

Qualification



Qf Name : Customer Service Associate – Financial Services

Qf Code: BSC/Q8402

Qf Version: 1.0

NSQF Level: 4

Banking, Financial Services & Insurance (BFSI) Sector Skill Council of India
1407, Lodha Supremus Powai, Opp Saki Vihar Telephone Exchange,
Saki Vihar Road, Powai, Mumbai - 400072
[email:ranjan.soumya@bfsissc.com](mailto:ranjan.soumya@bfsissc.com)

Qualification

Contents

BSC/Q8402: Customer Service Associate - Financial services	3
Brief Job Description.....	3
Applicable National Occupational Standards (NOS).....	3
<i>Compulsory NOS:</i>	3
<i>Qualification (Qf) Parameters</i>	4
BSC/N8405: Identify customer queries and requirements	5
BSC/N8406: Provide effective customer service	9
BSC/N8407: Maintain records and evaluate customer service	14
BSC/N9903: Maintain data integrity using digital tools	17
BSC/N9904: Communicate effectively and maintain inclusivity at the workplace.....	20
SSC/N9003: Maintain a healthy, safe and secure working environment	24
SGJ/N1702: Optimize resource utilization at workplace	28
Assessment Guidelines and Assessment Weightage	32
<i>Assessment Guidelines</i>	32
<i>Assessment Weightage</i>	33
Acronyms.....	344
Glossary	3535

Qualification

BSC/Q8402: Customer Service Associate - Financial services

Brief Job Description

The individual at work is responsible for providing effective customer service by focusing on the individual needs and issues of each customer and recommending appropriate resolutions or services as per the organizational standards.

Personal Attributes

The individual should be highly energetic with good aptitude and great interpersonal, communication and problem-solving skills.

Applicable National Occupational Standards (NOS)

Compulsory NOS:

1. [BSC/N8405: Identify customer queries and requirement](#)
2. [BSC/N8406: Provide effective customer service](#)
3. [BSC/N8407: Maintain records and evaluate customer service](#)
4. [BSC/N9903: Maintain data integrity using digital tools](#)
5. [BSC/N9904: Communicate effectively and maintain inclusivity at the workplace](#)
6. [SSC/N9003: Maintain a healthy, safe and secure working environment](#)
7. [SGJ/N1702: Optimize resource utilization at workplace](#)

Qualification

Qualification (Qf) Parameters

Sector	BFSI
Sub-Sector	Broking, Fund Investment & Services, Lending, Payments
Occupation	Marketing and Sales
Country	India
NSQF Level	4
Aligned to NCO/ISCO/ISIC Code	NCO-2015/ 4225.0100, 5244.0301, 5244.0303
Minimum Educational Qualification & Experience	Class 12th Pass + 6 months relevant work experience OR Class 10th Pass + ITI (2 years after Class 10th) OR Class 10th Pass and pursuing continuous regular schooling OR 3 year Diploma (after 10th) OR Previous relevant Qualification of NSQF level 3 + 2 years relevant work experience
Minimum Level of Education for Training in School	10 th pass
Pre-Requisite License or Training	NA
Minimum Job Entry Age	18 years
Last Reviewed On	30/06/2022
Next Review Date	30/06/2025
NSQC Approval Date	30/06/2022
Version	1.0

Qualification

BSC/N8405: Identify customer queries and requirements

Description

This OS unit is about greeting the customer, understanding their concerns and identifying their issues and requirements.

Scope

The scope covers the following

- Attend the customer
- Identify customer's needs and requirements

Elements and Performance Criteria

Attend the customer

To be competent, the user/individual on the job must be able to:

- PC1. greet and address the customers over the telephone or in person in friendly and professional manner as per the SOP
- PC2. verify customer identity using established security checking procedures
- PC3. check information provided by customers for accuracy and completeness
- PC4. seek customer's feedback on their experiences with the product or service
- PC5. confer with customer to provide add on information about product(s) or service(s), or obtain details of complaints, as applicable
- PC6. listen to customer's requirements, complaints or concerns attentively

Identify customer needs and requirements

To be competent, the user/individual on the job must be able to:

- PC7. identify and assess customer's requirements so as to provide appropriate clarifications and solutions
- PC8. identify whether customer is dissatisfied and follow the procedures set by the organization to address dissatisfaction
- PC9. obtain and examine all relevant information to assess validity of complaints and to determine possible causes
- PC10. identify complaints requiring escalation according to organizational policy
- PC11. inform relevant stakeholders that complaint has been received from the customer, if it is beyond the purview
- PC12. identify additional information requirements to resolve complaints that do not require escalation
- PC13. maintain customer relationship by responding to inquiries promptly
- PC14. build sustainable relationship and trust with customer through open and interactive communication
- PC15. develop and maintain relationship with customers and assist to generate sales opportunities for financial products of the organization
- PC16. maintain procedures to acknowledge and record customers' perception of the problem(s)

Knowledge and Understanding (KU)

The individual on the job needs to know and understand:

- KU1. organizational SOPs on greeting the customers
Customer Service Associate – Financial Services

Qualification

- KU2. parameters to verify customer details
- KU3. methods to assess customers' requirements
- KU4. organizational policies and procedures to deal with customer's complaint
- KU5. escalation process for customer's complaints and issues
- KU6. techniques to build effective customer relationships
- KU7. how to gather information to answer the customer queries
- KU8. the principles of customer service

Generic Skills (GS)

User/individual on the job needs to know how to:

- GS1. read and interpret instructions, procedures, and information at the workplace
- GS2. communicate effectively with the customers
- GS3. complete tasks efficiently and accurately within stipulated time
- GS4. take decisions in a time bound manner
- GS5. improve and modify own work practices

Assessment Criteria

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
<i>Attend the customer</i>	10	20	-	-
PC1. greet and address the customers over the telephone or in person in friendly and professional manner as per the SOP	-	-	-	-
PC2. verify customer identity using established security checking procedures	-	-	-	-
PC3. check information provided by customers for accuracy and completeness	-	-	-	-
PC4. seek customer's feedback on their experiences with the product or service	-	-	-	-
PC5. confer with customer to provide add on information about product(s) or service(s), or obtain details of complaints, as applicable	-	-	-	-
PC6. listen to customer's requirements, complaints or concerns attentively	-	-	-	-
<i>Identify customer needs and requirements</i>	30	40	-	-

Qualification

PC7. identify and assess customer's requirements so as to provide appropriate clarifications and solutions	-	-	-	-
PC8. identify whether customer is dissatisfied and follow the procedures set by the organization to address dissatisfaction	-	-	-	-
PC9. obtain and examine all relevant information to assess validity of complaints and to determine possible causes	-	-	-	-
PC10. identify complaints requiring escalation according to organizational policy	-	-	-	-
PC11. inform relevant stakeholders that complaint has been received from the customer, if it is beyond the purview	-	-	-	-
PC12. identify additional information requirements to resolve complaints that do not require escalation	-	-	-	-
PC13. maintain customer relationship by responding to inquiries promptly	-	-	-	-
PC14. build sustainable relationship and trust with customer through open and interactive communication	-	-	-	-
PC15. develop and maintain relationship with customers and assist to generate sales opportunities for financial products of the organization	-	-	-	-
PC16. maintain procedures to acknowledge and record customers' perception of the problem(s)	-	-	-	-
NOS Total	40	60	-	-

Qualification

National Occupational Standards (NOS) Parameters

NOS Code	BSC/N8405
NOS Name	Identify customer queries and requirements
Sector	BFSI
Sub-Sector	Broking, Fund Investment & Services, Lending, Payments
Occupation	Marketing and Sales
NSQF Level	4
Credits	
Version	1.0
Last Reviewed Date	30/06/2022
Next Review Date	30/06/2025
NSQC Clearance Date	30/06/2022

Qualification

BSC/N8406: Provide effective customer service

Description

This OS unit is about resolving queries effectively and providing ongoing services to the customers.

Scope

The scope covers the following

- Resolve customer queries effectively
- Provide ongoing customer service

Elements and Performance Criteria

Resolve customer queries effectively

To be competent, the user/individual on the job must be able to:

- PC1. maintain broad knowledge of products and services provided by the organizational
- PC2. identify implications of the complaint on the organization
- PC3. analyze options to resolve customer complaints according to legislation and organizational policies
- PC4. analyze and resolve all customers' queries regarding product and services
- PC5. handle customer complaints, provide appropriate solutions and alternatives within the time limits and follow up to ensure resolution
- PC6. respond to customer queries by understanding the same through reviewing previous inquiries and responses
- PC7. provide accurate, valid and complete information
- PC8. verify customer's understanding of the provided information or solution
- PC9. provide timelines and quality standards for resolution of the problem in agreement with the customer
- PC10. ensure services are provided within agreed timelines and quality standards
- PC11. follow the organizational procedures if agreed timelines are not achieved
- PC12. refer unresolved customer grievances to designated departments for further investigation
- PC13. deliver prompt and professional solution for customer inquiries via direct contact, phone, email, online chat, etc.
- PC14. contribute ideas to resolve customer problems to improve productivity
- PC15. route and direct customer requests to appropriate department
- PC16. manage and ensure that all customer's expectations are met
- PC17. solicit sales of new or additional services or products
- PC18. ensure response to customer's requests are designed to maximize customer satisfaction

Provide ongoing customer service

To be competent, the user/individual on the job must be able to:

- PC19. review previous interactions with the customers
- PC20. make sure the steps are taken to determine customer satisfaction with the product/service provided
- PC21. maintain regular communication with the customers
- PC22. make sure the communication is based on information about customer needs
- PC23. build working relationships with the customers

Qualification

Knowledge and Understanding (KU)

The individual on the job needs to know and understand:

- KU1.** types of services and products provided by the organization
- KU2.** how to assess implication of customer complaints on the organization
- KU3.** SOP to handle customer complaints
- KU4.** methods to assess timelines for resolution of the customer complaint
- KU5.** escalation matrix for customer query resolution
- KU6.** procedure to promptly deliver solutions to the customer queries
- KU7.** how to build effective relationship with the customers
- KU8.** standard procedure to maintain regular communication with the customers
- KU9.** how to ensure customer satisfaction
- KU10.** the purpose and benefits of delivering customer service that meets or exceeds and customer expectations
- KU11.** quality standards appropriate to own responsibilities
- KU12.** how to meet timelines and quality standards
- KU13.** the types of problems that customers may experience and how to process and resolve or refer them
- KU14.** the purpose and benefits of continuous improvement
- KU15.** the relevant legal and data protection legislation in relation to delivering customer service and information handling

Generic Skills (GS)

User/individual on the job needs to know how to:

- GS1.** read and interpret instructions, procedures, and information at the workplace
- GS2.** write e-mails to customers
- GS3.** communicate effectively with the customers
- GS4.** complete tasks efficiently and accurately within stipulated time
- GS5.** take decisions in a time bound manner
- GS6.** improve and modify own work practices

Qualification

Assessment Criteria

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
<i>Resolve customer queries effectively</i>	30	40	-	-
PC1. maintain broad knowledge of products and services provided by the organizational	-	-	-	-
PC2. identify implications of the complaint on the organization	-	-	-	-
PC3. analyze options to resolve customer complaints according to legislation and organizational policies	-	-	-	-
PC4. analyze and resolve all customers' queries regarding product and services	-	-	-	-
PC5. handle customer complaints, provide appropriate solutions and alternatives within the time limits and follow up to ensure resolution	-	-	-	-
PC6. respond to customer queries by understanding the same through reviewing previous inquiries and responses	-	-	-	-
PC7. provide accurate, valid and complete information	-	-	-	-
PC8. verify customer's understanding of the provided information or solution	-	-	-	-
PC9. provide timelines and quality standards for resolution of the problem in agreement with the customer	-	-	-	-
PC10. ensure services are provided within agreed timelines and quality standards	-	-	-	-
PC11. follow the organizational procedures if agreed timelines are not achieved	-	-	-	-

Qualification

PC12. refer unresolved customer grievances to designated departments for further investigation	-	-	-	-
PC13. deliver prompt and professional solution for customer inquiries via direct contact, phone, email, online chat, etc.	-	-	-	-
PC14. contribute ideas to resolve customer problems to improve productivity	-	-	-	-
PC15. route and direct customer requests to appropriate department	-	-	-	-
PC16. manage and ensure that all customer's expectations are met	-	-	-	-
PC17. solicit sales of new or additional services or products	-	-	-	-
PC18. ensure response to customer's requests are designed to maximize customer satisfaction	-	-	-	-
<i>Provide ongoing customer service</i>	10	20	-	-
PC19. review previous interactions with the customers	-	-	-	-
PC20. make sure the steps are taken to determine customer satisfaction with the product/service provided	-	-	-	-
PC21. maintain regular communication with the customers	-	-	-	-
PC22. make sure the communication is based on information about customer needs	-	-	-	-
PC23. build working relationships with the customers	-	-	-	-
NOS Total	40	60	-	-

Qualification

National Occupational Standards (NOS) Parameters

NOS Code	BSC/N8406
NOS Name	Provide effective customer service
Sector	BFSI
Sub-Sector	Broking, Fund Investment & Services, Lending, Payments
Occupation	Marketing and Sales
NSQF Level	4
Credits	
Version	1.0
Last Reviewed Date	30/06/2022
Next Review Date	30/06/2025
NSQC Clearance Date	30/06/2022

Qualification

BSC/N8407: Maintain records and evaluate customer service

Description

This OS unit is about evaluating the customer service and maintaining records of all the customer interactions.

Scope

The scope covers the following

- Monitor and evaluate customer service
- Maintain records of customer interaction

Elements and Performance Criteria

Monitor and evaluate customer service

To be competent, the user/individual on the job must be able to:

- PC1.** obtain and record customer feedback
- PC2.** evaluate feedback from the customer for its importance and impact on organization
- PC3.** respond to negative feedback and initiate remedial action in-line with organizational procedures
- PC4.** report customer complaints of unsafe or unsatisfactory behavior by organizational representatives to appropriate personnel
- PC5.** identify improvements that can be made to services to customer that are supported by analysis of feedback
- PC6.** follow the relevant legal and data protection legislation in relation to delivering customer service and information handling

Maintain records of customer interaction

To be competent, the user/individual on the job must be able to:

- PC7.** maintain records of customer interactions or transactions, recording details of inquiries, complaints, or comments, as well as actions taken
- PC8.** complete all documentation in accordance with legislation and organizational procedures
- PC9.** prepare information for resolving customer complaints
- PC10.** collect customer information and check with existing records

Knowledge and Understanding (KU)

The individual on the job needs to know and understand:

- KU1.** procedure to obtain customer feedback as per organizational standards
- KU2.** methods to evaluate customer feedback
- KU3.** escalation matrix for customer feedback within the organization
- KU4.** techniques to improve customer service based on the feedbacks
- KU5.** the relevant legal and data protection legislation in relation to delivering customer service and information handling
- KU6.** types of documents to be maintained for customer service as per the organizational standards
- KU7.** how to monitor customer satisfaction

Qualification

Generic Skills (GS)

User/individual on the job needs to know how to:

- GS1. read and interpret instructions, procedures, and information at the workplace
- GS2. write e-mails to customers to get feedback
- GS3. communicate effectively with the customers
- GS4. complete tasks efficiently and accurately within stipulated time
- GS5. take decisions in a time bound manner
- GS6. improve and modify own work practices

Assessment Criteria

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
<i>Monitor and evaluate customer service</i>	20	30	-	-
PC1. obtain and record customer feedback	-	-	-	-
PC2. evaluate feedback from the customer for its importance and impact on organization	-	-	-	-
PC3. respond to negative feedback and initiate remedial action in-line with organizational procedures	-	-	-	-
PC4. report customer complaints of unsafe or unsatisfactory behavior by organizational representatives to appropriate personnel	-	-	-	-
PC5. identify improvements that can be made to services to customer that are supported by analysis of feedback	-	-	-	-
PC6. follow the relevant legal and data protection legislation in relation to delivering customer service and information handling	-	-	-	-
<i>Maintain records of customer interaction</i>	20	30	-	-
PC7. maintain records of customer interactions or transactions, recording details of inquiries, complaints, or comments, as well as actions taken	-	-	-	-
PC8. complete all documentation in accordance with legislation and organizational procedures	-	-	-	-

Qualification

PC9. prepare information for resolving customer complaints	-	-	-	-
PC10. collect customer information and check with existing records	-	-	-	-
NOS Total	40	60	-	-

National Occupational Standards (NOS) Parameters

NOS Code	BSC/N8407
NOS Name	Maintain records and evaluate customer service
Sector	BFSI
Sub-Sector	Broking, Fund Investment & Services, Lending, Payments
Occupation	Marketing and Sales
NSQF Level	4
Credits	
Version	1.0
Last Reviewed Date	30/06/2022
Next Review Date	30/06/2025
NSQC Clearance Date	30/06/2022

Qualification

BSC/N9903: Maintain data integrity using digital tools

Description

This OS unit is about maintaining data integrity, privacy, and security using digital tools.

Scope

The scope covers the following

- Maintain data integrity
- Maintain data privacy and security

Elements and Performance Criteria

Maintain data integrity

To be competent, the user/individual on the job must be able to:

- PC1. use digital technology for data capturing, data processing, and data retrieval as per organizational policy to maintain data integrity
- PC2. check the accuracy and validity of the loaded data
- PC3. verify all exceptions and questionable data items
- PC4. ensure database is complete and accurate at all times

Maintain data privacy and security

To be competent, the user/individual on the job must be able to:

- PC5. comply with the processes and protocols laid down, for ensuring data privacy and security
- PC6. secure digital and paper documents
- PC7. manage data access, data acquisition, and data utilization as per the SOP
- PC8. dispose of digital data and paper records securely
- PC9. configure data and disseminate relevant information to others, as required

Knowledge and Understanding (KU)

The individual on the job needs to know and understand:

- KU1. usage of digital technology to capture data
- KU2. ways to check data for accuracy and validity
- KU3. procedure to generate reports for data analysis
- KU4. significance of complete and accurate database
- KU5. organizational processes and protocols for data privacy and security
- KU6. methods to secure digital and paper documents
- KU7. organizational SOP for disposing of the digital and paper records
- KU8. organization SOP on dissemination of data

Generic Skills (GS)

User/individual on the job needs to know how to:

Customer Service Associate – Financial Services

Qualification

- GS1. read organizational SOPs, policies, instructions, and guidelines
- GS2. communicate accurate information
- GS3. plan and organize the work to achieve targets and deadlines
- GS4. apply problem solving approaches in different situations

Assessment Criteria

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
<i>Maintain data integrity</i>	14	16	-	-
PC1. use digital technology for data capturing, data processing, and data retrieval as per organizational policy to maintain data integrity	4	4	-	-
PC2. check the accuracy and validity of the loaded data	4	4	-	-
PC3. verify all exceptions and questionable data items	3	4	-	-
PC4. ensure database is complete and accurate at all times	3	4	-	-
<i>Maintain data privacy and security</i>	15	25	-	-
PC5. comply with the processes and protocols laid down, for ensuring data privacy and security	3	5	-	-
PC6. secure digital and paper documents	3	5	-	-
PC7. manage data access, data acquisition, and data utilization as per the SOP	3	5	-	-
PC8. dispose of digital data and paper records securely	3	5	-	-
PC9. configure data and disseminate relevant information to others, as required	3	5	-	-
NOS Total	29	41	-	-

Qualification

National Occupational Standards (NOS) Parameters

NOS Code	BSC/N9903
NOS Name	Maintain data integrity using digital tools
Sector	BFSI
Sub-Sector	BFSI
Occupation	Generic
NSQF Level	4
Credits	
Version	2.0
Last Reviewed Date	30/06/2022
Next Review Date	30/06/2025
NSQC Clearance Date	30/06/2022

Qualification

BSC/N9904: Communicate effectively and maintain inclusivity at the workplace

Description

This NOS unit is about communicating effectively with customers, and colleagues, and maintaining ethical behaviour and inclusivity at the workplace.

Scope

The scope covers the following

- Communicate effectively with customers and colleagues
- Maintain ethical behaviour and inclusivity

Elements and Performance Criteria

Communicate effectively with customers and colleagues

To be competent, the user/individual on the job must be able to:

- PC1.** interact with the customers and colleagues in a polite and professional manner
- PC2.** listen actively to the issues or requirements and respond timely and appropriately
- PC3.** address customer queries considering the difference in technical knowledge of the customer and yourself
- PC4.** seek and incorporate regular feedback as per organization's SOP
- PC5.** escalate any negative feedback to the reporting authority
- PC6.** pass on essential information to the colleagues timely
- PC7.** maintain clarity, honesty and transparency while communicating with the customers and colleagues

Maintain ethical behaviour and inclusivity

To be competent, the user/individual on the job must be able to:

- PC8.** follow professional etiquette in day-to-day processes and dealings with customers and colleagues
- PC9.** ensure not to defame the competitors
- PC10.** follow organizational policies and other do's and don'ts while interacting with Persons with Disability (e.g. make eye contact and clear facial expression while talking to Persons with Hearing Impairment, don't hang or lean on a person's wheelchair)
- PC11.** maintain empathy, respect, and a collaborative attitude towards Persons with Disability
- PC12.** follow gender and age sensitive practices at the workplace

Knowledge and Understanding (KU)

The individual on the job needs to know and understand:

- KU1.** organizational code of ethics and professional conduct
- KU2.** active listening techniques

Qualification

- KU3. methods of effective communication with customers and colleagues
- KU4. complaint and conflict handling policy and procedures
- KU5. procedure to collect constructive feedback
- KU6. ways to maintain clarity and transparency in customer service and at workplace
- KU7. significance of helping colleagues with specific issues and problems
- KU8. organizational policies on gender and age sensitivity
- KU9. organizational policy with regards to PwD

Generic Skills (GS)

User/individual on the job needs to know how to:

- GS1. read and understand organizational SOPs, policies and procedure documents
- GS2. interact effectively with customers and colleagues
- GS3. solve problems as and when required
- GS4. improve work processes by incorporating customer's feedback
- GS5. fill up documentation pertaining to interactions and customer feedback

Assessment Criteria

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
<i>Communicate effectively with customers and colleagues</i>	20	30	-	-
PC1. interact with the customers and colleagues in a polite and professional manner	3	4	-	-
PC2. listen actively to the issues or requirements and respond timely and appropriately	3	4	-	-
PC3. address customer queries considering the difference in technical knowledge of the customer and yourself	3	4	-	-
PC4. seek and incorporate regular feedback as per organization's SOP	2	5	-	-
PC5. escalate any negative feedback to the reporting authority	3	4	-	-
PC6. pass on essential information to the colleagues timely	3	4	-	-
PC7. maintain clarity, honesty and transparency while communicating with the customers and colleagues	3	5	-	-

Qualification

<i>Maintain ethical behaviour and inclusivity</i>	16	25	-	-
PC8. follow professional etiquette in day-to-day processes and dealings with customers and colleagues	3	5	-	-
PC9. ensure not to defame the competitors	3	5	-	-
PC10. follow organizational policies and other do's and don'ts while interacting with Persons with Disability (e.g. make eye contact and clear facial expression while talking to Persons with Hearing Impairment, don't hang or lean on a person's wheelchair)	4	5	-	-
PC11. maintain empathy, respect, and a collaborative attitude towards Persons with Disability	3	5	-	-
PC12. follow gender and age sensitive practices at the workplace	3	5	-	-
NOS Total	36	55	-	-

Qualification

National Occupational Standards (NOS) Parameters

NOS Code	BSC/N9904
NOS Name	Communicate effectively and maintain inclusivity at the workplace
Sector	BFSI
Sub-Sector	BFSI
Occupation	Generic
NSQF Level	4
Credits	
Version	2.0
Last Reviewed Date	30/06/2022
Next Review Date	30/06/2025
NSQC Clearance Date	30/06/2022

Qualification

SSC/N9003: 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

The scope covers the following

- Ensure compliance
- Follow safety procedure

Elements and Performance Criteria

Ensure compliance

To be competent, the user/individual on the job must be able to:

- PC1.** comply with the organization's current health, safety and security policies and procedures
- PC2.** report any identified breaches in health, safety, and security policies and procedures to the designated person
- PC3.** identify and correct any hazards that you can deal with safely, competently and within the limits of your authority
- 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

Follow safety procedure

To be competent, the user/individual on the job must be able to:

- PC5.** follow the organization's emergency procedures promptly, calmly, and efficiently
- PC6.** identify and recommend opportunities for improving health, safety, and security to the designated person
- PC7.** complete any health and safety records legibly and accurately

Knowledge and Understanding (KU)

The individual on the job needs to know and understand:

- KU1.** legislative requirements and organization's procedures for health, safety and security and your role and responsibilities in relation to this
- KU2.** what is meant by a hazard, including the different types of health and safety hazards that can be found in the workplace
- KU3.** how and when to report hazards
- KU4.** limits of your responsibility for dealing with hazards
- KU5.** the organization's emergency procedures for different emergency situations and the importance of following these
- KU6.** the importance of maintaining high standards of health, safety and security

Qualification

- KU7.** implications that any non-compliance with health, safety and security may have on individuals and the organization
- KU8.** types of breaches in health, safety and security and how and when to report these
- KU9.** evacuation procedures for workers and visitors
- KU10.** how to summon medical assistance and the emergency services, where necessary
- KU11.** how to use the health, safety and accident reporting procedures and the importance of these
- KU12.** government agencies in the areas of safety, health and security and their norms and services

Generic Skills (GS)

User/individual on the job needs to know how to:

- GS1.** complete accurate, well written work with attention to detail
- GS2.** read instructions, guidelines, procedures, rules and service level agreements
- GS3.** listen effectively and orally communicate information accurately
- GS4.** make decisions on suitable courses of action
- GS5.** plan and organize your work to meet health, safety and security requirements
- GS6.** build and maintain positive and effective relationships with colleagues and customers
- GS7.** apply problem solving approaches in different situations
- GS8.** analyze data and activities
- GS9.** apply balanced judgments to different situations
- GS10.** check that the work is complete and free from errors
- GS11.** work effectively in a team environment
- GS12.** identify and refer anomalies
- GS13.** help reach agreements with colleagues
- GS14.** keep up to date with changes, procedures and practices in the job role

Qualification

Assessment Criteria

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
<i>Ensure compliance</i>	20	40	-	-
PC1. comply with the organization's current health, safety and security policies and procedures	10	10	-	-
PC2. report any identified breaches in health, safety, and security policies and procedures to the designated person	-	10	-	-
PC3. identify and correct any hazards that you can deal with safely, competently and within the limits of your authority	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	-	-
<i>Follow safety procedure</i>	10	30	-	-
PC5. follow the organization's emergency procedures promptly, calmly, and efficiently	10	10	-	-
PC6. identify and recommend opportunities for improving health, safety, and security to the designated person	-	10	-	-
PC7. complete any health and safety records legibly and accurately	-	10	-	-
NOS Total	30	70	-	-

Qualification

National Occupational Standards (NOS) Parameters

NOS Code	SSC/N9003
NOS Name	Maintain a healthy, safe and secure working environment
Sector	IT-ITeS
Sub-Sector	IT Services, Business Process Management, Engineering R&D, SoftwareProduct Development, IT Support Services, Software Products, Future Skills
Occupation	Generic
NSQF Level	4
Credits	
Version	4.0
Last Reviewed Date	30/06/2022
Next Review Date	30/06/2025
NSQC Clearance Date	30/06/2022

Qualification

SGJ/N1702: Optimize resource utilization at workplace

Description

This unit is about adopting sustainable practices and optimizing use of resources, especially material, energy and waste, in day-to-day operations at work

Scope

The scope covers the following

- Material conservation practices
- Energy/electricity conservation practices
- Effective waste management/recycling practices

Elements and Performance Criteria

Material conservation practices

To be competent, the user/individual on the job must be able to:

- PC1.** identify ways to optimize usage of material including water in various tasks/activities/processes
- PC2.** check for spills/leakages in various tasks/activities/processes
- PC3.** plug spills/leakages and escalate to appropriate authority if unable to rectify
- PC4.** carry out routine cleaning of tools, machines and equipment

Energy/electricity conservation practices

To be competent, the user/individual on the job must be able to:

- PC5.** identify ways to optimize usage of electricity/energy in various tasks/activities/processes
- PC6.** check if the equipment/machine is functioning normally before commencing work and rectify wherever required
- PC7.** report malfunctioning (fumes/sparks/emission/vibration/noise) and lapse in maintenance of equipment
- PC8.** ensure electrical equipment and appliances are properly connected and turned off when not in use

Effective waste management/recycling practices

To be competent, the user/individual on the job must be able to:

- PC9.** identify recyclable and non-recyclable, and hazardous waste generated
- PC10.** segregate waste into different categories
- PC11.** dispose non-recyclable waste appropriately
- PC12.** deposit recyclable and reusable material at identified location
- PC13.** follow processes specified for disposal of hazardous waste

Knowledge and Understanding (KU)

The individual on the job needs to know and understand:

- KU1.** potential hazards, risks and threats based on the nature of work
- KU2.** layout of the workstation and electrical and thermal equipment used

Qualification

- KU3. organizations procedures for minimizing waste
- KU4. efficient and inefficient utilization of material and water
- KU5. ways of efficiently managing material and water in the process
- KU6. basics of electricity and prevalent energy efficient devices
- KU7. ways to recognize common electrical problems
- KU8. common practices of conserving electricity
- KU9. usage of different colours of dustbins
- KU10. categorization of waste into dry, wet, recyclable, non-recyclable and items of single-use plastics
- KU11. waste management and methods of waste disposal
- KU12. common sources of pollution and ways to minimize it

Generic Skills (GS)

User/individual on the job needs to know how to:

- GS1. record data on waste disposal at workplace
- GS2. complete statutory documents relevant to safety and hygiene
- GS3. read Standard Operating Practices (SOP) documents
- GS4. communicate with colleagues on the significance of greening of jobs
- GS5. make timely decisions for efficient utilization of resources
- GS6. complete tasks efficiently and accurately within stipulated time
- GS7. work with supervisors/team members to carry out work related tasks
- GS8. identify cause and effect of greening of jobs

Assessment Criteria

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
<i>Material conservation practices</i>	4	8	-	-
PC1. identify ways to optimize usage of material including water in various tasks/activities/processes	1	2	-	-
PC2. check for spills/leakages in various tasks/activities/processes	1	2	-	-
PC3. plug spills/leakages and escalate to appropriate authority if unable to rectify	1	2	-	-
PC4. carry out routine cleaning of tools, machines and equipment	1	2	-	-
<i>Energy/electricity conservation practices</i>	4	8	-	-
PC5. identify ways to optimize usage of electricity/energy in various tasks/activities/processes	1	2	-	-

Qualification

PC6. check if the equipment/machine is functioning normally before commencing work and rectify wherever required	1	2	-	-
PC7. report malfunctioning (fumes/sparks/emission/vibration/noise) and lapse in maintenance of equipment	1	2	-	-
PC8. ensure electrical equipment and appliances are properly connected and turned off when not in use	1	2	-	-
<i>Effective waste management/recycling practices</i>	5	10	-	-
PC9. identify recyclable and non-recyclable, and hazardous waste generated	1	2	-	-
PC10. segregate waste into different categories	1	2	-	-
PC11. dispose non-recyclable waste appropriately	1	2	-	-
PC12. deposit recyclable and reusable material at identified location	1	2	-	-
PC13. follow processes specified for disposal of hazardous waste	1	2	-	-
NOS Total	13	26	-	-

Qualification

National Occupational Standards (NOS) Parameters

NOS Code	SGJ/N1702
NOS Name	Optimize resource utilization at workplace
Sector	Green Jobs
Sub-Sector	Other Green Jobs
Occupation	Resource Optimization
NSQF Level	3
Credits	
Version	1.0
Last Reviewed Date	30/06/2022
Next Review Date	30/06/2025
NSQC Clearance Date	30/06/2022

Qualification

Assessment Guidelines and Assessment Weightage

Assessment Guidelines

1. Criteria for assessment for each Qualification will be created by the Sector Skill Council. Each Performance Criteria (PC) will be assigned marks proportional to its importance in NOS. SSC will also lay down the proportion of marks for Theory and Skills Practical for each PC.
2. The assessment for the theory part will be based on the knowledge bank of questions created by the SSC.
3. Assessment will be conducted for all compulsory NOS, and where applicable, on the selected elective/option NOS/set of NOS.
4. Individual assessment agencies will create unique question papers for the theory part for each candidate at each examination/training center (as per assessment criteria below).
5. Individual assessment agencies will create unique evaluations for skill practical for every student at each examination/ training center based on these criteria.
6. To pass the Qualification assessment, every trainee should score a minimum of 70% of % aggregate marks to successfully clear the assessment.
7. In case of unsuccessful completion, the trainee may seek reassessment on the Qualification.

Recommended Pass % aggregate for Qf: 70

Qualification

Assessment Weightage

Compulsory NOS

National Occupational Standards	Theory Marks	Practical Marks	Project Marks	Viva Marks	Total Marks	Weightage
BSC/N8405. Identify customer queries and requirements	40	60	-	-	100	20
BSC/N8406. Provide effective customer service	40	60	-	-	100	20
BSC/N8407: Maintain records and evaluate customer service	40	60	-	-	100	20
BSC/N9903. Maintain data integrity using digital tools	29	41	-	-	70	10
BSC/N9904. Communicate effectively and maintain inclusivity at the workplace	36	55	-	-	91	10
SSC/N9003. Maintain a healthy, safe and secure working environment	30	70	-	-	100	10
SGJ/N1702. Optimize resource utilization at workplace	13	26	-	-	39	10
Total	228	372	-	-	600	100

Qualification

Acronyms

NOS	National Occupational Standard(s)
NSQF	National Skills Qualifications Framework
Qf	Qualifications
TVET	Technical and Vocational Education and Training
SOP	Standard Operating Practices
PwD	Persons with Disability

Qualification

Glossary

Sector	Sector is a conglomeration of different business operations having similar business 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.
Occupation	Occupation is a set of job roles, which perform similar/ related set of functions in an industry.
Job role	Job role defines a unique set of functions that together form a unique employment opportunity in an organisation.
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 (KU) they need to meet that standard consistently. Occupational Standards are applicable both in the Indian and global contexts.
Performance Criteria (PC)	Performance Criteria (PC) 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 (Qf)	Qf comprises the set of OS, together with the educational, training and other criteria required to perform a job role. A Qf is assigned a unique qualifications code.
Unit Code	Unit code is a unique identifier for an Occupational Standard, which is denoted by 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 a 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 quality of performance required.

Qualification

Knowledge and Understanding (KU)	Knowledge and Understanding (KU) are statements that together specify the technical, generic, professional and organisational specific knowledge that an individual need in order to perform to the required standard.
Organisational Context	Organisational context includes the way the organisation 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 (GS)	Core skills or Generic Skills (GS) are a group of skills that are the key to learning and working in today's world. These skills are typically needed in any work environment 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.
Electives	Electives are NOS/set of NOS that are identified by the sector as contributive to specialization in a job role. There may be multiple electives within a Qf for each specialized job role. Trainees must select at least one elective for the successful completion of a Qf with Electives.
Options	Options are NOS/set of NOS that are identified by the sector as additional skills. There may be multiple options within a Qf. It is not mandatory to select any of the options to complete a Qf with Options.