



**NRF FOUNDATION**  
RESEARCH & EDUCATION

**National  
Professional Certification in  
Customer Service<sup>®</sup>**

Certification Handbook  
Winter 2005-Fall 2005



Each candidate is required to read this handbook before taking the assessment for the National Professional Certification in Customer Service. This handbook contains information candidates need to take the assessment and to apply for and maintain certification. Additional copies are available online at [www.NRF.com/Foundation](http://www.NRF.com/Foundation).

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*Dear Certification Candidate,*

*On behalf of the NRF Foundation, I congratulate you for taking the initiative to work toward the National Professional Certification in Customer Service. This is an important step in demonstrating that you have the knowledge and skills shown to be important in customer service work in high-performance organizations.*

*NRF Foundation commends you for your commitment to professionalism in the industry. We wish you much success throughout your career.*

*Sincerely,*



*Katherine J. Mance  
Vice President, NRF Foundation*

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## About NRF Foundation

The NRF Foundation (NRFF) is the research and education arm of the National Retail Federation. A non-profit foundation created in 1981, the Foundation conducts industry research, develops education and workforce development programs, and promotes retailing as a career destination.

The National Retail Federation is the world's largest retail trade association, with membership that comprises all retail formats and channels of distribution including department, specialty, discount, catalog, Internet and independent stores as well as the industry's key trading partners of retail goods and services. NRF represents an industry with more than 1.4 million U.S. retail establishments, more than 20 million employees - about one in five American workers - and 2002 sales of \$3.6 trillion. As the industry umbrella group, NRF also represents more than 100 state, national and international retail associations.

## Skill Standards and Certification

**I**ndustry, government, education, labor and community organizations have worked together to develop assessments, certifications, and related products and services, such as training materials and programs. To help employees measure, document, and showcase their skills. Skill standards provide the cornerstone of this system, describing high-performance work and worker characteristics and communicating the keys to productivity and job success.

**W**orkers can use certification to assess their knowledge and promote their professionalism. Earning certifications through assessments shows that a worker has demonstrated the knowledge and skills noted as important to successful employment in sales and service careers. Certifications can help to build a committed, professional workforce and raise image and opportunity in sales and service careers.

**U**nder the leadership of the NRF Foundation, the Sales & Service Voluntary Partnership (S&SVP) identified skill standards that describe work in a best-practice, high-performance company at the level that means success for an entry-level worker through first-line supervisor in such a setting. To date, standards have been developed for two major areas, **Customer Service and Sales**. NRF Foundation will continue to develop skill standards for additional areas in the retail and related careers.

**H**undreds of representatives of sales and service industries have helped to identify these standards, which describe what to do to succeed in these work areas. They participated in review of labor market information to determine which jobs should be studied to develop standards that would be portable and applicable across industry segments; development sessions with highly effective workers; skills forums with work analysts, human resource managers, trainers, and educators; research on existing standards and training curricula; and national surveys of the work functions of sales and service employees.

## The Customer Service Certification

The National Professional Certification in Customer Service signifies that the person who earns it has demonstrated knowledge and skills noted as important to successful employment in best-practice, high-performance companies in the sales and service industries. A student or worker who earns this certification will have a national, transferable certification of skills and knowledge in customer service.

The certification is voluntary. NRF Foundation awards the National Professional Certification in Customer Service solely to indicate that the individual who earns it has demonstrated knowledge and skills noted as important to successful employment in the sales and service industries.

The title of the certification is "National Professional Certification in Customer Service." If you pass the assessment and earn the certification, you will be able to say that you are "Nationally Certified Professional in Customer Service." NRF Foundation does not permit any other representation of the certification.

Organizations or individuals who choose to incorporate the assessment or certification as a condition of employment or advancement do so at their own initiative. NRF Foundation advises that such organizations or individuals must determine for themselves that their criteria and methods of determining qualifications for employment meet their needs and comply with all laws and regulations applicable to them.

## Eligibility Requirements

To be eligible for certification, you must pass the required assessment AND you must:

- Be at least 16 years old or, if a student, have attained at least grade 11 standing
- Be in good standing with your employer, school, or training program

## Diversity and Inclusion

NRF Foundation embraces diversity and values the creation of opportunities for everyone. NRF Foundation does not discriminate among applicants on the basis of age, gender, race, ethnicity, religion, national origin, disability, sexual orientation, or marital status.

## The Customer Service Assessment

The Customer Service Assessment is one component in the national assessment system. Your results will be portable across the entire system, which is designed to be modular, cross-industry, and highly accessible to a wide audience. All of the assessments in the system are being built to facilitate linking with company-specific pieces and systems.

The Customer Service Assessment is based on the national skill standards for Customer Service included in this handbook. Experts and work analysts with first-hand knowledge of the workplace studied these standards and all of the data collected over time to develop a “blueprint” for this assessment. They determined, using all of the data at hand, the areas that are most important to be included in the assessment and what emphasis should be given to each.

Workers who are familiar with one or more of the NRF Foundation industries and occupations write and review questions for the assessment. Question writers include frontline workers, managers, instructors, curriculum developers, and training providers. NRF Foundation makes every effort to select question writers and reviewers who respect and value diversity and will consider the diversity of the workforce and candidates with respect to work environments, race, ethnicity, gender, disabilities, age, and other factors.

The assessment consists of 70 questions — 65 used to compute your score and five used to help ensure that the test is fair. These questions cover knowledge and skills needed for direct customer contact. It relates to four work functions:

<u>Work Function</u>	<u>% of the Assessment</u>
Learns About Products or Services	20
Assesses Customer Needs	26
Educates the Customer	26
Meets Customer Needs and Provides Ongoing Support	28

The knowledge and skill areas covered are listening; speaking; reading; writing; mathematics; using technology; gathering and analyzing information; analyzing and solving problems; making decisions and judgments; organizing and planning; using social skills; adaptability; working in teams; leading others; building consensus; self and career development; workplace health, safety and security; meeting client needs and expectations; initiating product and service improvements; sales procedures and techniques; and equipment and tools.

The assessment is given by computer and includes scenario-based, multimedia items, with some video, audio, and graphics. The computer presents each of the questions, and you indicate your answers on the computer.

All of the questions require you to apply customer service skills and knowledge to make a judgment about what is best to do in a customer service situation. You may be asked to select the correct answer from among four choices given (multiple-choice questions), to perform a task, such as clicking on a customer’s record to find information, or to sort or match items or information.

Sometimes you will read the situations, sometimes you will listen to an audio, and sometimes you will watch a video. For some of the questions, more than one answer could be somewhat correct, but you should always indicate the BEST answer. For all questions, you should give the answer that is in the customer’s best interests. Remember, although rules and practices vary

from company to company, the answers you give should be based on the customer service standards of high-performance companies—companies that empower their workers.

**You do not need computer experience to take this assessment.** At the assessment site, you will register for the assessment. Following your registration, a staff member will assist you in navigating to the system demonstration module. You may work in the demonstration module until you are comfortable with the online testing system and you may begin the assessment when you are ready. Both online help and staff will be available throughout your session to help you with the functions of the online testing system.

**A total of two hours is allotted** for the entire assessment appointment. This includes an hour and a half for the assessment, 15 minutes for the computer lesson, and 15 minutes for background information and giving your opinion of the assessment. This has been shown to be plenty of time to complete the lesson and assessment without pressure.

## Assessment Locations

**Assessment sites** include special testing centers, community colleges, high schools, skills centers, and industry settings. A number of employers provide the assessment on-site. If your company or organization is not sponsoring an onsite assessment, to see a list of the assessment sites available to you, please go to the online registration page for NRF Foundation-sponsored assessment sites, [www.castleworldwide.com/tds\\_v5/asp/NRF\\_online\\_reg1a.asp](http://www.castleworldwide.com/tds_v5/asp/NRF_online_reg1a.asp) or go to the online registration page for the CASTLE Worldwide –sponsored assessment sites, website, [www.castleworldwide.com/tds\\_v5/asp/NRF\\_online\\_reg1a.asp](http://www.castleworldwide.com/tds_v5/asp/NRF_online_reg1a.asp).

## Scheduling an Assessment

If you complete the National Professional Certification in Customer Service at one of CASTLE Worldwide, Inc.'s national test centers, the fee will be \$80, and the fee must be paid by credit card (MasterCard or Visa) at the time of test registration. Candidates can register online at [www.castleworldwide.com/tds\\_v5/asp/NRF\\_online\\_reg1a.asp](http://www.castleworldwide.com/tds_v5/asp/NRF_online_reg1a.asp) or they can complete their applications at the test center prior to testing.

If you complete the National Professional Certification in Customer Service at a private site, the fee will range from \$50-\$80. You may purchase a voucher or make payment arrangements through NRF Foundation prior to testing. Please go to the online registration page for NRF Foundation-sponsored assessment sites, [www.castleworldwide.com/tds\\_v5/asp/NRF\\_online\\_reg1a.asp](http://www.castleworldwide.com/tds_v5/asp/NRF_online_reg1a.asp)

## Buying a Voucher

If you complete the National Professional Certification in Customer Service at a private site, the fee will range from \$50-\$80. You may purchase a voucher or make payment arrangements through NRF Foundation prior to testing. Please contact them directly at: 202-783-7971 to make payment arrangements. Ask to be connected to the Certification Department.

## Obtaining a Refund

**If you have a medical or personal emergency** that prevents your keeping an assessment appointment, you may obtain a refund of your assessment fee. To obtain a refund, you must submit a written request to NRF Foundation. Your request must include:

- The date, time, and location of your scheduled appointment;
- The reason you were unable to keep the appointment;
- Documentation of the reason (letter from a physician or licensed mental health care professional or clergy member).

NRF Foundation will require four (4) to six (6) weeks to process your request.

If inclement weather or an assessment site emergency requires a site or CASTLE Worldwide to cancel your appointment, you will be notified by telephone. The site will reschedule your appointment at no charge or penalty to you.

## Requesting Accommodations

**NRF Foundation wishes to ensure** that individuals with disabilities are not deprived of the opportunity to participate in the assessment solely because of a disability. NRF Foundation complies with the Americans with Disabilities Act of 1990 (ADA) and title VII of the Civil Rights Act, as amended, in accommodating candidates with documented disabilities who need special arrangements to take an assessment.

Reasonable accommodations depend on the nature and severity of the documented disability. A particular accommodation will not be granted if it is not deemed reasonable and other suitable techniques are available.

**To arrange for an assessment accommodation**, you must submit an acceptable request to NRF Foundation within thirty(30) days before the assessment appointment. The request must include your name, address, and Social Security Number; the name of the assessment, the approximate date on which you wish to take the assessment, the location at which you wish to take the assessment; and a description of accommodations you request. The request also must include supporting documentation from a physician or other qualified professional reflecting a diagnosis of your disability and an explanation of the accommodation(s). The supporting documentation must be on the physician or other professional's letterhead, specify the professional's credentials, and be signed by the professional.

NRF Foundation will provide reasonable accommodations, auxiliary aids and services, except where such may fundamentally alter the assessment or results, or result in an undue burden. Assessment accommodations typically include:

- Extended time to complete an assessment (time and a half to double time);
- A reduced-distraction environment separate from other assessment candidates;
- Permission to use the candidate's adapting equipment, such as a magnifier;
- A reader or scribe;
- Another accommodation recommended by the professional documenting the disability that NRF Foundation considers reasonable.

Due to the unique nature of each accommodation request, NRF Foundation recommends that candidates request accommodations as early as possible. The assessment will be scheduled after NRF Foundation has received and reviewed all required information.

## Admission to the Assessment

You must check in at the testing center at least 30 minutes before your scheduled assessment time. If you are late for your assessment appointment, you will NOT be admitted and you will owe the full assessment fee. Remember to allow plenty of time to find parking and the assessment room.

You must present proper photo identification with signature and date of birth to the proctor at the testing center.

Examples of acceptable identification are:

- Driver's License
- Passport
- Government Issued Identification
- Official School identification

Examples of non-acceptable identification are:

- Gym membership
- Identification with signature only

If you cannot produce an acceptable photo ID with signature and date of birth, you WILL NOT be admitted for testing.

**Proper identification is required for admission to the assessment.**

**YOU ALSO Will NEED:**

- The contact information of a professional reference. You will need their name, number and e-mail address. A professional reference must not be a family member and can be a teacher, trainer, or employer. (Also see page 10.)

**You also may wish to bring:**

- Layered clothing.* It is a good idea to wear layers of clothes so you are prepared to adjust while taking the assessment. Be sure to bring an indoor sweater or jacket to use in case it is too cool for you in the center.
- A watch.* Although the computer assessment system includes a clock, your own watch may help to make you more comfortable while you take the assessment.

You will receive scratch paper, a pencil, and audio headphones to use while you are taking the assessment. Staff will collect the scratch paper, pencil, and headphones when you finish your assessment. No assessment materials may be taken from the assessment center.

⊘ Do NOT bring to the assessment:

-  Books or other reference material
-  Pencils or pens
-  Calculators
-  Food or drink
-  Telephones or signaling devices, such as pagers
-  Other electronic devices
-  Weapons/personal defense items

- ⊘ No guests, visitors, children, or pets are allowed at the assessment site.
- ⊘ No smoking or use of smokeless tobacco are permitted in the assessment room.

A calculator is built into the assessment.

## Candidate Agreement

Before you begin the assessment, you will be asked to read and indicate your acceptance of an agreement similar to this:

### TERMS AND CONDITIONS STATEMENT

Thank you for completing this application. In addition to the Candidate Handbook, candidates must agree to the following:

I agree that NRF Foundation may verify to others that I have earned the National Professional Certification in Customer Service; I authorized NRF Foundation to make such verification, and I release NRF Foundation from any liability associated with such disclosure. Notwithstanding the foregoing, I understand that my assessment performance will be kept confidential and will not be shared with any person or entity for any reason except as may be required by law.

This assessment and the questions contained in it are the exclusive property of the NRF Foundation and are protected by copyright law. No part of this assessment may be copied or reproduced in part or whole by any means whatsoever, *including, but not limited to, memorization*. I understand that I may not discuss or disclose the contents of the assessment orally, in writing, or by any other means.

I understand that during this assessment, I may NOT communicate with other assessment participants, refer to any materials other than those given to me by the staff, or help or obtain help from anyone other than assessment staff. Participating in any irregularity during the assessment, such as giving or receiving unauthorized information or help, may cause my assessment to be discontinued, invalidate my assessment results, or lead to other appropriate action. In such event, I understand that the assessment fee will not be refunded due to costs incurred by NRF Foundation.

By selecting "I Agree" below, I acknowledge that I have read and understood this agreement. I understand that failure to comply with the requirements outlined in this agreement can cause my participation to be terminated, my assessment results to be invalidated, or other appropriate action to be taken. I confirm that I have provided all accurate and up to date information.

## Assessment Site Conduct

If you must leave the room during the assessment, you must check out with the assessment site staff. You will not be allowed extra time to make up for any time that you spend away from the assessment.

**Your assessment may be stopped and you may be removed from the assessment site if you behave in a way that could compromise the integrity of assessment content or jeopardize the safety of assessment site occupants.**

This includes, but is not limited to:

- Offering or accepting help of any kind or viewing another person's monitor or test materials;
- Providing fraudulent identification or posing as another test taker;
- Bringing or trying to bring to the assessment center or use any study materials or unauthorized aids (such as textbooks, notebooks, notes, calculators, dictionaries);
- Disobeying assessment guidelines or instructions of the assessment center staff;
- Disturbing other candidates (for example, by talking or making noise);
- Copying or trying to copy assessment content or trying to remove information about assessment content from the assessment room;
- Altering an assessment site computer or attempting to use it for any purpose other than taking the assessment; or
- Failing to follow the rules or instructions given by the assessment staff.

### 🏆 Tips for Success 🏆

Follow all instructions precisely. Listen carefully to the assessment center staff, and carefully read all written directions you receive.

Read each question carefully. Review all of the possible answer choices. Picture what would be true or the proper thing to do *in a real-life setting*. Then make your answer choice.

Don't try to second-guess what the question writers want by thinking, "What do they want me to do?" You will have more success if you think, "What is the best approach for this situation?"

Pace yourself by checking the time and your progress periodically. The time allotted for the assessment is meant to allow everyone ample time to finish. You still need to be sure that you are spending a reasonable amount of time on each question, to avoid wasting the time that is set aside for your assessment.

### Assessment Results

**You will receive your results immediately when you complete the assessment. If you pass the assessment, you will receive a passing notice and will receive your certificate and lapel pin in the mail. All passing credentials are subject to verification of references, as described on page 10. Participants who do not meet the passing standard will receive a profile of strengths and weaknesses, along with information on how to strengthen areas of need. Those participants who do not pass may register to take the assessment again after 30 days.**

**Your standing on the assessment** indicates ONLY how well you respond to the types of questions in the assessment and depends ONLY on how well you answer the questions presented to you. It will NOT indicate how "good" you will be at customer service. It will not indicate whether one person is better at customer service than another. It is designed only to determine how well you respond to questions requiring application of knowledge, skills, and judgment in typical customer service situations.

The passing score represents the minimum level of knowledge and skill a candidate must demonstrate to pass the assessment. The passing score was set through a process that included study and recommendations by a panel of subject matter experts, review and recommendation by the NRF Foundation Assessment and Certification Committee, and adoption by the NRF Foundation Board.

The subject matter experts, committee members, and board members are highly familiar with the work of entry-level through first-line supervisory employees performing customer service work functions in high-performance workplaces in the sales and service industries. These experts are a diverse group of professionals familiar with customer service work for a variety of different products and services in all sizes of companies. They have experience with customer service work functions through first-hand experience or direct, regular contact with individuals performing the work, or in work analysis and assessment.

There are several versions, or forms, of the assessment. Only one "blueprint" is used for all of the forms, and all forms cover the same content. The actual questions will vary across the forms. A statistical procedure called "equating" or "linking" is used to compensate for any differences in difficulty across the forms. This gives candidates an equal chance of passing, no matter which form of the assessment they take.

After equating, the passing raw score (total number of points correct) is converted to 450 on a common scale (100 to 750) for all forms. Candidate raw scores are converted to scores on this scale. Thus, all candidates who receive the same scaled score have demonstrated the same level of performance, regardless of which form of the assessment they took.

On all forms of the assessment, 65 questions contribute to candidate scores. The remaining five are used in the development of the assessment to help ensure that assessments are sound and fair.

**All score information is confidential.** Neither NRF Foundation nor any of its agents will send score reports to third parties or give out score information over the telephone.

### Retaking the Assessment

If you do not pass the assessment, you may retake it in 30 days or longer. You may retake it as many times as you wish, but you must wait at least 30 days between sittings. Each time you sit for the assessment, you must pay the assessment fee.

### Rescoring

Within 30 days of your assessment, you may request that your assessment be rescored. You will be charged a fee for this service. Please contact CASTLE Worldwide, Inc. at 919.572.6880 to request rescoring

### Score Cancellation

**NRF Foundation may cancel a candidate's score** if the Assessment and Certification Committee determines that the candidate:

- Falsified or misrepresented information in the application to sit for the assessment;
- Participated in any violation of NRF Foundation's copyright or registration;
- Participated in any unauthorized disclosure of assessment materials in any form;
- Gave or received unauthorized help with the assessment; or
- Was in any way dishonest with regard to taking, administering, or preparing others to take the assessment that directly or indirectly compromises the integrity of the assessment or certification.

### Applying for Certification/ Audit Process

**As you may be aware, the application fee is built into your testing fee. If you successfully pass the assessment, you are eligible to apply for the National Professional Certification in Customer Service.** Each participant who passes the assessment will apply for certification before taking the assessment. You will need to have the name, number, and e-mail address of a professional reference with you at the time you sit for the assessment. A professional reference must not be a family member and can be a teacher, trainer, or employer.

After applying for certification, CASTLE Worldwide will receive your information and will request verification of eligibility within 30 days of passing the assessment. Please note that this audit process is done randomly, and you may be asked to verify current employment or enrollment in an education or training program. Not every professional reference will be contacted for verification. However, accurate and up-to-date information must be provided at the time of registration. Failure of the candidate's reference person to respond or to provide accurate, confirming information will constitute grounds for NRF Foundation to withhold certification until such reference information is verified, at the sole discretion of the NRF Foundation. The candidate will be notified of any problems with verification and provided an opportunity within thirty days to resubmit information for the same or a different reference.

After your verification, CASTLE Worldwide will enter your name, date of birth, location, and certification into the national database. Your credentials will then be mailed. This includes a certificate for framing, mini certification card, and lapel pin indicating that you have earned the certification. The pin looks like this:



The certification will be maintained in the national database, effective for a period of three years.

## Fees

### Assessment.

- If you complete the National Professional Certification in Customer Service at a private site, the fee will range from \$50-\$80. You must purchase a voucher or make payment arrangements through NRF Foundation prior to testing.
- If you complete the National Professional Certification in Customer Service at one of CASTLE Worldwide, Inc.'s national test centers, the fee will be \$80, and the fee must be paid by credit card (MasterCard or Visa) at the time of test registration.
- If you do not have a credit card, you may contact the NRF Foundation to discuss special arrangements.

**You are responsible** for the full amount of the assessment and site fee unless your employer or other organization has a direct arrangement with NRF Foundation. If you cannot or decide not to keep your assessment appointment, you must change or cancel your appointment as directed in this handbook to avoid paying the fee. You are responsible for knowing all rules regarding scheduling and fees presented in this handbook.

**Rescoring.** If for any reason you request that your assessment be rescored, you will be charged a fee for rescoring your assessment. Please contact CASTLE Worldwide, Inc. at 919.572.6880 to request rescoring

**Assessment Review.** The fee for reviewing your assessment in a setting supervised by NRF Foundation is \$40.

**Certification.** The fee to apply for certification is \$20; however, this fee is built into your testing fee. If you pass the assessment, you will apply for certification at the time you take the test.

**Replacement Certification.** If you need a replacement certificate for any reason, there is a \$10 fee. Please contact CASTLE Worldwide directly to request this.

**Replacement Lapel Pin.** If you need a replacement pin, there is a \$10 fee. Please contact NRFF directly to request this.

## Certification Denials & Appeals

NRF Foundation may deny certification if it determines that you:

- Do not meet the minimum eligibility requirements for the certification;
- Do not pass the assessment;
- Act in a manner that leads to cancellation of your assessment score; or
- Act in a manner that discredits the certification.

You may appeal decisions related to an application for certification within 30 days from the testing date. Requests must be in writing and signed. Mail requests to: NRF Foundation, Certification Department, 325 7<sup>th</sup> Street NW, Suite 1100, Washington, DC 20004.

## Maintaining Your Certification

During the three years that your certification is effective, you must continue to meet all eligibility requirements. You must continue to:

- Be in good standing with your employer, school, or training program

If, at any time during the three-year certification period, you fail to meet the eligibility requirement, you must notify NRF Foundation. You must also notify NRF Foundation if you change your address or your name.

NRF Foundation may revoke a certificate if it determines that a certificate holder has violated any of the rules of NRF Foundation, including those stated in this handbook, the Candidate Agreement, and the certification application.

At the end of the three-year certification period, NRF Foundation will send a notice of the renewal requirements to certificate holders who are in good standing.

## Commenting on the Assessment

During the assessment, you will have an opportunity to comment on the questions, the computer system, and other aspects of the experience. You are also welcome to submit any concerns you have to the NRF Foundation office. Please send your questions or comments in writing to the NRF Foundation office.

## Sample Questions

NOTE: An important aspect of the computer-based assessment also will be video clips, audio, and question types that cannot be adapted to paper and pencil, like sorting, identifying customer records, and other physical responses, which could not be incorporated into this sample. To preview a working model of the assessment, go to [www.nrf.com/foundation](http://www.nrf.com/foundation).

- 1) An associate has just spent 30 minutes showing a customer the features of a handheld computer. The customer says, "I can get this for a lot less over the Internet. Your prices are outrageous!" Which of these is the associate's most professional response to the customer's remark?
  - A) Return the computer to the case and begin to help another customer
  - B) Explain the benefits of buying from the store rather than the Internet
  - C) Ask the manager to try to convince the customer to buy in the store
  - D) Thank the customer politely for coming into the store
- 2) Use the following checklist to answer this question.

Checklist to Prepare for State Inspection	
	The sink for washing hands must be clean and close by.
	Employees must not have any open cuts or sores on hands.
	Equipment must be disinfected.
	Garbage must be kept in covered containers.
	All cleaning products must be properly labeled.
	The refrigerator and freezer must be at the right temperature.

The owner of a deli tells an employee that a state health inspector will be visiting that day. The owner asks the employee to help prepare for the inspection. The owner writes out a list of the regulations that the health inspector will check. To help the deli pass inspection, the employee must make sure that

- A) every workspace is warm or cool enough
- B) employees keep their hair covered
- C) food waste is in a can with a lid
- D) the items in the display window are fresh

- 3) A customer enters a popular electronics store and begins asking the sales associate detailed questions about a particular computer. The associate is unsure of the answers to the customer's questions. Another associate overhears the customer and offers to help. Which of these should the first associate do?
  - A) Politely refuse the help and try to answer the customer's questions anyway
  - B) Ignore the other associate, who probably only wants the commission on the sale
  - C) Let the other associate help the customer and look for another customer to help
  - D) Accept the offer of help and listen to the answers to the customer's questions
- 4) A hardware store has this sign displayed at its entrance.



One day, an associate sees a child bump into a shelf of industrial strength cleaners. A bottle falls off the shelf and breaks. Its contents spill on the floor. The child runs to a parent in the next aisle, who doesn't seem to notice what happened. Which of these should be the associate's FIRST response?

- A) Approach the child and ask open-ended questions
- B) Direct customers and employees away from the area
- C) Calmly clean the spill according to the directions on one of the bottles still on the shelf
- D) Let the parent know about the damage and tactfully ask for payment according to the policy

- 5) A customer approaches the service desk with a toy fire truck. She says she bought for her son a month ago and that the lights on the truck do not work. Which of these should the associate say FIRST?
- A) "Are you sure that you bought the truck at this store? Do you have your receipt, please?"
  - B) "With this kind of toy, it's always best to check the batteries first. Let me check them for you."
  - C) "We've never had any complaints about this truck before. What do you think your son did to it?"
  - D) "We've had a lot of complaints about that truck. You might want to contact the manufacturer."
- 6) Use the letter below to answer the question that follows.

999 Broad Street  
Hometown, USA 99999

July 4, 2002

XYZ Travel Club  
55 Main Street  
Business City, USA 55555

Dear Staff:

I am disappointed with your club's service. Your ads promised hotel discounts and "the usual high-quality auto travel benefits." When I paid my dues, I assumed that roadside assistance would be one of those "usual" benefits. I have checked with three other travel clubs, and they all provide hotel discounts AND roadside assistance.

Here is my club card. Please cancel my membership in your club. I have joined one of the other three clubs.

Sincerely,  
*Jamie Doe*  
Jamie Doe

A customer service representative at the travel club received this letter. The travel club is a nationwide, membership organization that offers hotel discounts to travelers who join the club. The customer canceled the membership because the customer

- A) thought the dues paid were too high
- B) wanted a club that provided more than discounts
- C) wished to use a different club card for auto repairs
- D) expected the club to provide a greater variety of discounts

- 7) At a large dry cleaning business, associates handle credit card payments by swiping cards through a card reader. A shift supervisor asks an associate to make imprints of cards also, so that the supervisor can collect marketing information. No other supervisor requests this, and the associate begins to wonder if this could be part of a dishonest scheme. Which of these is the associate's best response?
- A) Discuss the suspicions with that supervisor
  - B) Ignore the suspicions and follow the instructions
  - C) Check with the store manager about the practice
  - D) Follow the instructions only when that supervisor is on duty
- 8) A clothing shop has this sign clearly posted on the door.



An associate is ringing up a customer and sees that another customer has a small child who is eating a dripping ice cream cone. The child is standing near a display of silk shirts. Which of these is the associate's best response?

- A) Briefly interrupt the first customer's transaction, ask the second customer kindly to dispose of the ice cream, and offer to hold his selections
- B) Finish ringing up the first customer, then politely explain to the second customer that he cannot be served until the ice cream is out of the store
- C) Excuse herself from the first customer briefly and let the second customer know that he will have to pay for anything his child might damage
- D) Call security or the store manager to deal with the situation, but warn the customer and give him some time to leave before they arrive

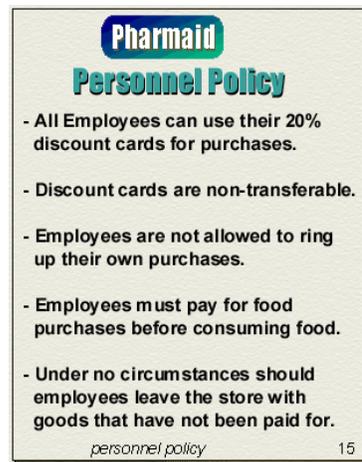
- 9) An associate has just begun a job at an office supply store. The associate has not seen any other employee use the copy machines for personal material, but knows that there are some benefits that haven't been explained yet. The associate decides to bring in tax returns to photocopy. Which of these is the associate's best course of action?
- A) Wait until no one is around and copy the returns quickly  
 B) Ask a coworker what everyone else does, and then do the same  
 C) Consult store policy or the manager about using the copier  
 D) Copy the returns any time during the shift when there are no customers
- 10) Use the glossary below to answer the question that follows.



The manager of the shipping and receiving department of a furniture store asks an employee to find out if a vendor in the region carries certain discontinued items. The manager wants to know if a

- A) person living in the same part of the state has items that are no longer available  
 B) nearby company has items that are no longer being made  
 C) nearby company has a list of products made on the same date  
 D) person has called and asked for items that the store doesn't have in stock

- 11) A store manager asks a new associate to straighten stock on the display shelves. During a lunch-hour rush, only one register is open, and the line of customers is growing. Some customers put down their selections and leave the store without buying. The associate has been trained on the register, but hasn't handled it alone. The manager is at lunch and cannot be consulted. Which of these is the associate's best course of action?
- A) Continue straightening the stock because that is the assignment the manager gave before leaving for lunch  
 B) Apologize to customers in line and tell them that the wait is unusual and the manager will be back soon  
 C) Open another register, since the associate knows how to operate it even without having done it alone  
 D) Stop straightening stock and help the cashier by bagging, finding items, and getting the selections ready to be rung up
- 12) Use the page from the personnel policy below to answer the question that follows.



A cashier at the Pharmaid decides to buy a candy bar to eat during break. According to the personnel policy shown, how should the cashier pay for the candy?

- A) Ring up the candy himself before the break begins  
 B) Use another employee's discount card to buy the candy  
 C) Ask someone else to ring up the candy after the break begins  
 D) Pay for the candy after the break is over

## Customer Service Skill Standards

The standards on which the assessment is based are made up of a *work*-oriented component and a *worker*-oriented component. The work-oriented component describes what needs to be done on the job and how well, while the worker-oriented component looks at the knowledge and skills a worker needs in order to fulfill these responsibilities. Following are the aspects of both components that are important to the Customer Service assessment and certification.

### **WORK-ORIENTED COMPONENT**

#### **Critical Work Function 1: Learns about Products or Services**

- Key Activity (KA) 1.1 Undergoes company-provided training to support product or services as well as follow-up training
- KA 1.2 Reviews and comprehends written and multimedia material pertaining to products or services produced by employee's company, trade organizations, media
- KA 1.3 Tests and samples products or services
- KA 1.4 Studies competitors' products or services, including marketing materials (ads, fliers, TV commercials, web pages, etc.)

#### **Critical Work Function 2: Assesses Customer Needs**

- KA 2.1 Addresses the customer either in person, by telephone or e-mail
- KA 2.2 Gathers information about the customer's needs, including customer's knowledge of products or services
- KA 2.3 Responds to the customer's comments
- KA 2.4 Determines the customer's price considerations

#### **Critical Work Function 3: Educates the Customer**

- KA 3.1 Explains and demonstrates products or services and prices to the customer
- KA 3.2 Identifies alternative or additional products or services available
- KA 3.3 Informs customer about service policies (warranties, guarantees, service plans)
- KA 3.4 Solicits supervisor or co-worker support and advice when necessary to meet customer needs
- KA 3.5 Presents alternate resources outside of company to customer and any other explanatory information needed to connect customer with resource

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

- KA 4.1 Coordinates as needed with other services to expedite delivery of service or product
- KA 4.2 Delivers promised products or services
- KA 4.3 Contacts customer to determine if products or services meet customer's expectations
- KA 4.4 If customer's expectations are not met, informs the customer of how the company will satisfy the customer's needs and facilitates resolution process

### **WORKER-ORIENTED COMPONENT**

#### **ACADEMIC AND EMPLOYABILITY KNOWLEDGE AND SKILLS**

- READING** Understand and make use of written information that may be presented in a variety of formats, such as text, tables, lists, figures, and diagrams; and select reading strategies appropriate to the purpose such as skimming for highlights, reading for detail, reading for meaning and critical analysis
- WRITING** Express ideas and information in written form clearly, succinctly, accurately, and in an organized manner; use English language conventions of spelling, punctuation, grammar, and sentence and paragraph structure; and tailor written communication to the intended purpose and audience
- LISTENING** Attend to, receive, and correctly interpret verbal communications and directions through cues such as the content and context of the message and the tone and "body language" of the speaker
- SPEAKING** Express ideas and facts orally in a clear and understandable manner that sustains listener attention and interest; tailor oral communication to the intended purpose and audience
- MATHEMATICS** Understand, interpret, manipulate numeric or symbolic information; solve problems by selecting and applying appropriate quantitative methods, such as arithmetic, quantitative reasoning, estimation, measurement, probability, statistics, algebra, geometry, and trigonometry
- USING INFORMATION AND COMMUNICATIONS TECHNOLOGY** Select, access and use necessary information, data, and communications-related technologies, such as basic personal computer applications, telecommunications equipment, Internet, electronic calculators, voice mail, electronic mail, facsimile, and copying equipment, to accomplish work activities
- GATHERING AND ANALYZING INFORMATION** Obtain facts, information, or data relevant to a particular problem, question, or issue through observation of events or situations, discussion with others, research, or retrieval from written or electronic sources; organize, integrate, analyze, and evaluate information
- ANALYZING AND SOLVING PROBLEMS** Anticipate or identify problems and their causes; develop and analyze potential solutions or improvements using rational/logical processes or innovative and creative approaches when needed
- MAKING DECISIONS AND JUDGMENTS** Make decisions that consider relevant facts and information, potential risks and benefits, and short- and long-term consequences of alternatives
- ORGANIZING AND PLANNING** Organize and structure work for effective performance and goal attainment; set and balance priorities; anticipate obstacles; formulate plans consistent with available human, financial, and physical resources; and modify plans or adjust priorities given changing goals or conditions
- USING SOCIAL SKILLS** Interact with others in ways that are friendly, courteous, and tactful, and that demonstrate respect for individual and cultural differences, and for the attitudes and feelings of others
- ADAPTABILITY** Change one's own behavior or work methods to adjust to other people or to changing situations or work demands; be receptive to new information, ideas, or strategies to achieve goals

**WORKING IN TEAMS** Work cooperatively and collaboratively with others to achieve goals by sharing or integrating ideas, knowledge, skills, information, support, resources, responsibility, and recognition

**LEADING OTHERS** Motivate, inspire, and influence others toward effective individual or team work performance, goal attainment, and personal learning and development by serving as a mentor, coach, and role model, and by providing feedback and recognition/rewards

**BUILDING CONSENSUS** Build consensus among individuals or groups by: facilitating agreements that involve sharing or exchanging resources or resolving differences in such a way as to promote mutual goals and interests; persuading others to change their point of view or behavior without losing their future support; and resolving conflicts, confrontations, and disagreements while maintaining productive working relationships

**SELF AND CAREER DEVELOPMENT** Identify own work and career interests, strengths, and limitations, and pursue education, training, feedback, or other opportunities for learning and development; manage, direct, and monitor one's own learning and development

### OCCUPATIONAL AND TECHNICAL KNOWLEDGE AND SKILLS

#### Critical Work Function 1: Learns About Products or Services

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

Knowledge of relevant federal and state health and safety regulations (e.g., pertinent OSHA regulations)

Knowledge of company health, safety and security standards for both customers and employees

Knowledge of company policies and legal consequences related to aiding or participating in illegal or inappropriate behavior

Knowledge of company procedures for handling and reporting unexpected health issues, violent and threatening behavior of customers and co-workers, and other emergency situations, such as lost child or personal belongings, accidents, fire, etc., based on company policies and procedures

Knowledge of privacy laws and company standards for obtaining, using, and protecting information obtained from a customer or another employee

Knowledge of company policies regarding what employees should do to deter and prevent unauthorized access to, use, or theft of property or resources

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

Knowledge of suppliers' practices, dependability and flexibility (e.g., delivery times of one manufacturer vs. another; dependability of one vendor's services vs. another's, etc.)

Knowledge of how seasonal changes affect the needs of customers and the products or services offered

Knowledge of sources of information about new products and services, changes to products and services, changes to competitors' products and services, and changes to the industry at large, and applying that information on the job

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

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

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

Skill in developing professional goals that align with company goals and mission

Knowledge of company goals, objectives, rewards and incentives

Skill in motivating oneself to meet professional goals

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

Knowledge of employee options for improving or helping to improve products and services

Knowledge of techniques used to determine if process changes improve services

Skill at appropriately balancing company goals and needs with those of the customer when making improvements

Knowledge of company policies and procedures for proposing or suggesting improvements

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

Knowledge of geographic area in which company provides products or services

Knowledge of differences in company products or services by geographic area or by different stores or offices

Knowledge of specific product information including recalls, health and safety issues, product defects, etc.

Knowledge of company's product and service lines—including benefits to customers—how they work, how much they cost, service policies, warranties, follow-up commitments, etc.

Knowledge of the health and safety regulations regarding the intended uses of different products and services

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

Knowledge of sources of information about company policies, procedures and special events.

Skill in carrying out all appropriate company service policies

Knowledge of company policies and procedures for documenting and maintaining records

Knowledge of ethical standards and practices set by company (e.g., standards regarding the acceptance of tips, the designation of commissions, etc.)

**Category 8: Sales Procedures and Techniques:** *The knowledge and skills necessary to implement company sales system*

Knowledge of relevant sales procedures (e.g., charge vs. cash vs. checks; special orders, drop shipments, returns, refunds and exchanges, etc.)

Knowledge of complementary and promotional products and services (e.g., add-ons and cross-selling)

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

Knowledge of pertinent government and company regulations for use of equipment and tools.

Knowledge of policies regarding maintenance of equipment and tools

Knowledge of requirements for reporting unsafe or defective equipment and tools

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

#### Critical Work Function 2: Assesses Customer Needs

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

Knowledge of company health, safety and security standards for both customers and employees

Knowledge of privacy laws and company standards for obtaining, using, and protecting information obtained from a customer or another employee

Knowledge of policy and procedures for handling and reporting customer concerns or complaints regarding health, safety, and security

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

Knowledge of suppliers' practices, dependability and flexibility (e.g., delivery times of one manufacturer vs. another; dependability of one vendor's services vs. another's, etc.)

Knowledge of how seasonal changes affect the needs of customers and the products or services offered

Knowledge of sources of information about new products and services, changes to products and services, changes to competitors' products and services, and changes to the industry at large, and applying that information on the job

Knowledge of company's product servicing policies (e.g., what kinds of faults will be repaired, extended warranty contracts, etc.) and other services available that relate to a product (e.g., clothing alterations, product delivery services, etc.)

Knowledge of company standards regarding how to interact with customers (e.g., company protocols for addressing and communicating with customers, handling complaints, etc.)

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

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

Skill in demonstrating cost/benefits/value to customer based on customer expectations and needs

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

Skill in developing professional goals that align with company goals and mission

Knowledge of company goals, objectives, rewards and incentives  
Skill in motivating oneself to meet professional goals

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

Knowledge of employee options for improving or helping to improve products and services

Knowledge of techniques used to determine if process changes improve services

Skill at appropriately balancing company goals and needs with those of the customer when making improvements

Skill in obtaining feedback from customer about performance through available and appropriate mechanisms

Skill at adjusting work practices to respond appropriately to customer needs

Knowledge of appropriate follow-up actions designed to improve products and services

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

Knowledge of geographic area in which company provides products or services

Knowledge of differences in company products or services by geographic area or by different stores or offices

Knowledge of specific product information including recalls, health and safety issues, product defects, etc.

Knowledge of company's product and service lines—including benefits to customers—how they work, how much they cost, service policies, warranties, follow-up commitments, etc.

Knowledge of sources of relevant information regarding company products in order to respond to customer needs (e.g., packaging, product manuals, warranties, etc.)

Knowledge of the health and safety regulations regarding the intended uses of different products and services

Knowledge of how product will perform in different circumstances

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

Knowledge of sources of information about company policies, procedures and special events

Skill in carrying out all appropriate company service policies

Knowledge of company policies and procedures for documenting and maintaining records

Knowledge of ethical standards and practices set by company (e.g., standards regarding the acceptance of tips, the designation of commissions, etc.)

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

Knowledge of relevant sales procedures (e.g., charge vs. cash vs. checks; special orders, drop shipments, returns, refunds and exchanges, etc.)

Skill in negotiating agreements with customers based on company policies

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

Knowledge of complementary and promotional products and services (e.g., add-ons and cross-selling)

Skill at increasing customer base and generating repeat business

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

Knowledge of pertinent government and company regulations for use of equipment and tools.

Knowledge of policies regarding maintenance of equipment and tools  
Knowledge of requirements for reporting unsafe or defective equipment and tools

Skill at safely and appropriately operating company's equipment

Knowledge of which tools and equipment to use for specific tasks

#### Critical Work Function 3: Educates the Customer

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

Knowledge of relevant federal and state health and safety regulations (e.g., pertinent OSHA regulations)

Knowledge of company health, safety and security standards for both customers and employees

Knowledge of company procedures for handling and reporting unexpected health issues, violent and threatening behavior of customers and co-workers, and other emergency situations, such as lost child or personal belongings, accidents, fire, etc., based on company policies and procedures

Knowledge of privacy laws and company standards for obtaining, using, and protecting information obtained from a customer or another employee

Knowledge of what information regarding the safety of products and services to make available to the customer

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

Knowledge of suppliers' practices, dependability and flexibility (e.g., delivery times of one manufacturer vs. another; dependability of one vendor's services vs. another's, etc.)

Knowledge of how seasonal changes affect the needs of customers and the products or services offered

Knowledge of sources of information about new products and services, changes to products and services, changes to competitors' products and services, and changes to the industry at large, and applying that information on the job

Knowledge of company's product servicing policies (e.g., what kinds of faults will be repaired, extended warranty contracts, etc.) and other services available that relate to a product (e.g., clothing alterations, product delivery services, etc.)

Knowledge of company standards regarding how to interact with customers (e.g., company protocols for addressing and communicating with customers, handling complaints, etc.)

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

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

Skill in demonstrating cost/benefits/value to customer based on customer expectations and needs

Skill in generating several alternative solutions that will meet a customer's needs

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

Skill in developing professional goals that align with company goals and mission

Knowledge of company goals, objectives, rewards and incentives

Skill in motivating oneself to meet professional goals

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

Knowledge of employee options for improving or helping to improve products and services

Skill at appropriately balancing company goals and needs with those of the customer when making improvements

Skill in obtaining feedback from customer about performance through available and appropriate mechanisms

Skill at adjusting work practices to respond appropriately to customer needs

Knowledge of appropriate follow-up actions designed to improve products and services

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

Knowledge of geographic area in which company provides products or services

Knowledge of specific product information including recalls, health and safety issues, product defects, etc.

Knowledge of company's product and service lines—including benefits to customers—how they work, how much they cost, service policies, warranties, follow-up commitments, etc.

Knowledge of sources of relevant information regarding company products in order to respond to customer needs (e.g., packaging, product manuals, warranties, etc.)

Knowledge of the health and safety regulations regarding the intended uses of different products and services

Knowledge of how product will perform in different circumstances

Knowledge of how products and services have been improved compared to previous offerings

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

Knowledge of sources of information about company policies, procedures and special events

Skill in carrying out all appropriate company service policies

Knowledge of company policies and procedures for documenting and maintaining records

Knowledge of ethical standards and practices set by company (e.g., standards regarding the acceptance of tips, the designation of commissions, etc.)

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

Skill in negotiating agreements with customers based on company policies

Knowledge of complementary and promotional products and services (e.g., add-ons and cross-selling)

Skill at increasing customer base and generating repeat business

Skill in overcoming customer's objections when making a sale or serving a customer

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

Knowledge of pertinent government and company regulations for use of equipment and tools

Knowledge of policies regarding maintenance of equipment and tools

Knowledge of requirements for reporting unsafe or defective equipment and tools

Skill at safely and appropriately operating company's equipment

Knowledge of which tools and equipment to use for specific tasks

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

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

Knowledge of company health, safety and security standards for both customers and employees

Knowledge of company policies and legal consequences related to aiding or participating in illegal or inappropriate behavior

Knowledge of company procedures for handling and reporting unexpected health issues, violent and threatening behavior of customers and co-workers, and other emergency situations, such as lost child or personal belongings, accidents, fire, etc., based on company policies and procedures

Knowledge of privacy laws and company standards for obtaining, using, and protecting information obtained from a customer or another employee

Knowledge of policy and procedures for handling and reporting customer concerns or complaints regarding health, safety, and security

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

Knowledge of suppliers' practices, dependability and flexibility (e.g., delivery times of one manufacturer vs. another; dependability of one vendor's services vs. another's, etc.)

Knowledge of how seasonal changes affect the needs of customers and the products or services offered

Knowledge of sources of information about new products and services, changes to products and services, changes to competitors' products and services, and changes to the industry at large, and applying that information on the job

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Knowledge of company standards regarding how to interact with customers (e.g., company protocols for addressing and communicating with customers, handling complaints, etc.)

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

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

Skill in demonstrating cost/benefits/value to customer based on customer expectations and needs.

Skill in generating several alternative solutions that will meet a customer's needs

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

Skill in developing professional goals that align with company goals and mission

Knowledge of company goals, objectives, rewards and incentives

Skill in motivating oneself to meet professional goals

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

Knowledge of employee options for improving or helping to improve products and services

Knowledge of techniques used to determine if process changes improve services

Skill at appropriately balancing company goals and needs with those of the customer when making improvements

Skill in obtaining feedback from customer about performance through available and appropriate mechanisms

Skill at adjusting work practices to respond appropriately to customer needs

Knowledge of appropriate follow-up actions designed to improve products and services

Knowledge of company policy regarding special requests and extraordinary circumstances

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

Knowledge of company's product and service lines—including benefits to customers—how they work, how much they cost, service policies, warranties, follow-up commitments, etc.

Knowledge of sources of relevant information regarding company products in order to respond to customer needs (e.g., packaging, product manuals, warranties, etc.)

Knowledge of the health and safety regulations regarding the intended uses of different products and services

Knowledge of how product will perform in different circumstances

Knowledge of company's products and services that will soon become available

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

Knowledge of company policies and procedures for documenting and maintaining records.

Knowledge of ethical standards and practices set by company (e.g., standards regarding the acceptance of tips, the designation of commissions, etc.)

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

Knowledge of relevant sales procedures (e.g., charge vs. cash vs. checks; special orders, drop shipments, returns, refunds and exchanges, etc.)

Skill in negotiating agreements with customers based on company policies

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

Knowledge of complementary and promotional products and services (e.g., add-ons and cross-selling)

Skill at increasing customer base and generating repeat business

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

Knowledge of pertinent government and company regulations for use of equipment and tools

Knowledge of policies regarding maintenance of equipment and tools

Knowledge of requirements for reporting unsafe or defective equipment and tools

Skill at safely and appropriately operating company's equipment  
Knowledge of which tools and equipment to use for specific tasks  
Skill at operating specialized equipment associated with occupation  
Skill at basic troubleshooting and maintenance procedures for general office equipment (e.g., how to change the paper in a fax machine, how to change the receipt tape in a cash register, how to adjust a sun bed, etc.)  
Knowledge of how to handle business transactions when equipment and tools are inoperable

**ANSWER KEY  
FOR SAMPLE  
QUESTIONS**

- 1 – B
- 2 – C
- 3 – D
- 4 – B
- 5 – B
- 6 – B
- 7 – A
- 8 – A
- 9 – C
- 10 – B
- 11 – D
- 12 – C

Once again, best wishes for your sales and service career.



We appreciate the initiative you are taking and wish you much success!



Contact NRF Foundation  
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Washington, DC 20004  
(202) 626-8193 ▪ Fax (202) 737-2849  
e-mail [certinfo@nrf.com](mailto:certinfo@nrf.com)

NRF Foundation welcomes your interest and participation.  
Be sure to visit the website at [www.nrf.com/foundation](http://www.nrf.com/foundation)