

# ILLINOIS OCCUPATIONAL SKILL STANDARDS

## IN-STORE RETAILING CLUSTER

Endorsed for Illinois  
by the  
Illinois Occupational Skill Standards  
and Credentialing Council

ILLINOIS OCCUPATIONAL SKILL STANDARDS  
IN-STORE RETAILING CLUSTER

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## A MESSAGE FROM THE ILLINOIS OCCUPATIONAL SKILL STANDARDS AND CREDENTIALING

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Preparing youth and adults to enter the workforce and to be able to contribute to society throughout their lives is critical to the economy of Illinois. Public and private interest in establishing national and state systems of industry-driven skill standards and credentials is growing in the United States, especially for occupations that require less than a four-year college degree. This interest stems from the understanding that the United States will increasingly compete internationally and the need to increase the skills and productivity of the front-line workforce. The major purpose of skill standards is to promote education and training investment and ensure that this education and training enables students and workers to meet industry standards that are benchmarked to our major international competitors.

The Illinois Occupational Skill Standards and Credentialing Council (IOSSCC) has been working with industry subcouncils, the Illinois State Board of Education and other partnering agencies to adopt, adapt and/or develop skill standards for high-demand occupations. Skill standards products are being developed for a myriad of industries, occupational clusters and occupations. This document represents the collaborative effort of the Marketing and Retail Subcouncil, and the In-Store Retailing Cluster Standards Development Committee.

These skill standards will serve as a guide to workforce preparation program providers in defining content for their programs and to employers to establish the skills and standards necessary for job acquisition. These standards will also serve as a mechanism for communication among education, business, industry and labor.

We encourage you to review these standards and share your comments. This effort has involved a great many people from business, industry and labor. Comments regarding their usefulness in curriculum and assessment design, as well as your needs for in-service and technical assistance in their implementation are critical to our efforts to move forward and improve the documents.

Questions concerning this document may be directed to:

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We look forward to your comments.

Sincerely,

The Members of the IOSSCC

# TABLE OF CONTENTS

|  |   |
|--|---|
| Introduction                               | The Illinois Perspective .....iv<br>IOSSCC Requirements for Occupations Skill Standards .....vi<br>Sample Format .....vii<br>Occupational Earnings and Employment Information .....viii<br>Assumptions .....xii<br>Performance Skill Levels .....xiv  |
| Provide Customer Service                   | Approach Customer ..... 1<br>Assess Customer Needs ..... 2<br>Meet Customer Needs ..... 4<br>Provide Ongoing Customer Support ..... 6<br>Build Customer Relations ..... 8<br>Process Manufacturer and Third-Party Warranties .....10<br>Process Product Recalls ..... 12<br>Issue Raincheck/Substitution ..... 14<br>Handle Customer Complaints ..... 16<br>Inform Customer of Special Services ..... 17<br>Provide Store Charge Account Services ..... 19<br>Provide Returned Check Services ..... 21              |
| Sell Products and Services                 | Establish Sales Goals .....23<br>Prospect Customers .....25<br>Increase Product/Service Knowledge.....27<br>Determine Customer Needs .....29<br>Present Solutions to Meet Customer Needs .....30<br>Gain Customer Commitment/Close Sale .....32<br>Process Sales Transaction .....33<br>Follow-up with Customer .....35<br>Conduct Price Checks .....37<br>Stock/Open Register.....38<br>Close Register .....40<br>Process Returns/Refunds .....41<br>Process Exchanges.....43<br>Process Void Transactions .....45 |
| Implement Merchandising Plans              | Determine Availability of Product/Service ..... 46<br>Set Up Display.....48<br>Replenish Merchandise .....50<br>Sign Merchandise.....52<br>Complete Price Changes of Merchandise.....54<br>Evaluate Effectiveness of Merchandising Plan.....56  |
| Maintain Appearance of<br>Store/Department | Restore/Refresh Merchandise Displays .....57<br>Clean Fixtures/Displays .....58   |
| Monitor Inventory                          | Receive Merchandise .....60<br>Check In Merchandise .....62<br>Receive Merchandise on Sales Floor .....64<br>Rotate/Remove Stock .....66<br>Identify Merchandise with Low<br>Inventories/Merchandise Outs .....68   |

---

|  |  |
|--|--|
| Monitor Inventory <i>(Continued)</i>       | Participate in Periodic Inventory .....70  |
|  | Transfer Inventory Store to Store.....72   |
|  | Charge Back/Return and/or Repair Inventory .....74                               |
|  | Fill Customer Orders .....76   |
|  | Ship/Deliver Orders to Customer.....78   |
|  | Store Customer Order for Pickup.....80   |
| <hr/>                                      |  |
| Protect Company Assets                     | Prevent Potential Theft of Company Assets .....82                                |
|  | Prevent Potential Loss of Company Assets.....84                                  |
|  | Maximize Property Security.....85  |
| <hr/>                                      |  |
| Work As Part of a<br>Store/Department Team | Maintain Professional Appearance .....87   |
|  | Keep Up with Industry Trends .....88   |
|  | Set Professional Goals and Objectives .....89                                    |
|  | Manage Personal Use of Non-Selling Time .....91                                  |
|  | Communicate with Team Members .....93  |
|  | Assist Coworkers to Meet Customer Needs .....95                                  |
|  | Facilitate Solution of Work Problems with Team .....96                           |
|  | Train/Coach Other Team Members.....97  |
|  | Seek Assessment/Feedback .....98   |
| <hr/>                                      |  |
| Supervise Functions                        | Perform Supervisory Transactions .....100  |
|  | Resolve Customer Complaints/Problems .....101                                    |
|  | Promote Compliance with Discrimination<br>and Harassment Standards/Laws .....103 |
|  | Maximize Safety .....105   |
|  | Follow Accident/Incident Response Procedures .....107                            |
|  | Communicate with/Manage Associate .....109                                       |
|  | Review Associates' Ability to Complete Tasks .....111                            |
|  | Conduct New Hire Orientation/Training.....113                                    |
|  | Evaluate Associate Performance .....115  |
|  | Schedule Associate .....117  |
|  | Establish Sales Projections .....119   |
|  | Discipline/Terminate Associate.....121   |

The Occupational Skill Standards Act (PA 87-1210) established the nine-member Illinois Occupational Skill Standards and Credentialing Council (IOSSCC). Members of the Council represent business, industry and labor and are appointed by the Governor or State Superintendent of Education. The IOSSCC, working with the Illinois State Board of Education, Illinois Community College Board, Illinois Board of Higher Education, Illinois Department of Employment Security and Illinois Department of Commerce and Community Affairs, has created a common vision for workforce development in Illinois.

### VISION

It is the vision of the IOSSCC to add value to Illinois' education and workforce development system by developing and supporting the implementation of a statewide system of industry defined and recognized skill standards and credentials for all major skilled occupations that provide strong employment and earnings opportunities.

The IOSSCC endorses occupational skill standards and credentialing systems for occupations that:

- require basic workplace skills and technical training,
- provide a large number of jobs with either moderate or high earnings, and
- provide career advancement opportunities to related occupations with moderate or high earnings.

### Subcouncils and Standards Development Committees

Under the direction of the Council, and in cooperation with industry organizations and associations, Industry Subcouncils have been formed to review, approve and promote occupational skill standards and credentialing systems. The Industry Subcouncils are Agriculture and Natural Resources; Applied Science and Engineering\*; Business and Administrative Information Services; Communications; Construction\*; Education and Training Services\*; Energy and Utilities\*; Financial Services; Health and Social Services; Hospitality; Legal and Protective Services\*; Manufacturing; Marketing and Retail Trade; and Transportation, Distribution and Logistics. (\*Subcouncils currently being formed.)

Standards Development Committees are composed of business, labor and education representatives who are experts in the related occupational cluster. They work with the product developer to

- Develop or validate occupational skill standards,
- Identify related academic skills,
- Develop or review assessment or credentialing approaches, and
- Recommend endorsement of the standards and credentialing system to the Industry Subcouncil.

### Expected Benefits

The intent of skill standards and credentialing systems is to promote investment in education and training to ensure that students and workers are trained to meet industry standards that are benchmarked to our major international competitors. Skill standards and credentialing systems have major benefits that impact students and workers, employers, and educators in Illinois.

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Students and Workers

- Help workers make better decisions about the training they need to advance their careers.
- Allow workers to communicate more effectively to employers what they know and can do.
- Improve long-term employability by helping workers move more easily among work roles.
- Enable workers to help their children make effective academic and career and technical decisions.

Employers

- Focus the investment in training and reduce training costs.
- Boost quality and productivity and create a more flexible workforce.
- Improve employee retention.
- Improve supplier performance.
- Enlarge the pool of skilled workers.

Educators

- Keep abreast of a rapidly changing workplace.
- Contribute to curriculum and program development.
- Provide students with better career advice.
- Strengthen the relationship between schools and local businesses.
- Communicate with parents because educators have up-to-date information about industry needs.

The IOSSCC is currently working with the Illinois State Board of Education and other state agencies to integrate the occupational standards with the Illinois Learning Standards which describe what students should know and be able to do as a result of their education. The Council is also working to integrate workplace skills—problem solving, critical thinking, teamwork, etc.—with both the Learning Standards and the Occupational Skill Standards.

Illinois Occupational Skill Standards define what an individual should know and the expected level of performance required in an occupational setting. They focus on the most critical work performances for an occupation or occupational area.

Any occupational skill standards and credentialing system seeking IOSSCC endorsement must

- represent an occupation or occupational cluster that meets the criteria for IOSSCC endorsement, including economic development, earnings potential and job outlook;
- address both content and performance standards for critical work functions and activities for an occupation or occupational area;
- ensure formal validation and endorsement by a representative group of employers and workers within an industry;
- provide for review, modification and revalidation by an industry group a minimum of once every five years;
- award credentials based on assessment approaches that are supported and endorsed by the industry and consistent with nationally recognized guidelines for validity and reliability;
- provide widespread access and information to the general public in Illinois; and
- include marketing and promotion by the industry in cooperation with the partner state agencies.

Occupations that do not meet the earnings criteria for IOSSCC endorsement, but are part of an occupational cluster that is being developed, may be presented for recognition by the IOSSCC. IOSSCC members encourage individuals to pursue occupational opportunities identified as endorsed occupations. Examples of occupations that do not meet the endorsement criteria but have been recognized by the IOSSCC are Certified Nurse Assistant and Physical Therapy Aide.

## **Skill Standards Components**

Illinois Occupational Skill Standards must contain these areas:

- Performance Area
- Performance Skill
- Skill Standard
- Performance Elements
- Performance Assessment Criteria

The Council further identified three components of the Skill Standard (*Conditions of Performance, Work to be Performed and Performance Criteria*) as critical work functions for an occupation or industry/occupational area. The sample format for Illinois Occupational Skill Standards on the following page provides a description of each component of a skill standard.

The sample format also illustrates the coding at the top of each page identifying the state, fiscal year in which standards were endorsed, Subcouncil abbreviation, cluster abbreviation and standard number. For example, the twenty-fifth skill standard in the In-Store Retailing Cluster, which has been developed by the Marketing and Retail Subcouncil, would carry the following coding: IL.02.MR.ISRC.25.

SUMMARY OF WORK TO BE PERFORMED. SUMMARY IS BRIEF AND BEGINS WITH AN ACTION VERB.

**IL.FY.SUBCOUNCIL. CLUSTER. STANDARD NO.**

PERFORMANCE AREA

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

A comprehensive listing of the information, tools, equipment and other resources provided to the person(s) performing the work.

### WORK TO BE PERFORMED

An overview of the work to be performed in demonstrating the performance skill standard. This overview should address the major components of the performance. The detailed elements or steps of the performance are listed under "Performance Elements."

### PERFORMANCE CRITERIA

The assessment criteria used to evaluate whether the performance meets the standard. Performance criteria specify product/outcome characteristics (e.g., accuracy levels, appearance, results, etc.) and process or procedure requirements (e.g., safety requirements, time requirements, etc.).

## PERFORMANCE ELEMENTS

Description of the major elements or steps of the overall performance and any special assessment criteria associated with each element.

## PERFORMANCE ASSESSMENT CRITERIA

Listing of required testing, certification and/or licensing.

Product and process used to evaluate the performance of the standard.

### PRODUCT

Description of the product resulting from the performance of the skill standard.

### PROCESS

Listing of steps from the Performance Elements which must be performed or the required order or performance for meeting the standard.

## **I. Developmental Process and Occupational Definition**

### **A. Developmental Process**

After reviewing current labor market information and considering the fact that the In-Store Retailing occupational cluster will need a steady supply of new and replacement workers, the Marketing and Retail Trade Subcouncil recommended the development of skill standards for this occupational cluster. Careers in this cluster include Cashier/Clerk, Sales Associate/Clerk, Customer Service Associate/Clerk, Visual Merchandise Associate/Clerk, Department Manager and Assistant Store Manager.

This occupational cluster meets the criteria for performance skill development, education and training requirements, employment opportunities, earning potential and career opportunities as established by the Illinois Occupational Skill Standards Credentialing Council (IOSSCC).

A product developer knowledgeable about in-store retailing occupations began the process of performance skill identification. Given the range within several occupations, the product developer prepared a set of skills that would address the major work areas in any workplace. This framework set the boundaries for addressing skill performances required by the in-store retail occupations.

The subcouncil recommended that the final skill standards product be presented to the IOSSCC. The IOSSCC reviewed the skill standards and met with the product developer, state liaison and chair of the subcouncil. Based on the review, the IOSSCC voted to endorse the In-Store Retail Cluster skill standards, recognizing the occupations of Cashier/Clerk, Sales Associate/Clerk, and Visual Merchandise Associate/Clerk.

#### **1. Resources**

Job descriptions, employee evaluation forms, training materials and store policy/procedure manuals were reviewed from a variety of Illinois retailers/retail formats. Interviews with, and observation of, retail associates in the course of performing their jobs were used for verification. The Illinois Retail Merchants Association provided access to IRMANet, their web site of articles written for retailers. The National Retail Federation (NRF) and National Retail Institute research and documents were incorporated. Current texts and web sites used by educational institutions and training programs were also used as resources.

#### **2. Standards Development Committee**

A standards development committee composed of retail professionals representing many different types of retailers and labor groups was convened. The framework, initial outline, matrix and draft skill standards were presented to the standards development committee for review, revision and validation during the course of several meetings. Additional skill standard statements with performance elements and assessment criteria were developed in accordance with the direction established by the IOSSCC and were presented to the standards development committee for review and revision.

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## B. Occupational Definition

Retailing occupations have become as varied as the retail environment and retailing formats. Today's operations can be as simple as a single local store and as complex as a multidepartment, multistore nationwide chain. The former may function with as little as only one person handling all activities (usually an owner or manager who is a generalist); the latter requires scores of employees with very specialized job titles/descriptions. What is common among all retail stores/companies, however, is that they must all perform the skills outlined in this occupational cluster. The larger stores might have one person assigned to each occupation listed below while the small store owner/manager will wear many hats and perform all of the job functions. Obviously, there are many different ways in which these job functions might be combined in other retail formats. In the ever-changing retail industry, it is often a necessity to view job/occupational descriptions more flexibly.

Therefore, the occupations listed below can be viewed as both actual job titles/descriptions and job responsibilities when one person is expected to perform a variety of tasks.

- 1. Cashier/Clerk** handles the cash register transactions in the store. The cashier/ clerk must be knowledgeable about cash register functions. The goal of this occupation is to correctly process sales and other register transactions. In grocery store and mass merchandising formats this person may be the only store associate who comes in contact with the customer during the shopping visit. In many cases the cashier/ clerk functions are performed by sales associates/ clerks.
- 2. Sales Associate/Clerk** sells a product/service to the customer. The sales associate/ clerk must provide information about the store's products/services, help the customer and close the sale. The goal of this occupation is to satisfy the customer's needs with the products/services offered by the store. The sales associate/ clerk is responsible for straightening and replenishing merchandise in the department. In addition, the sales associate/ clerk might also be required to assume the responsibilities of a cashier/ clerk, customer service associate/ clerk and visual merchandising associate/ clerk.
- 3. Customer Service Associate/Clerk** handles an assortment of customer- related issues that are not sales transactions. The goal of this occupation is to build customer relations and make the shopping experience pleasant for the customers. This job function is most often found as a defined occupation in stores that have customer service desks/departments. In many cases the customer service functions are performed by cashiers/ clerks or sales associates/ clerks.
- 4. Visual Merchandise Associate/Clerk** handles the setup, signage and replenishment of merchandise being displayed. Visual merchandise associates/ clerks might also be responsible for processing price changes on the sales floor. The goal of this occupation is to have attractive, accessible and correctly signed and tagged merchandise displays. This job function is most often found as a defined occupation in larger stores. However, in many cases the visual merchandising functions are performed by sales associates/ clerks, department managers and/ or assistant store managers.
- 5. Department Manager** performs all duties of a cashier/ clerk, sales associate/ clerk, customer service associate/ clerk, and visual merchandising associate/ clerk. In addition, a department manager is responsible for supervision of the sales force and control over the sales floor inventory of merchandise. The goal of this occupation is to ensure the smooth operation of a department, which in turn makes the customer's shopping experience a pleasant one.

**6. Assistant Store Manager** performs all duties of the in-store retail occupational cluster, supervises a group of department managers and is the acting store manager in the absence of the store manager. The goal of this occupation is to ensure the smooth operation of the store, which in turn makes the customer's shopping experience a pleasant one. The assistant store manager position can be an entry level management position with some retailers while others require several years of experience. Where the assistant store manager is entry level management position the wages may be on the lower end of the scale shown in Section II.C. Assistant managers with many years experience and responsibility for high volume areas may earn salaries shown at the higher end of the scale.

## II. Employment and Earning Opportunities

### A. Education and Training Requirements

Retailing is an industry that hires a large number of high school students in entry-level jobs such as cashier/clerk and sales associate/clerk. However, a high school diploma or GED is generally required for a department or assistant store manager position. A college education for two years (associates degree) or four years (bachelors degree) is often encouraged/required for a managerial/supervisory position. Any specialization in college (e.g. bachelor of arts in psychology, history, economics, retailing) is acceptable. Many Illinois colleges (Black Hawk College, Chicago State, McHenry County College, Oakton Community College, Parkland Community College, Rock Valley Community College, and Southwestern Illinois College) offer degrees or certificates with specialization in retailing. On-line courses are available for some segments of the industry. One example is the Cornell University Food Industry Management Distance Education Program.

At minimum, the occupations in this cluster require basic workplace skills (see Appendix G). Additionally, specific training conducted by the store/company and/or on-the-job training might also be required. Often the associate is considered to be in a probationary period during the course of this training with continued employment being contingent upon the successful completion of the training program.

### B. Employment Opportunities

Both in the nation and in the state of Illinois, the demand for in-store retailing occupations is expected to grow much faster than the average. The retail industry currently employs over 20 million workers nationwide, or 1 in 5 American workers. According to the U.S. Department of Labor, retail employment is expected to increase to 24 million workers by the year 2005. In addition to the need for new workers, a significant number of job openings will arise due to the need to replace those who retire or move to different industries.

### C. Earnings Opportunities

|                                    | <b>Middle Range<br/>Annual Earnings, 2000*</b> |
|------------------------------------|--|
| Cashier/Clerk                      | \$12,400 - \$17,300                            |
| Sales Associate/Clerk              | \$12,900 - \$21,400                            |
| Customer Service Associate/Clerk   | \$25,168 - \$33,758                            |
| Visual Merchandise Associate/Clerk | \$12,480 - \$19,360                            |
| Department Manager*                | \$23,700 - \$47,400                            |
| Assistant Store Manager*           | \$36,000 - \$97,600                            |

*\*Note: Job titles and earnings vary based on store format and volume.*

*\*Middle range is the middle 50%, i.e., one-fourth of persons in the occupation earn below the bottom of the range and one-fourth of persons in the occupation earn above the top of the range.*

*Sources: Bureau of Labor Statistics, Office of Employment Projections  
1998 Occupational Wage Survey for Illinois.*

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### **III. Assessment and Credentialing Systems**

The IOSSCC recognizes that industry commitment for third-party assessment is beneficial and requests that each Standards Development Committee (SDC) and/or Subcouncil identify the most beneficial method for assessing the standards.

- A.** The In-Store Retail SDC has recommended that training providers use performance assessments conducted by the providers and validated by third-party industry verifiers when assessing the In-Store Retail standards.
- B.** The Marketing and Retail Trade Subcouncil is committed to marketing and obtaining support and endorsements from the leading industry associations impacted by skill standards. A number of existing credentials (such as the TRAC Retail Skills Challenge sponsored by the NRF) are compatible with the Illinois standards.

The Subcouncil reviewed and considered all alternatives for assessing skill standards for the In-Store Retail Cluster. The need for additional credentialing or certification was reviewed with strong consideration given to embedding the assessment in the instruction provided at the site.

### **IV. Industry Support and Commitment**

#### **A. Industry Commitment for Development and Updating**

- 1.** The Marketing and Retail Trade Subcouncil and the In-Store Retail Cluster SDC developed these performance skill standards. The development effort utilized the following steps:
  - a. Identification of performance skills
  - b. Review of resources
  - c. Development of draft performance skills
  - d. Convening of SDC
  - e. Validation and approval of performance skills by SDC
  - f. Review of skill standards by SDC
  - g. Review and approval of skill standards by Marketing and Retail Trade Subcouncil and practitioners
  - h. Endorsement of skill standards by the IOSSCC
- 2.** A list of members of the Marketing and Retail Trade Subcouncil and In-Store Retail Cluster Standards Development Committee are located in Appendices D and E.

#### **B. Industry Commitment for Marketing**

The Marketing and Retail Trade Subcouncil is committed to marketing and obtaining support and endorsement from the leading industry associations impacted by the skill standards. Upon recognition/endorsement of the In-Store Retail Cluster skill standards by the IOSSCC, the Subcouncil strongly recommends developing and providing an in-service/seminar package for its members to provide awareness and obtain full industry commitment to the development of a full industry marketing plan.

The Marketing and Retail Trade Subcouncil encourages the availability of occupational skill standards to the public, including students, parents, workers, educators at all levels, employers and industry organization personnel.

## ASSUMPTIONS FOR IN-STORE RETAILING CLUSTER STANDARDS

**Skill standards assume that individuals have received education and/or training in a setting such as a secondary, postsecondary and/or apprenticeship/on-the-job training program and have the background knowledge necessary for performing the skill standards contained in this publication. The education and/or training includes instruction for the proper handling and operation of materials, tools and equipment required for performing the skills including the purpose of use, when to use, how to use and any related safety issues. The training program must adhere to all local, state and federal licensing and/or certification requirements as set by law, if applicable.**

**The Standards Development Committee developed these skill standards based on the following assumptions:**

1. Workplace skills (employability skills) are expected of the individual. Socialization skills needed for work are related to lifelong career experience and are not solely a part of the initial schooling process. The workplace skills can be found in Appendix G.
2. The size of the retail store/company, as well as the type and scope of services provided, determines the approach to meeting the skill standard.
3. Specific policies and procedures of the work site will be made known to the individual and will be followed.
4. Time elements outlined for the skill standards result from the experience and consideration of the panel of experts who made up the standards development committee.
5. Skills will progress from simple to complex. Once a skill has been successfully completed, it will be incorporated into more complex skills.
6. Skill standards describe the skill only and do not detail the background knowledge or theory related to the particular skill base. Although the skill standard enumerates steps to successful demonstration, rote approaches to the outcomes are not prescribed.
7. Skills will be completed in an expedient and safe manner.
8. Skill standards are selected because they meet workplace needs and are designed to meet professional standards of practice.
9. Skill standards do not replace, supersede or substitute for procedure manuals.
10. Skill standards do not supersede or take the place of industry certification or graduation from an accredited program of study.
11. External agencies such as Occupational Safety and Health Administration (OHSA), National Fire Protection Association (NFPA), labor unions, local and state governmental agencies, etc. impose rules and guidelines on stores/companies which must be followed. Skill standards do not replace, supersede or serve as substitutes for such rules and guidelines.
12. 100% accuracy is defined as self-correction of errors.
13. Retail associates are expected to maintain professional behavior at all times. This includes, but is not limited to, maintaining a positive attitude, demeanor and tone of voice and maintaining ethical conduct.
14. Retail associates are expected to communicate appropriately in all situations, to respond positively/courteously to the needs and/or requests of a diverse customer base and to treat all customers and fellow associates with respect.

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15. Retail associates are expected to handle disputes with fellow associates in a nondefensive manner, without raising their voices, and not in the presence of customers.
  16. Retail associates are expected to maintain appropriate dress and personal appearance as specified by the retail store/company.
  17. Retail associates are expected to demonstrate flexibility and adaptability in dealing with circumstances as they arise.
  18. Retail associates are expected to assume responsibility for their own workplace and social skills (employability skills) and to strive to improve/upgrade their skills as needed.
  19. Customer satisfaction, including issues related to safety and security, is a primary goal for all retail associates.

## PERFORMANCE SKILL LEVELS

|   | CASHIER/CLERK | SALES ASSOCIATE/CLERK | CUSTOMER SERVICE ASSOCIATE/CLERK | VISUAL MERCHANDISE ASSOCIATE/CLERK | DEPARTMENT MANAGER | ASSISTANT STORE MANAGER |
|---|---------------|-----------------------|----------------------------------|------------------------------------|--------------------|-------------------------|
| <b>PROVIDE CUSTOMER SERVICE</b>                 |               |                       |                                  |                                    |                    |                         |
| Approach Customer                               | •             | •                     | •                                | •                                  | •                  | •                       |
| Assess Customer Needs                           | •             | •                     | •                                | •                                  | •                  | •                       |
| Meet Customer Needs                             | •             | •                     | •                                | •                                  | •                  | •                       |
| Provide Ongoing Customer Support                |               | •                     | •                                |                                    |                    |                         |
| Build Customer Relations                        | •             | •                     | •                                |                                    |                    |                         |
| Process Manufacturer and Third-Party Warranties |               |                       | •                                |                                    |                    |                         |
| Process Product Recalls                         |               | •                     | •                                |                                    |                    |                         |
| Issue Raincheck/Substitution                    | •             | •                     | •                                |                                    |                    |                         |
| Handle Customer Complaints                      |               | •                     | •                                |                                    |                    |                         |
| Inform Customer of Special Services             | •             | •                     | •                                |                                    |                    |                         |
| Provide Store Charge Account Services           |               | •                     | •                                |                                    |                    |                         |
| Provide Returned Check Services                 | •             | •                     | •                                |                                    |                    |                         |
| <b>SELL PRODUCTS AND SERVICES</b>               |               |                       |                                  |                                    |                    |                         |
| Establish Sales Goals                           |               | •                     |                                  |                                    |                    |                         |
| Prospect Customers                              |               | •                     |                                  |                                    |                    |                         |
| Increase Product/Service Knowledge              |               | •                     |                                  |                                    |                    |                         |
| Determine Customer Needs                        |               | •                     |                                  |                                    |                    |                         |
| Present Solutions to Meet Customer Needs        |               | •                     |                                  |                                    |                    |                         |
| Gain Customer Commitment/Close Sale             |               | •                     |                                  |                                    |                    |                         |
| Process Sales Transaction                       |               | •                     |                                  |                                    |                    |                         |
| Follow-up with Customer                         |               | •                     | •                                |                                    |                    |                         |
| Conduct Price Checks                            | •             | •                     | •                                |                                    |                    |                         |
| Stock/Open Register                             | •             | •                     | •                                |                                    |                    |                         |
| Close Register                                  | •             | •                     | •                                |                                    |                    |                         |
| Process Returns/Refunds                         | •             | •                     | •                                |                                    |                    |                         |
| Process Exchanges                               | •             | •                     | •                                |                                    |                    |                         |
| Process Void Transactions                       | •             | •                     | •                                |                                    |                    |                         |
| <b>IMPLEMENT MERCHANDISING PLANS</b>            |               |                       |                                  |                                    |                    |                         |
| Determine Availability of Product/Service       |               | •                     |                                  | •                                  |                    |                         |
| Set Up Display                                  |               | •                     |                                  | •                                  |                    |                         |
| Replenish Merchandise                           |               | •                     |                                  | •                                  |                    |                         |
| Sign Merchandise                                |               | •                     |                                  | •                                  |                    |                         |
| Complete Price Changes of Merchandise           |               | •                     |                                  | •                                  |                    |                         |
| Evaluate Effectiveness of Merchandising Plan    |               |                       |                                  | •                                  |                    |                         |

# PERFORMANCE SKILL LEVELS *(Continued)*

|  | CASHIER/CLERK | SALES ASSOCIATE/CLERK | CUSTOMER SERVICE ASSOCIATE/CLERK | VISUAL MERCHANDISE ASSOCIATE/CLERK | DEPARTMENT MANAGER | ASSISTANT STORE MANAGER |
|--|---------------|-----------------------|----------------------------------|------------------------------------|--------------------|-------------------------|
| <b>MAINTAIN APPEARANCE OF STORE/DEPARTMENT</b>             |               |                       |                                  |                                    |                    |                         |
| Restore/Refresh Merchandise Displays                       | •             | •                     | •                                |                                    |                    |                         |
| Clean Fixtures/Displays                                    | •             | •                     | •                                | •                                  | •                  | •                       |
| <b>MONITOR INVENTORY</b>                                   |               |                       |                                  |                                    |                    |                         |
| Receive Merchandise  |               | •                     | •                                | •                                  | •                  |                         |
| Check In Merchandise                                       |               | •                     | •                                | •                                  | •                  |                         |
| Receive Merchandise on Sales Floor                         |               | •                     |                                  | •                                  |                    |                         |
| Rotate/Remove Stock  |               | •                     |                                  | •                                  |                    |                         |
| Identify Merchandise with Low Inventories/Merchandise Outs |               | •                     |                                  | •                                  |                    |                         |
| Participate in Periodic Inventory                          |               | •                     |                                  | •                                  |                    |                         |
| Transfer Inventory Store to Store                          |               | •                     |                                  | •                                  |                    |                         |
| Charge Back/Return and/or Repair Inventory                 |               | •                     |                                  | •                                  |                    |                         |
| Fill Customer Orders                                       | •             | •                     | •                                | •                                  | •                  | •                       |
| Ship/Deliver Orders to Customer                            |               |                       |                                  | •                                  |                    |                         |
| Store Customer Order for Pickup                            | •             | •                     | •                                |                                    |                    |                         |
| <b>PROTECT COMPANY ASSETS</b>                              |               |                       |                                  |                                    |                    |                         |
| Prevent Potential Theft of Company Assets                  | •             | •                     | •                                | •                                  | •                  | •                       |
| Prevent Potential Loss of Company Assets                   | •             | •                     | •                                | •                                  | •                  | •                       |
| Maximize Property Security                                 | •             | •                     | •                                | •                                  | •                  | •                       |
| <b>WORK AS PART OF STORE/DEPARTMENT TEAM</b>               |               |                       |                                  |                                    |                    |                         |
| Maintain Professional Appearance                           | •             | •                     | •                                | •                                  | •                  | •                       |
| Keep Up with Industry Trends                               | •             | •                     | •                                | •                                  | •                  | •                       |
| Set Professional Goals and Objectives                      | •             | •                     | •                                | •                                  | •                  | •                       |
| Manage Personal Use of Non-Selling Time                    | •             | •                     | •                                | •                                  | •                  | •                       |
| Communicate with Team Members                              | •             | •                     | •                                | •                                  | •                  | •                       |
| Assist Coworkers to Meet Customer Needs                    | •             | •                     | •                                | •                                  | •                  | •                       |
| Facilitate Solution of Work Problems with Team             | •             | •                     | •                                | •                                  | •                  | •                       |
| Train/Coach Other Team Members                             | •             | •                     | •                                | •                                  | •                  | •                       |
| Seek Assessment/Feedback                                   | •             | •                     | •                                | •                                  | •                  | •                       |

**PERFORMANCE SKILL LEVELS** (Continued)

| SUPERVISE FUNCTIONS  | CASHIER/CLERK | SALES ASSOCIATE/CLERK | CUSTOMER SERVICE ASSOCIATE/CLERK | VISUAL MERCHANDISE ASSOCIATE/CLERK | DEPARTMENT MANAGER | ASSISTANT STORE MANAGER |
|--|---------------|-----------------------|----------------------------------|------------------------------------|--------------------|-------------------------|
| Perform Supervisory Transactions                                     |               |                       |                                  |                                    | •                  | •                       |
| Resolve Customer Complaints/Problems                                 |               |                       |                                  |                                    | •                  | •                       |
| Promote Compliance with Discrimination and Harassment Standards/Laws |               |                       |                                  |                                    | •                  | •                       |
| Maximize Safety  |               |                       |                                  |                                    | •                  | •                       |
| Follow Accident/Incident Response Procedures                         |               |                       |                                  |                                    | •                  | •                       |
| Communicate with/Manage Associate                                    |               |                       |                                  |                                    | •                  | •                       |
| Review Associates' Ability to Complete Tasks                         |               |                       |                                  |                                    | •                  |                         |
| Conduct New Hire Orientation/Training                                |               |                       |                                  |                                    | •                  |                         |
| Evaluate Associate Performance                                       |               |                       |                                  |                                    | •                  | •                       |
| Schedule Associate   |               |                       |                                  |                                    | •                  |                         |
| Establish Sales Projections  |               |                       |                                  |                                    | •                  | •                       |
| Discipline/Terminate Associate                                       |               |                       |                                  |                                    | •                  | •                       |

**SKILL STANDARD**

CONDITIONS OF PERFORMANCE

**Given the following:**

- Customer
- Store/company customer service standards
- Store/company policy and procedures

WORK TO BE PERFORMED

Approach customer.

PERFORMANCE CRITERIA

All customers are greeted and made aware of willingness to provide service.  
 Time required to complete the skill is no more than one minute after customer enters store/department.

**PERFORMANCE ELEMENTS**

1. Acknowledge customer through eye contact or other appropriate means.  
 If unable to greet customer verbally, use nonverbal communication in a positive manner (i.e., smile, etc.).
2. Greet customer in a business-like, professional manner.
3. Adjust response and interaction to customer attitude.
4. Recognize customer's desire to browse.
5. Inform customer of readiness to provide service.
6. Reapproach customer at appropriate intervals.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of associate as he/she approaches customer.

PRODUCT

Customer is effectively approached by associate.

PROCESS

All performance elements for approaching customer are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Customer  
Store/company customer service standards  
Store/company policy and procedures

## WORK TO BE PERFORMED

Assess customer needs.

## PERFORMANCE CRITERIA

Needs of customers are assessed, without losing composure according to store/company customer service standards.

Time required to complete the skill is 2-5 minutes; however, some customers may require additional time.

## PERFORMANCE ELEMENTS

1. Approach customer.
2. Use nonverbal communication in a positive manner (e.g., smile, etc.).
3. Ask open-ended questions.
4. Provide comments/details for items at which customer is looking.
5. Demonstrate sensitivity to special needs and provide reasonable accommodations for those needs.
6. Secure translator, if necessary, to better understand customer.
7. Recognize customer desire to browse.
8. Inform customer of your readiness to provide service.
9. Reapproach customer when appropriate.
10. Follow-up with objective questions to gather more specific information about customer needs and personal situation.
11. Acknowledge customer responses.
12. Evaluate customer mood/attitude and non-verbal communication to determine best approach to clarifying customer needs.
13. Acknowledge customer anger, if applicable, in a calm and pleasant manner.
14. Contact supervisor/manager if customer is irate and can not be calmed.
15. Make appropriate suggestions to resolve misunderstanding if necessary.
16. Restate customer needs clearly and completely until his/her needs are fully understood.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of assessing customer needs.

PRODUCT

---

Customer needs are assessed.

PROCESS

---

All performance elements for assessing customer needs are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Customer  
 Assessed needs  
 Store/company customer service standards  
 Store/company policy and procedure

## WORK TO BE PERFORMED

Meet customer needs.

## PERFORMANCE CRITERIA

Customer needs are met according to store/company customer service standards.

Time required to complete the skill varies depending on customer needs and solutions.

## PERFORMANCE ELEMENTS

1. Identify solutions/options.
  - a. Determine what resources, time or special options are needed to meet customer needs.
  - b. Develop cost-effective options that can be provided.
2. Present solutions/options to customer.
  - a. Offer options according to company guidelines and within scope of authority.
  - b. Explain options clearly and thoroughly.
  - c. Respond positively and directly to questions and objections.
3. Facilitate solution.
  - a. Provide accurate information to customer and others involved in solving problem in order to facilitate resolution process.
  - b. Confirm procedure/process that will satisfy customer needs with those involved in providing solution.
  - c. Follow-up at appropriate levels within company to ensure that customer needs are met.
4. Refer customer to other resources.
  - a. Identify all appropriate alternative solutions available internally (e.g., catalog, web site, etc.) and/or outside company (e.g., repair shop, other store, etc.).
  - b. Present recommendation to customer, reasons supporting it and other explanatory information needed to connect customer with resource.
  - c. Direct customer to alternative internal or external resource

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of meeting customer needs.

PRODUCT \_\_\_\_\_

Customer needs are met and/or customer referred to other sources if necessary

PROCESS \_\_\_\_\_

All performance elements for meeting customer needs are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

- Customer
- Completed feedback forms
- Store/company confidentiality rules and regulations
- Store/company customer service standards
- Store/company policy and procedures

WORK TO BE PERFORMED

Provide ongoing customer support.

PERFORMANCE CRITERIA

Ongoing customer support is provided to all customers according to store/company policy and procedures.

Time required to complete the skill varies according to the needs of each customer and any required resolutions.

PERFORMANCE ELEMENTS

1. Receive call from customer; review feedback forms.
  - a. Record/review request or situation details per company guidelines.
  - b. Thank customer sincerely for directing request/problem, etc. to your department/store/company.
2. Offer follow-up assistance to customer regarding commitments made by department/store/company.
3. Provide customer with appropriate contact information (e. g., personal/store business card, location and phone number for consumer affairs department, vendor consumer relations department, etc.).
4. Contact customer to ascertain level of satisfaction with resolution of need/problem.
5. Follow-up with customer regarding future suggestions and alternatives as new situations dictate.
6. Maintain up-to-date file/database of regular customers, adhering to confidentiality rules and regulations.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of ongoing customer support.

PRODUCT \_\_\_\_\_

Customer is provided with ongoing support and has means to reach customer service provider.

PROCESS \_\_\_\_\_

All performance elements for providing ongoing customer support are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

**SKILL STANDARD**

**CONDITIONS OF PERFORMANCE**

**Given the following:**

- Customer
- Store/company layout
- Store/company customer service standards
- Store/company policy and procedures

**WORK TO BE PERFORMED**

Build customer relations.

**PERFORMANCE CRITERIA**

Customer relations are improved by handling inquiries and requests for personal service courteously, according to store customer service standards.

Time required to complete the skill is 2-5 minutes; however, some situations may require more time.

**PERFORMANCE ELEMENTS**

1. Review store layout/recent merchandise moves to provide customer with error-free directions.
2. Respond to general customer inquiries promptly and cheerfully.
3. Provide personal services to customer, such as:
  - a. Schedule appointments with store personnel.
  - b. Select/hold merchandise per store/company guidelines.
  - c. Provide assistance with parking (e.g., stamping parking tickets, valet parking, etc.).
  - d. Carry purchases to customer car.
  - e. Provide special needs assistance.
  - f. Provide gift-wrapping services.
  - g. Provide other special services (e.g., sell bus passes, cash paychecks/personal checks, provide courier services, sell postage stamps, etc.).
  - h. Call taxicabs for customers.
  - i. Provide information about frequent shopping programs, bonuses, in-store coupons, special promotions, etc.
4. Follow policy and procedures for handling lost and found items/situations.
5. Maintain key information on customer.
  - a. Build a customer file.
  - b. Register customers for frequent shopping programs, bonuses, promotions, raffles, etc.
6. Inform customer of future promotional events (e.g., trunk shows, jewelry re-mount events, etc.).
7. Support/honor promises made to customers by other associates whenever possible.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of building customer relations.

PRODUCT

---

Programs are implemented to build/improve customer relations.

PROCESS

---

All performance elements for building customer relations are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

- Customer
- Manufacturer and third-party warranty information
- Store/company customer service standards
- Store/company policy and procedures

WORK TO BE PERFORMED

Process manufacturer's and third-party warranties.

PERFORMANCE CRITERIA

Merchandise presented for warranty coverage is processed according to store/company policy and procedures.

Warranty claim (if applicable) is processed without error.

Time required to complete the skill varies depending on individual situation.

PERFORMANCE ELEMENTS

1. Identify nature of customer complaint.
2. Examine merchandise customer presents.
3. Determine when and where merchandise was purchased.
4. Review manufacturer's and/or third-party warranty coverage/requirements.
5. Contact warranty provider for clarification when necessary.
6. Determine whether merchandise is under warranty. Communicate warranty status to customer.
7. Review options with customer if item is not under warranty (e.g., direct customer to in-store repair facility if available or direct customer to external repair shop if it is responsible for repairs, etc.).
8. Determine whether the store or customer must take action to repair/replace merchandise under warranty.
  - a. If customer must take action proceed as follows:
    - 1) Review steps that customer must take to resolve warranty issue.
    - 2) Assist customer with any required proof of purchase, proof of warranty, etc. that will be required to submit claim.
    - 3) Direct customer to authorized repair center, if applicable.
  - b. If store must take action, proceed as follows:
    - 1) Collect all required documentation/information to submit warranty claim.
    - 2) Complete all paperwork related to warranty claim, including store tracking forms.
    - 3) Submit warranty claim along with merchandise for repair/replacement per warranty guidelines.

- 4) Follow-up with manufacturer/third-party on behalf of customer regarding claim.
- 5) Contact customer to pick up merchandise if it is returned to store.
- 9. Follow-up with customer to determine level of satisfaction.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of processing warranty claims.

PRODUCT \_\_\_\_\_

Warranty claims are processed.

PROCESS \_\_\_\_\_

Performance elements for processing manufacturer and third-party warranties are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Customer  
 Recall notice  
 Recalled merchandise  
 Company forms  
 Store/company customer service standards  
 Store/company policy and procedures

## WORK TO BE PERFORMED

Process product recalls.

## PERFORMANCE CRITERIA

Recalled merchandise is identified, collected, processed and/or disposed of without error according to recall notice and store/company policy and procedures.

Time required to complete the skill varies based on complexity of recall and number of items that need to be processed.

## PERFORMANCE ELEMENTS

1. Review information/materials (e.g., recall notice) provided regarding product recall.
2. Remove recalled merchandise from selling floor and stock areas.
3. Communicate recall information to customer.
4. Ensure merchandise presented is recalled product.
5. Direct customer to appropriate resource if store action is not required (e.g., toll-free number, web site, etc.).
6. Inform customer of recall process, indicating time frame for any actions to be taken by manufacturer (e.g., "You will receive a repair kit by mail within two weeks from today," etc.).
7. Issue refund or exchange, if appropriate.
8. Complete paperwork or data entry input to process recall.
9. Collect recalled merchandise and process/dispose of according to recall instructions (e.g., ship to manufacturer, destroy, etc.).

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of processing product recalls.

PRODUCT \_\_\_\_\_

Product recalls are processed.

PROCESS \_\_\_\_\_

All performance elements for processing product recalls are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

- Customer
- Store/company customer service standards
- Store/company raincheck/substitution form/policy
- Store/company policy and procedures

## WORK TO BE PERFORMED

Issue raincheck or authorized substitution to customer for out-of-stock merchandise.

## PERFORMANCE CRITERIA

Raincheck or authorized substitution is offered to customer according to store/company policy and procedures.

Time required to complete the skill is 2-5 minutes.

## PERFORMANCE ELEMENTS

1. Review raincheck and/or substitution policy of store/company for out-of-stock merchandise.
2. Check or request the following:
  - a. All stocking locations for merchandise
  - b. Expected receipt of out-of stock merchandise
  - c. Availability of merchandise at sister store.
3. Explain store/company's raincheck/substitution policy to customer. Explain policy with regard to discontinued merchandise that is out-of-stock.
4. Offer raincheck/substitution to customer, per store/company policy.
5. Complete paperwork required to issue raincheck/substitution.
6. Ensure that correct price, quantity, purchase limits and item number (SKU) are indicated on paperwork.
7. Contact customer (e.g., via mail, phone, etc.) when merchandise is received in store, if appropriate.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of issuing raincheck/substitution.

PRODUCT

---

Raincheck and/or substitutions are authorized and issued to customer.

PROCESS

---

All performance elements for issuing raincheck/substitution are critical. Performance elements are numbered to show appropriate an sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Customer  
 Store/company customer service standards  
 Store/company policy and procedures

## WORK TO BE PERFORMED

Handle customer complaints.

## PERFORMANCE CRITERIA

Customer complaints are received, recorded and/or resolved according to store/company policy and procedures.

Time required to complete the skill varies depending on individual situation.

## PERFORMANCE ELEMENTS

1. Listen to customer complaint .
2. Verify complaint.
3. Empathize with customer regarding their complaint.
4. Apologize to customer if appropriate.
5. Resolve complaint according to store/company policy and procedures.
6. Assure customer that complaint will be directed to appropriate personnel.
7. Document outcome.
8. Distribute/store documentation in accordance with store/company policy.

## PERFORMANCE ASSESSMENT CRITERIA

Observe the performance of handling customer complaints.

## PRODUCT

Customer complaints are handled.

## PROCESS

All performance elements for handling customer complaints are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

- Customer
- List of special services
- Special services training
- Store/company customer service standards
- Store/company policy and procedures

WORK TO BE PERFORMED

Inform customer of special services available.

PERFORMANCE CRITERIA

Customers are informed of special services according to store/company policy and procedures.

Time required to complete the skill varies depending on service offered.

PERFORMANCE ELEMENTS

1. Review special services offered by store/company.
2. Inform customer of special services available including, but not limited to:
  - a. Special orders and layaways
  - b. Stationary orders
  - c. Personal shopping/corporate gift shopping
  - d. Gift registry and/or gift wrap
  - e. Photographic processing and/or video services
  - f. Styling salon and other spa services
  - g. Portrait studio, optical department, floral department, etc.
  - h. Automotive and other repair services
  - i. Travel services
  - j. Dining services
  - k. Pharmacy
  - l. Lottery sales

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of informing customers of special services.

PRODUCT \_\_\_\_\_

Customers are informed of special services.

PROCESS \_\_\_\_\_

All performance elements for informing customers of special services are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

- Customer
- Authorization for associate/clerk to access customer charge account information and add/change/delete information
- Store/company customer service standards
- Store/company policy and procedures

WORK TO BE PERFORMED

Provide store charge account s ervices.

PERFORMANCE CRITERIA

Charge account services are provided to customers without error.

Time required to complete the skill is 2-5 minutes; however, some requests may require more time.

PERFORMANCE ELEMENTS

1. New Accounts
  - a. Provide customer with information about establishing a store charge account including any special offers for new accounts.
  - b. Register customer for store/company charge account.
  - c. Verify customer identity per store/company guidelines.
  - d. Provide customer with terms of charge account.
  - e. Provide customer with new account number if approved.
2. Existing Accounts
  - a. Request customer identification before accessing credit information.
  - b. Check account balances at request of customer.
  - c. Look up customer account number to process a register transaction if customer has forgotten his/her card. Issue temporary charge card if appropriate.
  - d. Accept payment for charge accounts.
  - e. Make adjustments to charge accounts.
  - f. Close charge accounts at request of customer.
  - g. Confiscate cards as directed/authorized (e.g., stolen/lost credit cards, closed accounts, etc.).

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of providing store charge account services.

PRODUCT \_\_\_\_\_

Store charge account services are provided.

PROCESS \_\_\_\_\_

All performance elements for providing store charge account services are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

**SKILL STANDARD**

CONDITIONS OF PERFORMANCE

**Given the following:**

- Customer
- Returned check notice/demand letter
- Customer credit/debit record(s)/files
- List of check verification services
- Store/company customer service standards
- State and local returned/bad check laws and regulations
- Store/company policy and procedures

WORK TO BE PERFORMED

Provide returned check services.

PERFORMANCE CRITERIA

Returned check services are provided according to store/company policy and procedures and local/state laws and regulations.

Time required to complete the skill is 5-15 minutes, but situations with supervisory intervention may require additional time.

**PERFORMANCE ELEMENTS**

*Note: This skill must be handled in a discreet manner upon being informed of the customer desire to resolve a returned check issue.*

1. Review notice/demand letter.
2. Locate store records related to customer returned check.
3. Verify whether time frame for responding to returned check demand letter has expired.
4. Refer customer to supervisor if demand letter time frame has expired to determine if payment can still be made at store.
5. Verify that information regarding returned check is accurate.
6. Explain store/company's returned check policy to customer, if necessary.
7. Determine whether returned check fees should be charged/waived, depending upon circumstances.
8. Inform customer of returned check fees that will be assessed, if appropriate.

**Customer agrees to pay assessed returned check fees and original check balance:**

9. Collect payment for original returned check balance plus any assessed fees, in accordance with the store/company's approved payment options (e.g., cash only, cashiers check/money order or credit card).
10. Issue receipt to customer for payment.
11. Process transaction(s) necessary for clearing customer credit/debit record/file, both internally and externally, and with check verification services.

**Customer refuses to pay assessed returned check fees and/or original check balance:**

- 12. Offer to contact supervisor to help resolve any issues with customer.
- 13. Contact supervisor/security if customer becomes irate or threatening.
- 14. Document contact with customer per store/company policy and state/local regulations.
- 15. Retain and file paperwork/documentation/returned check until date of expiration of demand letter.
- 16. Refer returned check paperwork/documentation to supervisor for further collection activity if time frame on demand letter has expired.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of associates as they handle resolution of returned checks for customers.

PRODUCT

---

Customer information is processed and updated when returned check notice/demand letter is presented with payment in full.

PROCESS

---

All performance elements for processing returned check notice/demand letter are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Past and current budget and sales reports  
 Hours worked reports for previous year  
 Employee work schedule  
 Store/company policy and procedures

## WORK TO BE PERFORMED

Establish sales goals.

## PERFORMANCE CRITERIA

Sales goals are established according to store/company policy and procedures.

Time required to complete the skill varies depending on size of staff and department/store and special circumstances (e.g., new store, relocation, etc.).

## PERFORMANCE ELEMENTS

1. Review sales estimates for store/department.
2. Review last year's sales for same time period for which you will establish sales goals.
3. Compare performance last year relative to department's performance. Note any sales trends, average sales ticket information, etc.
4. Establish sales goals, together with management, for month, week and day based on sales projections, last year's sales information and other information as appropriate (e.g., number of hours worked, varying dates for holidays, etc.).
5. Maintain personal records of sales and other statistics (e.g., average sales ticket, etc.).
6. Compare actual sales versus sales goals.
7. List ways to improve sales. Discuss with supervisor/manager.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of establishing sales goals.

PRODUCT

---

Sales goals are established and personal sales record maintained.

PROCESS

---

All performance elements for establishing sales goals are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Customer  
 Customer lists  
 Client cards  
 Computer/printer/manuals  
 List of community activities  
 Store/company promotional calendar  
 Store/company policy and procedures

## WORK TO BE PERFORMED

Prospect customers.

## PERFORMANCE CRITERIA

New customers are identified and prospecting activities completed according to store/company policy and procedures.

Time required to complete the skill varies due to ongoing nature of prospecting.

## PERFORMANCE ELEMENTS

1. Identify potential prospects on regular basis including but not limited to the following:
  - a. Referrals from existing customers
  - b. Community service activities, local affiliations
  - c. Open houses, special events
  - d. Customer lists, steady customers as well as information captured from new sales
  - e. Organization mailing lists (e.g., alumni groups, associations, etc.)
  - f. Phone book
2. Create/update customer profile (e.g., sizes, styles, vendor, personal information/notes, etc.).
3. Review customer profile for potential sales opportunities.
  - a. Upcoming sales/promotions
  - b. New merchandise
  - c. Special occasion purchases (e.g., birthdays, anniversaries, back to school, etc.)
4. Contact prospects on a regular schedule through mail, e-mail and/or telemarketing. For example:
  - a. Send promotional information to new customers.
  - b. Contact someone you met at an open house or community activity, etc.
  - c. Contact customers who have not purchased a product/service recently.
  - d. Inform established customers of upcoming sales and/or new merchandise.
5. Document results of prospecting.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of prospecting customers.

PRODUCT \_\_\_\_\_

Customers are identified and contacted.

PROCESS \_\_\_\_\_

All performance elements for prospecting customers are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

**SKILL STANDARD**

**CONDITIONS OF PERFORMANCE**

**Given the following:**

- List of product/service videos or other products/services demonstrations
- Storage location for product/service literature
- Warranty, product service and rebate information for product
- Commission/special incentive structure for department
- Store/company policy and procedures

**WORK TO BE PERFORMED**

Increase product/service knowledge.

**PERFORMANCE CRITERIA**

Following introduction to product/service, skill is performed 100% of the time.

Skill is performed with 100% accuracy.

Time required to complete the skill varies according to amount of product/service information available and customer feedback received.

**PERFORMANCE ELEMENTS**

1. Gather all available information regarding products/services to be sold, including videos, product brochures and bulletins and general information sources (including websites).
2. Gather information about competitor's products/services including pricing, comparative features and benefits.
3. Attend product/service demonstration/training if offered by in-store personnel or manufacturer/vendor.
4. Review complete information on products/services to be sold, including warranty information.
5. Review service contract information, if applicable, for product.
6. Test products/services to be sold to fully identify features.
7. Identify potential sales benefits associated with product/service features.
8. Review location of merchandise/services to be able to clearly direct customers to products/services.
9. Organize product literature/videos to be accessible by customers and sales associates for quick reference and handouts.
10. Review commission/special incentive structures for each product/service, if applicable, to determine what are key sales objectives for department.
11. Identify manufacturer/vendor or store rebates for products/services, if applicable, to determine additional benefits to customer.
12. Demonstrate increased product/service knowledge through role playing and customer interaction.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of increasing product/service knowledge.

PRODUCT

---

Product/service knowledge is demonstrated.

PROCESS

---

All performance elements for increasing product/service knowledge are critical. Performance elements are numbered to show an appropriate sequence of completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Customer  
Store/company customer service standards  
Store/company policy and procedures

## WORK TO BE PERFORMED

Determine customer needs.

## PERFORMANCE CRITERIA

Customer needs are determined by engaging customer in a needs assessment conversation according to store/company policy and procedures.

Time required to complete the skill varies depending on individual situation.

## PERFORMANCE ELEMENTS

1. Establish rapport with customer.
2. Respond to customer inquiries.
3. Ask open-ended questions to determine customer needs.
4. Determine customer level of knowledge about product/service.
5. Present product and service information in a manner appropriate to customer level of knowledge and characteristics.
6. Enhance customer desire for product/service.
7. Determine customer parameters regarding purchase (e.g., spending limits, timing of purchase, etc.) in a tactful manner.
8. Restate customer needs clearly and completely.

## PERFORMANCE ASSESSMENT CRITERIA

Observe the performance of determining customer needs.

## PRODUCT

Customer needs are identified and determined.

## PROCESS

All performance elements for identifying customer needs are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

- Customer
- Customer needs
- Statement of product/service knowledge mastered
- Store/company customer service standards
- Store/company policy and procedures

WORK TO BE PERFORMED

Present solutions to meet customer needs.

PERFORMANCE CRITERIA

Solutions are offered to meet customer needs according to store/company policy and procedures.

Time required to complete the skill varies depending on number of different solutions presented to customer.

PERFORMANCE ELEMENTS

1. Restate customer needs.
2. Recommend options appropriate to customer needs.
3. Present and/or demonstrate features and benefits of products/services.
4. Make comparisons between products/services explaining similarities and differences.
5. Offer new recommendations if customer does not like options suggested.
6. Suggest additional or related purchases that would complement purchase and meet customer needs (e.g., if customer is buying a copy machine, suggest buying a box of paper, or additional toner cartridge, etc.).
7. Provide quote (written, verbal) of estimated costs for product/service if appropriate; provide customer with personalized business card to give customer a way to get back in touch with you, including promotions, warranties and store/company policies.
8. Follow-up with customer.
9. Refer customer to other resources/department/store as needed.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of presenting solutions to meet customer needs.

PRODUCT

---

Customer needs are met and solutions presented.

PROCESS

---

All performance elements for presenting solutions to meet customer needs are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

- Customer
- List of addressed needs of customer
- Store/company customer service standards
- Store/company policy and procedures

WORK TO BE PERFORMED

Gain customer commitment to close sale.

PERFORMANCE CRITERIA

Sale is closed according to store/company policy and procedures.

Time required to complete the skill varies depending on individual situation.

PERFORMANCE ELEMENTS

1. Analyze customer response to suggestions and respond appropriately.
2. Address remaining concerns.
3. Offer alternatives to overcome price objections such as store credit card, layaway, special promotions, etc.
4. Suggest additional products/services or items to complement purchase.
5. Observe customer for signs that he/she is ready to complete sale.
6. Ask customer for commitment to close sale.
7. Suggest additional services (e.g., gift card, gift wrap, etc.)
8. Discuss/complete specifics of sale (e.g., delivery, warranty, etc.).
9. Thank customer sincerely, even if customer rejects suggestions.

PERFORMANCE ASSESSMENT CRITERIA

Observe the performance of gaining customer commitment to close the sale.

PRODUCT

Sale is closed.

PROCESS

All performance elements for gaining customer commitment to close the sale are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Customer  
 Selling terminal and forms  
 Register training completed by associate  
 Policies and procedures for local, state and federal government programs  
 (e.g., Link Card, WIC programs)  
 Local and state laws and regulations regarding sales transactions (e.g. check  
 acceptance and identification statutes/regulations)  
 Posted policy for check acceptance in store/company, including required  
 forms of identification  
 Store/company customer service standards  
 Store/company policy and procedures

## WORK TO BE PERFORMED

Process sales transaction.

## PERFORMANCE CRITERIA

Sales transactions are processed with 100% accuracy.

Time required to complete the skill is 3-5 minutes; however, some purchases may  
 take more time.

## PERFORMANCE ELEMENTS

1. Inform customer of return/exchange policy.
2. Complete/review order forms (e.g., phone orders, etc.) if applicable.
3. Request valid identification for purchases of age-restricted merchandise  
 (e.g., tobacco, liquor, etc.).
4. Collect demographic data from customer.
5. Ring merchandise.
  - a. Observe merchandise for price and SKU (Stock Keeping Unit) discrepancies.
  - b. Process rainchecks.
  - c. Record and process price matching or price guarantees relevant to sale.
6. Process coupons/discounts verifying expiration dates and recording required information.
7. Process payment media (e.g., cash, check, credit/debit card, gift certificate,  
 traveler's check, etc.) verifying expiration date and customer signature.
  - a. Follow store/company policies and state/local statutes/regulations for check  
 transactions.
    - 1) Verify check contains required information (e.g., preprinted name and  
 address, month and year account opened); verify numeric amount shown  
 on the check matches amount written in text.

- 2) Ensure check has not been altered or presigned.
- 3) Compare check to "bad check" listings and/or check verification services.
- 4) Request two forms of valid (unexpired) customer identification, including one picture ID.
- 5) Verify identification and signatures provided match and record information *except for credit card numbers* on front of check. (It is against Illinois law to record credit card numbers on a check.)
- 6) Refer questionable or unacceptable checks to supervisor.
- 7) Refer questionable or unacceptable identification to supervisor.
- b. Identify foreign/counterfeit currencies presented as payment and obtain manager approval to accept/reject per store/company policy.
- c. Process Link Card payment and other government program transactions (e.g., WIC, etc.) according to store/company and government policies/regulations.
- 8. Complete transaction, thanking customer and placing money and/or media in appropriate locations.
  - a. Give customer delivery and/or warranty paperwork, if applicable.
  - b. Remove all antitheft devices from purchased merchandise.
  - c. Package merchandise properly. Gift wrap merchandise if store/company policy permits.
  - d. Assure arrangements for shipping/mailling/deliveries are handled properly.
  - e. Encourage customer feedback regarding sale.
  - f. Report price/SKU discrepancies to appropriate personnel for correction.
  - g. Restock register/cash drawer as needed.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of processing sales transactions.

|         |  |
|---------|--|
| PRODUCT |  |
|---------|--|

Sales transaction is processed.

|         |  |
|---------|--|
| PROCESS |  |
|---------|--|

All performance elements for processing sales transactions are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Customer  
 Customer feedback  
 File of sales for customer follow-up  
 Store/company customer service standards  
 Store/company policy and procedures

## WORK TO BE PERFORMED

Follow-up with customer.

## PERFORMANCE CRITERIA

Contact is maintained with customers and problems addressed.  
 Time required to complete the skill varies depending on details of sale.

## PERFORMANCE ELEMENTS

1. Review customer feedback (e.g., comment cards, verbal reports, etc.).
2. Maintain personal file of sales that should be followed-up. Check file daily to determine who/when to contact.
3. Assure that shipping/ mailing/ deliveries occur as scheduled and in proper manner, if applicable.
4. Contact customer to determine if product/service met customer expectations/satisfaction.
5. Take actions necessary to assure that customer is satisfied with product/service, and/or to resolve a negative situation.
6. Develop new or repeat sales opportunities by offering to help in the future with additional sales with customer or his/her family and friends.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of following-up with customer.

PRODUCT \_\_\_\_\_

Customer follow-up is completed.

PROCESS \_\_\_\_\_

All performance elements for following-up with customer are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

**SKILL STANDARD**

**CONDITIONS OF PERFORMANCE**

**Given the following:**

- Customer
- Register training completed by associate
- Store pricing reports/system and procedures
- Store/company customer service standards
- Store/company policy and procedures

**WORK TO BE PERFORMED**

Conduct price checks.

**PERFORMANCE CRITERIA**

Items are properly tagged and priced per store procedures with 100% accuracy.  
 Correct pricing information is given to all customers.

Time required to complete the skill varies depending on availability of information.

**PERFORMANCE ELEMENTS**

1. Ensure that product is correctly tagged.
2. Verify that item is marked with correct price.
  - a. Scan/key SKU (Sales Keeping Unit) information into register, if applicable.
  - b. Check promotional information (e.g., ads, price sheets, mailers, etc.).
  - c. Compare to like item to determine correct price.
3. Inform customer of current price.
4. Mark item with correct SKU/price information.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of conducting price checks.

**PRODUCT**

Price checks are conducted.

**PROCESS**

All performance elements for conducting price checks are critical and must be performed in sequence.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

- Point of sale (POS) terminal/wrap desk
- Supplies to stock register (e.g., bags, current ads, register tape, gift boxes, etc.)
- Store/company customer service standards
- Store/company policy and procedures

## WORK TO BE PERFORMED

Stock/open register.

## PERFORMANCE CRITERIA

Register area is properly set up; equipment is functioning and ready for all customers/transactions.

Time required to complete the skill is 5-10 minutes.

## PERFORMANCE ELEMENTS

1. Pick up opening monies.
2. Sign on to register.
3. Verify contents of register drawer; contact appropriate person if problem is detected (e.g., incorrect quantities of each denomination, missing funds, etc.).
4. Ensure that register has receipt tape and extra tapes.
5. Replenish transaction forms, receipts, register tapes, etc.
6. Replenish shopping bags, boxes and any other packaging.
7. Contact appropriate personnel for repair/replacement of malfunctioning equipment per store/company policy.
8. Ensure all POS reference material is readily available. If materials are missing, attempt to replace them before they are needed.
9. Anticipate change needs and replenish supplies before running out.
10. Follow store procedures when cash drawer exceeds a specific/set dollar amount.
11. Review any situations that need to be resolved from prior shift (e.g., items being held for customer, inventory checks in process with sister stores, etc.).

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of stocking/opening register.

PRODUCT

---

Register is stocked/opened.

PROCESS

---

All performance elements for stocking/opening register are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Register  
Media folders  
Currency bags  
Store paperwork flow chart  
Store/company policy and procedures

## WORK TO BE PERFORMED

Close register.

## PERFORMANCE CRITERIA

Register is emptied of contents and secured. Contents are taken to designated area.

Skill is performed with 100% accuracy.

Time required to complete the skill is 30 minutes; however, time may vary based on contents of cash drawer.

## PERFORMANCE ELEMENTS

1. Sort media/forms into appropriate locations.
2. Print register closing tape if applicable.
3. Place cash and cash equivalent into appropriate bags/folders.
4. Sign off register per store/company policy and procedures.
5. Take all envelopes/bags or cash drawer to appropriate location.

## PERFORMANCE ASSESSMENT CRITERIA

Observe the performance of closing register.

## PRODUCT

Register is closed.

## PROCESS

All performance elements for closing register are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Customer  
 Returned merchandise  
 Training on register to process refunds/returns completed  
 Store return/refund policies/procedures  
 Store/company customer service standards  
 Store/company policy and procedures

## WORK TO BE PERFORMED

Process returns/refunds for customer.

## PERFORMANCE CRITERIA

Customer returns/refunds are processed according to store/company policy and procedures.

All returns/refunds are processed with 100% accuracy.

Time required to complete the skill is 5-10 minutes.

## PERFORMANCE ELEMENTS

1. Ask customer his/her reason for returning item.
2. Suggest alternative item to convert return into an exchange. (Check catalog, on-line store, sister store, etc.).
3. Ask customer for receipt.
4. Inform customer of store policy regarding returns without receipt, if applicable.
5. Verify that item being returned is returnable to your store. (Determine if item was purchased at your store or sister store.)
6. Determine if item is used/worn and not returnable according to store/company policy and procedures.
7. Determine if damages are covered by manufacturer's warranty.
8. Express regret that item being returned did not work out for customer.
9. Determine price of item being returned by using receipt, existing stock price, computer price lookup, bar code label scan, pricing reports, etc.
10. Complete refund transaction (e.g., cash refund, mail-check refund, store merchandise credit, credit to store or third party credit/debit card, etc.).
11. Issue customer refund receipt.
12. Reticket/repackage resaleable merchandise.
13. Record price adjustments if applicable.
14. Complete appropriate forms for nonresaleable merchandise.
15. Place merchandise in appropriate location.

**PERFORMANCE ELEMENTS**

Observe the performance of processing returns/refunds for customer.

PRODUCT

---

Returns/refunds are processed.

PROCESS

---

All performance elements for processing returns/refunds for customer are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

- Customer
- Store/company customer service standards
- Store/company policy and procedures
- Store/company exchange policies/procedures
- Training on register to process exchanges completed

## WORK TO BE PERFORMED

Process even and uneven exchanges.

## PERFORMANCE CRITERIA

Exchanges are processed with 100% accuracy according to store/company policy and procedures.

Time required to complete the skill is 5-10 minutes.

## PERFORMANCE ELEMENTS

1. Ask customer reason for exchanging item.
2. Ask customer for receipt.
3. Inform customer of store policy regarding exchanges without receipt, if applicable.
4. Verify that item being exchanged is returnable to your store. (Determine if item was purchased at your store or sister store.)
5. Determine if item is used/worn and not returnable according to store/company policy and procedures.
6. Determine if damages are covered by manufacturer's warranty.
7. Express regret that item being exchanged did not work out for customer.
8. Determine price of item being exchanged by using receipt, existing stock, computer price lookup, bar code label scan, pricing reports, etc.
9. Complete exchange transaction.
10. Issue customer exchange receipt.
11. Reticket/repackage resaleable merchandise.
12. Record price adjustments if applicable.
13. Complete appropriate forms for nonresaleable merchandise.
14. Place merchandise in appropriate location.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of processing even and uneven exchanges.

PRODUCT \_\_\_\_\_

Even and uneven exchanges are processed.

PROCESS \_\_\_\_\_

All performance elements for processing even and uneven exchanges are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

**SKILL STANDARD**

**CONDITIONS OF PERFORMANCE**

**Given the following:**

- Customer
- Training on register to process voids completed
- Store/company void policies/procedures
- Store/company customer service standards
- Store/company policy and procedures

**WORK TO BE PERFORMED**

Process void-item, void-during and void-after transactions.

**PERFORMANCE CRITERIA**

All void transactions are processed with 100% accuracy.

Time required to complete the skill is 5-10 minutes.

**PERFORMANCE ELEMENTS**

1. Determine whether transaction needs to be voided.
2. Obtain approval of void as required by store/company policy/procedures.
3. Void transaction during register entry process if entire transaction must be voided and you have not completed transaction in accordance with register system and store/company policy.
4. Void transaction after register entry process if transaction was completed and in accordance with register system and store/company policy.
5. File void slips in appropriate location.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of processing void transactions.

**PRODUCT**

Void transactions are processed.

**PROCESS**

All performance elements for processing void transactions are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

- Inventory reports
- Sales reports
- Department hours (e.g., for one-hour photo, floral, bakery, deli, photography and styling salon departments)
- Merchandising plan
- List of vendors/suppliers
- Store/company policy and procedures

WORK TO BE PERFORMED

Determine availability of product/service.

PERFORMANCE CRITERIA

Product/service availability is determined according to store/company policy and procedures.

Time required to complete the skill varies depending on number of items/orders to check.

PERFORMANCE ELEMENTS

1. Review store/company merchandising plan and/or department hours.
2. Adjust merchandising plan/department hours to reflect current sales trends.
3. Verify stock on hand/supplies are adequate to meet anticipated demand.
4. Review open order information if additional stock/supplies are required to meet demand.
  - a. Determine if orders are scheduled to arrive within adequate time frame.
  - b. Determine if order quantities and store stock are sufficient to meet demand/trends.
  - c. Determine if additional inventory/supplies should be ordered.
5. Confirm delivery schedule of open orders with home office and/or vendor/supplier.
6. Request/order additional merchandise/supplies to meet expectations.
7. Document actions taken.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of determining availability of product/service.

PRODUCT \_\_\_\_\_

Availability of product/service are confirmed and appropriate action taken.

PROCESS \_\_\_\_\_

All performance elements for determining availability of product/service are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## IMPLEMENT MERCHANDISING PLANS

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Fixtures/props and other display materials and instructions  
 Merchandising plan  
 Promotional plans  
 Plan-o-grams  
 Floor layout plans  
 Store/company loss prevention policies and procedures  
 Store/company policy and procedures

## WORK TO BE PERFORMED

Set up display.

## PERFORMANCE CRITERIA

Display is set up according to store/company policy and procedures.

Time required to complete the skill varies depending on size of merchandising plan and plan-o-gram.

## PERFORMANCE ELEMENTS

1. Review merchandising plan and plan-o-grams for display instructions/suggestions.
2. Review promotional plans.
3. Select items for display including, but not limited to, high margin or fast moving merchandise, seasonal merchandise, impulse items, etc.
4. Select best location for display (e.g., high traffic area, theme/seasonal area, end cap, front of store, etc.).
5. Gather required fixtures, tools and merchandise.
6. Remove existing display.
7. Inspect fixtures to ensure they are clean, safe and in good shape (visually and mechanically).
8. Review display plans to ensure safety and accessibility issues are not compromised.
9. Set up display.
  - a. Install display components (e.g., shelves, arms, pegs, etc.).
  - b. Attach shelf tags, sign holders and any other props as required.
  - c. Set up fixtures properly and in a visually appealing manner.
  - d. Ensure proper security devices are attached/installed.
  - e. Ensure that display model is functioning and batteries, if required, are installed.

10. Place merchandise on display.
11. Sign display.
12. Clear area of boxes and packing materials after stocking.
13. Put away tools, unused merchandise/equipment, fixtures/props, etc.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of setting up display.

PRODUCT \_\_\_\_\_

Display is set up.

PROCESS \_\_\_\_\_

All performance elements for setting up display are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## IMPLEMENT MERCHANDISING PLANS

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

- Replenishment checklist
- Merchandising plan
- Plan-o-grams
- Store/company loss prevention policies and procedures
- Store/company policy and procedures

## WORK TO BE PERFORMED

Replenish merchandise.

## PERFORMANCE CRITERIA

Merchandise is replenished according to merchandising plans, plan-o-grams and store/company policy and procedures.

Display/fixture is replenished with 100% accuracy.

Time required to complete the skill varies depending on amount of replenishment/replacement required.

## PERFORMANCE ELEMENTS

1. Review replenishment checklist/assignments.
2. Review sales floor regularly to identify areas requiring replenishment.
3. Compare plan-o-gram and/or merchandising plan to stock on display.
  - a. Remove merchandise past expiration date/damaged merchandise and dispose of it according to store procedures.
  - b. Remove merchandise that does not belong in display/presentation.
4. Identify merchandise to be replenished (i.e., sizes, colors, etc.).
5. Obtain merchandise required to fill fixture/display from stock area.
6. Replace/replenish/reset merchandise.
  - a. Replace damaged/missing fixtures, props and shelf tags/signage as needed.
  - b. Rotate/reset stock according to plan-o-gram, merchandising plan and/or expiration dates.
  - c. Ensure that all merchandise is lined up and facing in proper manner (e.g., front of package facing customer, clothes folded and top facing customer, clothes hung on hangers in same direction, etc.).
  - d. Pull damaged/defective merchandise from display/presentation.
7. Review stock reports if merchandise cannot be located.
8. Notify supervisor/manager to place/expedite orders for out-of-stock merchandise.
9. Replenish with substitute merchandise if out of stock, if approved by store management.

10. Take damaged/defective items to designated area.
11. Take merchandise not belonging on display to proper location.
12. Clear area of boxes and packing materials after stocking.
13. Put away all merchandising equipment following its use.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of replenishing merchandise.

|         |  |
|---------|--|
| PRODUCT |  |
|---------|--|

Merchandise is replenished.

|         |  |
|---------|--|
| PROCESS |  |
|---------|--|

All performance elements for replenishing merchandise are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## IMPLEMENT MERCHANDISING PLANS

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Signs (e.g., shelf tags, fixture signs, etc.)  
 Sign holders  
 Signing requirements/recommendations  
 Merchandising plans  
 Plan-o-gram  
 Local, state and federal standards/regulations  
 Store/company policy and procedures

## WORK TO BE PERFORMED

Place signs on fixtures/displays to increase merchandise exposure.

## PERFORMANCE CRITERIA

Signs are prepared and placed on fixtures/displays according to merchandising plan and company policy and procedures.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on number of signs, signage changes, merchandising plan and plan-o-gram.

## PERFORMANCE ELEMENTS

1. Review merchandise and promotional plans.
2. Determine signs required to achieve objectives of merchandising and promotional plans.
3. Locate and review signage, if already provided.
4. Create/request additional signs required.
5. Ensure signage complies with store/company guidelines and local, state and federal standards/regulations.
6. Ensure accuracy of pricing.
  - a. Verify labels/tickets/merchandise pricing/shelf pricing match merchandising and promotional plans.
  - b. Determine correct pricing/signage information if discrepancies are found.
  - c. Correct discrepancies as required.
7. Place new signs in locations that are visible and draw customers to display/presentation and/or department.
8. Remove obsolete signage.
9. Review signs regularly (e.g., daily, weekly, etc.) and adjust/ replace signage if necessary.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of implementing signage.

PRODUCT \_\_\_\_\_

Merchandise/promotional signs are placed on designated merchandise.

PROCESS \_\_\_\_\_

All performance elements for implementing signage are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

- Sales trends/reports
- Store/company pricing plan/reports
- Price change equipment and instructions
- Merchandising plan
- Store/company policy and procedures

WORK TO BE PERFORMED

Complete permanent price changes of merchandise.

PERFORMANCE CRITERIA

Permanent price changes are completed according to merchandising and pricing plans and store/company policy and procedures.

Time required to complete the skill varies depending on stock on hand and merchandising/pricing plan.

PERFORMANCE ELEMENTS

1. Review merchandising and pricing plans for store/company.
2. Ensure all supplies and equipment for repricing merchandise (e.g., new price stickers/tape, etc.) are ready.
3. Locate merchandise to be repriced.
  - a. Check sales floor
  - b. Check stocking areas
  - c. Check receiving room for merchandise orders recently received and not yet checked in/stocked.
4. Reprice merchandise if applicable.
5. Record details of price changes (e.g., quantity, original price, new price, etc.), as required.
6. Place new/change existing signing/shelf tags on merchandise to reflect new pricing.
7. Verify that computer system price file has been updated, if applicable.
8. Make corrections to store price file, if needed, per store/company procedures.
9. Complete required paperwork and return to designated person.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of conducting permanent price changes.

PRODUCT \_\_\_\_\_

Permanent merchandise price changes are implemented.

PROCESS \_\_\_\_\_

All performance elements for conducting permanent price changes are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

- Promotional plan
- Merchandising plan
- Store/company policy and procedures

WORK TO BE PERFORMED

Evaluate effectiveness of merchandising plan.

PERFORMANCE CRITERIA

Merchandising plan is evaluated according to store/company policy and procedures.  
Time required to complete the skill varies depending on size of merchandising and promotional plans.

PERFORMANCE ELEMENTS

1. Review merchandising and promotional plans.
2. Solicit feedback from customers and associates.
3. Compare actual sales of merchandise to projected estimates.
4. List items meeting or exceeding plan.
5. List items not meeting plan.
6. Identify potential reasons for success/failure (e.g., promotional plan, presentation, weather, pricing, competition, economy, etc.).
7. Document information.
8. Distribute to appropriate parties.

PERFORMANCE ASSESSMENT CRITERIA

Observe the performance of evaluating effectiveness of merchandising plan.

PRODUCT

Effectiveness of merchandising plan is evaluated.

PROCESS

All performance elements for evaluating effectiveness of merchandising plan are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

- Presentation guidelines
- Plan-o-grams
- Merchandise plans
- Store/company policy and procedures

WORK TO BE PERFORMED

Restore/refresh merchandise displays/presentations.

PERFORMANCE CRITERIA

Merchandise displays/presentations are reset, reorganized and restored/refreshed according to presentation guidelines and store/company policy and procedures.

Time required to complete the skill is 5 minutes per display/fixture. Larger displays/fixtures may require additional time.

PERFORMANCE ELEMENTS

1. Review plan-o-gram for display/fixture.
2. Fold garments that have been unfolded.
3. Re-box merchandise removed from original boxes/containers.
4. Discard empty packaging materials.
5. Remove merchandise that does not belong in display.
6. Sort merchandise by color, size, type, brand, etc.
7. Fix/adjust display model as needed.

PERFORMANCE ASSESSMENT CRITERIA

Observe the performance of restoring/replenishing merchandise displays.

PRODUCT

Merchandise displays/presentations are restored/refreshed.

PROCESS

All performance elements for restoring/refreshing merchandise displays are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

**SKILL STANDARD**

CONDITIONS OF PERFORMANCE

**Given the following:**

- Cleaning supplies
- Cleaning standards
- Store/company policy and procedures

WORK TO BE PERFORMED

Maintain cleanliness of department and fixtures/displays.

PERFORMANCE CRITERIA

Cleanliness of department and fixtures/displays are maintained according to store/company policy and procedures.

Time required to complete the skill is 10-15 minutes per display/fixture.  
Larger displays/fixtures may require additional time.

**PERFORMANCE ELEMENTS**

1. Remove shopping carts and baskets and put them in appropriate place, if applicable.
2. Clean department fixtures, glass, mirrors, selling station, etc. and remove all dust and debris.
3. Clean up spills, broken items, etc. and promptly report larger spills, broken items and trash removal to maintenance/manager.
4. Return unused signs and sign holders to appropriate location.
5. Return extra hangers, security tags, etc. to appropriate location.
6. Report need for repairs, replacement and/or special maintenance of equipment.
7. Return cleaning supplies to proper location.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of maintaining cleanliness of department.

PRODUCT \_\_\_\_\_

Department and displays/fixtures are clean and well maintained.

PROCESS \_\_\_\_\_

All performance elements for maintaining cleanliness of department are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Receiving equipment/forms  
 Receiving/inventory system  
 Department of Transportation Hazardous Materials  
 (DOT HazMat) standards/regulations  
 Occupational Safety and Health Association (OSHA)  
 standards/regulations  
 Store/company policy and procedures

## WORK TO BE PERFORMED

Receive new shipments of merchandise.

## PERFORMANCE CRITERIA

Merchandise is received and verified against shipping documents according to company policy and procedures and DOT HazMat standards/regulations.

Time required to complete the skill varies depending on quantity/size of shipments received.

## PERFORMANCE ELEMENTS

*Note: Individuals must be made aware of age restrictions for equipment used in the receiving area. Those under 18 can not operate certain types of equipment.*

1. Clear receiving area of any other stock/merchandise prior to receiving new shipment.
2. Unload merchandise from carrier.
3. Verify all cartons belong to your store.
4. Confirm number of cartons received versus quantity on bill of lading.
5. Take note of fragile contents and damaged boxes/shipping cartons.
6. Get appropriate signatures from carrier and store personnel for all shortages, overages and damaged goods. Sign carriers' documents, if applicable.
7. Stamp all receiving documents, if required, per store procedure.
8. Forward receiving documents to office.
9. Move cartons to check-in area.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of receiving incoming merchandise.

OSHA standards/regulations are followed.

PRODUCT \_\_\_\_\_

Merchandise is received and accounted/signed for.

PROCESS \_\_\_\_\_

All performance elements for receiving merchandise are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Purchase order(s)/bills of lading/invoices/packing lists  
 Merchandise processing equipment (e.g., scanners, computers, manual forms, etc.)  
 Pricing equipment and supplies  
 Receiving/inventory system (computer or manual)  
 Store/company policy and procedures

## WORK TO BE PERFORMED

Check in merchandise and prepare for selling floor.

## PERFORMANCE CRITERIA

Merchandise is checked in according to company policy and procedures.  
 Time required to complete the skill varies depending on quantity/size of merchandise orders being processed.

## PERFORMANCE ELEMENTS

1. Locate order information (e.g., store name/number, purchase order number, subdivision/department, etc.) on carton.
2. Locate purchase order/bill of lading/invoice.
3. Verify quantities received against shipping documents (packing lists, invoices) and receiving documents (purchase orders), noting any substitutions or discrepancies.
4. Record quantities of damaged merchandise and set aside merchandise for charge back.
5. Verify accurate pricing, department number, SKU (Sales Keeping Unit), color, size, etc. on prepriced and tagged merchandise.
6. Prepare tickets for unmarked merchandise if necessary.
7. Follow company marking procedures to tag/price unmarked merchandise.
8. Attach security devices as required.
9. Report receipt of merchandise to appropriate personnel or enter information into inventory system.
10. Stage merchandise in proper location(s) for transfer to stock area or sales floor.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of unloading and checking incoming merchandise.

PRODUCT \_\_\_\_\_

Merchandise is checked in and readied for sales floor.

PROCESS \_\_\_\_\_

All performance elements for checking in new merchandise are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

- New merchandise
- Plan-o-gram
- Receiving/inventory system (computer or manual)
- Merchandising plan
- Store/company policy and procedures

## WORK TO BE PERFORMED

Receive merchandise on sales floor.

## PERFORMANCE CRITERIA

Merchandise is placed on sales floor according to plan-o-grams and store/company policy and procedures.

Time required to complete the skill varies depending on quantity/size of shipments received.

## PERFORMANCE ELEMENTS

1. Check stock carts/receiving area for new merchandise.
2. Check for merchandise returned from store's collection location.
3. Determine placement of merchandise within store using merchandise plan.
4. Place merchandise on display/fixture using plan-o-grams.
  - a. Compare new merchandise tags to existing stock. Address discrepancies.
  - b. Verify security devices are in place, if required.
  - c. Ensure all sizes, colors, styles, etc are represented on sales floor.
5. Place excess merchandise in alternate location (e.g., secondary display, stockroom, etc.).
6. Dispose of packing materials in designated location.
7. Remove stock carts from sales floor as quickly as possible to prevent accidents/incidents.
8. Verify merchandise signage (e.g., fixture signs, shelf tags, product tag, etc.) is correct.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of placing merchandise on sales floor in stockroom.

PRODUCT \_\_\_\_\_

Recently received merchandise is placed on floor or in stockroom.

PROCESS \_\_\_\_\_

All performance elements for placing merchandise on sales floor or in stockroom are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

**SKILL STANDARD**

CONDITIONS OF PERFORMANCE

**Given the following:**

- Plan-o-grams
- Inventory reports, aging reports, sales reports, etc.
- Dates on packaging
- Receiving/inventory system
- Store/company loss prevention procedures
- Store/company policy and procedures

WORK TO BE PERFORMED

Rotate and/or remove stock to prevent outdated/spoiled/damaged stock.

PERFORMANCE CRITERIA

Stock is rotated periodically and removed as needed.

Time required to complete the skill varies depending on inventory levels, merchandise plans and store procedures.

**PERFORMANCE ELEMENTS**

1. Review plan-o-gram and inventory reports.
2. Identify product areas in need of merchandise review.
3. Move older stock to front of display/fixture.
4. Identify merchandise past expiration date and remove.
5. Remove/relocate/mark down seasonal merchandise.
6. Remove spoiled/damaged stock.
7. Recommend outdated/spoiled/damaged stock for mark down, if applicable.
8. Dispose of outdated/spoiled/damaged stock (e.g., vendor/manufacture charge-backs, write-off and destroy, etc.) according to store/company procedures.
9. Ensure that losses due to spoilage are within company guidelines.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of rotating and removing stock.

PRODUCT \_\_\_\_\_

Stock is rotated and outdated/damaged stock is removed.

PROCESS \_\_\_\_\_

All performance elements for rotating and removing stock are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

- Inventory reports
- Customer requests
- Receiving/inventory system
- Store/company loss prevention procedures
- Store/company policy and procedures

WORK TO BE PERFORMED

Identify merchandise with low inventories to determine when it will be available for sale.

PERFORMANCE CRITERIA

Merchandise with low inventories/out-of-stocks is reviewed and appropriate action taken according to store/company policy and procedures.

Time required to complete the skill varies depending on number of items to check, reports to review and contacts required to determine merchandise status.

PERFORMANCE ELEMENTS

1. Identify merchandise with low inventory levels.
  - a. Review inventory reports or system.
  - b. Inspect sales floor for missing sizes, colors, etc.
  - c. Check customer requests for merchandise.
2. Verify location (e.g., misplaced, alternate display areas, etc) of merchandise.
3. Verify merchandise is not in stockroom, warehouse or receiving area.
4. Count on-hand merchandise.
5. Compare to inventory reports.
6. Check inventory reports for on-order quantities.
  - a. Check expected receipt dates of on-order amounts.
  - b. Contact appropriate party to order additional quantities, if needed.
7. Confirm merchandise distribution method (e.g., via distribution center, direct ship from vendor, etc.).
8. Contact distribution center/vendor to expedite shipping.
9. Contact another store location for potential transfer of merchandise.
10. Update inventory system.
11. Report unusual inventory movements/discrepancies to loss prevention/management.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of reviewing merchandise with low inventories/out-of-stocks.

PRODUCT \_\_\_\_\_

Merchandise with low inventories/out-of-stocks is reviewed.

PROCESS \_\_\_\_\_

All performance elements for reviewing merchandise with low inventories/out-of-stocks are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

**SKILL STANDARD**

**CONDITIONS OF PERFORMANCE**

**Given the following:**

- Inventory guidelines
- Inventory equipment and supplies
- Receiving/inventory system
- Inventory reports, aging reports, etc.
- Store/company inventory and loss prevention procedures
- Store/company policy and procedures

**WORK TO BE PERFORMED**

Participate in periodic (e.g., annual, semiannual, etc.) inventory.

**PERFORMANCE CRITERIA**

Periodic inventory is completed according to store/company policy and procedures.

Time required to complete the skill varies depending on inventory levels, shrinkage and store/company policy and procedures.

**PERFORMANCE ELEMENTS**

1. Prepare for periodic inventory.
  - a. Review store layout/plan-o-gram for locations to be inventoried.
  - b. Review store/company inventory procedures and relevant reports.
  - c. Locate merchandise to be inventoried.
  - d. Verify merchandise is ticketed with correct SKU (Sales Keeping Unit) and/or price.
2. Count merchandise (e.g., manually, with hand-held scanners, etc.).
3. Record count as required.
4. Proceed to next SKU/fixture, etc. to be inventoried.
5. Repeat process until assigned area is inventoried.
6. Turn in inventory counts for input, as required by inventory procedures.
7. Double check inventory counts as required.
8. Check periodic inventory reports for accuracy, questionable figures/values (e.g., negative amounts, unusually large or small amounts/discrepancies), etc.
9. Review reports and make adjustments and corrections, (e.g., adding in layaway merchandise, correcting incorrect data input, etc.) as needed.
10. Review shrinkage figures with loss prevention and store/company management.
11. Suggest ways to reduce shrinkage in future through inventory management, changes to daily inventory methods, or loss prevention.

**PERFORMANCE ASSESSMENT CRITERIA**

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Observe the performance of participating in periodic inventory process.

PRODUCT

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Periodic inventory is completed and reports reviewed.

PROCESS

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All performance elements for participating in periodic inventory process are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

- Requested merchandise
- Transfer forms
- Inventory report
- Receiving/inventory system
- Store/company policy and procedures

WORK TO BE PERFORMED

Transfer inventory between stores.

PERFORMANCE CRITERIA

Merchandise is transferred between stores according to store/company policy and procedures.

Time required to complete the skill varies depending on type of transfer and store/company policy and procedures.

PERFORMANCE ELEMENTS

1. Transfer merchandise to another store location.
  - a. Review requests for merchandise from sister store.
  - b. Locate requested merchandise.
  - c. Complete appropriate paperwork.
  - d. Place merchandise in appropriate area for shipping.
  - e. Enter stock transfer into inventory system.
2. Request merchandise transfer from another store location:
  - a. Review merchandise requests/outs (i. e., customer requests, reported outs, store reports, etc).
  - b. Verify merchandise is out -of-stock and not misplaced.
  - c. Check on-order status.
    - 1) Locate open orders with current ship dates.
    - 2) Verify shipping status of current open orders with vendor/manufacturer.
  - d. Locate store with needed merchandise.
  - e. Contact store to request merchandise transfer.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of transferring inventory between stores.

PRODUCT \_\_\_\_\_

Inventory is transferred between stores.

PROCESS \_\_\_\_\_

All performance elements for transferring inventory are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

- Merchandise (e.g., damaged and/or recalled merchandise, vendor agreements, etc.)
- Charge back/repair forms
- Inventory reports
- Receiving/inventory system
- Department of Transportation Hazardous Materials (DOT HazMat) standards/regulations
- Occupational Safety and Health Association (OSHA) standards/regulations
- Store/company policy and procedures

WORK TO BE PERFORMED

Charge back/return or send to repair facility damaged/recalled inventory.

PERFORMANCE CRITERIA

Merchandise is charged back/returned or sent to repair facility according to store/company policy and procedures and DOT HazMat standards/regulations.

Time required to complete the skill varies depending on store/company policy and procedures.

PERFORMANCE ELEMENTS

*Note: Individuals must be made aware of age restrictions for equipment used in the receiving area. Those under 18 can not operate certain types of equipment.*

1. Charge back/return item.
  - a. Verify reason for item charged back/returned (e.g., warranty issue, recall, vendor agreement or charge back issues, etc.) is legitimate.
  - b. Identify manufacturer/vendor of item.
  - c. Review manufacturer/vendor return/repair policy.
  - d. Obtain authorization for merchandise return/credit from manufacturer/vendor representatives.
  - e. Follow manufacturer/vendor directions for final disposition of or repair of merchandise (e.g., destroy locally, return to vendor, hold for pickup, etc.).
  - f. Complete appropriate paperwork.
  - g. Send completed paperwork to data entry for processing.

2. Send item to repair facility.
  - a. Verify reason/need for repair.
  - b. Complete repair tag/request form.
  - c. Contact repair facility.
  - d. Send merchandise to repair facility.
  - e. File paperwork in appropriate location for items at repair facility.
  - f. Receive repaired items according to policy.
  - g. Verify item is repaired.
  - h. Notify customer or return to store stock, as appropriate.
  - i. Send completed paperwork to data entry department for processing.

### PERFORMANCE ASSESSMENT CRITERIA

Observe the performance of returning damaged/defective inventory or sending it for repair.

OSHA standards/regulations are followed.

PRODUCT

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Damaged/defective inventory is returned to vendor or sent to repair facility.

PROCESS

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All performance elements for returning/repairing damaged/defective inventory are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Customer order  
 Shipping/delivery paperwork  
 Package pickup area/forms  
 Thank you cards, etc.  
 Receiving/inventory system  
 Store/company policy and procedures

## WORK TO BE PERFORMED

Fill customer orders.

## PERFORMANCE CRITERIA

Customer orders made via phone, e-mail, fax and e-commerce are filled according to store/company policy and procedures.

Time required to complete the skill varies depending on individual orders and store/company policy and procedures.

## PERFORMANCE ELEMENTS

1. Review customer order.
2. Select items to fill order.
3. Verify correct merchandise and quantity is being pulled.
4. Advise store management of any problems with order (e.g., out-of-stocks, back orders, substitutions, etc.).
5. Notify customer if there will be a delay or problem with filling order.
6. Secure payment for merchandise and other services provided (e.g., gift wrapping, shipping charges, etc.) from customer.
7. Package merchandise as directed (i.e., enclose receipts, gift wrapping, gift card, etc.)
8. Enclose thank-you card, catalog, promotional materials, etc. if applicable.
9. Take packages along with appropriate paperwork and shipping information to appropriate area of store for shipping/pickup.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of filling customer orders.

PRODUCT \_\_\_\_\_

Customer orders are filled and prepared for shipping/pickup.

PROCESS \_\_\_\_\_

All performance elements for filling customer orders are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Customer orders, pulled and prepared  
 Delivery vehicle or common carrier (e.g., trucking company,  
 Fed Ex, USPS, UPS, etc.)  
 Receiving/inventory system (computer or manual)  
 Store/company policy and procedures

## WORK TO BE PERFORMED

Ship/deliver orders to customer.

## PERFORMANCE CRITERIA

Customer orders are shipped/delivered according to store/company policy and procedures.

Time required to complete the skill varies depending on individual orders and store/company procedures.

## PERFORMANCE ELEMENTS

1. Identify perishable items.
2. Determine most appropriate and cost-effective means of shipment/delivery or customer requested method.
3. Advise customer and/or sales associate of any situations/conditions that may interfere with prompt and safe delivery of merchandise.
4. Prioritize shipments/deliveries as necessary.
5. Prepare shipment/delivery according to requirements.
6. Verify delivery time and availability of customer.
7. Prepare shipping/delivery documents.
8. Inspect shipment carefully for damage/proper packing before shipping/delivery to customer.
9. Complete and review store/company paperwork before package is given to carrier/customer.
10. Obtain customer/carrier signature and/or payment.
11. Send shipping paperwork to appropriate party for processing/filing.
12. Track shipment/delivery if necessary.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of shipping/delivering orders to customer.

PRODUCT

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Customer orders are shipped/delivered.

PROCESS

---

All performance elements for shipping/delivering orders to customer are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Customer order, pulled and prepared  
 Customer pickup schedule/procedures/documentation  
 Receiving/inventory system (computer or manual)  
 Store/company policy and procedures

## WORK TO BE PERFORMED

Store customer order for pickup.

## PERFORMANCE CRITERIA

Customer orders are stored for customer pick up according to store/company policy and procedures.

Time required to complete the skill varies depending on individual orders and store/company procedures.

## PERFORMANCE ELEMENTS

1. Review customer order information and pick up schedule.
2. Identify perishable and/or high-risk items.
3. Place customer order in a secure location (e.g., refrigerator/freezer items in cooler, high-risk items in safe/lock-up, etc.).
4. Ensure that the order is properly identified and that paperwork is noted with all storage locations.
5. Advise customer and/or sales associate of any situations/conditions that may interfere with pickup of merchandise (e.g., special store hours, out-of-stock items, etc.).
6. Pull order when customer comes to pick it up.
7. Verify outstanding payments (for merchandise and fees) have been made.
8. Inspect order for damage/spoilage before giving to customer.
9. Obtain customer signature, if required.
10. Complete and process store/company paperwork after order is given to customer.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of customer pickup orders being processed.

PRODUCT \_\_\_\_\_

Customer orders are picked up and processed.

PROCESS \_\_\_\_\_

All performance elements for processing pickups of customer orders are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

- Security/antitheft devices
- Loss prevention policy and procedures
- Store/company policy and procedures

WORK TO BE PERFORMED

Prevent potential theft of company assets.

PERFORMANCE CRITERIA

Situations of theft or potential theft are identified and actions taken to prevent situation according to store/company policy and procedures.

Time required to complete the skill varies due to ongoing nature of process.

PERFORMANCE ELEMENTS

1. Ensure security/antitheft devices are in place and functional.
2. Handle high-risk merchandise (e.g., jewelry, electronics, guns and ammunition, medication, high-dollar items, etc.) according to store procedures.
3. Provide quality customer service to deter shoplifting.
4. Account for all merchandise entering and leaving dressing rooms.
5. Observe customers and other associates for signs of suspicious behavior.
6. Report suspicious actions/activities of customers/associates to loss prevention including, but not limited to
  - a. Individual wearing out-of-season/oversized clothing (e.g., coat in summer, baggy pants, etc.),
  - b. Merchandise pulled off shelf/fixture indiscriminately,
  - c. Individuals looking constantly to see if they are being watched and/or looking quickly from one direction to another,
  - d. Groups using diversionary tactics (e.g., fainting, clumsiness, etc.) while accomplices grab merchandise, and
  - e. Individuals making repeated trips to same area of store, presumably until coast is clear to steal.
7. Follow store/company procedures for reporting/apprehending shoplifters.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of taking steps to prevent theft.

PRODUCT

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Areas of theft or potential theft are identified and steps are taken to prevent theft.

PROCESS

---

All performance elements for identifying and preventing theft are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

- Security/antitheft devices
- Loss prevention policy and procedures
- Store/company policy and procedures

WORK TO BE PERFORMED

Prevent potential loss of company assets.

PERFORMANCE CRITERIA

Areas of loss or potential loss are identified and actions taken to prevent loss according to store/company policy and procedures.

Time required to complete the skill varies due to ongoing nature of process.

PERFORMANCE ELEMENTS

1. Ensure security/antitheft devices are in place and functional.
2. Identify subdivisions/departments with high shrinkage percentages.
3. Review store/company reports (e.g., daily cash/register reports, price adjustment reports, inventory variance reports, receipt variance reports, etc.).
4. Review forms (e.g., charge back/returned goods, transfer, price change, void transactions, etc.) to ensure forms were completed correctly.
5. Determine potential reasons for high shrink areas.
6. Recommend actions to reduce shrinkage (e.g., update/add new procedures, provide/arrange additional training, etc.).
7. Document changes and distribute to appropriate parties.

PERFORMANCE ASSESSMENT CRITERIA

Observe the performance of identifying and preventing loss.

PRODUCT

Areas of loss or potential loss are identified and action is taken/recommended to prevent future loss.

PROCESS

All performance elements for identifying and preventing loss are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Security equipment (e.g., safety-deposit box, alarm system)  
 Security checklists and written standard operating procedures  
 Key control policy and procedures  
 Loss prevention and asset protection procedures  
 Security log  
 Security signage  
 Property policy and procedures

## WORK TO BE PERFORMED

Maximize property security.

## PERFORMANCE CRITERIA

Property security procedures are implemented according to store/company policy and procedures.

Skill is performed without error on an ongoing basis.

## PERFORMANCE ELEMENTS

1. Ensure property security equipment systems (e.g., alarms, security signage, emergency lighting, etc.) are functional.
2. Ensure store security procedures (e.g., for lost child, inclement weather, criminal activity, etc.) are followed.
3. Screen phone calls according to property policy and procedures.
4. Set/reset alarm systems.
5. Train associates on proper security procedures.
6. Monitor access points (e.g., service entrance, utility access).
7. Monitor parking areas.
8. Monitor public access areas and equipment (e.g., stairways, entry/exit areas, recreational areas, building equipment, furnishings).
9. Monitor internal transportation systems (e.g., elevators, escalators).
10. Identify potential security risks/violations.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of taking steps to maximize property security.

PRODUCT \_\_\_\_\_

All security risks/violations are identified.

PROCESS \_\_\_\_\_

All performance elements for maximizing guest and property security are critical.

**SKILL STANDARD**

CONDITIONS OF PERFORMANCE

**Given the following:**

- Dress code
- Local, state and federal standards/regulations
- Store/company policy and procedures

WORK TO BE PERFORMED

Maintain professional appearance.

PERFORMANCE CRITERIA

Professional appearance is maintained according to dress code and store/company policy and procedures.

Time required to complete the skill varies due to ongoing nature of process.

**PERFORMANCE ELEMENTS**

1. Review dress code.
2. Dress according to store/company dress code guidelines.
3. Ensure grooming habits conform to store/company policy and local, state and federal standards/regulations.
4. Wear required uniforms, hair restraints, clothing protectors, etc., as directed by local, state and federal standards/regulations and store/company policy.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the associate's performance of maintaining professional appearance.

PRODUCT

Professional appearance is maintained.

PROCESS

All performance elements for maintaining professional appearance are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Computer  
Trade magazines and other periodicals  
Industry trend information  
Store/company policy and procedures

## WORK TO BE PERFORMED

Keep up with industry trends.

## PERFORMANCE CRITERIA

Industry trends are identified and reported according to store/company policy and procedures.

Time required to complete the skill varies due to ongoing nature of process.

## PERFORMANCE ELEMENTS

1. Review sources of industry trend information (e.g., trade magazines, newspapers, annual reports, Internet, radio, television, etc.).
2. Maintain membership in professional organizations, if applicable.
3. Identify available training events that highlight new industry trends.
4. Compare store/company trends to those available at competitors' stores/companies.
5. Provide suggestions to meet new industry trends.

## PERFORMANCE ASSESSMENT CRITERIA

Observe the performance of keeping up with industry trends.

## PRODUCT

Industry trends are reported to supervisor/manager.

## PROCESS

All performance elements for keeping up with industry trends are critical. The level of an individual's position within the store/company may determine the importance of each step as it relates to that position.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

- Professional development plan for individuals
- List of career pathways
- Store/company goals/objectives
- Store/company policy and procedures

WORK TO BE PERFORMED

Set professional goals and objectives.

PERFORMANCE CRITERIA

Professional goals and objectives are developed according to store/company policy and procedures.

Time required to complete the skill varies due to ongoing nature of process.

PERFORMANCE ELEMENTS

1. Identify self-improvement opportunities.
2. List immediate, short-term and long-term goals (with time frames indicated) in plan, both professional and personal.
3. Develop goals/objectives that meet store/company goals/objectives.
4. Describe how those immediate, short-term and long-term goals will be attained/measured (e.g., attend related training sessions, continue formal education, take on additional responsibility, cross-train in other areas, etc.).
5. Discuss plan with supervisor/manager.
6. Record changes to plan.
7. Document plan.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of developing professional goals and objectives.

PRODUCT \_\_\_\_\_

Professional goals and objectives are identified.

PROCESS \_\_\_\_\_

All performance elements for developing professional goals and objectives are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

- Plan-o-grams
- Stocking supplies
- Cleaning supplies
- Task/to-do lists
- Store/company policy and procedures

WORK TO BE PERFORMED

Manage personal use of non-selling time to complete non-selling tasks such as replenishment, cleaning, updating store reports, etc.

PERFORMANCE CRITERIA

Non-selling time is used to complete other tasks according to store/company policy and procedures.

Time required to complete the skill varies due to ongoing nature of process.

PERFORMANCE ELEMENTS

1. Review task/to-do lists.
2. Inspect department for areas in need of replenishment, straightening, cleaning, etc.
3. Prioritize tasks and areas needing attention into one list.
4. Complete tasks in order of highest priority.
5. Document needed supplies, merchandise, etc. if on-hand materials are inadequate to fill display/fixture or complete task.
6. Provide list/details of completed and remaining tasks to supervisor/manager.
7. Communicate list of remaining tasks to next shift personnel.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of managing personal use of non-selling time.

PRODUCT

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Personal use of non-selling time is managed to complete non-selling responsibilities.

PROCESS

---

All performance elements for managing personal use of non-selling time are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

- Marketing product information
- Store/company information
- Store/company policy and procedures

WORK TO BE PERFORMED

Communicate with team members.

PERFORMANCE CRITERIA

Ideas and concerns are shared with team members according to store/company policy and procedures.

Time required to complete the skill varies due to ongoing nature of process.

PERFORMANCE ELEMENTS

1. Share ideas and information about selling, marketing products, customer feedback and loss prevention with fellow associates.
2. Share with fellow associates concerns and questions about products, services or policies/procedures.
3. Attend store/company meetings.
  - a. Share information regarding topic of meeting.
  - b. Share questions, thoughts, concerns and potential solutions to problems you have regarding topic of meeting.
  - c. Allow other associates to present their questions, thoughts, concerns and solutions.
  - d. Record meeting notes including any changes, resolutions, outcomes, etc.
4. Share meeting notes and/or outcomes with team members absent from meeting.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of communicating with team members.

PRODUCT \_\_\_\_\_

Communication with team members is maintained.

PROCESS \_\_\_\_\_

All performance elements for communicating with team members are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

# ASSIST COWORKERS TO MEET CUSTOMER NEEDS.

**IL.02.MR.ISRC.54**

WORK AS PART OF STORE/DEPARTMENT TEAM

## SKILL STANDARD

### CONDITIONS OF PERFORMANCE

**Given the following:**

Store/company policy and procedures

### WORK TO BE PERFORMED

Assist coworkers to meet customer needs.

### PERFORMANCE CRITERIA

Co-workers are assisted to meet customer needs according to store/company policy and procedures.

Time required to complete the skill varies due to ongoing nature of process.

## PERFORMANCE ELEMENTS

1. Identify all resources available to meet customer needs.
2. Instruct fellow associates on appropriate use of electronic systems (e.g., customer profile systems, e-mail, fax, etc.), where available, to gather information to meet customer needs.
3. Provide fellow associates and/or management with assistance to meet customer needs (e.g., how to operate equipment, etc.).
4. Assist fellow associate with sale as requested/necessary to better serve customer and store/company.

## PERFORMANCE ASSESSMENT CRITERIA

Observe the performance of assisting coworkers .

### PRODUCT

Coworkers are provided with assistance.

### PROCESS

All performance elements for assisting coworkers are critical.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

- Team members
- Situation/problem
- Store/company policy and procedures

WORK TO BE PERFORMED

Facilitate solution of work problems with team members.

PERFORMANCE CRITERIA

Work problems are solved using a team approach according to store/company policy and procedures.

Time required to complete the skill varies due to ongoing nature of process.

PERFORMANCE ELEMENTS

1. Identify work problems.
2. Obtain information about work problem from all parties involved.
3. Evaluate information to discern facts from behavior.
4. Explain problem to team members.
5. Identify potential solutions with team members.
6. Reach consensus for proper solutions.
7. Implement solutions.

PERFORMANCE ASSESSMENT CRITERIA

Observe the performance of facilitating the solution of work related problems with the team.

PRODUCT

Associate facilitates the solution of work-related problems with team members.

PROCESS

All performance elements for facilitating solutions of work-related problems with the team are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

**SKILL STANDARD**

**CONDITIONS OF PERFORMANCE**

**Given the following:**

- Team members
- Revised company/product information
- Training materials and equipment
- Store/company policy and procedures

**WORK TO BE PERFORMED**

Train/coach other team members.

**PERFORMANCE CRITERIA**

Team members are consistently trained and coached according to store/company policy and procedures.

Time required to complete the skill varies due to ongoing nature of process.

**PERFORMANCE ELEMENTS**

1. Assist with orientation of new associates.
2. Present new/revised information to fellow associates.
3. Ensure that all team members understand new/revised information.
4. Demonstrate proper ways to complete tasks using repetition to train team members.
5. Respond to questions from associates.
6. Encourage individual and team growth through communication and participation.
7. Offer encouragement and direction to make associates feel comfortable.
8. Remove barriers that may make associates uncomfortable.
9. Solicit feedback on effectiveness of training/coaching.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of training/coaching other team members.

**PRODUCT**

Team members are trained and coached.

**PROCESS**

All performance elements for training/coaching other team members are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Customers  
Feedback instruments  
Associates and supervisors/managers  
Store/company policy and procedures

## WORK TO BE PERFORMED

Seek assessment or feedback from various individuals including management, fellow associates and customers.

## PERFORMANCE CRITERIA

Assessment or feedback is sought according to store/company policy and procedures.

Time required to complete the skill varies due to ongoing nature of process.

## PERFORMANCE ELEMENTS

1. Request customers complete feedback instrument/survey to assess your performance.
2. Request fellow associates assess your performance and suggest improvements.
3. Request management feedback of your performance.
4. Identify areas needing improvement as suggested by customers, fellow associates and/or management.
5. Address areas needing improvement by attending training, obtaining additional product knowledge, etc.
6. Demonstrate improved product knowledge/performance techniques.
7. Share successes with team members to improve their knowledge/performance.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of seeking assessment/feedback.

PRODUCT

---

Assessment or feedback obtained from customers, fellow associates and management.

PROCESS

---

All performance elements for seeking assessment/feedback are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

Store/company policy and procedures

WORK TO BE PERFORMED

Perform supervisory transactions.

PERFORMANCE CRITERIA

Supervisory transactions are conducted correctly.

Time required to complete the skill varies.

PERFORMANCE ELEMENTS

1. Respond to pages from sales associates and cashiers immediately to prevent customer from waiting.
2. Review transaction (e.g., cash refund over certain dollar amounts, verification of ID for age-restricted sales, referred check or credit card, etc.) which needs supervisory approval.
3. Determine whether transaction should be approved per store/company policies.
4. Complete transaction using "key", special password, signature or other approval means required by store/company.
5. Manage all forms of cash handling (e.g., change requests, register checks, cash collection, processing cash refunds, till audits, etc.) on sales floor.

PERFORMANCE ASSESSMENT CRITERIA

Observe performance of completing supervisory transactions.

PRODUCT

Supervisory transactions are completed.

PROCESS

All performance elements for completing supervisory transactions are critical and must be performed in sequence.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

- Customer
- Local, state and federal standards/regulations
- Local, state and federal program policies and procedures
- Store/company policy and procedures

WORK TO BE PERFORMED

Resolve customer complaints/problems.

PERFORMANCE CRITERIA

Customer complaints/problems are resolved according to store/company policy and procedures.

Time required to complete the skill varies depending on complexity of complaint and/or problem.

PERFORMANCE ELEMENTS

1. Review all complaint forms, customer surveys and letters for complaints.
2. Review complaints for patterns/repeats and submit them to appropriate personnel; suggest resolutions to complaints.
3. Respond to pages immediately to prevent customer from waiting.
4. Review situation.
  - a. Listen to customer and store associate to determine facts.
  - b. Note store/company policy/procedures that are relevant to situation.
5. Restate complaint/problem to customer to ensure that problem is correctly defined.
6. Reassure customers that you will do everything you can to resolve situation.
7. Present solution(s) to complaint/problem which will meet customer needs.
8. Assist customer and store associate in selecting and executing solution.
9. Thank customer for bringing complaint/problem to your attention.
10. Thank associate for requesting your intervention.
11. Assure customer that complaint will be directed to appropriate personnel.
12. Refer customer to next level supervisor, if appropriate or if customer requests.
13. Contact security as required.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of resolving customer complaints/problems.

PRODUCT \_\_\_\_\_

Customer complaints/problems are resolved.

PROCESS \_\_\_\_\_

All performance elements for resolving customer complaints/problems are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

Company forms (corrective action, reporting, etc.)  
Local, state and federal standards/regulations  
Store/company policy and procedures

WORK TO BE PERFORMED

Promote compliance with discrimination and harassment standards/laws.

PERFORMANCE CRITERIA

Compliance with discrimination and harassment standards/regulations are encouraged through education and training according to store/company policy and procedures.

Time required to complete the skill varies based on training materials required and individual's awareness of existing standards/regulations.

PERFORMANCE ELEMENTS

1. Review relevant discrimination and harassment guidelines.
2. Conduct discrimination/harassment training for associates.
  - a. Provide handouts about discrimination/harassment.
  - b. Show company videos.
  - c. Outline corrective actions for violating store/company policy.
3. Recognize unlawful discrimination.
  - a. Note discrimination against customers and/or associates on basis of race, sex, national origin, age, religion, disabilities or any other personal characteristic.
  - b. Immediately intervene to prevent discriminatory behavior.
  - c. Instill in associates importance of preventing discriminatory behavior.
  - d. Model nondiscriminatory behavior.
4. Recognize harassment.
  - a. Note harassment against customers and/or associates.
  - b. Immediately intervene to prevent harassment.
  - c. Instill in associates importance of preventing harassment.
  - d. Model harassment-free behavior.
5. Report violations in writing to appropriate parties.
6. Take corrective action against associates who violate policy.
7. Complete appropriate documentation and file.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of promoting compliance with harassment and discrimination policies.

PRODUCT

---

Associates are trained to comply with harassment and discrimination standards/regulations.

PROCESS

---

All performance elements for promoting compliance with harassment and discrimination policies are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Safety equipment and systems  
 Safety materials and training  
 Personal protective equipment (PPE)  
 Safety checklists with standard operating policy and procedures  
 Material Safety Data Sheets (MSDS)  
 Chemical storage and labeling policy and procedures  
 Safety storage areas  
 Safety signage  
 Safety log  
 In-house property forms (e.g., safety status checklist, safety violation form, work order, etc.)  
 First aid kit  
 Disaster drill policy and procedures  
 Emergency evacuation plans  
 Local, state and federal regulations (e.g., National Fire Protection Association [NFPA] Standards, Occupational Safety and Health Administration [OSHA] Standards/regulations)  
 Annual OSHA record of work-related employee injuries and illnesses log (OSHA Log No. 200)  
 Store/company policy and procedures

## WORK TO BE PERFORMED

Maximize customer, associate and property safety.

## PERFORMANCE CRITERIA

All safety hazards that can cause falls, burns, cuts, poisoning or other accidents are eliminated. All safety violations are reported to designated staff. All safety violation documentation is completed.

All breaches of safety are reported immediately. Identification of potential safety risks is ongoing.

The skill is performed without error on an ongoing basis.

## PERFORMANCE ELEMENTS

1. Remove all electrical cords, objects or spills located where they could cause injury or damage.
2. Clean up or temporarily cover all spills on floors and work surfaces.
3. Replace frayed electrical cords.

4. Maintain appropriate fire extinguishers and fire protection equipment according to NFPA standards.
  - a. Check expiration dates on fire extinguishers.
  - b. Maintain fire protection equipment according to NFPA standards.
  - c. Ensure authorized service center maintains fire extinguishers yearly (e.g., recharging).
5. Store combustible materials away from ignition sources.
6. Store caustic or poisonous substances away from food preparation or serving areas.
7. Ensure store equipment is properly maintained and/or sanitized.
8. Ensure associates use proper PPE.
9. Ensure associates are trained and use equipment properly.
10. Ensure required MSDS sheets are updated and easily accessible.
11. Post evacuation plans for all stairwells and elevators.
12. Ensure all exit signs and warning indicators are in working order.
13. Maintain evacuation equipment (e.g., flashlights, light sticks, blankets).
14. Maintain first aid equipment, supplies, kits and systems.
15. Report all safety violations to designated staff.
16. Ensure exterior seasonal maintenance of walkways and parking areas is completed.
17. Ensure preventive measures (e.g., signage, carpet placement, vacuuming) are taken to prevent accidents during inclement weather.
18. Ensure maintenance of elevators and escalators is completed. equipment is fully trained and able to deal with emergencies.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of monitoring store safety.

OSHA standards/regulations are followed.

PRODUCT

All safety hazards and/or violations are identified and reported to appropriate parties and/or eliminated. Appropriate procedures for extreme weather conditions are followed.

PROCESS

All performance elements for monitoring store safety are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

**SKILL STANDARD**

**CONDITIONS OF PERFORMANCE**

**Given the following:**

- Property accident/incident response policy and procedures
- Accident/incident -specific checklists
- First aid kit
- Telephone
- Accident report and log
- Incident report and log
- Disaster policy and procedures
- Emergency call lists for
  - medical services      executive committee members
  - police department      emergency response team members
  - fire department      electrician
  - ambulance      plumber
  - general manager or manager on duty
- Emergency policy and procedures for
  - medical situations      civil disturbances
  - bomb threats      fire
  - robbery/theft      natural disasters

**WORK TO BE PERFORMED**

Follow accident/incident response procedures.

**PERFORMANCE CRITERIA**

All established procedures for handling accidents/incidents are followed.  
All accidents/incidents are reported to designated staff. Details of all accidents/incidents are logged and documented.

Skill is performed without error.

Time required to complete the skill varies depending on information required for documentation and the of accident/incident.

**PERFORMANCE ELEMENTS**

1. Assess accident/incident situation.
2. Determine seriousness of accident/incident.
3. Call emergency personnel if necessary.
4. Assist individual by most appropriate means.
5. Establish guest communication checkpoints as required.
6. Direct guests to temporary waiting areas as required.
7. Report accident/incident to designated staff or entity (e.g., workers' compensation, insurance, etc.).
8. Complete accident/incident documentation.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of implementing accident/incident response procedures.  
All insurance, local, state and federal regulations are followed.

PRODUCT

---

Accident/incident reports and logs are completed and reported to designated staff or entity. Emergency personnel are contacted as required.

PROCESS

---

All performance elements for implementing accident/incident response policy and procedures are critical. Performance element 2 is critical for determining which accident/incident response procedure(s) must be followed and who should be contacted.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

Store/company policy and procedures  
Local, state and federal standards/regulations

WORK TO BE PERFORMED

Communicate with/manage associates.

PERFORMANCE CRITERIA

Supervisor communicates with/manages associates according to store/company policy and procedures.

Skill is completed on an ongoing basis.

PERFORMANCE ELEMENTS

1. Communicate with associates using words, phrases and actions that do not alienate or offend.
2. Recognize and employ different ways of communicating effectively with each associate.
3. Use constructive feedback to help your associates do their job as well as expected.
4. Recognize associates' good efforts with timely, specific and sincere positive reinforcement, rewards, etc.
5. Treat all associates with equality and respect according to store/company policy and various government acts: Family Medical Leave Act, Fair Labor Standards Act, National Labor Relations Act and state and local labor laws.
6. Encourage teamwork and open communication to promote a positive work environment.
7. Encourage associates to take advantage of in-house and off-site training to further their personal and professional goals.
8. Inform associates of new/revised policies, procedures, programs, computer systems, merchandise lines, customer service initiatives, government regulations, etc.
9. Inform associates of merchandising plans, promotional plans, advertising, etc., which will effect their jobs/work load/scheduling.
10. Communicate store/company goals, both short-term and long-term in nature.
11. Explain company compensation and benefit information to associates.
12. Inform associates of contests or other sales motivation programs, especially for commissioned associates.
13. Solicit suggestions from associates for improving procedures, merchandise, customer relations, etc. Reward associates whose suggestions are used.
14. Distribute periodic communications (e.g., newsletter, e-mail, etc.) to associates.
15. Share information with other supervisors/managers/department heads as needed/required.

16. Review, respond to and take action on notes that associates have written to you.
17. Rotate responsibilities to cross-train associates.
18. Review associates' daily schedules and hours worked. Check time and attendance system for irregularities (e.g., consistent tardiness, higher than normal absences, breaks/lunches that exceed allocated time, etc.).

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of communicating with/managing associates.

PRODUCT

---

Supervisor communicates with/manages associates.

PROCESS

---

All performance elements for communicating with/managing associates are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

Associates  
Training materials  
Company guidelines and programs (e.g., marketing/advertising plans,  
plan-o-grams, etc.)  
Reporting forms  
Reward programs  
Local, state and federal standards/regulations  
Store/company policy and procedures

WORK TO BE PERFORMED

Review associates' ability to complete daily job responsibilities and expectations.

PERFORMANCE CRITERIA

Associates' daily performance and expectations are reviewed according to store/company policy and procedures.

Time required to complete the skill varies due to ongoing nature of process.

PERFORMANCE ELEMENTS

1. Inform associates of goals (e.g., sales goals, etc.), job responsibilities and performance expectations.
2. Delegate/provide tasks/task lists to associates. (Define task to be done, how task should be completed, standard you expect task to meet when completed and when you want task completed.)
3. Monitor associates' progress in achieving goals, job responsibilities and performance expectations and completing task assignments.
4. Review completed task lists.
5. Reward superior performance (e.g., superior customer service, high sales, high productivity, loss prevention and special projects, etc.) per store/company guidelines (e.g., gift certificate, medallion/pin/plaque, savings bond, cash bonus, recognition in newsletter, paid day off, etc.).
6. Encourage associates to take greater responsibility.
7. Correct associates when they are making mistakes/errors (e.g., ringing up wrong SKU ((Sales Keeping Unit) or price, placing merchandise in wrong location, etc.).
9. Communicate associates' performance/productivity observations, concerns and problems to store manager in a timely manner.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of reviewing associates' ability to complete tasks.

PRODUCT \_\_\_\_\_

Associates' performance of completing tasks is reviewed.

PROCESS \_\_\_\_\_

All performance elements for reviewing associates' ability to complete tasks are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

**Given the following:**

- Completed personnel paperwork
- Training area, equipment and supplies
- Training manuals/programs
- Local, state and federal standards/regulations
- Store/company policy and procedures

WORK TO BE PERFORMED

Conduct new hire orientation/training.

PERFORMANCE CRITERIA

Associates are oriented and trained according to store/company policy and procedures.

Time required to complete the skill varies according to store/company requirements.

PERFORMANCE ELEMENTS

1. Provide new associates with store/company policy and procedures.
2. Provide associates with company benefit guides, if applicable.
3. Introduce new associate to fellow associates.
4. Show new associate store layout, location of departments, functioning of phone system, etc.
5. Provide/review register training for new associate per store procedures.
6. Discuss performance standards expected of associates.
7. Discuss customer service standards expected of associates.
8. Review company/store policy procedures.
9. Assign new associate to a "buddy" (a seasoned, top performing associate) to ensure that new associate will receive on-the-job training.
10. Document training activities and forward to personnel.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of conducting new hire orientation/training.

PRODUCT \_\_\_\_\_

New hires complete training/orientation.

PROCESS \_\_\_\_\_

All performance elements for conducting new hire orientation/training are critical and must be performed in sequence.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Associate personnel file  
 Associate goals  
 Associate performance standards/job description  
 Associate review form  
 Company review schedule  
 Local, state and federal standards/regulations  
 Store/company policy and procedures

## WORK TO BE PERFORMED

Evaluate associate performance/productivity as directed by company schedule.

## PERFORMANCE CRITERIA

Associate performance/productivity is evaluated according to performance standards and store/company policy and procedures.

Time required to complete the skill varies depending on complexity of evaluation and company requirements.

## PERFORMANCE ELEMENTS

1. Review associate file for commendations, observations and/or disciplinary action taken during time period being evaluated.
2. Review associate progress in achieving individual and departmental goals.
3. Prepare associate performance evaluation based on objective performance measures.
4. Discuss evaluation, performance rating, merit wage increase and/or applicable bonuses/promotions with store management.
5. Conduct formal review of written evaluation with associate.
  - a. Communicate job responsibilities and performance expectations to associate.
  - b. Compare associate performance to expectations.
  - c. Create a performance improvement plan, if appropriate.
  - d. Inform associate of performance rating, wage increase, bonus and/or promotions as store policy allows.
6. Document associate response.
7. Obtain signature of associate, if required.
8. Complete evaluation paperwork and return to personnel.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of evaluating associate performance.

PRODUCT

---

Associate performance evaluation is completed and discussed with associate.

PROCESS

---

All performance elements for evaluating associate performance are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Base crew staffing  
 Salary budget  
 Union contract  
 Associate hours worked last year  
 Sales history and projections  
 List of holiday calendar shifts  
 Associate availability times  
 Associate time off requests  
 Current events calendar  
 Promotional calendar  
 Scheduling software or forms  
 Local, state and federal standards/regulations  
 Store/company policy and procedures

## WORK TO BE PERFORMED

Schedule associates to provide optimal coverage during peak selling periods.

## PERFORMANCE CRITERIA

Associates are scheduled according to store/company policy and procedures.

Time required to complete the skill varies according to size of work force to be scheduled.

## PERFORMANCE ELEMENTS

1. Review last year's information (e.g., sales, promotions, hours worked, holidays, etc.).
2. Review current year's projections/information (e.g., sales, promotions, hours worked, holidays, etc.).
3. Determine traffic patterns (e.g., season/month, peak hours, day of week, store hours, etc.).
4. Compare forecasted staffing requirements to base crew hours.
  - a. Determine sales per person per hour (SPH) rate.
  - b. Establish benchmark SPH based on your data and industry standards.
  - c. Determine total number of hours to schedule your associates for upcoming week by dividing forecasted weekly sales by SPH (dollar sales per associate per hour).
  - d. Estimate what percent of weekly sales is done on each day of week (e.g., 5 percent on Monday, 5 percent on Tuesday, 12 percent on Wednesday, etc.), using averaged historical sales information if possible.

- e. Calculate how many sales hours you need to staff each day of week by multiplying day of week sales percent by total allocated hours for week (calculated above). *(Note: If total hours per week is 2000, and Monday is 5 percent, then Monday needs  $2000 \times 5 \text{ percent} = 100$  hours of staffing.)*
- 5. Determine availability of associates to work taking into consideration vacation schedules, sick leave, training schedules, scheduling limitations of associates, etc.
- 6. Adjust base crew schedule to optimize coverage during peak selling times.
- 7. Schedule associates by the hour for each day of the week.
- 8. Post schedules.
- 9. Adjust schedules to account for absent associates, scheduling errors, current events, etc.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of scheduling associates.

|         |  |
|---------|--|
| PRODUCT |  |
|---------|--|

---

Associates are scheduled.

|         |  |
|---------|--|
| PROCESS |  |
|---------|--|

---

All performance elements for scheduling associates are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

- List of economic factors
- Calendar changes (major holidays)
- Trends (e.g., fashion, sales, etc.)
- Store/company sales projections
- Sales reports
- Store/company policy and procedures

## WORK TO BE PERFORMED

Establish sales projections/budget for designated area/period.

## PERFORMANCE CRITERIA

Sales projections/budget are established for designated area/period according to store/company policy and procedures.

Time required to complete the skill varies depending on size of designated area and number of factors to be considered.

## PERFORMANCE ELEMENTS

1. Review historical data (e.g., past sales, trends, weather, etc.).
2. Analyze current trends (e.g., sales, fashion, weather, etc.).
3. Identify holiday calendar changes for this year versus last year.
4. Compare economic factors (e.g., recession/growth period, business closings/openings, layoffs/increase in hiring, etc.).
5. Determine achievable sales projections.
6. Review sales projections with appropriate parties.
7. Revise sales projections as needed.
8. Record sales projections.
9. Distribute sales projections to appropriate parties.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of establishing sales projections/budget.

PRODUCT

---

Sales projections/budget are completed.

PROCESS

---

All performance elements for establishing sales projections/budget are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

## SKILL STANDARD

## CONDITIONS OF PERFORMANCE

**Given the following:**

Associate personnel file  
 Associate performance standards/job description  
 Union contract  
 Labor laws  
 Local, state and federal standards/regulations  
 Store/company policy and procedures

## WORK TO BE PERFORMED

Discipline/terminate associate.

## PERFORMANCE CRITERIA

Associate is disciplined/terminated according to labor contracts and/or store/company policy and procedures.

Time required to complete the skill varies depending on complexity of evaluation and company requirements.

## PERFORMANCE ELEMENTS

1. Identify disciplinary problem/issue.
2. Review associate file for previous disciplinary action related to current issue.
3. Determine prerequisites that must be met prior to initiating disciplinary and/or termination action.
4. Investigate and interview witnesses/affected persons.
5. Complete disciplinary/termination form.
6. Review disciplinary/termination action with appropriate parties (e.g., human resources department, attorney, store/district/regional manager, labor relations director, loss prevention department, etc).
7. Contact law enforcement as needed.
8. Discuss completed disciplinary/termination form with associate.
9. Create a performance improvement plan, if appropriate.
10. Document associate response.
11. Obtain signature of associate, if required.
12. Reevaluate need for disciplinary action/termination, if needed.
13. Discipline/terminate associate per store/company procedures.
14. Complete documentation and forward to appropriate parties/personnel.

**PERFORMANCE ASSESSMENT CRITERIA**

Observe the performance of disciplining and/or terminating associate.

PRODUCT

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Disciplining and/or termination of associate is completed and discussed with associate.

PROCESS

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All performance elements for disciplining and/or terminating associate are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

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| Academic Skills  | Skills (and related knowledge) contained in the subject areas and disciplines addressed in most national and state educational standards, including English, mathematics, science, etc.  |
| Assessment   | A process of measuring performance against a set of standards through examinations, practical tests, performance observations and/or the completion of work portfolios.  |
| Content Standard   | A specification of what someone should know or be able to do to successfully perform a work activity or demonstrate a skill.   |
| Critical Work Functions  | <p>Distinct and economically meaningful sets of work activities critical to a work process or business unit which are performed to achieve a given work objective with work outputs that have definable performance criteria. A critical work function has three major components:</p> <ul style="list-style-type: none"> <li>• <b>Conditions of Performance:</b> The information, tools, equipment and other resources provided to a person for a work performance.</li> <li>• <b>Work to Be Performed:</b> A description of the work to be performed.</li> <li>• <b>Performance Criteria:</b> The criteria used to determine the required level of performance. These criteria could include product characteristics (e.g., accuracy levels, appearance), process or procedure requirements (e.g., safety, standard professional procedures) and time and resource requirements. The IOSSCC requires that these performance criteria be further specified by more detailed individual performance elements and assessment criteria.</li> </ul> |
| Credentialing  | The provision of a certificate or award to an individual indicating the attainment of a designated set of knowledge and skills and/or the demonstration of a set of critical work functions for an industry/occupational area.   |
| Illinois Occupational Skill Standards and Credentialing Council (IOSSCC) | Legislated body representing business and industry which establishes skill standards criteria, endorses final products approved by the industry subcouncil and standards development committee and assists in marketing and dissemination of occupational skill standards.   |
| Industry   | Type of economic activity, or product or service produced or provided in a physical location (employer establishment). They are usually defined in terms of the Standard Industrial Classification (SIC) system.   |

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| Industry Subcouncil          | Representatives from business/industry and education responsible for identifying and prioritizing occupations for which occupational performance skill standards are adapted, adopted or developed. They establish standards development committees and submit developed skill standards to the IOSSCC for endorsement. They design marketing plans and promote endorsed skill standards across the industry. |
| Knowledge                    | Understanding the facts, principles, processes, methods and techniques related to a particular subject area, occupation or industry.  |
| Occupation                   | A group or cluster of jobs, sharing a common set of work functions and tasks, work products/services and/or worker characteristics. Occupations are generally defined in terms of a national classification system including the Standard Occupational Classification (SOC), Occupational Employment Statistics (OES) and the Dictionary of Occupational Titles (DOT).  |
| Occupational Cluster         | Grouping of occupations from one or more industries that share common skill requirements.   |
| Occupational Skill Standards | Specifications of content and performance standards for critical work functions or activities and the underlying academic, workplace and occupational knowledge and skills needed for an occupation or an industry/occupational area.   |
| Occupational Skills          | Technical skills (and related knowledge) required to perform the work functions and activities within an occupation.  |
| Par Levels                   | Par refers to a specific quantity of items kept in stock to ensure efficient operation. Par levels are set by property and/or corporate management based on calculations of past usage and projected occupancy.   |
| Performance Standard         | A specification of the criteria used to judge the successful performance of a work activity or the demonstration of a skill.  |
| Product Developer            | Individual contracted to work with the standard development committee, state liaison, industry subcouncil and IOSSCC for the adaptation, adoption or development of skill standards content.  |
| Reliability                  | The degree of precision or error in an assessment system so repeated measurements yield consistent results.   |

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| Skill                           | A combination of perceptual, motor, manual, intellectual and social abilities used to perform a work activity.   |
| Skill Standard                  | Statement that specifies the knowledge and competencies required to perform successfully in the workplace.   |
| Standards Development Committee | Incumbent workers, supervisors and human resource persons within the industry who perform the skills for which standards are being developed. Secondary and postsecondary educators are also represented on the committee. They identify and verify occupational skill standards and assessment mechanisms and recommend products to the industry subcouncil for approval. |
| State Liaison                   | Individual responsible for communicating information among all parties (e.g., IOSSCC, subcouncil, standard development committee, product developer, project director, etc.) in skill standard development.  |
| Third-Party Assessment          | An assessment system in which an industry-designated organization (other than the training provider) administers and controls the assessment process to ensure objectivity and consistency. The training provider could be directly involved in the assessment process under the direction and control of a third-party organization.                                      |
| Validity                        | The degree of correspondence between performance in the assessment system and job performance.   |
| Workplace Skills                | The generic skills essential to seeking, obtaining, keeping and advancing in any job. These skills are related to the performance of critical work functions across a wide variety of industries and occupations including problem solving, leadership, teamwork, etc.   |

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Margaret Blackshere

AFL-CIO

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Skip Douglas

Lucent Technologies

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Judith Hale

Hale Associates

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Terry Hoyland

Caterpillar University  
Caterpillar, Inc.

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Michael O'Neill

Chicago Building Trades Council

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Janet Payne

United Samaritans Medical Center

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Gene Rupnik

Hospitality Industry

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Jim Schultz

Illinois Retail Merchants Association  
Walgreen Company

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| Charlene Callison  | Department of Family & Consumer Services<br>Western Illinois University     |
| Lisa Catanzaro     | Field Director<br>Local 881 UFCW  |
| Cheryl Clark       | Handbag Selling Manager<br>Marshall Fields                                  |
| Joseph Cotey       | Education to Careers Coordinator<br>CPS Harper High School                  |
| Bill Cox           | President<br>Brown Drug Company   |
| Tim Drea           | Legislative Director<br>Local 881 UFCW                                      |
| Nancy Elich        | Corporate Recruiter<br>Crate & Barrel                                       |
| Louie Frame        | Director of Personnel<br>Kirlin's   |
| Mary Lee Krantz    | Vice President and Director of Operations<br>Fantastic Sams Hair Care Salon |
| Anne Marie Laures  | Corporate Manager, Human Resources Development Services<br>Walgreen Company |
| Debbie Miller      | Director of Organizational Development & Training<br>Schnuck's Supermarkets |
| Mary Lou Pritchard | Regional People & Learning Manager<br>Best Buy                              |
| Gary Rejebian      | VP/Marketing<br>Illinois Retail Merchants Association                       |
| Cindy Sanchez      | Region Human Resources Director<br>Carson Pirie Scott                       |
| Roger Schinderling | Training Manager<br>Niemann Foods   |
| Liz Sherlock       | Cosmetics Selling Manager<br>Marshall Fields                                |

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| Linda Spiwak     | Employment Manager<br>Jewel-Osco                   |
| Leonard Thomas   | District 114 Manager<br>Barnes & Noble, Inc.       |
| Winniefred Weber | Director of Training<br>Claire's Accessories       |
| Roger Uhe        | State Liaison<br>Illinois State Board of Education |

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| Dan Beal             | Manager Trainer<br>Footlocker   |
| Harold Bucy          | Store Manager<br>Barnes & Noble   |
| Lisa Cantanzaro      | Field Director<br>Local 881 UFCW  |
| Mary Beth DeJong     | Central States HR Director<br>Nordstrom                                     |
| Tim Drea             | Legislative Director<br>Local 881 UFCW                                      |
| Nancy Elich          | Corporate Recruiter<br>Crate & Barrel                                       |
| Beth Henderson-Wiley | Henderson's On State  |
| Mary Lee Krantz      | Vice President and Director of Operations<br>Fantastic Sams Hair Care Salon |
| Audrey Lee           | Regional Recruiter<br>K-Mart  |
| Sue Meske            | Assistant Store Manager<br>Carson Prairie Scott Company                     |
| Greg Montgomery      | Assistant Store Manager<br>Burlington Coat Factory                          |
| Dale Nichols         | District Manager<br>Footlocker  |
| Gina Salitore        | Regional Educator<br>Fantastic Sams Hair Care Salon                         |
| Yvonne Selzer        | Store Manager<br>Schnuck's Supermarket                                      |
| Cheryl Stevenson     | Training Supervisor<br>JC Penney, Inc.                                      |

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|---------------|---|
| Angie Whitney | Senior Merchandising Assistant (SMA)<br>JC Penney, Inc. |
| Sona Rejebian | Product Developer                                       |
| Roger Uhe     | State Liaison<br>Illinois State Board of Education      |

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| A. Developing an Employment Plan | <ol style="list-style-type: none"><li>1. Match interests to employment area.</li><li>2. Match aptitudes to employment area.</li><li>3. Identify short-term work goals.</li><li>4. Match attitudes to job area.</li><li>5. Match personality type to job area.</li><li>6. Match physical capabilities to job area.</li><li>7. Identify career information from counseling sources.</li><li>8. Demonstrate a drug-free status.</li></ol> |
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| B. Seeking and Applying for Employment Opportunities | <ol style="list-style-type: none"><li>1. Locate employment opportunities.</li><li>2. Identify job requirements.</li><li>3. Locate resources for finding employment.</li><li>4. Prepare a resume.</li><li>5. Prepare for job interview.</li><li>6. Identify conditions for employment.</li><li>7. Evaluate job opportunities.</li><li>8. Identify steps in applying for a job.</li><li>9. Write job application letter.</li><li>10. Write interview follow-up letter.</li><li>11. Complete job application form.</li><li>12. Identify attire for job interview.</li></ol> |
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| C. Accepting Employment | <ol style="list-style-type: none"><li>1. Apply for social security number.</li><li>2. Complete state and federal tax forms.</li><li>3. Accept or reject employment offer.</li><li>4. Complete employee's Withholding Allowance Certificate Form W-4.</li></ol> |
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| D. Communicating on the Job | <ol style="list-style-type: none"><li>1. Communicate orally with others.</li><li>2. Use telephone etiquette.</li><li>3. Interpret the use of body language.</li><li>4. Prepare written communication.</li><li>5. Follow written directions.</li><li>6. Ask questions about tasks.</li></ol> |
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| E. Interpreting the Economics of Work | <ol style="list-style-type: none"><li>1. Identify the role of business in the economic system.</li><li>2. Describe responsibilities of employee.</li><li>3. Describe responsibilities of employer or management.</li><li>4. Investigate opportunities and options for business ownership.</li><li>5. Assess entrepreneurship skills.</li></ol> |
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| F. Maintaining Professionalism | <ol style="list-style-type: none"><li>1. Participate in employment orientation.</li><li>2. Assess business image, products and/or services.</li><li>3. Identify positive behavior.</li><li>4. Identify company dress and appearance standards.</li><li>5. Participate in meetings in a positive and constructive manner.</li><li>6. Identify work-related terminology.</li><li>7. Identify how to treat people with respect.</li></ol> |
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| G. Adapting to and Coping with Change              | <ol style="list-style-type: none"> <li>1. Identify elements of job transition.</li> <li>2. Formulate a transition plan.</li> <li>3. Identify implementation procedures for a transition plan.</li> <li>4. Evaluate the transition plan.</li> <li>5. Exhibit ability to handle stress.</li> <li>6. Recognize need to change or quit a job.</li> <li>7. Write a letter of resignation.</li> </ol>  |
| H. Solving Problems and Critical Thinking          | <ol style="list-style-type: none"> <li>1. Identify the problem.</li> <li>2. Clarify purposes and goals.</li> <li>3. Identify solutions to a problem and their impact.</li> <li>4. Employ reasoning skills.</li> <li>5. Evaluate options.</li> <li>6. Set priorities.</li> <li>7. Select and implement a solution to a problem.</li> <li>8. Evaluate results of implemented option.</li> <li>9. Organize workloads.</li> <li>10. Assess employer and employee responsibility in solving a problem.</li> </ol> |
| I. Maintaining a Safe and Healthy Work Environment | <ol style="list-style-type: none"> <li>1. Identify safety and health rules/procedures.</li> <li>2. Demonstrate the knowledge of equipment in the workplace.</li> <li>3. Identify conservation and environmental practices and policies.</li> <li>4. Act during emergencies.</li> <li>5. Maintain work area.</li> <li>6. Identify hazardous substances in the workplace.</li> </ol>   |
| J. Demonstrating Work Ethics and Behavior          | <ol style="list-style-type: none"> <li>1. Identify established rules, regulations and policies.</li> <li>2. Practice cost effectiveness.</li> <li>3. Practice time management.</li> <li>4. Assume responsibility for decisions and actions.</li> <li>5. Exhibit pride.</li> <li>6. Display initiative.</li> <li>7. Display assertiveness.</li> <li>8. Demonstrate a willingness to learn.</li> <li>9. Identify the value of maintaining regular attendance.</li> <li>10. Apply ethical reasoning.</li> </ol> |
| K. Demonstrating Technological Literacy            | <ol style="list-style-type: none"> <li>1. Demonstrate basic keyboarding skills.</li> <li>2. Demonstrate basic knowledge of computing.</li> <li>3. Recognize impact of technological changes on tasks and people.</li> </ol>  |
| L. Maintaining Interpersonal Relationships         | <ol style="list-style-type: none"> <li>1. Value individual diversity.</li> <li>2. Respond to praise or criticism.</li> <li>3. Provide constructive praise or criticism.</li> <li>4. Channel and control emotional reactions.</li> <li>5. Resolve conflicts.</li> <li>6. Display a positive attitude.</li> <li>7. Identify and react to sexual intimidation/harassment.</li> </ol>  |
| M. Demonstrating Teamwork                          | <ol style="list-style-type: none"> <li>1. Identify style of leadership used in teamwork.</li> <li>2. Match team member skills and group activity.</li> <li>3. Work with team members.</li> <li>4. Complete a team task.</li> <li>5. Evaluate outcomes.</li> </ol>  |