

## QUALIFICATIONS PACK –NATIONAL OCCUPATIONAL STANDARDS FOR IT-BPM INDUSTRY

### What are National Occupational Standards (NOS)?

- NOS describe what individuals need to do, know and understand in order to carry out a particular job role or function
- NOS are performance standards that individuals must achieve when carrying out functions in the workplace, together with specifications of the underpinning knowledge and understanding

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## Introduction

### Qualifications Pack-Sales/Pre-Sales Executive

**SECTOR:** IT-ITes

**SUB-SECTOR:** Software Products

**OCCUPATION:** Sales & Marketing/Business Development

**REFERENCE ID:** SSC/Q6303

**ALIGNED TO NCO CODE:** NCO-2015/ 2434.0201

**Sales/Pre-Sales Executive** in the IT-ITes Industry is also known as a Business Development Associate, Product Consultant, Technical Consultant, Sales Executive, Business Development Executive, Presales Executive etc.

**Brief Job Description:** Individuals in this job are responsible for new business development by capturing and understanding the requirements and proposing the right solution. They manage relationships with various internal and external stakeholders to ensure inflow of required inputs. This role also involves supporting all aspects of the pre-sales cycle from requirements analysis to successful evaluation and solutioning.

**Personal Attributes:** This job requires the individual to work independently and be comfortable in making decisions pertaining to his/her area of work. The individual should be result oriented. The individual should also be able to

<b>Job Details</b>	<b>Qualifications Pack Code</b>	<b>SSC/Q6303</b>		
	<b>Job Role</b>	<b>Sales / Pre-Sales Executive</b> This job role is applicable in both national and international scenarios		
	<b>Credits(NSQF)</b>	<b>TBD</b>	<b>Version number</b>	<b>1.0</b>
	<b>Sector</b>	<b>IT-ITes</b>	<b>Drafted on</b>	<b>10/12/2013</b>
	<b>Sub-sector</b>	<b>Software Products</b>	<b>Last reviewed on</b>	<b>31/03/2017</b>
	<b>Occupation</b>	<b>Sales &amp; Marketing/Business Development</b>	<b>Next review date</b>	<b>31/03/2018</b>
	<b>NSQC Clearance on</b>	<b>05/08/2015</b>		

<b>Job Role</b>	<b>Sales/Pre-Sales Executive</b> (Business Development Associate, Product Consultant, Technical Consultant, Sales Executive, Business Development Executive, Presales Executive)
<b>Role Description</b>	Support business development activities such as coordination with stakeholders, creating proposals and bids for project sales.
<b>NSQF level</b>	7
<b>Minimum Educational Qualifications</b>	Bachelor's Degree in Management/Business/Science/Technology/Computers
<b>Maximum Educational Qualifications</b>	Master's Degree in Management/Business/Marketing
<b>Training</b> (Suggested but not mandatory)	Project Management, Technical Solutioning. Certification courses in SQL, JavaScript, .NET, HTTP, SAP
<b>Minimum Job Entry Age</b>	18 years
<b>Experience</b>	0-2 years of work experience/internship in Business Development
<b>Applicable National Occupational Standards (NOS)</b>	<b>Compulsory:</b> <ol style="list-style-type: none"> <li><a href="#">SSC/N1101 (Conduct marketing research and analysis for sales)</a></li> <li><a href="#">SSC/N1102 (Contribute to new business generation)</a></li> <li><a href="#">SSC/N1103 (Contribute to developing sales plans)</a></li> <li><a href="#">SSC/N1104 (Contribute to development of responses to RFIs and RFPs)</a></li> <li><a href="#">SSC/N1105 (Assist in collection of payments from clients)</a></li> <li><a href="#">SSC/N9001 (Manage your work to meet requirements)</a></li> <li><a href="#">SSC/N9002 (Work effectively with colleagues)</a></li> <li><a href="#">SSC/N9003 (Maintain a healthy, safe and secure working environment)</a></li> <li><a href="#">SSC/N9004 (Provide data/information in standard formats)</a></li> <li><a href="#">SSC/N9005 (Develop your knowledge, skills and competence)</a></li> </ol> <b>Optional:</b> Not Applicable
<b>Performance Criteria</b>	As described in the relevant NOS units

Definitions

Keywords /Terms	Description
Sector	Sector is a conglomeration of different business operations having similar businesses and interests. It may also be defined as a distinct subset of the economy whose components share similar characteristics and interests.
Sub-sector	Sub-sector is derived from a further breakdown based on the characteristics and interests of its components.
Vertical	Vertical may exist within a sub-sector representing different domain areas or the client industries served by the industry.
Occupation	Occupation is a set of job roles, which perform similar/related set of functions in an industry.
Function	Function is an activity necessary for achieving the key purpose of the sector, occupation, or area of work, which can be carried out by a person or a group of persons. Functions are identified through functional analysis and form the basis of OS.
Sub-functions	Sub-functions are sub-activities essential to fulfill the achieving the objectives of the function.
Job role	Job role defines a unique set of functions that together form a unique employment opportunity in an organization.
Occupational Standards (OS)	OS specify the standards of performance an individual must achieve when carrying out a function in the workplace, together with the knowledge and understanding they need to meet that standard consistently. Occupational Standards are applicable both in the Indian and global contexts.
Performance Criteria	Performance Criteria are statements that together specify the standard of performance required when carrying out a task.
National Occupational Standards (NOS)	NOS are Occupational Standards which apply uniquely in the Indian context.
Qualifications Pack Code	Qualifications Pack Code is a unique reference code that identifies a qualifications pack.
Qualifications Pack (QP)	Qualifications Pack comprises the set of OS, together with the educational, training and other criteria required to perform a job role. A Qualifications Pack is assigned a unique qualification pack code.
Unit Code	Unit Code is a unique identifier for an OS unit, which can be denoted with either an 'O' or an 'N'.
Unit Title	Unit Title gives a clear overall statement about what the incumbent should be able to do.
Description	Description gives a short summary of the unit content. This would be helpful to anyone searching on a database to verify that this is the appropriate OS they are looking for.
Scope	Scope is the set of statements specifying the range of variables that an individual may have to deal with in carrying out the function which have a critical impact on the quality of performance required.
Knowledge and	Knowledge and Understanding are statements which together specify the



Understanding	technical, generic, professional and organizational specific knowledge that an individual needs in order to perform to the required standard.
Organizational Context	Organizational Context includes the way the organization is structured and how it operates, including the extent of operative knowledge managers have of their relevant areas of responsibility.
Technical Knowledge	Technical Knowledge is the specific knowledge needed to accomplish specific designated responsibilities.
Core Skills/Generic Skills	Core Skills or Generic Skills are a group of skills that are key to learning and working in today's world. These skills are typically needed in any work environment. In the context of the OS, these include communication related skills that are applicable to most job roles.
Helpdesk	Helpdesk is an entity to which the customers will report their IT problems. IT Service Helpdesk Attendant is responsible for managing the helpdesk.

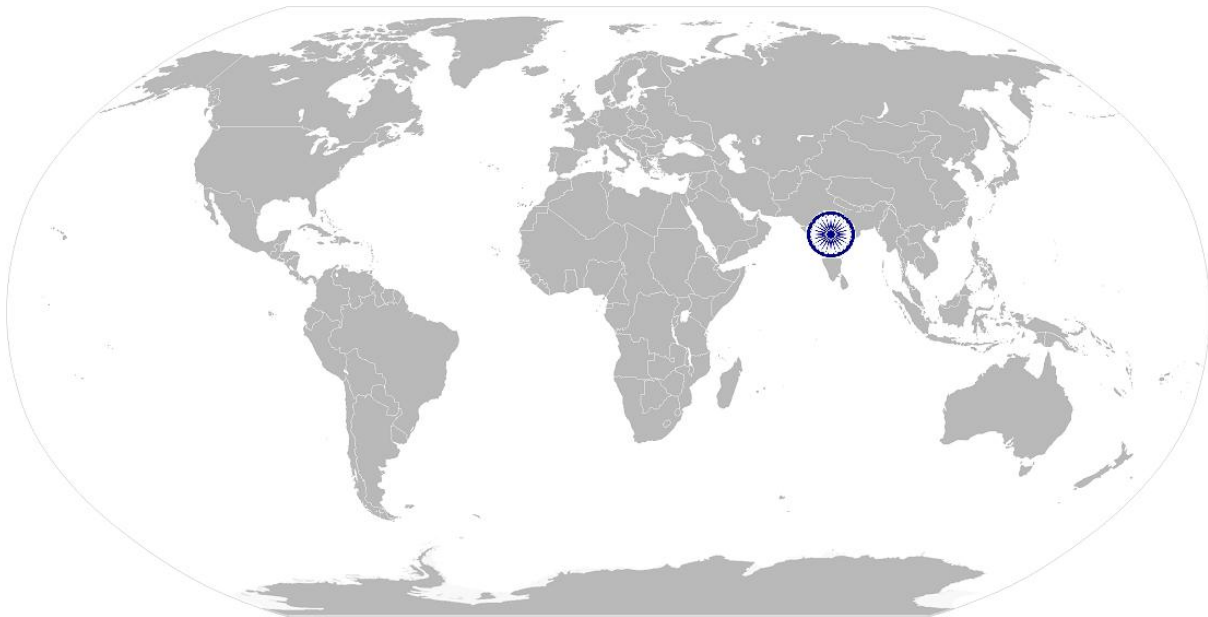
Acronyms

Keywords /Terms	Description
IT-ITeS	Information Technology - Information Technology enabled Services
BPM	Business Process Management
BPO	Business Process Outsourcing
KPO	Knowledge Process Outsourcing
LPO	Legal Process Outsourcing
IPO	Information Process Outsourcing
BCA	Bachelor of Computer Applications
B.Sc.	Bachelor of Science
OS	Occupational Standard(s)
NOS	National Occupational Standard(s)
QP	Qualifications Pack
UGC	University Grants Commission
MHRD	Ministry of Human Resource Development
MoLE	Ministry of Labor and Employment
NVEQF	National Vocational Education Qualifications Framework
NVQF	National Vocational Qualifications Framework
NSQF	National Skill Qualification Framework

SSC/N1101

Conduct marketing research and analysis for sales

# National Occupational Standard



## Overview

This unit is about carrying out research into markets for your organization's products/services and analyzing their potential for sales opportunities.

SSC/N1101

Conduct marketing research and analysis

Applicable NOS Unit	Unit Code	SSC/N1101
	Unit Title (Task)	Conduct marketing research and analysis for sales
	Description	This unit is about carrying out research into markets for your organization's products/services and analyzing their potential for sales opportunities.
	Scope	<p>This unit/task covers the following:</p> <p><b>Research and analysis into:</b></p> <ul style="list-style-type: none"> <li>geographical markets</li> <li>industry sectors</li> <li>market segments</li> <li>individual prospects</li> <li>competitors</li> </ul> <p><b>Appropriate people:</b></p> <ul style="list-style-type: none"> <li>line manager</li> <li>research requestors</li> <li>research commissioners</li> <li>subject matter experts</li> </ul> <p><b>Data/information:</b></p> <ul style="list-style-type: none"> <li>quantitative</li> <li>qualitative</li> </ul>
	Performance Criteria (PC) w.r.t. the Scope	
		<p>To be competent, you must be able to:</p> <p>PC1. establish clearly the objectives and scope of the <b>research and analysis</b> to meet the needs of the business</p> <p>PC2. obtain guidance from <b>appropriate people</b> within your organization to refine the <b>research and analysis</b> approach and methodology</p> <p>PC3. obtain relevant <b>data/information</b> from your organization's knowledge base and published reports to understand overall market/industry trends</p> <p>PC4. obtain relevant <b>data/information</b> on individual prospects and competitors from reliable secondary sources</p> <p>PC5. consolidate <b>data/information</b> correctly into standard templates and tools</p> <p>PC6. review <b>data/information</b> with <b>appropriate people</b> and incorporate their inputs</p> <p>PC7. conduct rule-based analysis on the <b>data/information</b> in line with procedures and draw inferences</p> <p>PC8. review your analysis and inferences with <b>appropriate people</b> and incorporate their inputs</p> <p>PC9. share agreed analysis and inferences with <b>appropriate people</b> using standard</p>



SSC/N1101

Conduct marketing research and analysis

	<p>templates and tools</p> <p>PC10. update the customer relationship management (CRM) database accurately with the findings</p>
<b>Knowledge and Understanding (K)</b>	
<p><b>A. Organizational Context</b> (Knowledge of the company/ organization and its processes)</p>	<p>You need to know and understand:</p> <p>KA1. your organization's specific policies and procedures which relate to conducting marketing research and analysis and the importance of following these</p> <p>KA2. your organization's knowledge base and how to access this</p> <p>KA3. your organization's products/services and those of competitor organizations</p> <p>KA4. the purpose of conducting research</p> <p>KA5. how to refine the research and analysis approach and methodology</p> <p>KA6. different sources of data/information</p> <p>KA7. limits of the research/analysis and the importance of keeping within these boundaries</p> <p>KA8. organizational policies and procedures for recording and sharing information and the importance of complying with these</p> <p>KA9. the range of standard templates and tools available and how to use these</p> <p>KA10. the purpose of the CRM database and how to use and update this</p>
<p><b>B. Technical Knowledge</b></p>	<p>You need to know and understand:</p> <p>KB1. different techniques used to obtain data/information for research and analysis and how to apply these</p> <p>KB2. the importance of validating data/information before use and how to do this</p> <p>KB3. how to carry out rule-based analysis on data/information</p> <p>KB4. different methods used to interpret the market/industry trends and how to select the methods best suited to the work being carried out</p> <p>KB5. the importance of reviewing data/information with others including the methods used to gather and collate feedback</p>
<b>Skills (S)</b>	
<p><b>A. Core Skills/ Generic Skills</b></p>	<p><b>Writing Skills</b></p> <p>You need to know and understand how to:</p> <p>SA1. communicate with others in writing</p> <p>SA2. complete accurate well written work with attention to detail</p> <p><b>Reading Skills</b></p> <p>You need to know and understand how to:</p> <p>SA3. read instructions, guidelines, procedures, rules and service level agreements</p> <p><b>Oral Communication (Listening and Speaking skills)</b></p> <p>You need to know and understand how to:</p> <p>SA4. ask for clarification and advice from others</p>

SSC/N1101

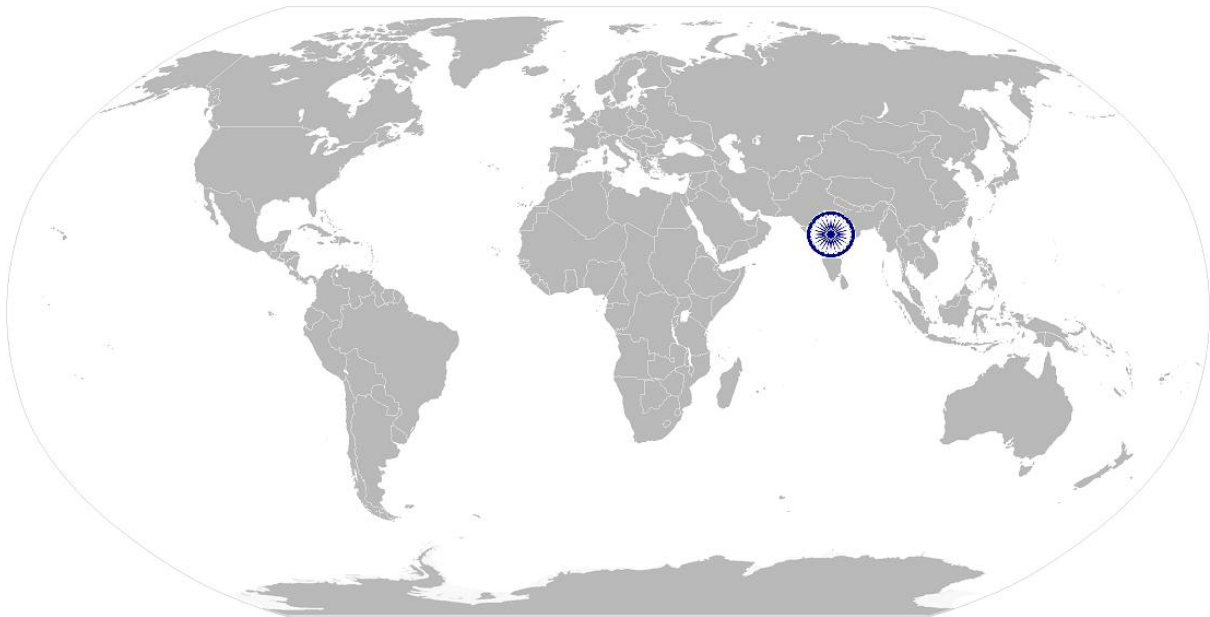
Conduct marketing research and analysis

	<p>SA5. listen effectively and orally communicate information accurately</p> <p>SA6. communicate with people in a positive and constructive manner</p>
<b>B. Professional Skills</b>	<p><b>Decision Making</b></p> <p>You need to know and understand how to:</p> <p>SB1. follow rule-based decision-making analysis</p> <p>SB2. make a decision on a suitable course of action</p> <p><b>Plan and Organize</b></p> <p>You need to know and understand how to:</p> <p>SB3. plan, organize and carry out your work to achieve targets and deadlines</p> <p><b>CustomerCentricity</b></p> <p>You need to know and understand how to:</p> <p>SB4. check that your own work meets customer requirements</p> <p>SB5. deliver consistent and reliable service to customers</p> <p>SB6. build and maintain positive and effective relationships with colleagues and stakeholders</p> <p><b>Problem Solving</b></p> <p>You need to know and understand how to:</p> <p>SB7. apply problem-solving approaches in different situations</p> <p><b>Analytical Thinking</b></p> <p>You need to know and understand how to:</p> <p>SB8. analyze data/activities</p> <p>SB9. apply balanced judgments to different situations</p> <p><b>Critical Thinking</b></p> <p>You need to know and understand how to:</p> <p>SB10. provide opinions on work in a detailed and constructive way</p> <p>SB11. apply balanced judgments to different situations</p> <p><b>Attention to Detail</b></p> <p>You need to know and understand how to:</p> <p>SB12. check your work is complete and free from errors</p> <p>SB13. get your work checked by peers</p> <p><b>Team Working</b></p> <p>You need to know and understand how to:</p> <p>SB14. work effectively in a team environment</p>
<b>C. Technical Skills</b>	<p>You need to know and understand how to:</p> <p>SC1. apply current techniques and methods for research and analysis</p> <p>SC2. use tools and software packages specific to your field of expertise</p> <p>SC3. identify and refer anomalies in data</p> <p>SC4. use information technology effectively to input and/or extract data accurately</p> <p>SC5. keep up to date with changes, procedures and practices in your role</p>



SSC/N1101

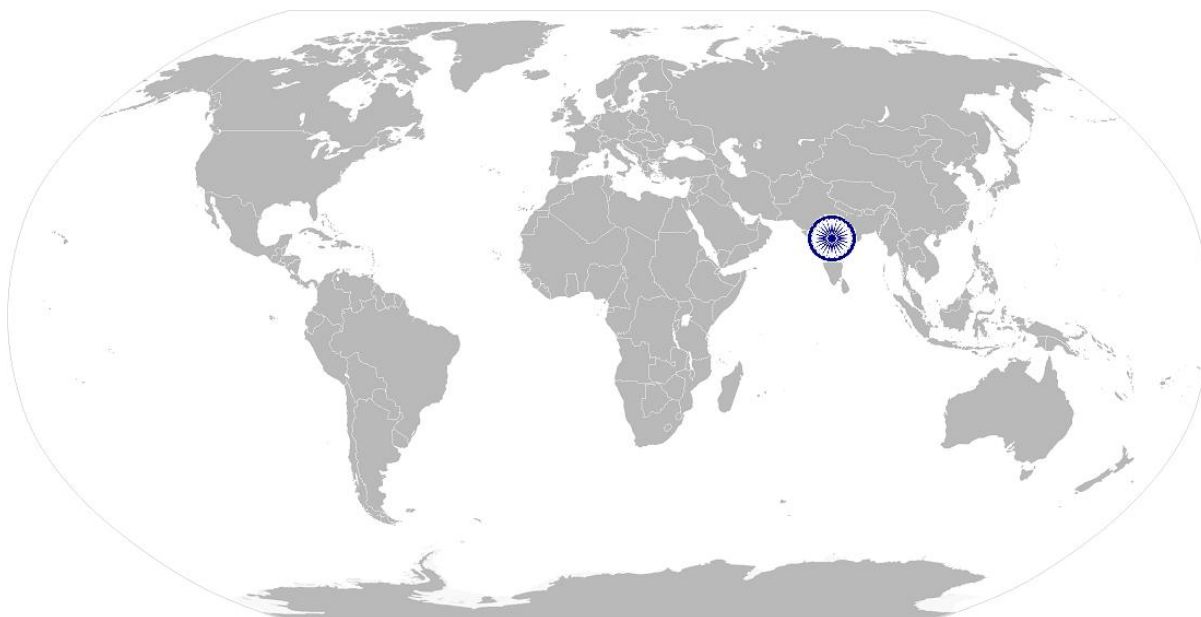
Conduct marketing research and analysis



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Conduct marketing research and analysis

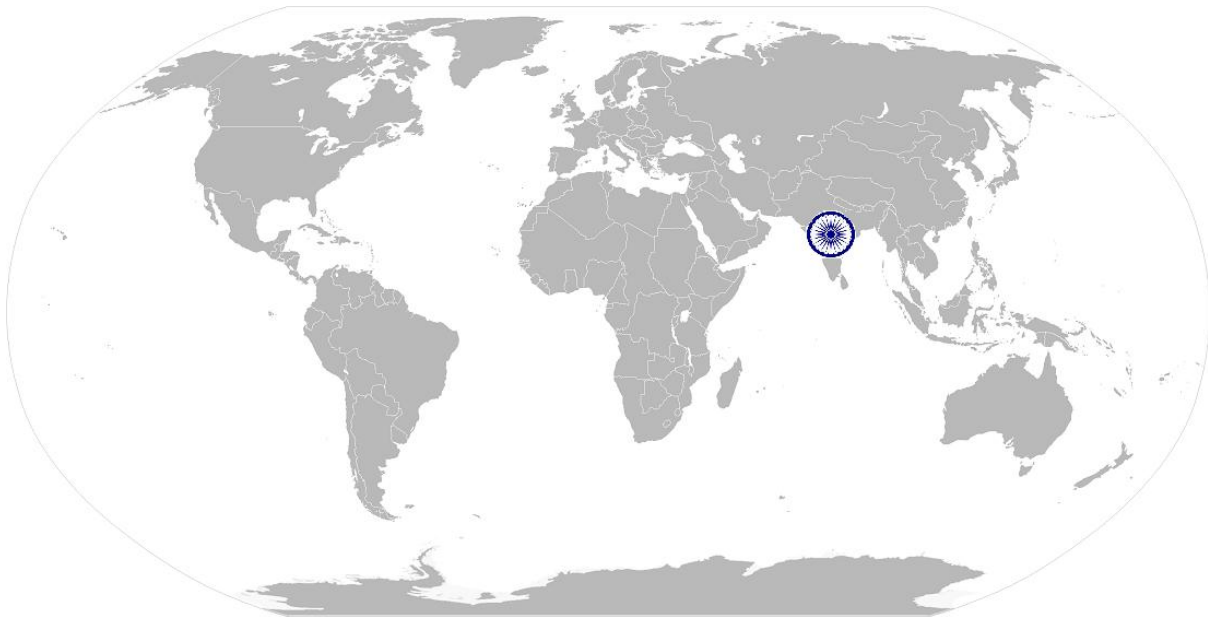
NOS Code	SSC/N1101		
Credits(NSQF)	TBD	Version number	1.0
Industry	IT-ITeS	Drafted on	30/04/2013
Industry Sub-sector	Software Products	Last reviewed on	31/01/2015
		Next review date	31/03/2016



SSC/N1102

Contribute to Business generation

# National Occupational Standard



## Overview

This unit is about making specific contributions to generating new business for your organization.

SSC/N1102

Contribute to Business generation

Applicable NOS Unit

Unit Code	SSC/N1102
Unit Title (Task)	Contribute to new business generation
Description	This unit is about making specific contributions to generating new business for your organization.
Scope	<p>This unit/task covers the following:</p> <p><b>Appropriate people:</b></p> <ul style="list-style-type: none"> <li>• line manager</li> <li>• colleagues</li> <li>• subject matter experts</li> </ul> <p><b>Communication modes:</b></p> <ul style="list-style-type: none"> <li>• face-to face</li> <li>• telephone</li> <li>• e-mail</li> <li>• webinars</li> <li>• referrals</li> </ul>
Performance Criteria (PC) w.r.t. the Scope	
	<p>To be competent, you must be able to:</p> <p>PC1. establish how you are required to contribute to generating new business in line with procedures</p> <p>PC2. obtain sufficient information from your organization's knowledge base and <b>appropriate people</b> to understand the markets you are operating in and your organization's or work group's sales plans</p> <p>PC3. obtain relevant information from the customer relationship management (CRM) database or other sources to create a database of suspects</p> <p>PC4. obtain sufficient information from the CRM database and <b>appropriate people</b> to understand the history of relationships with suspects</p> <p>PC5. contact suspects using the <b>communication modes</b> and at frequencies specified in sales plans</p> <p>PC6. communicate with suspects using approved scripts in line with your organization's business communication guidelines and standards</p> <p>PC7. convert suspects to new business prospects and clients as specified in sales plans</p> <p>PC8. record new business generation activities and suspect responses on the CRM database</p>
Knowledge and Understanding (K)	
A. Organizational Context (Knowledge of the	<p>You need to know and understand:</p> <p>KA1. your organization's policies, procedures and priorities for generating new business and your role in applying these</p>

SSC/N1102

Contribute to Business generation

company/ organization and its processes)	<p>KA2. your organization's knowledge base and how to access this</p> <p>KA3. the purpose of the CRM database and how to use this to record and extract information</p> <p>KA4. how to create and use a database of suspects</p> <p>KA5. information from within your organization about markets and sales plans</p> <p>KA6. your organization's guidelines and procedures for converting suspects to new business prospects and clients</p> <p>KA7. your organization's sales plans and the ways in which you must contribute to these</p>
<b>B. Technical Knowledge</b>	<p>You need to know and understand:</p> <p>KB1. different markets in which your organization operates</p> <p>KB2. market developments and competitive practices within the sector</p> <p>KB3. the range and purpose of communication modes used and how to apply these</p> <p>KB4. different scripts used to communicate with suspects and when to use these</p> <p>KB5. the importance of taking feedback from suspects and how to record this</p>
<b>Skills (S)</b>	
<b>A. Core Skills/ Generic Skills</b>	<b>Writing Skills</b>
	<p>You need to know and understand how to:</p> <p>SA1. communicate with colleagues and suspects in writing</p>
	<b>Reading Skills</b>
	<p>You need to know and understand how to:</p> <p>SA2. read instructions, guidelines, procedures, rules and service level agreements</p>
	<b>Oral Communication (Listening and Speaking skills)</b>
	<p>You need to know and understand how to:</p> <p>SA3. ask for clarification and advice from line managers</p> <p>SA4. communicate orally with colleagues and suspects</p> <p>SA5. listen effectively and orally communicate information accurately</p> <p>SA6. communicate with people in a positive and constructive manner</p>
<b>B. Professional Skills</b>	<b>Decision Making</b>
	<p>You need to know and understand how to:</p> <p>SB1. identify anomalies in data</p> <p>SB2. make a decision on a suitable course of action</p>
	<b>Plan and Organize</b>
	<p>You need to know and understand how to:</p> <p>SB3. plan and organize your work to achieve targets and deadlines</p>
	<b>CustomerCentricity</b>
	<p>You need to know and understand how to:</p> <p>SB4. check that your own work meets customer requirements</p>

SSC/N1102

Contribute to Business generation

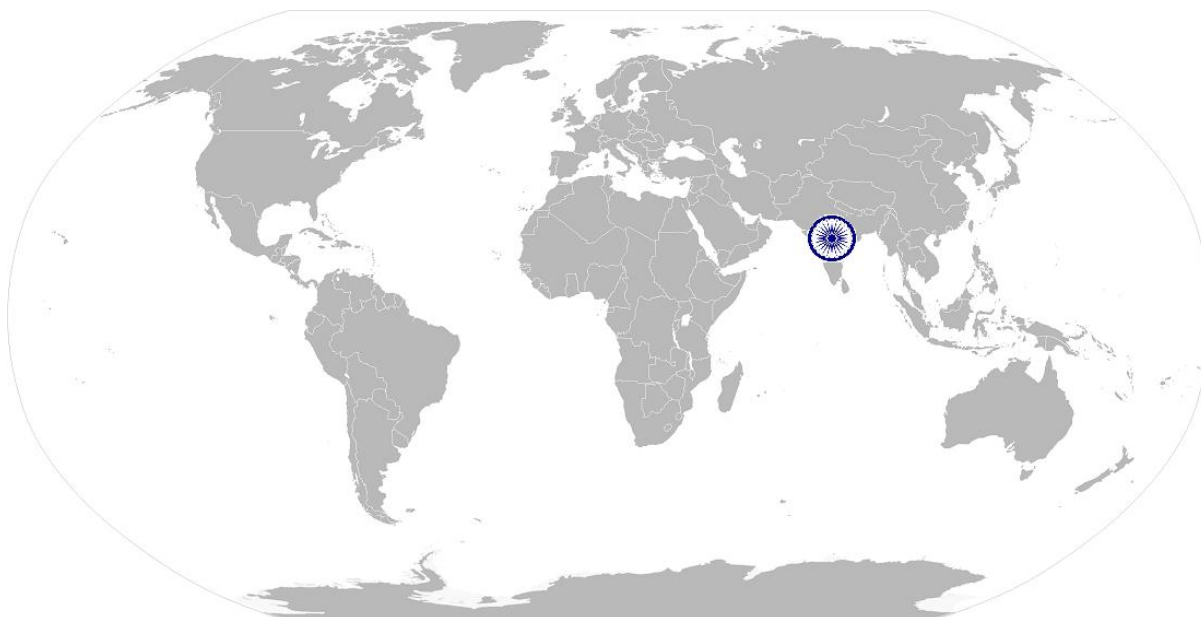
	SB5. work effectively in a customer facing environment
	SB6. deliver consistent and reliable service
	SB7. build and maintain positive and effective relationships with colleagues and stakeholders
	<b>Problem Solving</b>
	You need to know and understand how to:
	SB8. refer anomalies to the line manager
	<b>Analytical Thinking</b>
	You need to know and understand how to:
	SB9. analyze data and activity
	<b>Critical Thinking</b>
	You need to know and understand how to:
	SB10. apply balanced judgments to different situations
	<b>Attention to Detail</b>
	You need to know and understand how to:
	SB11. check your work is complete and free from errors
	SB12. get your work checked by peers
	<b>Team Working</b>
	You need to know and understand how to:
	SB13. work effectively in a team environment
<b>C. Technical Skills</b>	You need to know and understand how to:
	SC1. use information technology effectively, to input and/or extract data accurately
	SC2. keep up to date with changes, procedures and practices in your role



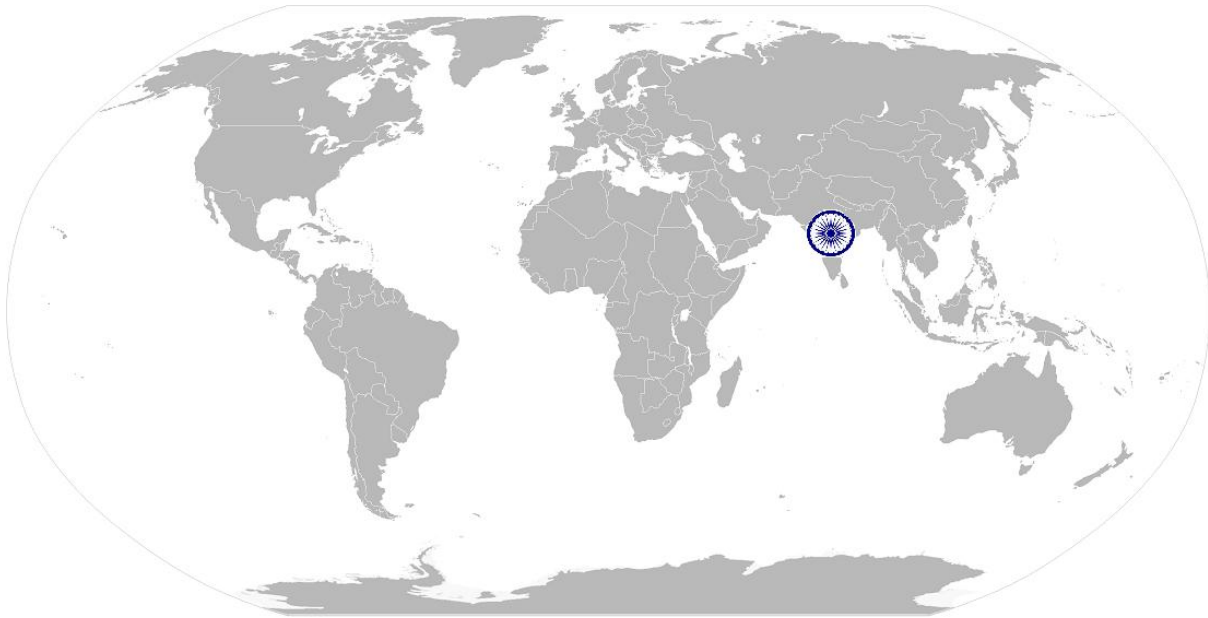
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## Contribute to Business generation

NOS Code	SSC/N1102		
Credits(NSQF)	TBD	Version number	1.0
Industry	IT-ITeS	Drafted on	30/04/2013
Industry Sub-sector	Software Products	Last reviewed on	31/01/2015
		Next review date	31/03/2016



# National Occupational Standard



## Overview

This unit is about developing sales plans for individual suspects, prospects and clients which in turn contribute to overall sales strategies and targets.

SSC/N1103

Contribute to developing sales plan

Applicable NOS Unit

Unit Code	SSC/N1103
Unit Title (Task)	Contribute to developing sales plans
Description	This unit is about developing sales plans for individual suspects, prospects and clients which in turn contribute to overall sales strategies and targets.
Scope	<p>This unit/task covers the following:</p> <p><b>Sales plans</b> for:</p> <ul style="list-style-type: none"> <li>• suspects</li> <li>• prospects</li> <li>• clients</li> </ul> <p><b>Appropriate people:</b></p> <ul style="list-style-type: none"> <li>• line manager</li> <li>• subject matter experts</li> </ul>
Performance Criteria (PC) w.r.t. the Scope	
	<p>To be competent, you must be able to:</p> <p>PC1. agree the activities you will undertake to contribute to the development of <b>sales plans</b></p> <p>PC2. obtain sufficient, up-to-date information from your organization's knowledge base and <b>appropriate people</b> to build a clear picture of actual sales, sales trends and targets for your organization/work group</p> <p>PC3. obtain sufficient, up-to-date information from your organization's knowledge base and secondary sources to build a clear picture of competitors' actual sales and sales trends</p> <p>PC4. obtain sufficient information from your organization's customer relationship management (CRM) system to understand past relationships and projects executed for particular clients</p> <p>PC5. obtain sufficient information from your organization's customer relationship management (CRM) system to identify existing research, analysis and inferences as a basis for sales plans</p> <p>PC6. identify suitable suspects, prospects and clients and the effective contact management approaches (mode and frequency of communication) for each one</p> <p>PC7. create effective draft <b>sales plans</b> using standards templates and tools in line with organizational procedures</p> <p>PC8. review draft <b>sales plans</b> with <b>appropriate people</b> and incorporate inputs to meet their requirements</p> <p>PC9. update the customer relationship management (CRM) database with the <b>sales plans</b></p>
Knowledge and Understanding (K)	

SSC/N1103

Contribute to developing sales plan

<b>A. Organizational Context</b> (Knowledge of the company/ organization and its processes)	You need to know and understand: KA1. your organization's policies, procedures and priorities for developing sales plans and your role in applying these KA2. your organization's business and marketing strategy and plans KA3. your organization's knowledge base and how to access this KA4. the purpose of the CRM database and how to use this to record and extract information KA5. different markets in which your organization operates KA6. information about: a. actual sales, sales trends and targets for your organization/work group b. competitors actual sales and sales trends c. past relationships and projects executed for particular clients d. market developments and competitive practices within the sector e. competitors plans within the market place, and the impact of this upon the organization f. existing research, analysis and inferences that can inform sales plans KA7. your organization's procedures and criteria for identifying suspects, prospects and clients KA8. the range of standard templates and tools available and how to use these
<b>B. Technical Knowledge</b>	You need to know and understand: KB1. how to create and review sales plans and the importance of doing this correctly KB2. ways in which information on past relationships and projects can help with future sales plans and the importance of using this information
<b>Skills (S)</b>	
<b>A. Core Skills/ Generic Skills</b>	<b>Writing Skills</b>
	You need to know and understand how to:
	SA1. communicate with colleagues regarding queries in writing SA2. complete accurate, well written work with attention to detail
	<b>Reading Skills</b>
	You need to know and understand how to:
	SA3. read instructions, guidelines, procedures, rules and service level agreements
<b>B. Professional Skills</b>	<b>Oral Communication (Listening and Speaking skills)</b>
	You need to know and understand how to:
	SA4. listen effectively and orally communicate information accurately
<b>B. Professional Skills</b>	<b>Decision Making</b>
	You need to know and understand how to:
	SB1. make a decision on a suitable course of action
<b>Plan and Organize</b>	

SSC/N1103

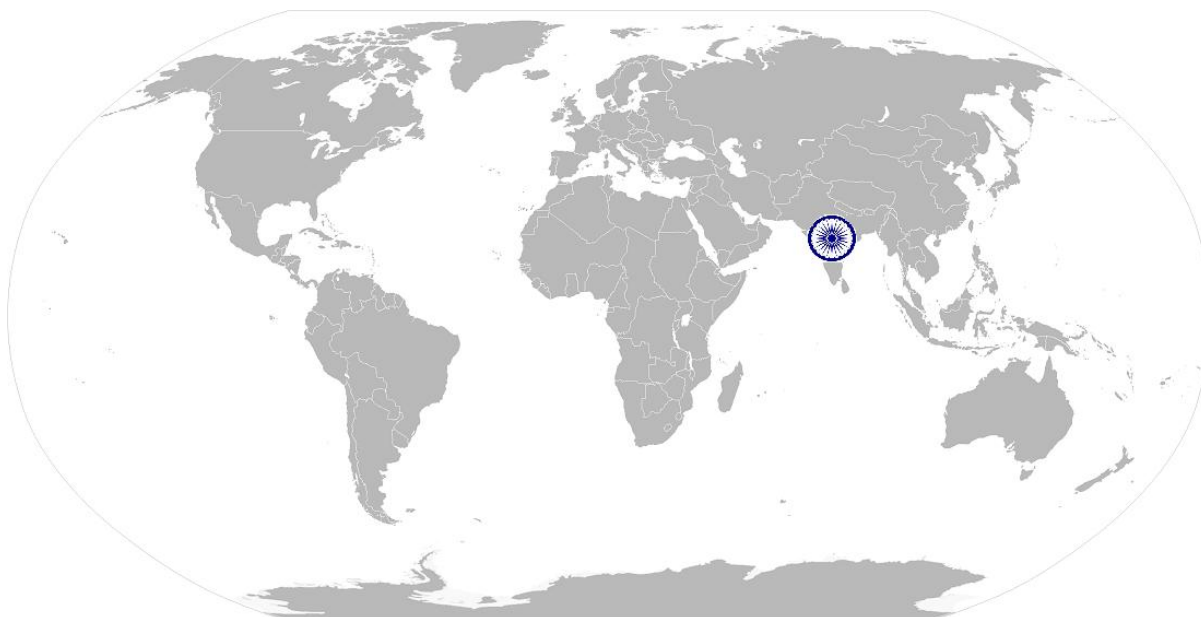
Contribute to developing sales plan

	You need to know and understand how to: SB2. plan and organize your work to achieve targets and deadlines
	<b>CustomerCentricity</b>
	You need to know and understand how to: SB3. check that your own work meets customer requirements SB4. work effectively in a customer facing environment
	<b>Problem Solving</b>
	You need to know and understand how to: SB5. apply problem solving approaches in different situations
	<b>Analytical Thinking</b>
	You need to know and understand how to: SB6. configure data and disseminate information to others SB7. analyze data and activity
	<b>Critical Thinking</b>
	You need to know and understand how to: SB8. apply balanced judgments to different situations
	<b>Attention to Detail</b>
	You need to know and understand how to: SB9. check your work is complete and free from errors SB10. get your work checked by peers
	<b>Team Working</b>
	You need to know and understand how to: SB11. work effectively in a team environment
<b>C. Technical Skills</b>	You need to know and understand how to: SC1. use information technology effectively to input and/or extract data accurately SC2. identify and refer anomalies in data SC3. keep up to date with changes, procedures and practices in your role

SSC/N1103  
NOS Version Control

Contribute to developing sales plan

NOS Code	SSC/N1103		
Credits(NSQF)	TBD	Version number	1.0
Industry	IT-ITeS	Drafted on	30/04/2013
Industry Sub-sector	Software Products	Last reviewed on	31/01/2015
		Next review date	31/03/2016

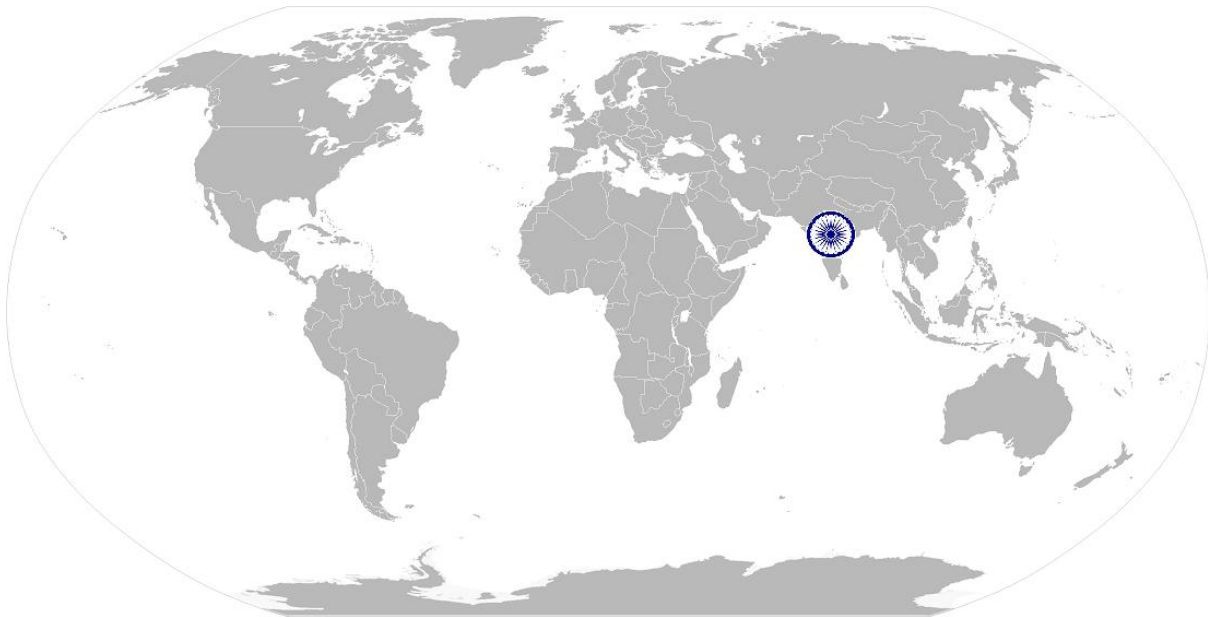




SSC/N1104

Contribute to development of responses to RFIs and RFPs

# National Occupational Standard



## Overview

This unit is about contributing to the development of responses to requests from clients for information about your organization (RFIs) or for specific proposals (RFPs).

SSC/N1104 Contribute to development of responses to RFIs and RFPs

Applicable NOS Unit


Unit Code	SSC/N1104
Unit Title (Task)	Contribute to development of responses to RFIs and RFPs
Description	This unit is about contributing to the development of responses to requests from clients for information about your organization (RFIs) or for specific proposals (RFPs).
Scope	<p>This unit/task covers the following:</p> <p><b>RFIs and RFPs from:</b></p> <ul style="list-style-type: none"> <li>clients</li> <li>prospects</li> </ul> <p><b>Appropriate people:</b></p> <ul style="list-style-type: none"> <li>line manager</li> <li>colleagues</li> <li>subject matter experts</li> </ul>
<b>Performance Criteria (PC) w.r.t. the Scope</b>	
	<p>To be competent, you must be able to:</p> <p>PC1. establish clearly your role and responsibilities in developing responses to <b>RFIs and RFPs</b></p> <p>PC2. read RFIs and RFPs carefully and discuss with <b>appropriate people</b> to gain a clear understanding of the requirements, process and timelines</p> <p>PC3. work with <b>appropriate people</b> to identify queries about RFIs and RFPs and gain clarification of these from the client, where required</p> <p>PC4. work with <b>appropriate people</b> to develop responses to RFIs and RFPs, referring to previous responses, where available</p> <p>PC5. work with partners and/or sub-contractors to agree their roles and responsibilities and obtain data/information required for RFIs and RFPs</p> <p>PC6. enter data/information accurately into standard templates for responses to RFIs and RFPs</p> <p>PC7. review draft responses with <b>appropriate people</b> to meet organizational guidelines</p> <p>PC8. consolidate the response documents, to comply with the requirements, process and timelines</p> <p>PC9. participate in pre-bid/client/proposal meetings, where required to provide relevant information on RFIs and RFPs</p> <p>PC10. update the customer relationship management (CRM) database with information about RFIs and RFPs to meet organizational guidelines</p>
<b>Knowledge and Understanding (K)</b>	
<b>A. Organizational Context</b> (Knowledge of the	<p>You need to know and understand:</p> <p>KA1. your organization's policies, procedures and priorities for developing responses to RFIs and RFPs and the roles and responsibilities of all those</p>

**SSC/N1104 Contribute to development of responses to RFIs and RFPs**

company/ organization and its processes)	involved in processing these KA2. the purpose and importance of RFIs and RFPs KA3. your organization's procedures for handling data and managing records KA4. standard templates and tools available and how to use these KA5. the purpose of the CRM database and how to use this to record information KA6. how to build and maintain relationships with stakeholders
<b>B. Technical Knowledge</b>	You need to know and understand: KB1. appropriate timescales for responding to RFIs and RFPs and the implications of non-compliance with these timescales for individuals and the organization KB2. the range of typical queries about RFI's and RFPs and the standard ways in which to respond and present these KB3. the range of partners and sub-contractors involved in responding to RFIs and RFPs and their roles KB4. the importance of collating responses about RFIs and RFPs and how to record these KB5. the purpose of pre-bid/client/proposal meetings and your role in these
<b>Skills (S)</b>	
<b>A. Core Skills/ Generic Skills</b>	<b>Writing Skills</b>
	You need to know and understand how to: SA1. communicate with colleagues regarding queries in writing SA2. complete accurate well written work with attention to detail
	<b>Reading Skills</b>
	You need to know and understand how to: SA3. read instructions, guidelines, procedures, rules and service level agreements
	<b>Oral Communication (Listening and Speaking skills)</b>
	You need to know and understand how to: SA4. communicate orally with stakeholders regarding queries SA5. listen effectively and orally communicate information accurately
<b>B. Professional Skills</b>	<b>Decision Making</b>
	You need to know and understand how to: SB1. make a decision on a suitable course of action
	<b>Plan and Organize</b>
	You need to know and understand how to: SB2. plan and organize your work to achieve targets and deadlines
	<b>CustomerCentricity</b>
	You need to know and understand how to: SB3. check that your own work meets customer requirements SB4. deliver consistent and reliable service to customers
	<b>Problem Solving</b>

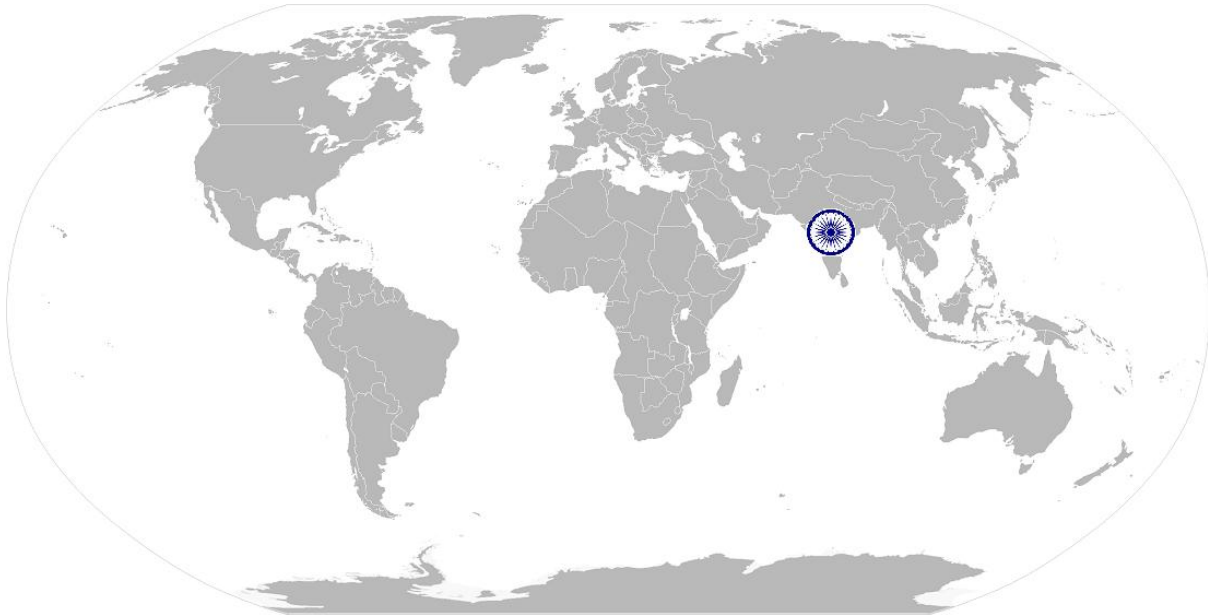
SSC/N1104

Contribute to development of responses to RFIs and RFPs

	You need to know and understand how to: SB5. identify and refer anomalies to the line manager SB6. apply problem solving approaches in different situations
	<b>Analytical Thinking</b>
	You need to know and understand how to: SB7. analyze information and activity SB8. configure data and disseminate information to relevant others
	<b>Critical Thinking</b>
	You need to know and understand how to: SB9. apply balanced judgments to different situations
	<b>Attention to Detail</b>
	You need to know and understand how to: SB10. check your work is complete and free from errors SB11. get your work checked by peers
	<b>Team Working</b>
	You need to know and understand how to: SB12. work effectively in a team environment
<b>C. Technical Skills</b>	You need to know and understand how to:  SC1. use information technology effectively to input and/or extract data accurately SC2. identify and refer anomalies in data SC3. keep up to date with changes, procedures and practices in your role

**SSC/N1104**      **Contribute to development of responses to RFIs and RFPs**  
NOS Version Control

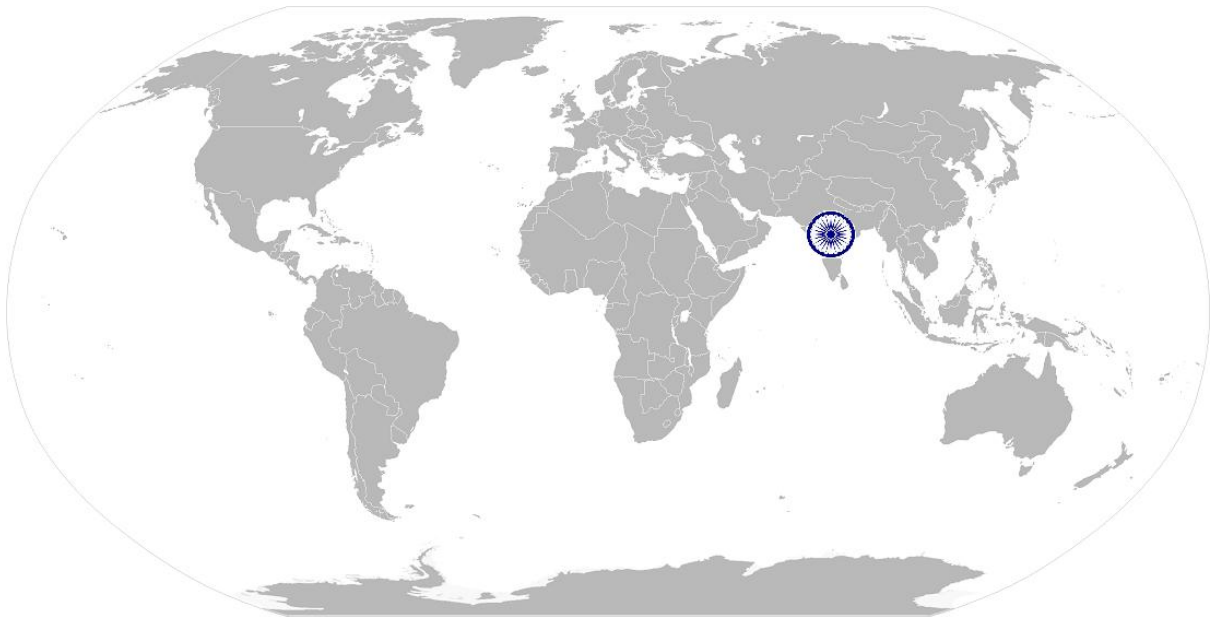
NOS Code	SSC/N1104		
Credits(NSQF)	TBD	Version number	1.0
Industry	IT-ITeS	Drafted on	30/04/2013
Industry Sub-sector	Software Products	Last reviewed on	31/01/2015
		Next review date	31/03/2016



SSC/N1105

Assist in collection of payments from clients

# National Occupational Standard



## Overview

This unit is about submitting invoices to corporate clients and making sure they pay these on time



SSC/N1105

Assist in collection of payments from clients

Applicable NOS Unit

Unit Code	SSC/N1105
Unit Title (Task)	Assist in collection of payment from clients.
Description	This unit is about submitting invoices to corporate clients and making sure they pay these on time.
Scope	<p>This unit/task covers the following:</p> <p><b>Agreed method:</b></p> <ul style="list-style-type: none"> <li>in person</li> <li>via registered post/courier</li> <li>electronically</li> </ul> <p><b>Appropriate people:</b></p> <ul style="list-style-type: none"> <li>line manager</li> <li>members of the delivery team</li> <li>members of the finance team</li> </ul>
<b>Performance Criteria (PC) w.r.t. the Scope</b>	
	<p>To be competent, you must be able to:</p> <p>PC1. check accuracy of invoices for work carried out on projects</p> <p>PC2. submit invoices to clients on time and through the <b>agreed method</b></p> <p>PC3. clarify relevant information on invoices in response to queries received from corporate clients</p> <p>PC4. pass queries outside your area of competence to <b>appropriate people</b> to resolve directly with corporate clients</p> <p>PC5. monitor approval and payment of invoices at milestones and due dates</p> <p>PC6. make courteous and authoritative requests to clients for timely approval and payment of invoices</p> <p>PC7. inform <b>appropriate people</b> of any delays in approval or payment of invoices and the reasons in line with organizational procedures</p> <p>PC8. file all documentation in a logical manner in line with organizational requirements</p>
<b>Knowledge and Understanding (K)</b>	
<b>A. Organizational Context</b> (Knowledge of the company/ organization and its processes)	<p>You need to know and understand:</p> <p>KA1. your organization's policies, processes and procedures for collecting and processing payments from corporate clients and your role in this</p> <p>KA2. standard procedures including method for requesting payments from corporate clients and the importance of following these</p> <p>KA3. different methods for processing invoices and how to use these</p> <p>KA4. relevant aspects of your organization's credit terms and where payments fall outside these terms</p>

SSC/N1105

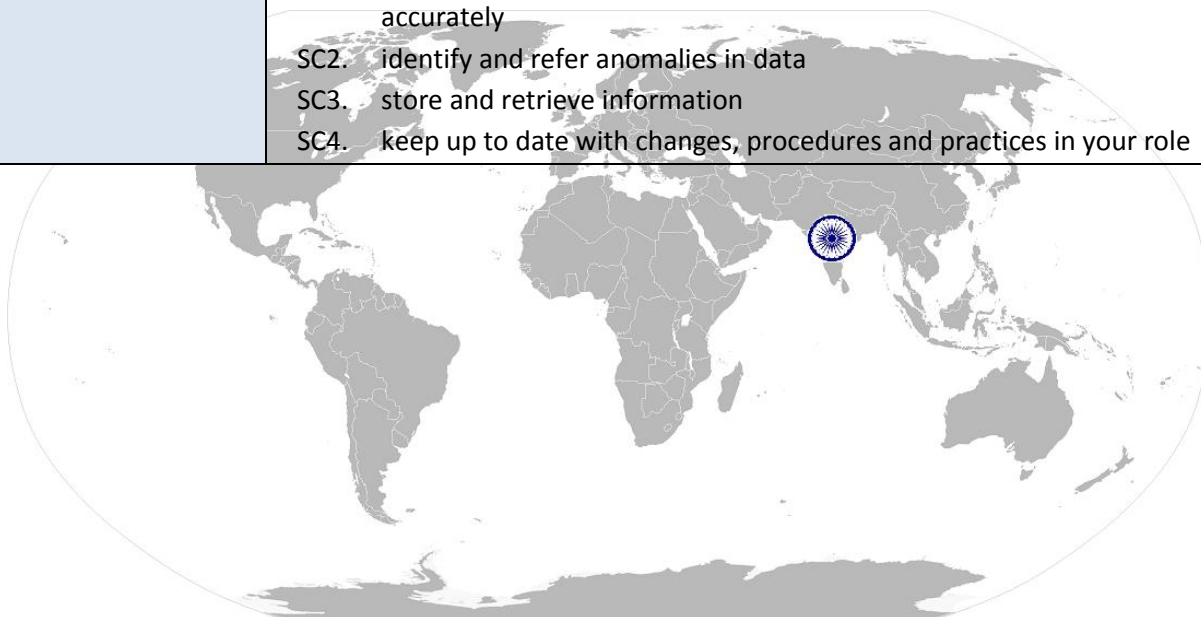
Assist in collection of payments from clients.

	<p>KA5. various methods of payment used by corporate clients and documentation required to process these</p> <p>KA6. your organization's procedures for filing and retrieving payment information</p>
<b>B. Technical Knowledge</b>	<p>You need to know and understand:</p> <p>KB1. how to identify the contract/work order relevant to the invoice</p> <p>KB2. typical types of queries received regarding invoices and the standard ways in which to respond to these</p> <p>KB3. types of queries that should be dealt with by others and who to pass these to</p> <p>KB4. how to monitor approvals and payments of invoices</p> <p>KB5. how to deal with different types of non-payments and problems</p> <p>KB6. how to spot and fraudulent transactions and who to report these to</p>
<b>Skills (S)</b>	
<b>A. Core Skills/ Generic Skills</b>	<b>Writing Skills</b>
	<p>You need to know and understand how to:</p> <p>SA1. communicate with clients regarding in writing</p> <p>SA2. complete accurate, well written work with attention to detail</p>
	<b>Reading Skills</b>
	<p>You need to know and understand how to:</p> <p>SA3. read instructions, guidelines, procedures, rules and service level agreements</p>
	<b>Oral Communication (Listening and Speaking skills)</b>
	<p>You need to know and understand how to:</p> <p>SA4. ask for clarification and advice from line managers</p> <p>SA5. communicate orally with clients and colleagues regarding queries</p>
<b>B. Professional Skills</b>	<b>Decision Making</b>
	<p>You need to know and understand how to:</p> <p>SB1. make a decision on a suitable course of action</p>
	<b>Plan and Organize</b>
	<p>You need to know and understand how to:</p> <p>SB2. plan and organize your work to achieve targets and deadlines</p>
	<b>CustomerCentricity</b>
	<p>You need to know and understand how to:</p> <p>SB3. check that your own work meets customer requirements</p> <p>SB4. work effectively in a customer facing environment</p>
	<b>Problem Solving</b>
	<p>You need to know and understand how to:</p> <p>SB5. apply problem solving approaches in different situations</p>
	<b>Analytical Thinking</b>
	<p>You need to know and understand how to:</p> <p>SB6. analyze data and activities</p>

SSC/N1105

Assist in collection of payments from clients.

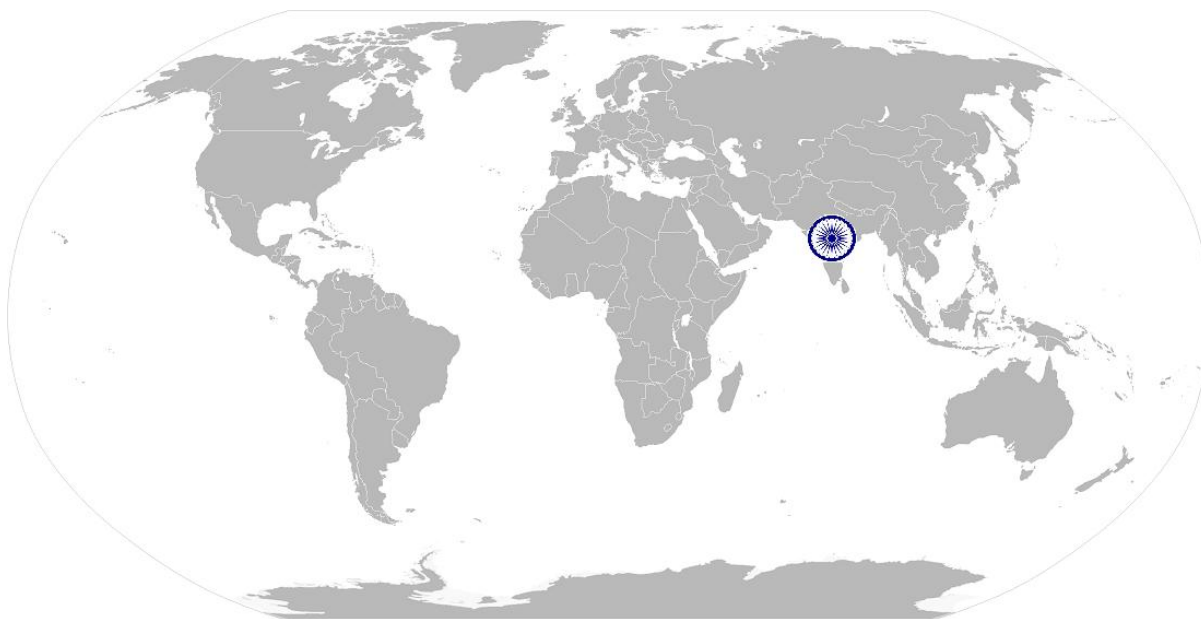
	<b>Critical Thinking</b>
	You need to know and understand how to: SB7. apply balanced judgments to different situations
	<b>Attention to Detail</b>
	You need to know and understand how to: SB8. check your work is complete and free from errors SB9. get your work checked by peers
	<b>Team Working</b>
	You need to know and understand how to: SB10. work effectively in a team environment
<b>C. Technical Skills</b>	You need to know and understand how to: SC1. use information technology effectively, to input and/or extract data accurately SC2. identify and refer anomalies in data SC3. store and retrieve information SC4. keep up to date with changes, procedures and practices in your role



SSC/N1105  
NOS Version Control

Assist in collection of payments from clients.

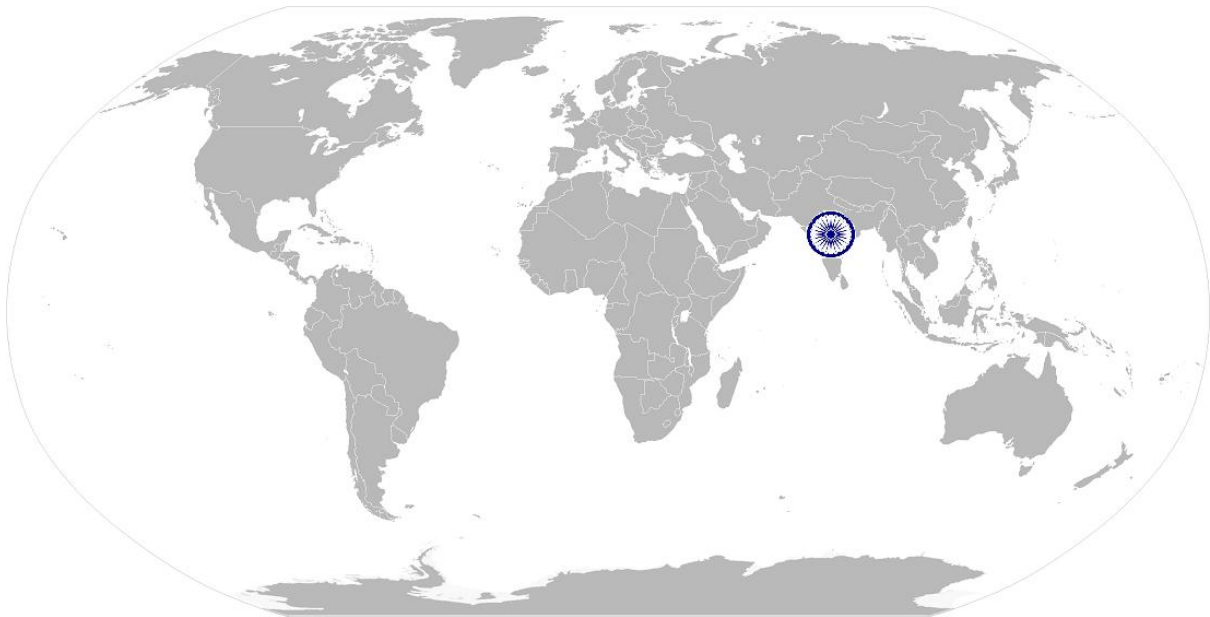
NOS Code	SSC/N1105		
Credits(NSQF)	TBD	Version number	1.0
Industry	IT-ITeS	Drafted on	30/04/2013
Industry Sub-sector	Software Products	Last reviewed on	31/01/2015
		Next review date	31/03/2016



SSC/N9001

Manage your work to meet requirements

# National Occupational Standard



## Overview

This unit is about planning and organizing your work in order to complete it to the required standards on time

SSC/N9001

Manage your work to meet requirements

Applicable NOS Unit

Unit Code	SSC/N9001
Unit Title (Task)	Manage your work to meet requirements
Description	This unit is about planning and organizing your work in order to complete it to the required standards on time.
Scope	<p>This unit/task covers the following:</p> <p><b>Work requirements:</b></p> <ul style="list-style-type: none"> <li>activities (what you are required to do)</li> <li>deliverables (the outputs of your work)</li> <li>quantity (the volume of work you are expected to complete)</li> <li>standards (what is acceptable performance, including compliance with Service Level Agreements)</li> <li>timing (when your work needs to be completed)</li> </ul> <p><b>Appropriate people:</b></p> <ul style="list-style-type: none"> <li>line manager</li> <li>the person requesting the work</li> <li>members of the team/department</li> <li>members from other teams/departments</li> </ul> <p><b>Resources:</b></p> <ul style="list-style-type: none"> <li>equipment</li> <li>materials</li> <li>information</li> </ul>
Performance Criteria (PC) w.r.t. the Scope	
	<p>To be competent on the job, you must be able to:</p> <p>PC1. establish and agree your <b>work requirements</b> with <b>appropriate people</b></p> <p>PC2. keep your immediate work area clean and tidy</p> <p>PC3. utilize your time effectively</p> <p>PC4. use <b>resources</b> correctly and efficiently</p> <p>PC5. treat confidential information correctly</p> <p>PC6. work in line with your organization's policies and procedures</p> <p>PC7. work within the limits of your job role</p> <p>PC8. obtain guidance from <b>appropriate people</b>, where necessary</p> <p>PC9. ensure your work meets the agreed <b>requirements</b></p>
Knowledge and Understanding (K)	
A. Organizational Context (Knowledge of the company/ organization and its processes)	<p>You need to know and understand:</p> <p>KA1. your organization's policies, procedures and priorities for your area of work and your role and responsibilities in carrying out your work</p> <p>KA2. limits of your responsibilities and when to involve others</p> <p>KA3. your specific work requirements and who these must be agreed with</p> <p>KA4. the importance of having a tidy work area and how to do this</p> <p>KA5. how to prioritize your workload according to urgency and importance and the benefits of this</p>



SSC/N9001

Manage your work to meet requirements

	<p>KA6. your organization's policies and procedures for dealing with confidential information and the importance of complying with these</p> <p>KA7. the purpose of keeping others updated with the progress of your work</p> <p>KA8. who to obtain guidance from and the typical circumstances when this may be required</p> <p>KA9. the purpose and value of being flexible and adapting work plans to reflect change</p>
<b>B. Technical Knowledge</b>	<p>You need to know and understand:</p> <p>KB1. the importance of completing work accurately and how to do this</p> <p>KB2. appropriate timescales for completing your work and the implications of not meeting these for you and the organization</p> <p>KB3. resources needed for your work and how to obtain and use these</p>
<b>Skills (S)</b>	
<b>A. Core Skills/ Generic Skills</b>	<b>Writing Skills</b>
	You need to know and understand how to:
	SA1. complete accurate work with attention to detail
	<b>Reading Skills</b>
	You need to know and understand how to:
	SA2. read instructions, guidelines, procedures, rules and service level agreements
<b>B. Professional Skills</b>	<b>Oral Communication (Listening and Speaking skills)</b>
	You need to know and understand how to:
	SA3. ask for clarification and advice from line managers
	SA4. communicate orally with colleagues
	<b>Decision Making</b>
	You need to know and understand how to:
	SB1. make a decision on a suitable course of action
	<b>Plan and Organize</b>
	You need to know and understand how to:
	SB2. plan and organize your work to achieve targets and deadlines
	SB3. agree objectives and work requirements
	<b>CustomerCentricity</b>
	You need to know and understand how to:
	SB4. deliver consistent and reliable service to customers
	SB5. check that your own work meets customer requirements
	<b>Problem Solving</b>
	You need to know and understand how to:
	SB6. refer anomalies to the line manager
	SB7. seek clarification on problems from others
	<b>Analytical Thinking</b>

SSC/N9001

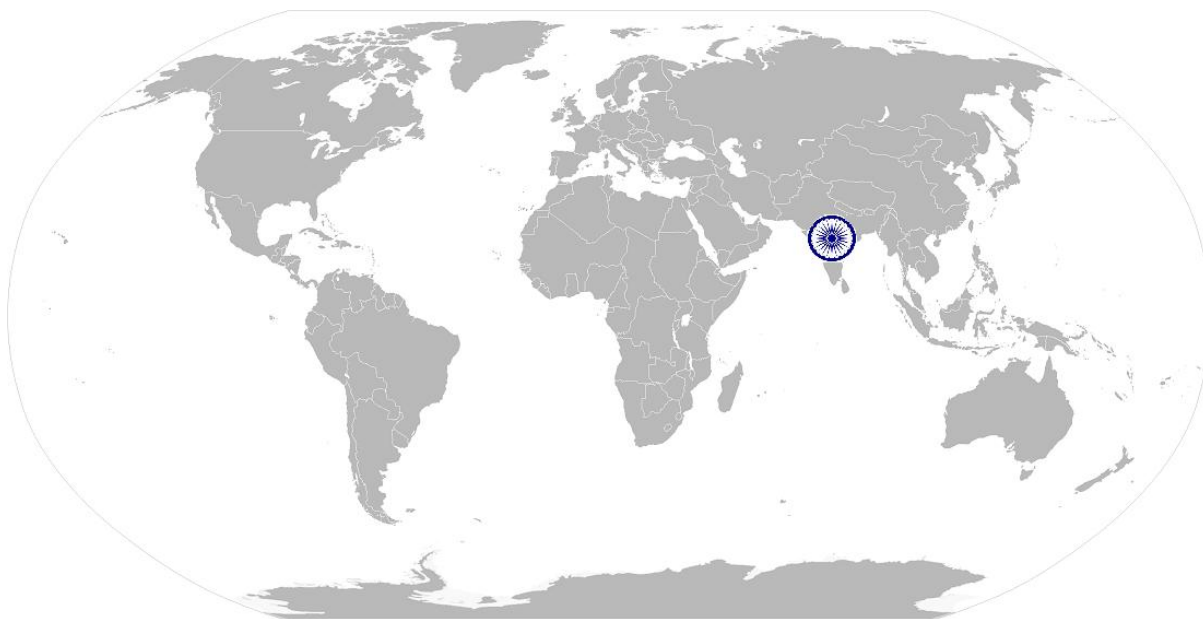
Manage your work to meet requirements

	You need to know and understand how to: SB8. provide relevant information to others SB9. analyze needs, requirements and dependencies in order to meet your work requirements
	<b>Critical Thinking</b>
	You need to know and understand how to: SB10. apply judgments to different situations
	<b>Attention to Detail</b>
	You need to know and understand how to: SB11. check your work is complete and free from errors SB12. get your work checked by peers
	<b>Team Working</b>
<b>C. Technical Skills</b>	You need to know and understand how to: SB13. work effectively in a team environment
	You need to know and understand how to: SC1. use information technology effectively, to input and/or extract data accurately SC2. identify and refer anomalies in data SC3. store and retrieve information SC4. keep up to date with changes, procedures and practices in your role

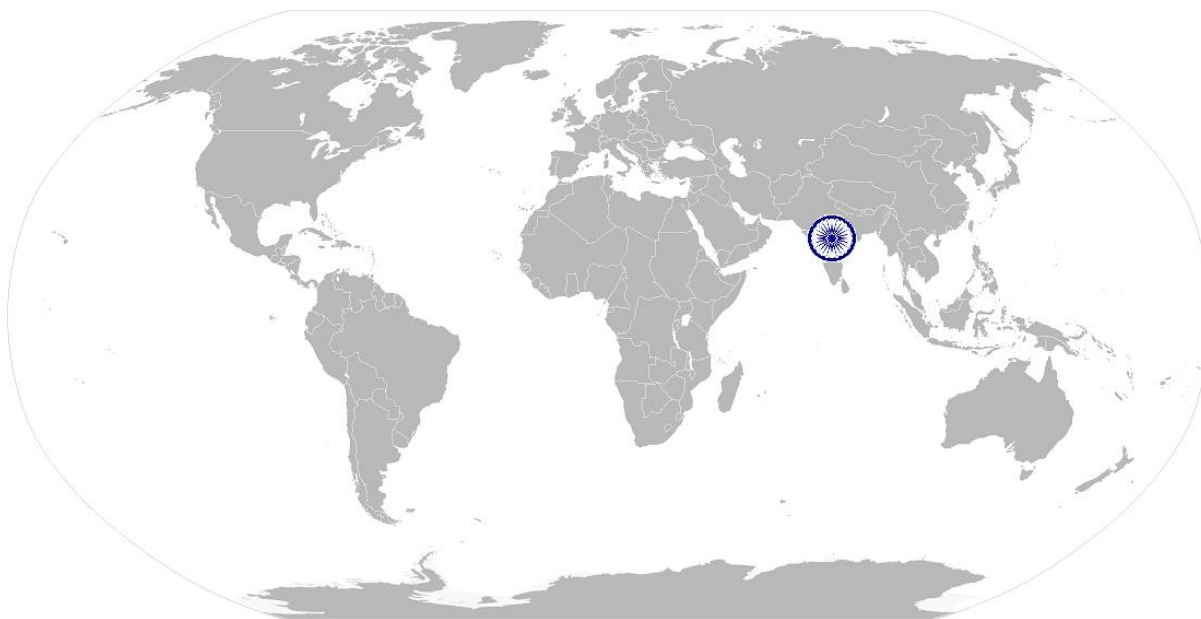
**SSC/N9001**  
**NOS Version Control**

**Manage your work to meet requirements**

NOS Code	SSC/N9001		
Credits(NSQF)	TBD	Version number	1.0
Industry	IT-ITeS	Drafted on	30/04/2013
Industry Sub-sector	Software Products	Last reviewed on	31/01/2015
		Next review date	31/03/2016



# National Occupational Standard



## Overview

This unit is about working effectively with colleagues, either in your own work group or in other work groups within your organization.

SSC/N9002

Work effectively with colleagues

Applicable NOS Unit

Unit Code	SSC/N9002
Unit Title (Task)	Work effectively with colleagues
Description	This unit is about working effectively with colleagues, either in your own work group or in other work groups within your organization.
Scope	<p>This unit/task covers the following:</p> <p><b>Colleagues:</b></p> <ul style="list-style-type: none"> <li>line manager</li> <li>members of your own work group</li> <li>people in other work groups in your organization</li> </ul> <p><b>Communicate:</b></p> <ul style="list-style-type: none"> <li>face-to-face</li> <li>by telephone</li> <li>in writing</li> </ul>
Performance Criteria (PC) w.r.t. the Scope	
	<p>To be competent, you must be able to:</p> <p>PC1. communicate with <b>colleagues</b> clearly, concisely and accurately</p> <p>PC2. work with <b>colleagues</b> to integrate your work effectively with them</p> <p>PC3. pass on essential information to <b>colleagues</b> in line with organizational requirements</p> <p>PC4. work in ways that show respect for <b>colleagues</b></p> <p>PC5. carry out commitments you have made to <b>colleagues</b></p> <p>PC6. let <b>colleagues</b> know in good time if you cannot carry out your commitments, explaining the reasons</p> <p>PC7. identify any problems you have working with <b>colleagues</b> and take the initiative to solve these problems</p> <p>PC8. follow the organization's policies and procedures for working with <b>colleagues</b></p>
Knowledge and Understanding (K)	
A. Organizational Context (Knowledge of the company/ organization and its processes)	<p>You need to know and understand:</p> <p>KA1. your organization's policies and procedures for working with colleagues and your role and responsibilities in relation to this</p> <p>KA2. the importance of effective communication and establishing good working relationships with colleagues</p> <p>KA3. different methods of communication and the circumstances in which it is appropriate to use these</p> <p>KA4. benefits of developing productive working relationships with colleagues</p> <p>KA5. the importance of creating an environment of trust and mutual respect in an environment where you have no authority over those you are working with</p> <p>KA6. where you do not meet your commitments, the implications this will have on individuals and the organization</p>
B. Technical	<p>You need to know and understand:</p> <p>KB1. different types of information that colleagues might need and the importance</p>

SSC/N9002

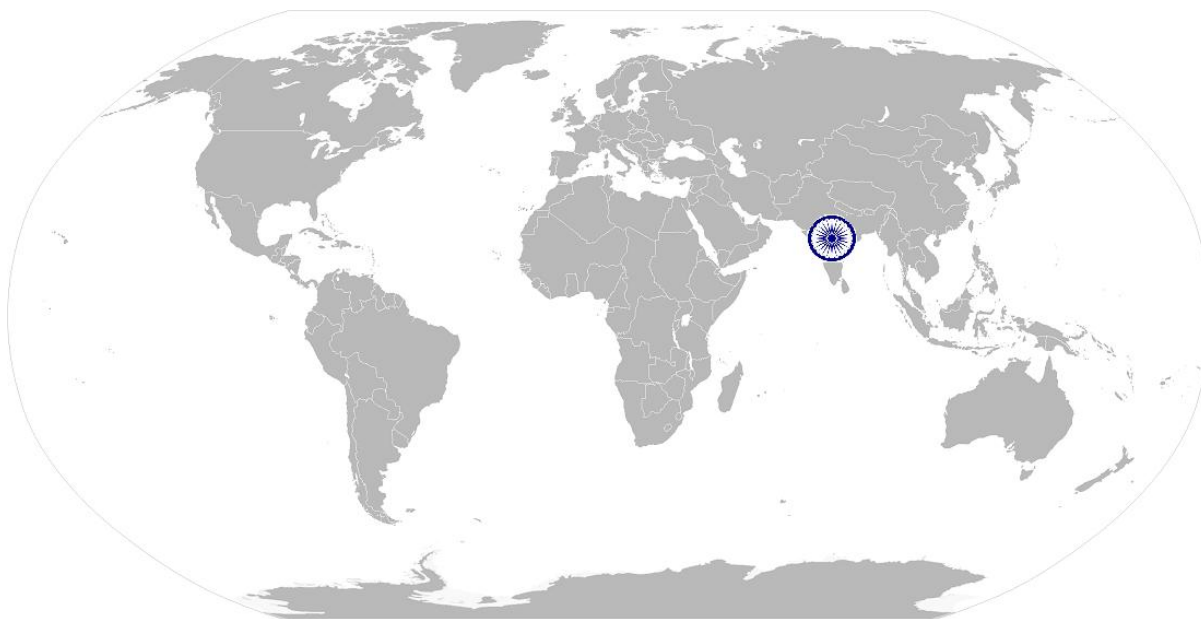
Work effectively with colleagues

Knowledge	<p>of providing this information when it is required</p> <p>KB2. the importance of understanding problems from your colleague's perspective and how to provide support, where necessary, to resolve these</p>
<b>Skills (S)</b>	
<b>A. Core Skills/ Generic Skills</b>	<b>Writing Skills</b>
	<p>You need to know and understand how to:</p> <p>SA1. complete accurate, well written work with attention to detail</p> <p>SA2. communicate effectively with colleagues in writing</p>
	<b>Reading Skills</b>
	<p>You need to know and understand how to:</p> <p>SA3. read instructions, guidelines, procedures, rules and service level agreements</p>
	<b>Oral Communication (Listening and Speaking skills)</b>
<b>B. Professional Skills</b>	<p>You need to know and understand how to:</p> <p>SA4. listen effectively and orally communicate information accurately</p> <p>SA5. ask for clarification and advice from line managers</p>
	<b>Decision Making</b>
	<p>You need to know and understand how to:</p> <p>SB1. make a decision on a suitable course of action</p>
	<b>Plan and Organize</b>
	<p>You need to know and understand how to:</p> <p>SB2. plan and organize your work to achieve targets and deadlines</p>
	<b>CustomerCentricity</b>
	<p>You need to know and understand how to:</p> <p>SB3. check that your own work meets customer requirements</p> <p>SB4. deliver consistent and reliable service to customers</p>
	<b>Problem Solving</b>
	<p>You need to know and understand how to:</p> <p>SB5. apply problem solving approaches in different situations</p>
	<b>Critical Thinking</b>
	<p>You need to know and understand how to:</p> <p>SB6. apply balanced judgments to different situations</p>
	<b>Attention to Detail</b>
	<p>You need to know and understand how to:</p> <p>SB7. check your work is complete and free from errors</p> <p>SB8. get your work checked by peers</p>
	<b>Team Working</b>
	<p>You need to know and understand how to:</p> <p>SB9. work effectively in a team environment</p> <p>SB10. work effectively with colleagues and other teams</p>

SSC/N9002

Work effectively with colleagues

	SB11. treat other cultures with respect
<b>C. Technical Skills</b>	<p>You need to know and understand how to:</p> <p>SC1. identify and refer anomalies</p> <p>SC2. help reach agreements with colleagues</p> <p>SC3. keep up to date with changes, procedures and practices in your role</p>

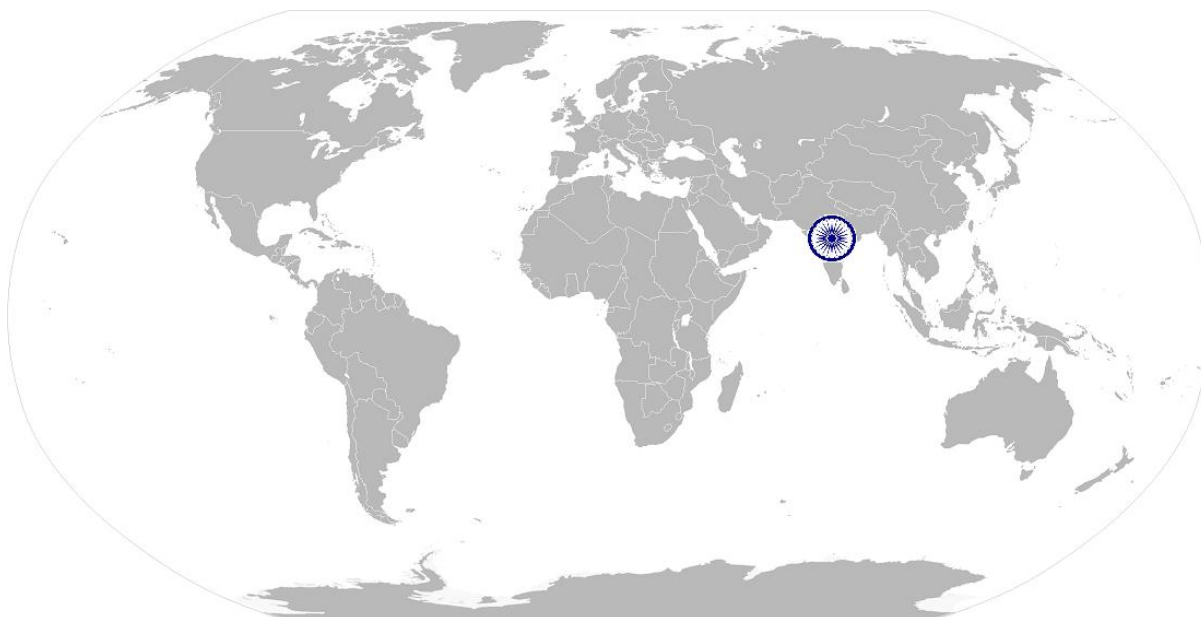




**SSC/N9002**  
**NOS Version Control**

**Work effectively with colleagues**

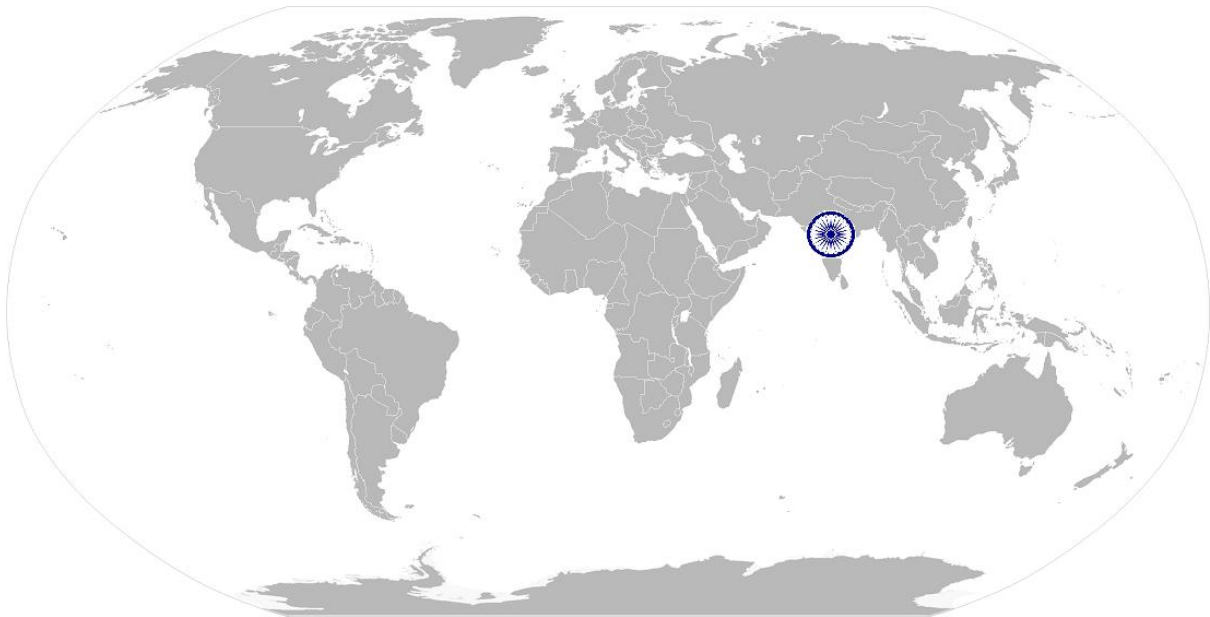
NOS Code	SSC/N9002		
Credits(NSQF)	TBD	Version number	1.0
Industry	IT-ITeS	Drafted on	30/04/2013
Industry Sub-sector	Software Products	Last reviewed on	31/01/2015
		Next review date	31/03/2016



SSC/N9003

Maintain a healthy, safe and secure working environment

# National Occupational Standard



## Overview

This unit is about monitoring the working environment and making sure it meets requirements for health, safety and security.

SSC/N9003 Maintain a healthy, safe and secure working environment

Applicable NOS Unit

Unit Code	SSC/N9003
Unit Title (Task)	Maintain a healthy, safe and secure working environment
Description	This unit is about monitoring your working environment and making sure it meets requirements for health, safety and security.
Scope	<p>This unit/task covers the following:</p> <p><b>Emergency procedures:</b></p> <ul style="list-style-type: none"> <li>illness</li> <li>accidents</li> <li>fires</li> <li>other reasons to evacuate the premises</li> <li>breaches of security</li> </ul>
<b>Performance Criteria (PC) w.r.t. the Scope</b>	
	<p>To be competent, you must be able to:</p> <p>PC1. comply with your organization's current health, safety and security policies and procedures</p> <p>PC2. report any identified breaches in health, safety, and security policies and procedures to the designated person</p> <p>PC3. identify and correct any hazards that you can deal with safely, competently and within the limits of your authority</p> <p>PC4. report any hazards that you are not competent to deal with to the relevant person in line with organizational procedures and warn other people who may be affected</p> <p>PC5. follow your organization's <b>emergency procedures</b> promptly, calmly, and efficiently</p> <p>PC6. identify and recommend opportunities for improving health, safety, and security to the designated person</p> <p>PC7. complete any health and safety records legibly and accurately</p>
<b>Knowledge and Understanding (K)</b>	
<b>A. Organizational Context</b> (Knowledge of the company/ organization and its processes)	<p>You need to know and understand:</p> <p>KA1. legislative requirements and organization's procedures for health, safety and security and your role and responsibilities in relation to this</p> <p>KA2. what is meant by a hazard, including the different types of health and safety hazards that can be found in the workplace</p> <p>KA3. how and when to report hazards</p> <p>KA4. limits of your responsibility for dealing with hazards</p> <p>KA5. your organization's <b>emergency procedures</b> for different emergency situations and the importance of following these</p> <p>KA6. the importance of maintaining high standards of health, safety and security</p> <p>KA7. implications that any non-compliance with health, safety and security may have on individuals and the organization</p>
<b>B. Technical</b>	You need to know and understand:

SSC/N9003

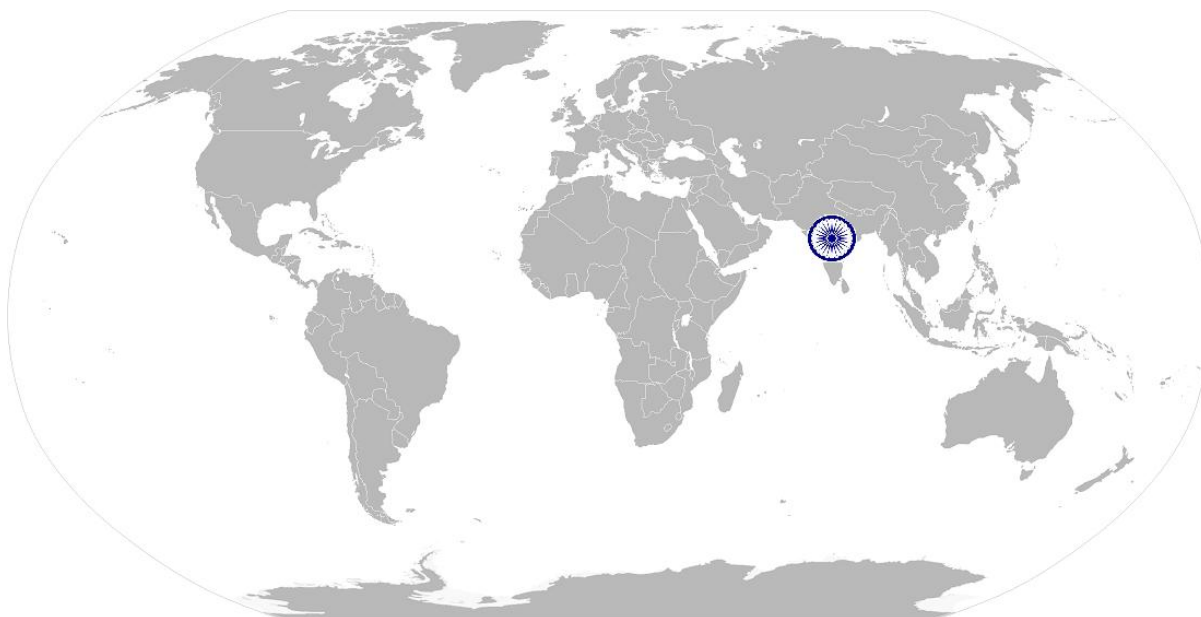
Maintain a healthy, safe and secure working environment

Knowledge	<p>KB1. different types of breaches in health, safety and security and how and when to report these</p> <p>KB2. evacuation procedures for workers and visitors</p> <p>KB3. how to summon medical assistance and the emergency services, where necessary</p> <p>KB4. how to use the health, safety and accident reporting procedures and the importance of these</p> <p>KB5. government agencies in the areas of safety, health and security and their norms and services</p>
Skills (S)	
A. Core Skills/ Generic Skills	Writing Skills
	You need to know and understand how to:
	SA1. complete accurate, well written work with attention to detail
	Reading Skills
	You need to know and understand how to:
	SA2. read instructions, guidelines, procedures, rules and service level agreements
B. Professional Skills	Oral Communication (Listening and Speaking skills)
	You need to know and understand how to:
	SA3. listen effectively and orally communicate information accurately
	Decision Making
	You need to know and understand how to:
	SB1. make a decision on a suitable course of action
	Plan and Organize
	You need to know and understand how to:
	SB2. plan and organize your work to meet health, safety and security requirements
	CustomerCentricity
	You need to know and understand how to:
	SB3. build and maintain positive and effective relationships with colleagues and customers
	Problem Solving
	You need to know and understand how to:
	SB4. apply problem solving approaches in different situations
	Analytical Thinking
	You need to know and understand how to:
	SB5. analyze data and activities
	Critical Thinking
	You need to know and understand how to:
	SB6. apply balanced judgments to different situations
	Attention to Detail

SSC/N9003

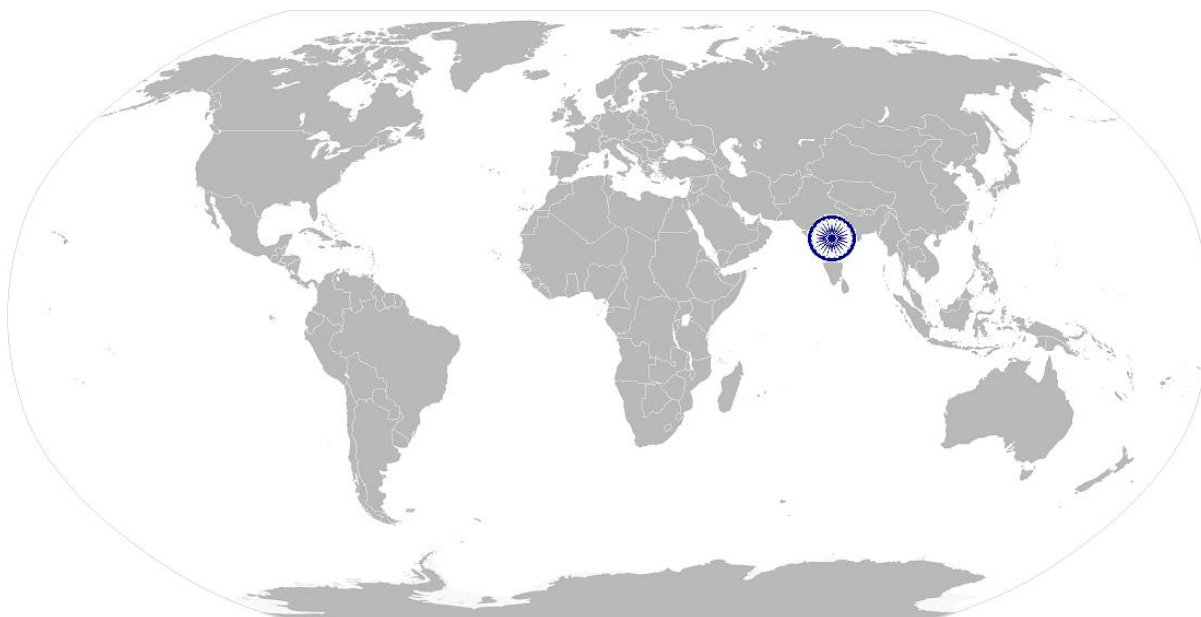
**Maintain a healthy, safe and secure working environment**

	You need to know and understand how to: SB7. check your work is complete and free from errors SB8. get your work checked by peers
	<b>Team Working</b>
	You need to know and understand how to: SB9. work effectively in a team environment
<b>C. Technical Skills</b>	You need to know and understand how to: SC1. identify and refer anomalies SC2. help reach agreements with colleagues SC3. keep up to date with changes, procedures and practices in your role



**SSC/N9003 Maintain a healthy, safe and secure working environment**  
**NOS Version Control**

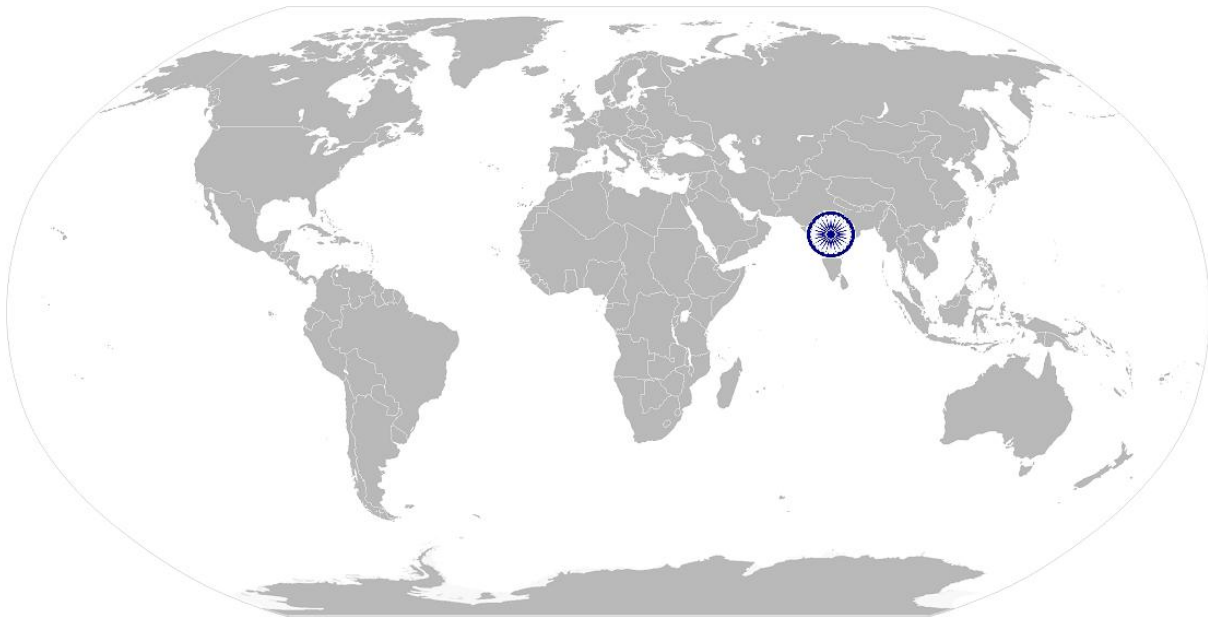
NOS Code	SSC/N9003		
Credits(NSQF)	TBD	Version number	1.0
Industry	IT-ITeS	Drafted on	30/04/2013
Industry Sub-sector	Software Products	Last reviewed on	31/01/2015
		Next review date	31/03/2016



SSC/N9004

Provide data/information in standard formats

# National Occupational Standard



## Overview

This unit is about providing specified data/information related to your work in templates or other standard formats



SSC/N9004

Provide data/information in standard formats

Unit Code	SSC/N9004
Unit Title (Task)	Provide data/information in standard formats
Description	This unit is about providing specified data/information related to your work in templates or other standard formats.
Scope	<p>This unit/task covers the following:</p> <p><b>Appropriate people:</b></p> <ul style="list-style-type: none"> <li>line manager</li> <li>members of your own work group</li> <li>people in other work groups in your organization</li> <li>subject matter experts</li> </ul> <p><b>Data/information:</b></p> <ul style="list-style-type: none"> <li>quantitative</li> <li>qualitative</li> </ul> <p><b>Sources:</b></p> <ul style="list-style-type: none"> <li>within your organization</li> <li>outside your organization</li> </ul> <p><b>Formats:</b></p> <ul style="list-style-type: none"> <li>paper-based</li> <li>electronic</li> </ul>
<b>Performance Criteria (PC) w.r.t. the Scope</b>	
	<p>To be competent, you must be able to:</p> <p>PC1. establish and agree with <b>appropriate people</b> the <b>data/information</b> you need to provide, the <b>formats</b> in which you need to provide it, and when you need to provide it</p> <p>PC2. obtain the <b>data/information</b> from reliable <b>sources</b></p> <p>PC3. check that the <b>data/information</b> is accurate, complete and up-to-date</p> <p>PC4. obtain advice or guidance from <b>appropriate people</b> where there are problems with the <b>data/information</b></p> <p>PC5. carry out rule-based analysis of the <b>data/information</b>, if required</p> <p>PC6. insert the <b>data/information</b> into the agreed <b>formats</b></p> <p>PC7. check the accuracy of your work, involving colleagues where required</p> <p>PC8. report any unresolved anomalies in the <b>data/information</b> to <b>appropriate people</b></p> <p>PC9. provide complete, accurate and up-to-date data/information to the <b>appropriate people</b> in the required <b>formats</b> on time</p>
<b>Knowledge and Understanding (K)</b>	
<b>A. Organizational Context</b>	<p>You need to know and understand:</p> <p>KA1. your organization's procedures and guidelines for providing data/information</p>

## SSC/N9004

## Provide data/information in standard formats

(Knowledge of the company/ organization and its processes)	<p>in standard formats and your role and responsibilities in relation to this</p> <p>KA2. the knowledge management culture of your organization</p> <p>KA3. your organization's policies and procedures for recording and sharing information and the importance of complying with these</p> <p>KA4. the importance of validating data/information before use and how to do this</p> <p>KA5. procedures for updating data in appropriate formats and with proper validation</p> <p>KA6. the purpose of the CRM database</p> <p>KA7. how to use the CRM database to record and extract information</p> <p>KA8. the importance of having your data/information reviewed by others</p> <p>KA9. the scope of any data/information requirements including the level of detail required</p> <p>KA10. the importance of keeping within the scope of work and adhering to timescales</p>
<b>B. Technical Knowledge</b>	<p>You need to know and understand:</p> <p>KB1. data/information you may need to provide including the sources and how to do this</p> <p>KB2. templates and formats used for data/information including their purpose and how to use these</p> <p>KB3. different techniques used to obtain data/information and how to apply</p> <p>KB4. these</p> <p>KB5. how to carry out rule-based analysis on the data/information</p> <p>KB6. typical anomalies that may occur in data/information</p> <p>KB7. who to go to in the event of inaccurate data/information and how to report this</p>
<b>Skills (S)</b>	
<b>A. Core Skills/ Generic Skills</b>	<b>Writing Skills</b>
	<p>You need to know and understand how to:</p> <p>SA1. complete accurate, well written work with attention to detail</p>
	<b>Reading Skills</b>
	<p>You need to know and understand how to:</p> <p>SA2. read instructions, guidelines, procedures, rules and service level agreements</p>
	<b>Oral Communication (Listening and Speaking skills)</b>
	<p>You need to know and understand how to:</p> <p>SA3. listen effectively and orally communicate information accurately</p>
<b>B. Professional Skills</b>	<p><b>Decision Making</b></p> <p>You need to know and understand how to:</p> <p>SB1. follow rule-based decision-making processes</p> <p>SB2. make a decision on a suitable course of action</p>

SSC/N9004

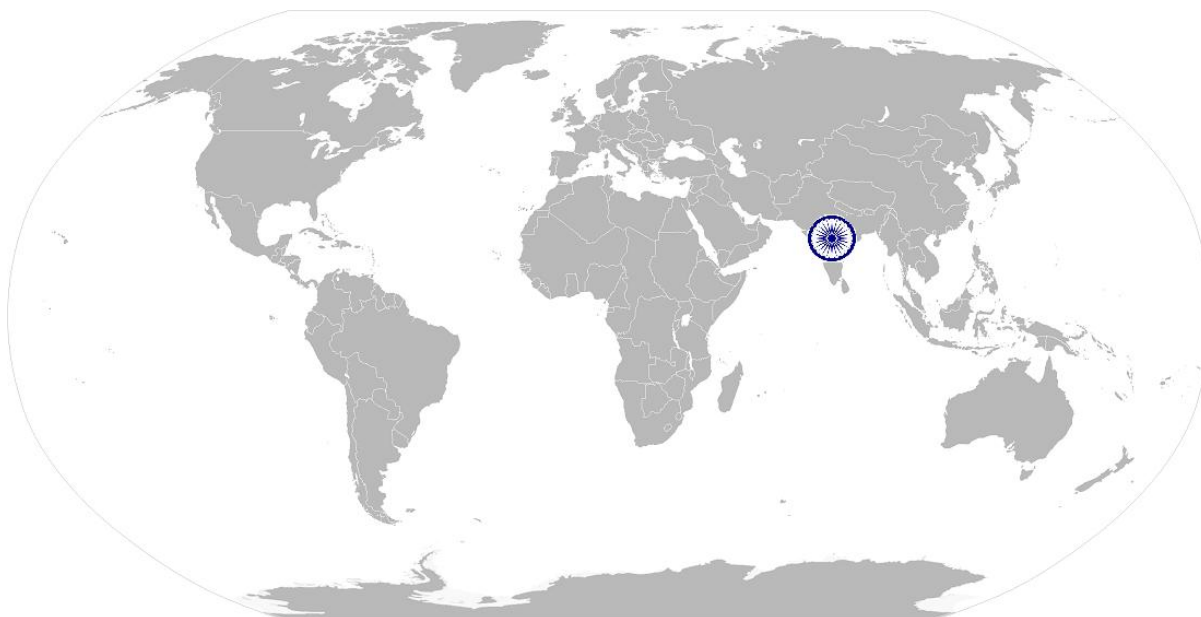
Provide data/information in standard formats

	<b>Plan and Organize</b>
	You need to know and understand how to: SB3. plan and organize your work to achieve targets and deadlines
	<b>CustomerCentricity</b>
	You need to know and understand how to: SB4. check that your own work meets customer requirements SB5. meet and exceed customer expectations
	<b>Problem Solving</b>
	You need to know and understand how to: SB6. apply problem solving approaches in different situations
	<b>Analytical Thinking</b>
	You need to know and understand how to: SB7. configure data and disseminate relevant information to others
	<b>Critical Thinking</b>
	You need to know and understand how to: SB8. apply balanced judgments to different situations
	<b>Attention to Detail</b>
	You need to know and understand how to: SB9. check your work is complete and free from errors SB10. get your work checked by peers
	<b>Team Working</b>
	You need to know and understand how to: SB11. work effectively in a team environment
<b>C. Technical Skills</b>	You need to know and understand how to: SC1. use information technology effectively, to input and/or extract data accurately SC2. validate and update data SC3. identify and refer anomalies in data SC4. store and retrieve information SC5. share information using standard formats and templates SC6. keep up to date with changes, procedures and practices in your role

**SSC/N9004**  
**NOS Version Control**

**Provide data/information in standard formats**

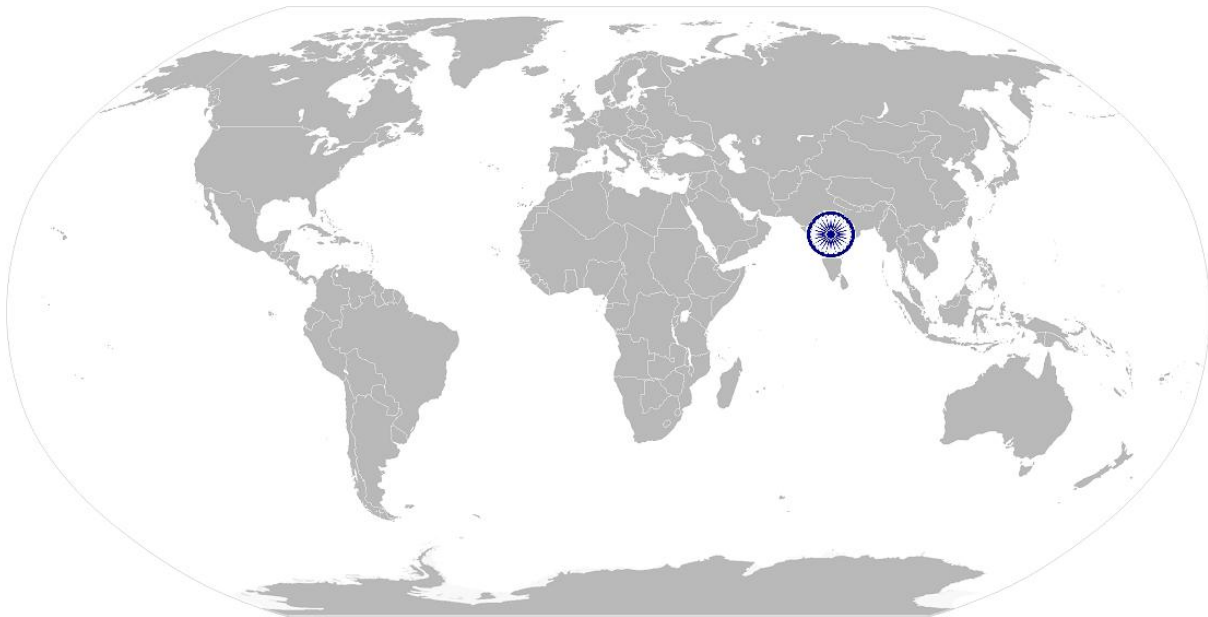
NOS Code	SSC/N9004		
Credits(NSQF)	TBD	Version number	1.0
Industry	IT-ITeS	Drafted on	30/04/2013
Industry Sub-sector	Software Products	Last reviewed on	31/01/2015
		Next review date	31/03/2016



SSC/N9005

Develop your knowledge, skills and competence

# National Occupational Standard



## Overview

This unit is about taking action to ensure you have the knowledge and skills you need to perform competently in your current job role and to take on new responsibilities, where required.

SSC/N9005

Develop your knowledge, skills and competence

Unit Code	SSC/N9005
Unit Title (Task)	Develop your knowledge, skills and competence
Description	<p>This unit is about taking action to ensure you have the knowledge and skills you need to perform competently in your current job role and to take on new responsibilities, where required.</p> <p><i>Competence</i> is defined as: the application of knowledge and skills to perform to the standards required.</p>
Scope	<p>This unit/task covers the following:</p> <p><b>Appropriate people</b> may be:</p> <ul style="list-style-type: none"> <li>• line manager</li> <li>• human resources specialists</li> <li>• learning and development specialists</li> <li>• peers</li> </ul> <p><b>Job role:</b></p> <ul style="list-style-type: none"> <li>• current responsibilities as defined in your job description</li> <li>• possible future responsibilities</li> </ul> <p><b>Learning and development activities:</b></p> <ul style="list-style-type: none"> <li>• formal education and training programs, leading to certification</li> <li>• non-formal activities (such as private study, learning from colleagues, project work), designed to meet learning and development objectives but without certification</li> </ul> <p><b>Appropriate action</b> may be:</p> <ul style="list-style-type: none"> <li>• undertaking further learning and development activities</li> <li>• finding further opportunities to apply your knowledge and skills</li> </ul>
Performance Criteria (PC) w.r.t. the Scope	
	<p>To be competent, you must be able to:</p> <p>PC1. obtain advice and guidance from <b>appropriate people</b> to develop your knowledge, skills and competence</p> <p>PC2. identify accurately the knowledge and skills you need for your <b>job role</b></p> <p>PC3. identify accurately your current level of knowledge, skills and competence and any learning and development needs</p> <p>PC4. agree with <b>appropriate people</b> a plan of <b>learning and development activities</b> to address your learning needs</p> <p>PC5. undertake <b>learning and development activities</b> in line with your plan</p> <p>PC6. apply your new knowledge and skills in the workplace, under supervision</p> <p>PC7. obtain feedback from <b>appropriate people</b> on your knowledge and skills and how effectively you apply them</p> <p>PC8. review your knowledge, skills and competence regularly and take <b>appropriate</b></p>

SSC/N9005

Develop your knowledge, skills and competence

	action
<b>Knowledge and Understanding (K)</b>	
<b>A. Organizational Context</b> (Knowledge of the company/ organization and its processes)	<p>You need to know and understand:</p> <p>KA1. your organization's procedures and guidelines for developing your knowledge, skills and competence and your role and responsibilities in relation to this</p> <p>KA2. the importance of developing your knowledge, skills and competence to you and your organization</p> <p>KA3. different methods used by your organization to review skills and knowledge including:</p> <ul style="list-style-type: none"> <li>• training need analysis</li> <li>• skills need analysis</li> <li>• performance appraisals</li> </ul> <p>KA4. how to review your knowledge and skills against your job role using different methods and analysis</p> <p>KA5. different types of learning and development activities available for your job role and how to access these</p> <p>KA6. how to produce a plan to address your learning and development needs, who to agree it with and the importance of undertaking the planned activities</p> <p>KA7. different types of support available to help you plan and undertake learning and development activities and how to access these</p> <p>KA8. why it is important to maintain records of your learning and development</p> <p>KA9. methods of obtaining and accepting feedback from appropriate people on your knowledge skills and competence</p> <p>KA10. how to use feedback to develop in your job role</p>
<b>B. Technical Knowledge</b>	<p>You need to know and understand:</p> <p>KB1. the knowledge and skills required in your job role</p> <p>KB2. your current learning and development needs in relation to your job role</p> <p>KB3. different types of learning styles and methods including those that help you learn best</p> <p>KB4. the importance of taking responsibility for your own learning and development</p> <p>KB5. to the importance of learning and practicing new concepts, theory and how to apply these in the work environment or on samples.</p> <p>KB6. how to explore sample problems and apply solutions</p>
<b>Skills (S)</b>	
<b>A. Core Skills/ Generic Skills</b>	<p><b>Writing Skills</b></p> <p>You need to know and understand how to:</p> <p>SA1. communicate with colleagues in writing</p>



SSC/N9005

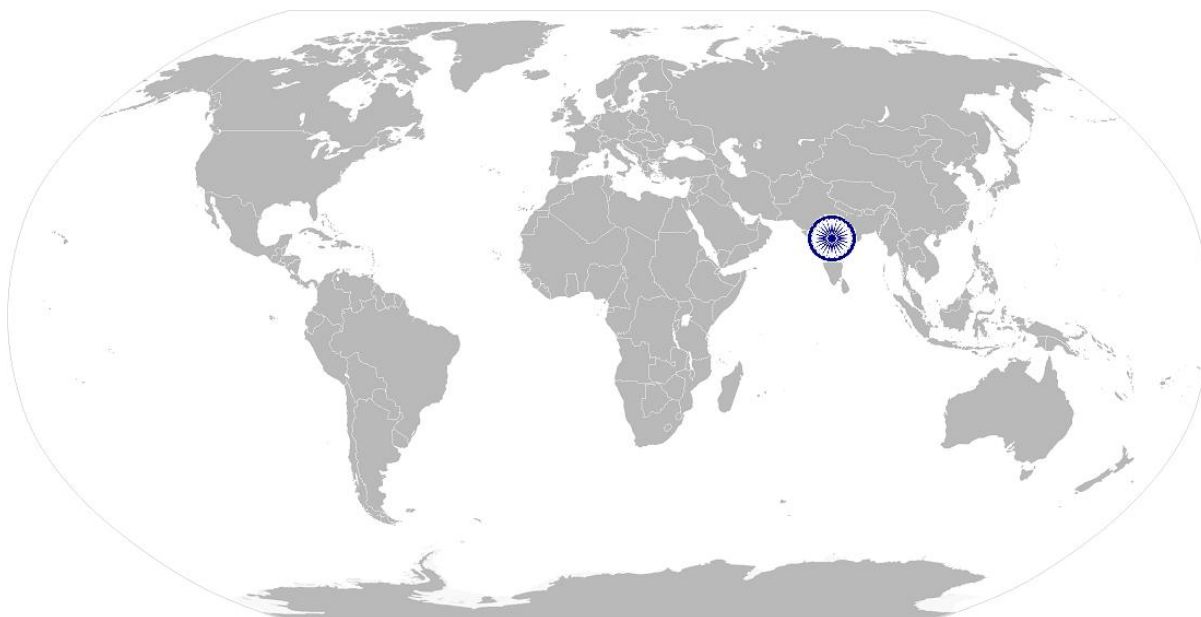
Develop your knowledge, skills and competence

	<b>Reading Skills</b>
	You need to know and understand how to: SA2. read instructions, guidelines and procedures
	<b>Oral Communication (Listening and Speaking skills)</b>
	You need to know and understand how to: SA3. ask for clarification and advice from line managers
<b>B. Professional Skills</b>	<b>Decision Making</b>
	You need to know and understand how to: SB1. make a decision on a suitable course of action
	<b>Plan and Organize</b>
	You need to know and understand how to: SB2. plan and organize your work to achieve targets and deadlines
	<b>CustomerCentricity</b>
	You need to know and understand how to: SB3. check that your own work meets customer requirements
	<b>Problem Solving</b>
	You need to know and understand how to: SB4. refer anomalies to the line manager
	<b>Analytical Thinking</b>
	You need to know and understand how to: SB5. analyze data and activities
	<b>Critical Thinking</b>
	You need to know and understand how to: SB6. apply balanced judgments to different situations
	<b>Attention to Detail</b>
	You need to know and understand how to: SB7. check your work is complete and free from errors SB8. get your work checked by peers
	<b>Team Working</b>
	You need to know and understand how to: SB9. work effectively in a team environment
<b>C. Technical Skills</b>	You need to know and understand how to: SC1. use information technology effectively SC2. agree objectives and work requirements SC3. keep up to date with changes, procedures and practices in your role

SSC/N9005  
NOS Version Control

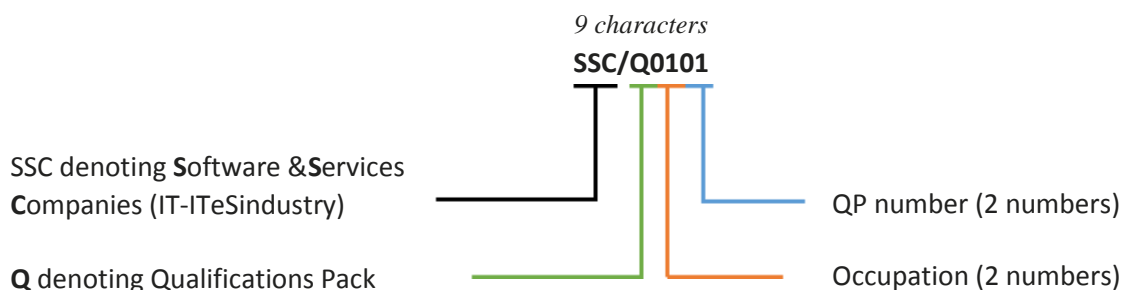
Develop your knowledge, skills and competence

NOS Code	SSC/N9005		
Credits(NSQF)	TBD	Version number	1.0
Industry	IT-ITeS	Drafted on	30/04/2013
Industry Sub-sector	Software Products	Last reviewed on	31/01/2015
		Next review date	31/03/2016

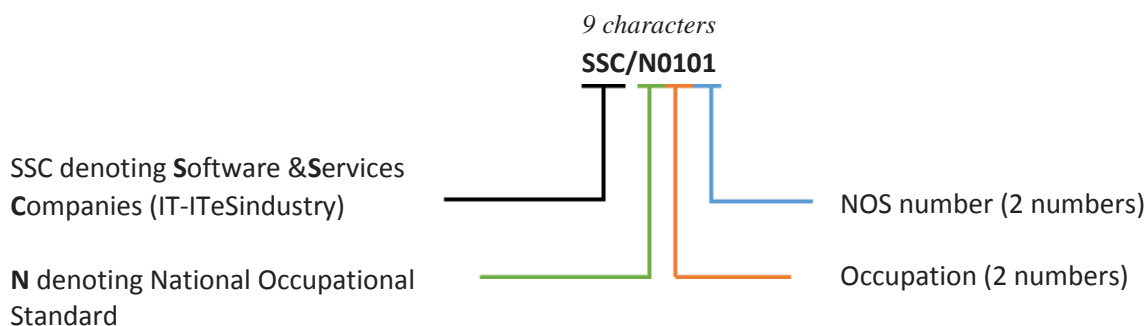


## Nomenclature for QP and NOS Units

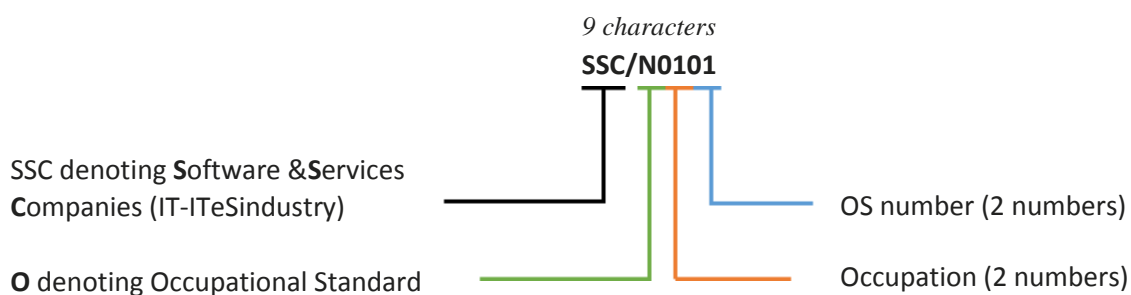
### Qualifications Pack



### National Occupational Standard



### Occupational Standard



It is important to note that an OS unit can be denoted with either an 'O' or an 'N'.

- If an OS unit denotes 'O', it is an OS unit that is an international standard. An example of OS unit denoting 'O' is SSC/O0101.
- If an OS unit denotes 'N', it is an OS unit that is a national standard and is applicable only for the Indian IT-ITeS industry. An example of OS unit denoting 'N' is SSC/N0101

### *Nomenclature for QP and NOS Units*

The following acronyms/codes have been used in the nomenclature above:

Sub-Sector	Range of Occupation numbers
IT Service(ITS)	01-20
Business Process Management (BPM)	21-40
Engg. and R&D(ERD)	41-60
Software Products(SPD)	61-80

Sequence	Description	Example
Three letters	Industry name (Software&Service Companies )	SSC
Slash	/	/
Next letter	Whether QP or NOS	N
Next two numbers	Occupation Code	01
Next two numbers	OS number	01

### Criteria for Assessment of Trainees

**Job Role** Sales / Pre-Sales Executive

**Qualification Pack** SSC/Q6303

**Sector Skill Council** IT-ITeS

#### Guidelines for Assessment:

1. Criteria for assessment for each Qualification Pack (QP) will be created by the Sector Skill Council (SSC). Each performance criteria (PC) will be assigned Theory and Skill/Practical marks proportional to its importance in NOS.
2. The assessment will be conducted online through assessment providers authorised by SSC.
3. Format of questions will include a variety of styles suitable to the PC being tested such as multiple choice questions, fill in the blanks, situational judgment test, simulation and programming test.
4. To pass a QP, a trainee should pass each individual NOS. Standard passing criteria for each NOS is 70%.
5. For latest details on the assessment criteria, please visit [www.sscnasscom.com](http://www.sscnasscom.com).

				Marks Allocation	
Assessment Outcomes	Assessment Criteria for Outcomes	Total Mark	Out of	Theory	Skills Practical
<b>1.SSC/N1101 ( Conduct marketing research and analysis for sales)</b>	PC1. establish clearly the objectives and scope of the research and analysis to meet the needs of the business	<b>100</b>	5	0	5
	PC2. obtain guidance from appropriate people within your organization to refine the research and analysis approach and methodology		5	0	5
	PC3. obtain relevant data/information from your organization's knowledge base and published reports to understand overall market/industry trends		20	10	10
	PC4. obtain relevant data/information on individual prospects and competitors from reliable secondary sources		20	10	10
	PC5. consolidate data/information correctly into standard templates and tools		10	0	10
	PC6. review data/information with appropriate people and incorporate their inputs		5	0	5
	PC7. conduct rule-based analysis on the data/information in line with procedures and draw inferences		20	10	10
	PC8. review your analysis and inferences with appropriate people and incorporate their		5	0	5

### Criteria for Assessment of Trainees

	inputs				
	PC9. share agreed analysis and inferences with appropriate people using standard templates and tools		5	0	5
	PC10. update the customer relationship management (CRM) database accurately with the findings		5	0	5
		<b>Total</b>	<b>100</b>	<b>30</b>	<b>70</b>
<b>2. SSC/N1102 (Contribute to new business generation )</b>	PC1. establish how you are required to contribute to generating new business in line with procedures	<b>100</b>	15	5	10
	PC2. obtain sufficient information from your organization's knowledge base and appropriate people to understand the markets you are operating in and your organization's or work group's sales plans		10	5	5
	PC3. obtain relevant information from the customer relationship management (CRM) database or other sources to create a database of suspects		10	0	10
	PC4. obtain sufficient information from the CRM database and appropriate people to understand the history of relationships with suspects		10	0	10
	PC5. contact suspects using the communication modes and at frequencies specified in sales plans		20	10	10
	PC6. communicate with suspects using approved scripts in line with your organization's business communication guidelines and standards		15	5	10
	PC7. convert suspects to new business prospects and clients as specified in sales plans		15	5	10
	PC8. record new business generation activities and suspect responses on the CRM database		5	0	5
		<b>Total</b>	<b>100</b>	<b>30</b>	<b>70</b>
<b>3.SSC/N1103 (Contribute to developing sales plans)</b>	PC1. agree the activities you will undertake to contribute to the development of sales plans	<b>100</b>	5	0	5
	PC2. obtain sufficient, up-to-date information from your organization's knowledge base and appropriate people to build a clear picture of actual sales, sales trends and targets for your organization/work group		10	5	5
	PC3. obtain sufficient, up-to-date information from your organization's knowledge base and secondary sources to build a clear picture of competitors' actual sales and		20	10	10

### Criteria for Assessment of Trainees

	sales trends				
	PC4. obtain sufficient information from your organization's customer relationship management (CRM) system to understand past relationships and projects executed for particular clients		15	5	10
	PC5. obtain sufficient information from your organization's customer relationship management (CRM) system to identify existing research, analysis and inferences as a basis for sales plans		20	10	10
	PC6. identify suitable suspects, prospects and clients and the effective contact management approaches (mode and frequency of communication) for each one		10	0	10
	PC7. create effective draft sales plans using standards templates and tools in line with organizational procedures		10	0	10
	PC8. review draft sales plans with appropriate people and incorporate inputs to meet their requirements		5	0	5
	PC9. update the customer relationship management (CRM) database with the sales plans		5	0	5
		<b>Total</b>	<b>100</b>	<b>30</b>	<b>70</b>
<b>4. SSC/N1104 (Contribute to development of responses to RFIs and RFPs)</b>	PC1. establish clearly your role and responsibilities in developing responses to RFIs and RFPs	<b>100</b>	10	0	10
	PC2. read RFIs and RFPs carefully and discuss with appropriate people to gain a clear understanding of the requirements, process and timelines		15	5	10
	PC3. work with appropriate people to identify queries about RFIs and RFPs and gain clarification of these from the client, where required		10	0	10
	PC4. work with appropriate people to develop responses to RFIs and RFPs, referring to previous responses, where available		10	0	10
	PC5. work with partners and/or sub-contractors to agree their roles and responsibilities and obtain data/information required for RFIs and RFPs		10	0	10
	PC6. enter data/information accurately into standard templates for responses to RFIs and RFPs		10	5	5
	PC7. review draft responses with		10	0	10



*Criteria for Assessment of Trainees*

	appropriate people to meet organizational guidelines				
	PC8. consolidate the response documents, to comply with the requirements, process and timelines		10	5	5
	PC9. participate in pre-bid/client/proposal meetings, where required to provide relevant information on RFIs and RFPs		10	0	10
	PC9. update the customer relationship management (CRM) database with information about RFIs and RFPs to meet organizational guidelines		5	0	5
		<b>Total</b>	<b>100</b>	<b>15</b>	<b>85</b>
<b>5.SSC/N1105 ( Assist in collection of payments from clients)</b>	PC1. check accuracy of invoices for work carried out on projects	<b>100</b>	20	10	10
	PC2. submit invoices to clients on time and through the agreed method		10	0	10
	PC3. clarify relevant information on invoices in response to queries received from corporate clients		20	10	10
	PC4. pass queries outside your area of competence to appropriate people to resolve directly with corporate clients		10	0	10
	PC5. monitor approval and payment of invoices at milestones and due dates		10	0	10
	PC6. make courteous and authoritative requests to clients for timely approval and payment of invoices		10	0	10
	PC7. inform appropriate people of any delays in approval or payment of invoices and the reasons in line with organizational procedures		10	0	10
	PC8. file all documentation in a logical manner in line with organizational requirements		10	5	5
		<b>Total</b>	<b>100</b>	<b>25</b>	<b>75</b>
<b>6.SSC/N9001 (Manage your work to meet requirements)</b>	PC1. establish and agree your work requirements with appropriate people	<b>100</b>	6.25	0	6.25
	PC2. keep your immediate work area clean and tidy		12.5	6.25	6.25
	PC3. utilize your time effectively		12.5	6.25	6.25
	PC4. use resources correctly and efficiently		18.75	6.25	12.5
	PC5. treat confidential information correctly		6.25	0	6.25
	PC6. work in line with your organization's policies and procedures		12.5	0	12.5
	PC7. work within the limits of your job role		6.25	0	6.25

*Criteria for Assessment of Trainees*

	PC8. obtain guidance from appropriate people, where necessary		6.25	0	6.25
	PC9. ensure your work meets the agreed requirements		18.75	6.25	12.5
		<b>Total</b>	<b>100</b>	<b>25</b>	<b>75</b>
<b>7.SSC/N9002 (Work effectively with colleagues)</b>	PC1. communicate with colleagues clearly, concisely and accurately	<b>100</b>	20	0	20
	PC2. work with colleagues to integrate your work effectively with theirs		10	0	10
	PC3. pass on essential information to colleagues in line with organizational requirements		10	10	0
	PC4. work in ways that show respect for colleagues		20	0	20
	PC5. carry out commitments you have made to colleagues		10	0	10
	PC6. let colleagues know in good time if you cannot carry out your commitments, explaining the reasons		10	10	0
	PC7. identify any problems you have working with colleagues and take the initiative to solve these problems		10	0	10
	PC8. follow the organization's policies and procedures for working with colleagues		10	0	10
		<b>Total</b>	<b>100</b>	<b>20</b>	<b>80</b>
<b>8.SSC/N9003 (Maintain a healthy, safe and secure working environment)</b>	PC1. comply with your organization's current health, safety and security policies and procedures	<b>100</b>	20	10	10
	PC2. report any identified breaches in health, safety, and security policies and procedures to the designated person		10	0	10
	PC3. identify and correct any hazards that you can deal with safely, competently and within the limits of your authority		20	10	10
	PC4. report any hazards that you are not competent to deal with to the relevant person in line with organizational procedures and warn other people who may be affected		10	0	10
	PC5. follow your organization's emergency procedures promptly, calmly, and efficiently		20	10	10
	PC6. identify and recommend opportunities for improving health, safety, and security to the designated person		10	0	10
	PC7. complete any health and safety records legibly and accurately		10	0	10
		<b>Total</b>	<b>100</b>	<b>30</b>	<b>70</b>
<b>9.SSC/N9004 (Provide data/information in</b>	PC1. establish and agree with appropriate people the data/information you need to	<b>100</b>	12.5	12.5	0

*Criteria for Assessment of Trainees*

standard formats)	provide, the formats in which you need to provide it, and when you need to provide it				
	PC2. obtain the data/information from reliable sources		12.5	0	12.5
	PC3. check that the data/information is accurate, complete and up-to-date		12.5	6.25	6.25
	PC4. obtain advice or guidance from appropriate people where there are problems with the data/information		6.25	0	6.25
	PC5. carry out rule-based analysis of the data/information, if required		25	0	25
	PC6. insert the data/information into the agreed formats		12.5	0	12.5
	PC7. check the accuracy of your work, involving colleagues where required		6.25	0	6.25
	PC8. report any unresolved anomalies in the data/information to appropriate people		6.25	6.25	0
	PC9. provide complete, accurate and up-to-date data/information to the appropriate people in the required formats on time		6.25	0	6.25
		<b>Total</b>	<b>100</b>	<b>25</b>	<b>75</b>
<b>10.SSC/N9005 (Develop your knowledge, skills and competence)</b>	PC1. obtain advice and guidance from appropriate people to develop your knowledge, skills and competence	<b>100</b>	10	0	10
	PC2. identify accurately the knowledge and skills you need for your job role		10	0	10
	PC3. identify accurately your current level of knowledge, skills and competence and any learning and development needs		20	10	10
	PC4. agree with appropriate people a plan of learning and development activities to address your learning needs		10	0	10
	PC5. undertake learning and development activities in line with your plan		20	10	10
	PC6. apply your new knowledge and skills in the workplace, under supervision		10	0	10
	PC7. obtain feedback from appropriate people on your knowledge and skills and how effectively you apply them		10	0	10
	PC8. review your knowledge, skills and competence regularly and take appropriate action		10	0	10
		<b>Total</b>	<b>100</b>	<b>20</b>	<b>80</b>