE GUIDE

1. Critical Aspects of Competency	Assessment requires evidence that the candidate: 1.8 Applied product knowledge 1.9 Approached customers 1.10　Gathered information 1.11　Sold benefits 1.12　Overcame objections 1.13　Closed sales 1.14　Performed aftersales service 1.15　Maximized sales opportunities
2. Resource Implications	The following resources should be provided: 2.1 Tools, Materials and Equipment appropriate for the unit of competency 2.2 Workplace environment appropriate for the unit of competency
3. Methods of Assessment	Competency in this unit may be assessed through: 3.1 Interview 3.2 Demonstration with Questioning 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

1. **Audit Trails** - An audit trail is a step-by-step record by which accounting, trade details, or other financial data can be traced to their source. Audit trails are used to verify and track many types of transactions, including accounting transactions and trades in brokerage accounts.

2. **Budget** - plan to show how much money a person or organization will earn and how much they will need or be able to spend: The firm has drawn up a budget for the coming fiscal year

3. **Business Goals and Objectives** - Business goals represent the direction in which a company intends to go and define what the organization wants to achieve. A business objective specifies the methods and paths that can help a business achieve that goal.

4. **Business Plan** - is an essential written document that provides a description and overview of your company's future. All businesses should have a business plan. The plan should explain your business strategy and your key goals to get from where you are now to where you want to be in the future.

5. **Cash Flow** - refers to the net balance of cash moving into and out of a business at a specific point in time. Cash is constantly moving into and out of a business. For example, when a retailer purchases inventory, money flows out of the business toward its suppliers.

6. **Contingency Plan** - is a course of action designed to help an organization respond effectively to a significant future incident, event or situation that may or may not happen.

7. **Customer** - someone who buys something from a seller, vendor, or supplier in exchange for money or something else of value. This person is also called a client, buyer, or purchaser.

8. **External Environment**- refers to the outside influences and factors that affect business operations. The business environment factors include competitive, political, technological, and economic factors

9. **Financial and Operational Systems**- refers to the process of overseeing the various functions of a business's financial activities. All businesses engage in financial activity, which is based on the concept of transactions.

10. **Financial Data**- refers to quantitative information that is used by organizations to make financial decisions. It is essentially data concerning a company's financial health and performance. This data includes information about an organization's income, expenses, assets, liabilities, and cash flow.

11. **Financial Management Processes**- re, in their simplest terms, plans and procedures which will help an individual, family or institution reach their financial goals. These processes can include a series of steps, such as: Identifying financial goals. Gathering financial and personal information

12. **Financial Plan**- documents an individual's short- and long-term financial goals and includes a strategy to achieve them. The plan should be comprehensive and highly customized. It should reflect an individual's personal and family financial needs, investment risk tolerance, and plan for saving and investing.

13. **Financial Transactions**- is an agreement, or communication, between a buyer and seller to exchange goods, services, or assets for payment. Any transaction

involves a change in the status of the finances of two or more businesses or individuals. A financial transaction always involves one or more financial asset, most commonly money or another valuable item such as gold or silver.

14. **Legislative Requirements i**) all laws, regulations, acts, orders, by-laws, decrees, or other such ordinances of the jurisdiction where the Services or the particular part of the Assignment is being carried out, and ii) all requirements, permits, approvals, licences, certificates and other directives made by any other authorities, public bodies, or other organizations having jurisdiction in connection with the carrying out of the Services.

15. **Market Segmentation**- is the practice of dividing your target market into approachable groups. Market segmentation creates subsets of a market based on demographics, needs, priorities, common interests, and other psychographic or behavioural criteria used to better understand the target audience.

16. **Marketing Clients**- shoppers who seek personalized services or advice from businesses. When you have clients, you're building long-term relationships in which you understand your buyers at a much deeper level. There can be some overlap when using the term customer vs client. Clients are still making purchases, after all.

17. **Marketing Factors**- are elements of consumer behavior and economic trends that can affect a particular sales market. This can include any variables or phenomena that might impact a business' sales.

18. **Marketing Objectives, Organizational Structure**- re a set of clearly defined, measurable goals established as part of a marketing plan. Marketing objectives provide specific targets to be met within a time frame, such as "decrease customer acquisition cost by 10% by the end of next quarter."

19. **Marketing Opportunities**- openings for a company to sell something to a certain type of customer. These customers, or potential leads, have a need for a product or service that the company can provide

20. **Marketing Plans**- is the advertising strategy that a business will implement to sell its product or service. The marketing plan will help determine who the target market is, how best to reach them, at what price point the product or service should be sold, and how the company will measure its efforts.

21. **Marketing Strategies**- is a long-term plan for achieving a company's goals by understanding the needs of customers and creating a distinct and sustainable competitive advantage. It encompasses everything from determining who your customers are to deciding what channels you use to reach those customers.

22. **Occupational Safety and Health (OSH)**- is the discipline dealing with the prevention of work-related injuries and diseases as well as the protection and promotion of the health of workers. It aims at the improvement of working conditions and environment.

23. **Problem Solving**- is the act of defining a problem; determining the cause of the problem; identifying, prioritizing, and selecting alternatives for a solution; and implementing a solution. The problem-solving process. Problem solving resources.

24. **Product Knowledge**- is the process of teams learning about company products so that they can effectively describe them to customers. This involves people who

have customer-facing positions learning details about product features, benefits and uses.

25. **Production/Operations Plan**- describes in detail how a company's products and services will be manufactured. It spells out the production targets, required resources, processes and overall schedule.

26. **Profit and Loss Statements**- formally known as an income statement or simply as a P&L, tracks the amount of profit that remains after a business subtracts all of its costs from its revenue during a specific accounting period, typically monthly, quarterly and annually

27. **Risk Management Strategies**- Strategy that addresses how organizations intend to assess risk, respond to risk, and monitor risk—making explicit and transparent the risk perceptions that organizations routinely use in making both investment and operational decisions.

28. **Routine Customer Questions** - Probing questions to customers in customer service specifically in selling products or services

29. **Sales**- refer to any transactions where money or value is exchanged for the ownership of a good or entitlement to a service. In an accounting context, sales refers to a company's revenue earned from the sales of products or services (net sales).

30. **Software**- Software is a set of instructions, data or programs used to operate computers and execute specific tasks. It is the opposite of hardware, which describes the physical aspects of a computer. Software is a generic term used to refer to applications, scripts and programs that run on a device. It can be thought of as the variable part of a computer, while hardware is the invariable part.

31. **Sources of Information**- is anything that provides you with information. There are mainly two types of information sources. They are: documentary and non-documentary. The documents are physical sources of information that are fit for physical handling or they are the record in some physical form.

32. **Specialist Services**- is a company that performs tasks for the benefit of their customers. These tasks can include transportation, cleaning, traveling, hospitality, maintenance or consulting.

33. **Staffing Requirements** - means the job descriptions for new positions, which focus on experience, education, skills and job clearance. For backfilled positions, the original job description is used as a basis, then validated or updated as necessary.

34. **Statutory Requirements**- Laws passed by a state and/or central government. Regulatory Requirements - A rule issued by a regulatory body appointed by a state and/or central government Standard - Documented procedure whose intention is to harmonize actions or processes within an specific discipline or activity.

35. **Store Policy** - A Terms and Conditions agreement that outlines the rules customers must observe to enjoy a hassle-free shopping experience at your store. A Return and Refund Policy that explains how you handle product returns and whether you offer refunds or alternative compensation to customers.

36. **Structure and Format of Reports**- Adhere to a structured format, including a clear title, table of contents, summary, introduction, body, conclusion, recommendations, and appendices. This ensures clarity and coherence.

37. **Target Market**- is a specific group of people with shared characteristics that a business markets its products or services to. Companies use target markets to thoroughly understand their potential customers and craft marketing strategies that help them meet their business and marketing objectives.

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