

B2B Marketing Automation



Junior Executive-B2B Customer Relation (Automation)

QP Code: IAS/Q8006

Version: 1.0

NSQF Level: 4

Qualification Pack

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IAS/Q8006: Junior Executive-B2B Customer Relation (Automation)

Brief Job Description

B2B Customer Relation Executive will be a key player in managing and improving relationships with business-to-business (B2B) clients in the context of automation solutions. Individuals in this job will be able to comprehend customer objectives, provide personalized solutions, and streamline their automation journey in automation technology and procedures. An executive will help in creating long-lasting relationships and ensure that automation services and products are successfully adopted. Executive deals with Business-to-Business, within the automation and allied industry to primarily analyse the automation need, provide products, services, or solutions related to automation technologies to other businesses.

Personal Attributes

Individuals in this job must be able to communicate with similar company with background of automation techniques / Knowledge. B2B Customer relation executive are well-organized multitaskers who have a habit of accomplishing all the responsibilities that face them. They are well spoken, have excellent organizational and communication skills and able to build and maintain client relation on behalf of organisation he is working.

Applicable National Occupational Standards (NOS)

Compulsory NOS:

1. [IAS/N8002: Identify opportunities to grow the customer base](#)
2. [IAS/N0218: Build and maintain profitable relationships with key customers](#)
3. [IAS/N8003: Resolve customer complaints quickly and efficiently](#)
4. [IAS/N8004: Meeting with management in the organization to plan strategically](#)
5. [IAS/N8005: Conduct quality assurance surveys](#)
6. [IAS/N8006: Updating records and reporting to management](#)
7. [DGT/VSQ/N0102: Employability Skills \(60 Hours\)](#)

Qualification Pack (QP) Parameters

Sector	Instrumentation
Sub-Sector	Instrumentation & Automation

Qualification Pack

Occupation	Installation and Commissioning
Country	India
NSQF Level	4
Credits	14
Aligned to NCO/ISCO/ISIC Code	NCO2015/2431.0502
Minimum Educational Qualification & Experience	<p>12th Class OR Completed 2nd year of the 3-year diploma after 10 OR 10th grade pass with 2 year NTC plus 1 year NAC (10th grade pass with two years of any combination of NTC/NAC/CITS) OR 10th grade pass plus 1-year NTC/ NAC (10th grade pass with one year NTC/NAC/CITS) with 1 Year of experience Relevant experience OR 11th Class with 1 Year of experience Relevant experience</p>
Minimum Level of Education for Training in School	12th Class
Pre-Requisite License or Training	NA
Minimum Job Entry Age	18 Years
Last Reviewed On	NA
Next Review Date	31/08/2026
NSQC Approval Date	31/08/2023
Version	1.0
Reference code on NQR	QG-04-OA-00862-2023-V1-IASC
NQR Version	1.0

Qualification Pack

IAS/N8002: Identify opportunities to grow the customer base

Description

Identifying opportunities to grow the customer base is a critical aspect of business development. Individual will work is to identify and evaluate opportunities for expanding the customer base in Instrumentation and automation through strategic initiatives and actions.

Scope

The scope covers the following :

- This scope of work outlines the steps and activities required to identify and capitalize on opportunities for growing the customer base of the Instrumentation and automation industry. The successful execution of these tasks will help drive sustainable business growth and enhance customer relationships.

Elements and Performance Criteria

About the industry and roles of executive

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

- PC1.** Identifying opportunities to grow the customer base in the automation B2B (business-to-business) sector requires a strategic approach that leverages automation technologies to attract and retain new clients.
- PC2.** Explain fundamentals of various automation technologies, including robotic process automation (RPA), workflow automation, AI-driven automation, and their applications
- PC3.** Market research and Customer Profiling
- PC4.** Create high-quality content, such as blog posts, whitepapers, case studies, and videos, that highlights the benefits and success stories of your automation solutions
- PC5.** Collaborate with complementary technology providers, consultants, or industry associations to reach a wider audience.
- PC6.** Develop lead generation campaigns that offer valuable resources in exchange for contact information.

Knowledge and Understanding (KU)

The individual on the job needs to know and understand:

- KU1.** About Instrumentation, Automation, Surveillance and communication Industry
- KU2.** About allied Industries where automation is preferred
- KU3.** Uses of technical practices in allied industry
- KU4.** Business value in different industry
- KU5.** Competitor analysis across industry
- KU6.** SWOT practice and analysis in the industry
- KU7.** Compliance management system in Industry

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Generic Skills (GS)

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

- GS1.** Communicate politely and professionally
- GS2.** Listen attentively to understand the information being shared
- GS3.** Analyse need of automation
- GS4.** Maintain work-related notes and records
- GS5.** Identify possible disruptions to work and take appropriate preventive measures
- GS6.** Read the relevant literature to get the latest updates about the field of work
- GS7.** About the workplace, objective and organisational value

Qualification Pack

Assessment Criteria

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
<i>About the industry and roles of executive</i>	18	42	22	18
PC1. Identifying opportunities to grow the customer base in the automation B2B (business-to-business) sector requires a strategic approach that leverages automation technologies to attract and retain new clients.	3	7	3	2
PC2. Explain fundamentals of various automation technologies, including robotic process automation (RPA), workflow automation, AI-driven automation, and their applications	3	7	3	2
PC3. Market research and Customer Profiling	3	7	5	5
PC4. Create high-quality content, such as blog posts, whitepapers, case studies, and videos, that highlights the benefits and success stories of your automation solutions	3	7	5	5
PC5. Collaborate with complementary technology providers, consultants, or industry associations to reach a wider audience.	3	7	3	2
PC6. Develop lead generation campaigns that offer valuable resources in exchange for contact information.	3	7	3	2
NOS Total	18	42	22	18

Qualification Pack

National Occupational Standards (NOS) Parameters

NOS Code	IAS/N8002
NOS Name	Identify opportunities to grow the customer base
Sector	Instrumentation
Sub-Sector	Instrumentation & Automation
Occupation	Product Engineering/System Design
NSQF Level	4
Credits	1
Version	1.0
Last Reviewed Date	31/08/2023
Next Review Date	31/08/2026
NSQC Clearance Date	31/08/2023

Qualification Pack

IAS/N0218: Build and maintain profitable relationships with key customers

Description

Building and maintaining profitable relationships with key customers in the automation industry requires a specialized approach. Individual in this role will create valuable connect so Automation industry will rely on suppliers for technology, support, and expertise. Understand the unique challenges and opportunities. Adaptability, innovation, and a strong commitment to customer success will be key to success in this industry.

Scope

The scope covers the following :

- Individual will generate lead and Nurturing the industry for Partnerships and Alliances, conduct Webinars and Workshops as well as customized demonstrations and referral programs to showcase successful implementations of your automation solutions through client testimonials and detailed case studies. Highlight the measurable benefits achieved, such as increased efficiency, reduced costs, and improved accuracy.

Elements and Performance Criteria

Approach key customer

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

- PC1.** Demonstrate deep understanding of the automation industry, including the latest technologies, trends, and challenges
- PC2.** Identify key customers within the automation industry, such as manufacturers, industrial facilities, or system integrators.
- PC3.** Offer customized automation solutions that address the specific needs and pain points of each key customer. Tailor the products or services suited to their industry and operational requirements.
- PC4.** Provide comprehensive technical support and training programs to help customers maximize the use of automation products or systems.
- PC5.** Keep the customers informed about new automation technologies, software updates, and improvements that can benefit their operations.
- PC6.** Stay up-to-date with industry regulations and safety standards to ensure automation solutions comply with all relevant requirements.
- PC7.** Conduct regular on-site visits to key customers to understand their operational challenges and opportunities better.
- PC8.** Share case studies and success stories showcasing how automation solutions have helped other clients in the industry, also use social media platform, webinar etc.
- PC9.** Attend industry events, trade shows, and conferences to connect with key customers and stay updated on industry developments.
- PC10.** Schedule periodic business reviews with key customers to discuss their goals, performance, and how further support can be provided for their success.

Qualification Pack

Knowledge and Understanding (KU)

The individual on the job needs to know and understand:

- KU1.** About automation Industry
- KU2.** Need of automation requirements
- KU3.** Allied industry segment require automation upgradation
- KU4.** Latest technology and requirement to customize the machinery with automation
- KU5.** Categorization of industry having application of automation
- KU6.** Organisational behaviors in instrumentation/automation industry

Generic Skills (GS)

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

- GS1.** read the relevant literature to get the latest updates about the field of work
- GS2.** communicate politely and professionally
- GS3.** Increase industry connect
- GS4.** listen attentively to understand the information being shared
- GS5.** identify possible disruptions to work and take appropriate preventive measures
- GS6.** about the workplace, objective and organisational value

Qualification Pack

Assessment Criteria

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
<i>Approach key customer</i>	20	42	6	32
PC1. Demonstrate deep understanding of the automation industry, including the latest technologies, trends, and challenges	2	3	3	2
PC2. Identify key customers within the automation industry, such as manufacturers, industrial facilities, or system integrators.	2	4	-	4
PC3. Offer customized automation solutions that address the specific needs and pain points of each key customer. Tailor the products or services suited to their industry and operational requirements.	2	3	3	2
PC4. Provide comprehensive technical support and training programs to help customers maximize the use of automation products or systems.	2	4	-	4
PC5. Keep the customers informed about new automation technologies, software updates, and improvements that can benefit their operations.	2	4	-	4
PC6. Stay up-to-date with industry regulations and safety standards to ensure automation solutions comply with all relevant requirements.	2	5	-	3
PC7. Conduct regular on-site visits to key customers to understand their operational challenges and opportunities better.	2	5	-	3
PC8. Share case studies and success stories showcasing how automation solutions have helped other clients in the industry, also use social media platform, webinar etc.	2	5	-	3
PC9. Attend industry events, trade shows, and conferences to connect with key customers and stay updated on industry developments.	2	4	-	4
PC10. Schedule periodic business reviews with key customers to discuss their goals, performance, and how further support can be provided for their success.	2	5	-	3

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Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
NOS Total	20	42	6	32

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National Occupational Standards (NOS) Parameters

NOS Code	IAS/N0218
NOS Name	Build and maintain profitable relationships with key customers
Sector	Instrumentation
Sub-Sector	Instrumentation & Automation
Occupation	Installation and Commissioning
NSQF Level	4
Credits	3
Version	1.0
Last Reviewed Date	31/08/2023
Next Review Date	31/08/2026
NSQC Clearance Date	31/08/2023

Qualification Pack

IAS/N8003: Resolve customer complaints quickly and efficiently

Description

In the B2B customer relations within the automation industry, resolving customer complaints quickly and efficiently is crucial to maintain strong relationships and ensure customer satisfaction. Individual will establish a Customer-Focused Culture, Streamline Complaint Reporting, Designate a Complaints Handling Team, Categorize and Prioritize and offer timely solutions or workarounds to mitigate the impact of the complaint on the customer's operations while the root cause is being addressed.

Scope

The scope covers the following :

- Individual will deal with the client to maintain and follow-up for problems and provide the solution within defined timeline.

Elements and Performance Criteria

Customer-Focused complaints resolution

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

- PC1.** Ensure that business team, from sales to support, understands the importance of customer satisfaction and resolving complaints promptly
- PC2.** Set up a centralized system for customers to report complaints. This could include a dedicated email address, phone line, or an online portal
- PC3.** Gather all necessary information related to the complaint, including product/service details, customer history, and any relevant documentation.
- PC4.** Categorize complaints based on their severity and impact on the customer's operations. Prioritize those that have the greatest potential to disrupt their business.
- PC5.** Identify the root cause of the complaint to prevent similar issues in the future. This may involve collaboration with engineering, manufacturing, or other relevant departments.
- PC6.** Define reporting mechanism
- PC7.** Offer timely solutions or workarounds to mitigate the impact of the complaint on the customer's operations while the root cause is being addressed.
- PC8.** Use the insights gained from complaints to improve your products, services, and processes. Implement preventive measures to minimize future complaints.
- PC9.** Establish a clear escalation process for complaints that cannot be resolved at the initial level. Ensure that upper management is aware of and involved in critical issues.
- PC10.** Develop customer retention strategies to rebuild trust and maintain strong relationships after a complaint has been resolved successfully.

Knowledge and Understanding (KU)

The individual on the job needs to know and understand:

- KU1.** About instrumentation and automation industry

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- KU2.** Review case studies across identified business organisation
- KU3.** The available automation techniques client industry is using
- KU4.** About the production capacity of the industry
- KU5.** Business value and target capacity in Industry
- KU6.** Complaint redressal process

Generic Skills (GS)

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

- GS1.** Organisational behaviors
- GS2.** Analyse the clients production value chain
- GS3.** Analyse available technology in use by client organisation
- GS4.** Measure available solution / platform readily available including case studies
- GS5.** Demonstrate value addition with available solution
- GS6.** Listen attentively to understand the information being shared
- GS7.** Communicate politely and professionally

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Assessment Criteria

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
<i>Customer-Focused complaints resolution</i>	30	50	-	20
PC1. Ensure that business team, from sales to support, understands the importance of customer satisfaction and resolving complaints promptly	3	5	-	2
PC2. Set up a centralized system for customers to report complaints. This could include a dedicated email address, phone line, or an online portal	3	5	-	2
PC3. Gather all necessary information related to the complaint, including product/service details, customer history, and any relevant documentation.	3	5	-	2
PC4. Categorize complaints based on their severity and impact on the customer's operations. Prioritize those that have the greatest potential to disrupt their business.	3	5	-	2
PC5. Identify the root cause of the complaint to prevent similar issues in the future. This may involve collaboration with engineering, manufacturing, or other relevant departments.	3	5	-	2
PC6. Define reporting mechanism	3	5	-	2
PC7. Offer timely solutions or workarounds to mitigate the impact of the complaint on the customer's operations while the root cause is being addressed.	3	5	-	2
PC8. Use the insights gained from complaints to improve your products, services, and processes. Implement preventive measures to minimize future complaints.	3	5	-	2
PC9. Establish a clear escalation process for complaints that cannot be resolved at the initial level. Ensure that upper management is aware of and involved in critical issues.	3	5	-	2
PC10. Develop customer retention strategies to rebuild trust and maintain strong relationships after a complaint has been resolved successfully.	3	5	-	2

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Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
NOS Total	30	50	-	20

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National Occupational Standards (NOS) Parameters

NOS Code	IAS/N8003
NOS Name	Resolve customer complaints quickly and efficiently
Sector	Instrumentation
Sub-Sector	Instrumentation & Automation
Occupation	Product Engineering/System Design
NSQF Level	4
Credits	2
Version	1.0
Last Reviewed Date	31/08/2023
Next Review Date	31/08/2026
NSQC Clearance Date	31/08/2023

Qualification Pack

IAS/N8004: Meeting with management in the organization to plan strategically

Description

Planning strategically in the B2B automation industry requires a collaborative and well-structured approach. Management meeting is required to strategize, consider the progressive approach like industry trends and market analysis, competitive and SWOT analysis, defining goals and KPIs, technology integration etc. to ensure a successful planning.

Scope

The scope covers the following :

- Internal business management strategy to increase the business value.

Elements and Performance Criteria

Meeting with management to define strategy

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

- PC1.** Define the purpose and objectives of the strategic planning session. What are you trying to achieve? What specific goals are you aiming for in the automation industry?
- PC2.** Conduct a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) to assess company's current position in the automation industry. Identify internal strengths and weaknesses as well as external opportunities and threats.
- PC3.** Present an overview of the current trends and market dynamics within the automation industry.
- PC4.** Analyze competitors in the automation industry including their strengths and weaknesses, and determine how it can be differentiated in the market.
- PC5.** Prepare automated presentations that highlight key data points, customer trends, and strategic goals.
- PC6.** Outline plans for product or service development and enhancement in the automation sector and how individual will stay innovative and meet customer needs.
- PC7.** Develop strategies for reaching and engaging B2B customers in the automation industry.
- PC8.** Discuss the integration of emerging technologies, such as artificial intelligence, the Internet of Things (IoT), and data analytics, in automation solutions.
- PC9.** Create a timeline with clear milestones for implementing your strategic initiatives in the automation industry. Ensure that it aligns with long-term vision.
- PC10.** Explain how you'll monitor progress and evaluate the success of strategic initiatives.

Knowledge and Understanding (KU)

The individual on the job needs to know and understand:

- KU1.** About instrumentation and automation industry

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- KU2.** Review case studies across identified business organisation
- KU3.** Preparation agenda for the meeting including invitation to the senior business manager(s)
- KU4.** The available automation techniques client industry is using
- KU5.** Available technology available in market competitors

Generic Skills (GS)

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

- GS1.** Listen attentively to understand the information being shared
- GS2.** Communicate politely and professionally
- GS3.** Present the sequential way of activities as part of meeting agenda
- GS4.** Analyse available technology in use by client organisation
- GS5.** Demonstrate value addition with available solution
- GS6.** Note down the solution and strategy offered by senior management

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Assessment Criteria

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
<i>Meeting with management to define strategy</i>	30	50	-	20
PC1. Define the purpose and objectives of the strategic planning session. What are you trying to achieve? What specific goals are you aiming for in the automation industry?	3	5	-	2
PC2. Conduct a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) to assess company's current position in the automation industry. Identify internal strengths and weaknesses as well as external opportunities and threats.	3	5	-	2
PC3. Present an overview of the current trends and market dynamics within the automation industry.	3	5	-	2
PC4. Analyze competitors in the automation industry including their strengths and weaknesses, and determine how it can be differentiated in the market.	3	5	-	2
PC5. Prepare automated presentations that highlight key data points, customer trends, and strategic goals.	3	5	-	2
PC6. Outline plans for product or service development and enhancement in the automation sector and how individual will stay innovative and meet customer needs.	3	5	-	2
PC7. Develop strategies for reaching and engaging B2B customers in the automation industry.	3	5	-	2
PC8. Discuss the integration of emerging technologies, such as artificial intelligence, the Internet of Things (IoT), and data analytics, in automation solutions.	3	5	-	2
PC9. Create a timeline with clear milestones for implementing your strategic initiatives in the automation industry. Ensure that it aligns with long-term vision.	3	5	-	2

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Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
PC10. Explain how you'll monitor progress and evaluate the success of strategic initiatives.	3	5	-	2
NOS Total	30	50	-	20

Qualification Pack

National Occupational Standards (NOS) Parameters

NOS Code	IAS/N8004
NOS Name	Meeting with management in the organization to plan strategically
Sector	Instrumentation
Sub-Sector	Instrumentation & Automation
Occupation	Product Engineering/System Design
NSQF Level	4
Credits	2
Version	1.0
Last Reviewed Date	31/08/2023
Next Review Date	31/08/2026
NSQC Clearance Date	31/08/2023

Qualification Pack

IAS/N8005: Conduct quality assurance surveys

Description

Individual at this role will be able to conduct quality assurance surveys for B2B customer relations in the automation industry to ensure customer satisfaction, identify areas for improvement, and maintain strong business relationships. He/she will act on that feedback to improve customer relations and business outcomes in the automation industry.

Scope

The scope covers the following :

- Individual in this role will learn to provide customer satisfaction within the industry by maintaining quality of automation solution.

Elements and Performance Criteria

Conduct Quality Survey

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

- PC1.** Start by clarifying the objectives of quality assurance survey. Determine what specific aspects of B2B customer relations in the automation industry need to assess. Common objectives may include evaluating product satisfaction, service quality, communication effectiveness, and overall customer experience.
- PC2.** Define the key performance indicators (KPIs) and metrics that will help in measuring the quality of business relations including customer satisfaction scores (CSAT), Net Promoter Score (NPS), customer retention rates, response times, and any industry-specific metrics.
- PC3.** Create a well-structured questionnaire with clear and concise questions that align with the survey objectives. Make sure the questions are relevant to the automation industry and the specific aspects you want to evaluate.
- PC4.** Identify the most suitable delivery method for the client audience like online surveys, phone interviews, email surveys, or in-person interviews, depending on customer's preferences and accessibility.
- PC5.** Segment B2B customers based on criteria such as industry, company size, or purchase history. This allows in tailor survey questions and responses to specific customer groups, which can provide more targeted insights.
- PC6.** Collect and analyze the survey responses systematically, use statistical analysis tools to calculate scores and identify trends. Pay attention to both quantitative data (scores and ratings) and qualitative data (comments and suggestions).
- PC7.** Share the survey results with relevant teams within the organization, such as sales, customer support, and product development. Develop action plan based on the feedback received to address any issues or areas for improvement.
- PC8.** After implementing improvements, consider conducting follow-up surveys to measure the impact of the changes and ensure continuous improvement in B2B customer relations.

Knowledge and Understanding (KU)

Qualification Pack

The individual on the job needs to know and understand:

- KU1.** About instrumentation and automation industry
- KU2.** Review case studies across identified business organisation
- KU3.** The available automation techniques client industry is using
- KU4.** About the production capacity of the industry
- KU5.** Business value and target capacity in Industry
- KU6.** Complaint redressal process
- KU7.** Data matrices uses in automation industry

Generic Skills (GS)

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

- GS1.** Organisational behaviors
- GS2.** Analyse the clients production value chain
- GS3.** Analyse available technology in use by client organisation
- GS4.** Measure available solution / platform readily available including case studies
- GS5.** Demonstrate value addition with available solution
- GS6.** Listen attentively to understand the information being shared
- GS7.** Communicate politely and professionally

Qualification Pack

Assessment Criteria

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
<i>Conduct Quality Survey</i>	30	46	-	24
PC1. Start by clarifying the objectives of quality assurance survey. Determine what specific aspects of B2B customer relations in the automation industry need to assess. Common objectives may include evaluating product satisfaction, service quality, communication effectiveness, and overall customer experience.	4	6	-	5
PC2. Define the key performance indicators (KPIs) and metrics that will help in measuring the quality of business relations including customer satisfaction scores (CSAT), Net Promoter Score (NPS), customer retention rates, response times, and any industry-specific metrics.	2	4	-	4
PC3. Create a well-structured questionnaire with clear and concise questions that align with the survey objectives. Make sure the questions are relevant to the automation industry and the specific aspects you want to evaluate.	4	6	-	5
PC4. Identify the most suitable delivery method for the client audience like online surveys, phone interviews, email surveys, or in-person interviews, depending on customer's preferences and accessibility.	4	6	-	-
PC5. Segment B2B customers based on criteria such as industry, company size, or purchase history. This allows in tailor survey questions and responses to specific customer groups, which can provide more targeted insights.	4	6	-	5
PC6. Collect and analyze the survey responses systematically, use statistical analysis tools to calculate scores and identify trends. Pay attention to both quantitative data (scores and ratings) and qualitative data (comments and suggestions).	4	6	-	5

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Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
PC7. Share the survey results with relevant teams within the organization, such as sales, customer support, and product development. Develop action plan based on the feedback received to address any issues or areas for improvement.	4	6	-	-
PC8. After implementing improvements, consider conducting follow-up surveys to measure the impact of the changes and ensure continuous improvement in B2B customer relations.	4	6	-	-
NOS Total	30	46	-	24

Qualification Pack

National Occupational Standards (NOS) Parameters

NOS Code	IAS/N8005
NOS Name	Conduct quality assurance surveys
Sector	Instrumentation
Sub-Sector	Instrumentation & Automation
Occupation	Product Engineering/System Design
NSQF Level	4
Credits	1
Version	1.0
Last Reviewed Date	31/08/2023
Next Review Date	31/08/2026
NSQC Clearance Date	31/08/2023

Qualification Pack

IAS/N8006: Updating records and reporting to management

Description

Effective records management and reporting in B2B customer relations within the automation industry can lead to improved decision-making, enhanced customer experiences, and increased competitiveness. Individual at this role will update client records for maintaining efficient operations improving customer satisfaction, and making informed business decisions.

Scope

The scope covers the following :

- Reporting Practices and MIS

Elements and Performance Criteria

Reporting Practice

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

- PC1.** Establish clear data management policies and procedures that outline how customer-related information should be collected, stored, and updated. Ensure compliance with data protection regulations, such as GDPR or CCPA, as applicable.
- PC2.** Implement a Customer Relationship Management (CRM) system to centralize customer data. A CRM system helps automate record-keeping, tracks interactions, and allows for easy access to customer information by authorized personnel.
- PC3.** Ensure that CRM system captures comprehensive customer data, including contact information, purchase history, service requests, communication history, and any other relevant details specific to the automation industry.
- PC4.** Implement a process for regularly updating customer records. This may include scheduled reviews of customer accounts, verifying contact information, and updating purchase or service history.
- PC5.** Automate data entry processes where feasible, such as integrating your CRM system with other tools and platforms used in the automation industry, like inventory management systems or email marketing platforms.
- PC6.** Use the CRM system to segment customer data based on various criteria, such as industry, location, purchasing behavior, or engagement level. This segmentation allows for targeted communication and marketing efforts.
- PC7.** Create standardized reports for management that provide insights into customer relations, such as customer satisfaction levels, sales trends, service request patterns, and account growth. These reports should be generated on a regular interval.
- PC8.** Present data in a visual and understandable format using charts, graphs, and dashboards. Visualization tools can help management quickly grasp key insights.
- PC9.** Offer actionable insights and recommendations based on the findings. Suggest strategies for improving customer relations or capitalizing on opportunities in the automation industry.
- PC10.** Maintain strict data security measures to protect customer information and ensure compliance with data protection regulations. Regularly update security protocols as needed.

Qualification Pack

Knowledge and Understanding (KU)

The individual on the job needs to know and understand:

- KU1.** About instrumentation and automation industry
- KU2.** Review case studies across identified business organisation
- KU3.** The available automation techniques client industry is using
- KU4.** About the production capacity of the industry
- KU5.** Business value and target capacity in Industry

Generic Skills (GS)

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

- GS1.** Organisational way of functions
- GS2.** Analyse the clients production value chain
- GS3.** Analyse available technology in use by client organisation
- GS4.** Measure available solution / platform readily available including case studies
- GS5.** Demonstrate value addition with available solution
- GS6.** Listen attentively to understand the information being shared

Qualification Pack

Assessment Criteria

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
<i>Reporting Practice</i>	30	40	-	30
PC1. Establish clear data management policies and procedures that outline how customer-related information should be collected, stored, and updated. Ensure compliance with data protection regulations, such as GDPR or CCPA, as applicable.	3	4	-	3
PC2. Implement a Customer Relationship Management (CRM) system to centralize customer data. A CRM system helps automate record-keeping, tracks interactions, and allows for easy access to customer information by authorized personnel.	3	4	-	3
PC3. Ensure that CRM system captures comprehensive customer data, including contact information, purchase history, service requests, communication history, and any other relevant details specific to the automation industry.	3	4	-	3
PC4. Implement a process for regularly updating customer records. This may include scheduled reviews of customer accounts, verifying contact information, and updating purchase or service history.	3	4	-	3
PC5. Automate data entry processes where feasible, such as integrating your CRM system with other tools and platforms used in the automation industry, like inventory management systems or email marketing platforms.	3	4	-	3
PC6. Use the CRM system to segment customer data based on various criteria, such as industry, location, purchasing behavior, or engagement level. This segmentation allows for targeted communication and marketing efforts.	3	4	-	3
PC7. Create standardized reports for management that provide insights into customer relations, such as customer satisfaction levels, sales trends, service request patterns, and account growth. These reports should be generated on a regular interval.	3	4	-	3

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Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
PC8. Present data in a visual and understandable format using charts, graphs, and dashboards. Visualization tools can help management quickly grasp key insights.	3	4	-	3
PC9. Offer actionable insights and recommendations based on the findings. Suggest strategies for improving customer relations or capitalizing on opportunities in the automation industry.	3	4	-	3
PC10. Maintain strict data security measures to protect customer information and ensure compliance with data protection regulations. Regularly update security protocols as needed.	3	4	-	3
NOS Total	30	40	-	30

Qualification Pack

National Occupational Standards (NOS) Parameters

NOS Code	IAS/N8006
NOS Name	Updating records and reporting to management
Sector	Instrumentation
Sub-Sector	Instrumentation & Automation
Occupation	Product Engineering/System Design
NSQF Level	4
Credits	3
Version	1.0
Last Reviewed Date	31/08/2023
Next Review Date	31/08/2026
NSQC Clearance Date	31/08/2023

Qualification Pack

DGT/VSQ/N0102: Employability Skills (60 Hours)

Description

This unit is about employability skills, Constitutional values, becoming a professional in the 21st Century, digital, financial, and legal literacy, diversity and Inclusion, English and communication skills, customer service, entrepreneurship, and apprenticeship, getting ready for jobs and career development.

Scope

The scope covers the following :

- Introduction to Employability Skills
- Constitutional values - Citizenship
- Becoming a Professional in the 21st Century
- Basic English Skills
- Career Development & Goal Setting
- Communication Skills
- Diversity & Inclusion
- Financial and Legal Literacy
- Essential Digital Skills
- Entrepreneurship
- Customer Service
- Getting ready for Apprenticeship & Jobs

Elements and Performance Criteria

Introduction to Employability Skills

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

PC1. identify employability skills required for jobs in various industries

PC2. identify and explore learning and employability portals

Constitutional values - Citizenship

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

PC3. recognize the significance of constitutional values, including civic rights and duties, citizenship, responsibility towards society etc. and personal values and ethics such as honesty, integrity, caring and respecting others, etc.

PC4. follow environmentally sustainable practices

Becoming a Professional in the 21st Century

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

PC5. recognize the significance of 21st Century Skills for employment

PC6. practice the 21st Century Skills such as Self-Awareness, Behaviour Skills, time management, critical and adaptive thinking, problem-solving, creative thinking, social and cultural awareness, emotional awareness, learning to learn for continuous learning etc. in personal and professional life

Basic English Skills

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

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PC7. use basic English for everyday conversation in different contexts, in person and over the telephone

PC8. read and understand routine information, notes, instructions, mails, letters etc. written in English

PC9. write short messages, notes, letters, e-mails etc. in English

Career Development & Goal Setting

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

PC10. understand the difference between job and career

PC11. prepare a career development plan with short- and long-term goals, based on aptitude

Communication Skills

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

PC12. follow verbal and non-verbal communication etiquette and active listening techniques in various settings

PC13. work collaboratively with others in a team

Diversity & Inclusion

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

PC14. communicate and behave appropriately with all genders and PwD

PC15. escalate any issues related to sexual harassment at workplace according to POSH Act

Financial and Legal Literacy

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

PC16. select financial institutions, products and services as per requirement

PC17. carry out offline and online financial transactions, safely and securely

PC18. identify common components of salary and compute income, expenses, taxes, investments etc

PC19. identify relevant rights and laws and use legal aids to fight against legal exploitation

Essential Digital Skills

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

PC20. operate digital devices and carry out basic internet operations securely and safely

PC21. use e-mail and social media platforms and virtual collaboration tools to work effectively

PC22. use basic features of word processor, spreadsheets, and presentations

Entrepreneurship

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

PC23. identify different types of Entrepreneurship and Enterprises and assess opportunities for potential business through research

PC24. develop a business plan and a work model, considering the 4Ps of Marketing Product, Price, Place and Promotion

PC25. identify sources of funding, anticipate, and mitigate any financial/ legal hurdles for the potential business opportunity

Customer Service

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

PC26. identify different types of customers

PC27. identify and respond to customer requests and needs in a professional manner.

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PC28. follow appropriate hygiene and grooming standards

Getting ready for apprenticeship & Jobs

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

PC29. create a professional Curriculum vitae (Résumé)

PC30. search for suitable jobs using reliable offline and online sources such as Employment exchange, recruitment agencies, newspapers etc. and job portals, respectively

PC31. apply to identified job openings using offline /online methods as per requirement

PC32. answer questions politely, with clarity and confidence, during recruitment and selection

PC33. identify apprenticeship opportunities and register for it as per guidelines and requirements

Knowledge and Understanding (KU)

The individual on the job needs to know and understand:

KU1. need for employability skills and different learning and employability related portals

KU2. various constitutional and personal values

KU3. different environmentally sustainable practices and their importance

KU4. Twenty first (21st) century skills and their importance

KU5. how to use English language for effective verbal (face to face and telephonic) and written communication in formal and informal set up

KU6. importance of career development and setting long- and short-term goals

KU7. about effective communication

KU8. POSH Act

KU9. Gender sensitivity and inclusivity

KU10. different types of financial institutes, products, and services

KU11. how to compute income and expenditure

KU12. importance of maintaining safety and security in offline and online financial transactions

KU13. different legal rights and laws

KU14. different types of digital devices and the procedure to operate them safely and securely

KU15. how to create and operate an e- mail account and use applications such as word processors, spreadsheets etc.

KU16. how to identify business opportunities

KU17. types and needs of customers

KU18. how to apply for a job and prepare for an interview

KU19. apprenticeship scheme and the process of registering on apprenticeship portal

Generic Skills (GS)

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

GS1. read and write different types of documents/instructions/correspondence

GS2. communicate effectively using appropriate language in formal and informal settings

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- GS3.** behave politely and appropriately with all
- GS4.** how to work in a virtual mode
- GS5.** perform calculations efficiently
- GS6.** solve problems effectively
- GS7.** pay attention to details
- GS8.** manage time efficiently
- GS9.** maintain hygiene and sanitization to avoid infection

Qualification Pack

Assessment Criteria

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
<i>Introduction to Employability Skills</i>	1	1	-	-
PC1. identify employability skills required for jobs in various industries	-	-	-	-
PC2. identify and explore learning and employability portals	-	-	-	-
<i>Constitutional values - Citizenship</i>	1	1	-	-
PC3. recognize the significance of constitutional values, including civic rights and duties, citizenship, responsibility towards society etc. and personal values and ethics such as honesty, integrity, caring and respecting others, etc.	-	-	-	-
PC4. follow environmentally sustainable practices	-	-	-	-
<i>Becoming a Professional in the 21st Century</i>	2	4	-	-
PC5. recognize the significance of 21st Century Skills for employment	-	-	-	-
PC6. practice the 21st Century Skills such as Self-Awareness, Behaviour Skills, time management, critical and adaptive thinking, problem-solving, creative thinking, social and cultural awareness, emotional awareness, learning to learn for continuous learning etc. in personal and professional life	-	-	-	-
<i>Basic English Skills</i>	2	3	-	-
PC7. use basic English for everyday conversation in different contexts, in person and over the telephone	-	-	-	-
PC8. read and understand routine information, notes, instructions, mails, letters etc. written in English	-	-	-	-
PC9. write short messages, notes, letters, e-mails etc. in English	-	-	-	-
<i>Career Development & Goal Setting</i>	1	2	-	-

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Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
PC10. understand the difference between job and career	-	-	-	-
PC11. prepare a career development plan with short- and long-term goals, based on aptitude	-	-	-	-
<i>Communication Skills</i>	2	2	-	-
PC12. follow verbal and non-verbal communication etiquette and active listening techniques in various settings	-	-	-	-
PC13. work collaboratively with others in a team	-	-	-	-
<i>Diversity & Inclusion</i>	1	2	-	-
PC14. communicate and behave appropriately with all genders and PwD	-	-	-	-
PC15. escalate any issues related to sexual harassment at workplace according to POSH Act	-	-	-	-
<i>Financial and Legal Literacy</i>	2	3	-	-
PC16. select financial institutions, products and services as per requirement	-	-	-	-
PC17. carry out offline and online financial transactions, safely and securely	-	-	-	-
PC18. identify common components of salary and compute income, expenses, taxes, investments etc	-	-	-	-
PC19. identify relevant rights and laws and use legal aids to fight against legal exploitation	-	-	-	-
<i>Essential Digital Skills</i>	3	4	-	-
PC20. operate digital devices and carry out basic internet operations securely and safely	-	-	-	-
PC21. use e-mail and social media platforms and virtual collaboration tools to work effectively	-	-	-	-
PC22. use basic features of word processor, spreadsheets, and presentations	-	-	-	-

Qualification Pack

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
<i>Entrepreneurship</i>	2	3	-	-
PC23. identify different types of Entrepreneurship and Enterprises and assess opportunities for potential business through research	-	-	-	-
PC24. develop a business plan and a work model, considering the 4Ps of Marketing Product, Price, Place and Promotion	-	-	-	-
PC25. identify sources of funding, anticipate, and mitigate any financial/ legal hurdles for the potential business opportunity	-	-	-	-
<i>Customer Service</i>	1	2	-	-
PC26. identify different types of customers	-	-	-	-
PC27. identify and respond to customer requests and needs in a professional manner.	-	-	-	-
PC28. follow appropriate hygiene and grooming standards	-	-	-	-
<i>Getting ready for apprenticeship & Jobs</i>	2	3	-	-
PC29. create a professional Curriculum vitae (Résumé)	-	-	-	-
PC30. search for suitable jobs using reliable offline and online sources such as Employment exchange, recruitment agencies, newspapers etc. and job portals, respectively	-	-	-	-
PC31. apply to identified job openings using offline /online methods as per requirement	-	-	-	-
PC32. answer questions politely, with clarity and confidence, during recruitment and selection	-	-	-	-
PC33. identify apprenticeship opportunities and register for it as per guidelines and requirements	-	-	-	-
NOS Total	20	30	-	-

Qualification Pack

National Occupational Standards (NOS) Parameters

NOS Code	DGT/VSQ/N0102
NOS Name	Employability Skills (60 Hours)
Sector	Cross Sectoral
Sub-Sector	Professional Skills
Occupation	Employability
NSQF Level	4
Credits	2
Version	1.0
Last Reviewed Date	07/10/2025
Next Review Date	07/10/2028
NSQC Clearance Date	07/10/2025

Assessment Guidelines and Assessment Weightage

Assessment Guidelines

1. Assessment System Overview:

- Batches assigned to the assessment agencies for conducting the assessment on SDSM/SIP or email
- Assessment agencies send the assessment confirmation to VTP/TC looping SSC
- Assessment agency deploys the ToA certified Assessor for executing the assessment
- SSC monitors the assessment process & records.

2. Testing Environment:

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- Confirm that the center is available at the same address as mentioned on SDMS or SIP
- Check the duration of the training.
- Check the Assessment Start and End time to be as 10 a.m. and 5 p.m.
- If the batch size is more than 30, then there should be 2 Assessors.
- Check that the allotted time to the candidates to complete Theory & Practical Assessment is correct.
- Check the mode of assessment—Online (TAB/Computer) or Offline (OMR/PP).
- Confirm the number of TABs on the ground are correct to execute the Assessment smoothly.
- Check the availability of the Lab Equipment for the Job Role.

3. Assessment Quality Assurance levels / Framework:

- Question papers created by the Subject Matter Experts (SME)
- Question papers created by the SME verified by the other subject Matter Experts
- Questions are mapped with NOS and PC
- Question papers are prepared considering that level 1 to 3 are for the unskilled & semi-skilled individuals, and level 4 and above are for the skilled, supervisor & higher management
- Assessor must be ToA certified & trainer must be ToT Certified
- Assessment agency must follow the assessment guidelines to conduct the assessment

4. Types of evidence or evidence-gathering protocol:

- Time-stamped & geotagged reporting of the assessor from assessment location
- Center photographs with signboards and scheme specific branding
- Biometric or manual attendance sheet (stamped by TP) of the trainees during the training period
- Time-stamped & geotagged assessment (Theory + Viva + Practical) photographs & videos

5. Method of verification or validation:

- Surprise visit to the assessment location

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- Random audit of the batch
- Random audit of any candidate

6. Method for assessment documentation, archiving, and access

- Hard copies of the documents are stored
- Soft copies of the documents & photographs of the assessment are uploaded / accessed from Cloud Storage
- Soft copies of the documents & photographs of the assessment are stored in the Hard Drives

Minimum Aggregate Passing % at QP Level : 70

(**Please note:** Every Trainee should score a minimum aggregate passing percentage as specified above, to successfully clear the Qualification Pack assessment.)

Assessment Weightage

Compulsory NOS

National Occupational Standards	Theory Marks	Practical Marks	Project Marks	Viva Marks	Total Marks	Weightage
IAS/N8002.Identify opportunities to grow the customer base	18	42	22	18	100	10
IAS/N0218.Build and maintain profitable relationships with key customers	20	42	6	32	100	20
IAS/N8003.Resolve customer complaints quickly and efficiently	30	50	0	20	100	20
IAS/N8004.Meeting with management in the organization to plan strategically	30	50	0	20	100	20
IAS/N8005.Conduct quality assurance surveys	30	46	0	24	100	10

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National Occupational Standards	Theory Marks	Practical Marks	Project Marks	Viva Marks	Total Marks	Weightage
IAS/N8006.Updating records and reporting to management	30	40	0	30	100	10
DGT/VSQ/N0102.Employability Skills (60 Hours)	20	30	-	-	50	10
Total	178	300	28	144	650	100

Qualification Pack

Acronyms

NOS	National Occupational Standard(s)
NSQF	National Skills Qualifications Framework
QP	Qualifications Pack
TVET	Technical and Vocational Education and Training
CRM	Customer Relationship Management
B2B	Business to Business
AI	Artificial Intelligence
NLP	Natural Language Processing
KPI	Key Performance Indicator

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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 Pack (QP)	QP comprises the set of OS, together with the educational, training and other criteria required to perform a job role. A QP is assigned a unique qualifications pack 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.

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Knowledge and Understanding (KU)	Knowledge and Understanding (KU) are statements which together specify the technical, generic, professional and organisational specific knowledge that an individual needs 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 QP for each specialized job role. Trainees must select at least one elective for the successful completion of a QP 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 QP. It is not mandatory to select any of the options to complete a QP with Options.
IASC SSC	Instrumentation Automation Surveillance & Communication Sector Skill Council
NSQF	National Skill Qualification Framework
NCrF	National Credit Framework
NCVET	National Council for Vocational Education and Training
NSDC	National Skill Development Corporation
SID	Skill India Digital
RPL	Recognition of Prior Learning