Qualification Pack

Junior Executive - Technical Sales (Automation)

QP Code: IAS/Q8007

Version: 1.0

NSQF Level: 4

Contents

IAS/Q8007: Junior Executive - Technical Sales (Automation)

Brief Job Description

Individuals in this job will be a key contributor to our business growth by promoting and selling our automation solutions to clients. Individual roles involve leveraging technical expertise and understanding of automation technologies to identify potential customers, engage with them, and provide tailored solutions that address their automation needs.

Personal Attributes

Individuals in this job must be able to comunicate similar company with background of automation techniques / Knowledge. Technical Sales 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 organization he represents.

Applicable National Occupational Standards (NOS)

Compulsory NOS:

1. IAS/N8009: Preparing and compiling proposal and reports

2. IAS/N8011: Presentation & professional appearance

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

4. IAS/N8007: Analyse the technical need of automation solutions

5. IAS/N8008: Explain complex technical information to the customer

6. IAS/N8006: Updating records and reporting to management

Qualification Pack (QP) Parameters

Sector	Instrumentation
Sub-Sector	Instrumentation & Automation
Occupation	Product Engineering/System Design
Country	India
NSQF Level	4

Credits	14
Aligned to NCO/ISCO/ISIC Code	NCO2015/2433.0601

Minimum Educational Qualification & Experience	12th Class
	  OR
	Completed 2nd year of the 3-year diploma after 10
	  OR
	11th Class with 1 Year of experience relevant experience
	  OR
	10th grade pass plus 1-year NTC/ NAC (10th grade pass with two years of any combination of NTC/NAC/CITS or equivalent)
	  OR
	10th grade pass plus 1-year NTC/ NAC with 1 Year of experience relevant experience

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-00863-2023-V1
NQR Version	1.0

IAS/N8009: Preparing and compiling proposal and reports

Description

Individual at this role will prepare and compile proposals and reports. These documents serve as essential tools to communicate in offerings and demonstrating the value addition in terms of offered automation solutions to potential clients.

Scope

The scope covers the following :

- Technical sales - develop proposal and reports

Elements and Performance Criteria

Develop proposal documents and MIS

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

PC1. Create concise executive summary that highlights the key points of the proposal. This should include a brief overview of the client's challenges, proposed solution, and the potential benefits of automation

PC2. • Articulate the client's pain points and challenges related to their current processes. This section should resonate with the client and demonstrate understanding of their situation.
• Detail the automation solution you're offering including how the automation will address the identified challenges and pain points. Provide an overview of the automation process, tools, technologies, and methodologies to offer.

PC3. Organize the proposal or report with a logical structure in sequential way

PC4. Customize the proposal or report to meet the specific needs and preferences of the client which address the concerns and objectives directly in the document for target company

PC5. Clearly outline the pricing structure, including any options or packages available. Be transparent about what is included in the pricing and applicable taxes.

PC6. Present the proposal or report in a professional manner, whether in printed form, digitally, or during a face-to-face presentation. Pay attention to formatting and design.

PC7. Continuously gather feedback from successful and unsuccessful proposals to refine approach over time.

PC8. Provide technical specifications of the automation solution, including the software/tools used, integration with existing systems, data flow, security measures, and any customization required.

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

KU6. Technical know how of the soultion

Generic Skills (GS)

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

GS1. Organisational key 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 politely

GS6. Listen attentively to understand the information being shared

GS7. Communicate politely and professionally

Assessment Criteria

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
Develop proposal documents and MIS	**30**	**50**	**-**	**20**
PC1. Create concise executive summary that highlights the key points of the proposal. This should include a brief overview of the client's challenges, proposed solution, and the potential benefits of automation	4	6	-	-
PC2. • Articulate the client's pain points and challenges related to their current processes. This section should resonate with the client and demonstrate understanding of their situation. • Detail the automation solution you're offering including how the automation will address the identified challenges and pain points. Provide an overview of the automation process, tools, technologies, and methodologies to offer.	4	6	-	2
PC3. Organize the proposal or report with a logical structure in sequential way	4	6	-	2
PC4. Customize the proposal or report to meet the specific needs and preferences of the client which address the concerns and objectives directly in the document for target company	4	6	-	2
PC5. Clearly outline the pricing structure, including any options or packages available. Be transparent about what is included in the pricing and applicable taxes.	4	6	-	2
PC6. Present the proposal or report in a professional manner, whether in printed form, digitally, or during a face-to-face presentation. Pay attention to formatting and design.	4	6	-	4
PC7. Continuously gather feedback from successful and unsuccessful proposals to refine approach over time.	3	6	-	4
PC8. Provide technical specifications of the automation solution, including the software/tools used, integration with existing systems, data flow, security measures, and any customization required.	3	8	-	4

Qualification Pack

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

National Occupational Standards (NOS) Parameters

NOS Code	IAS/N8009
NOS Name	Preparing and compiling proposal and reports
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

IAS/N8011: Presentation & professional appearance

Description

Presentation and professional appearance are vital aspects of being a successful technical sales professional in the automation industry. Individual in this role will mark his/her appearance, demeanor, and presentation skills which significantly impact how potential customers perceive individual and service providing company.

Scope

The scope covers the following :

- Demonstrate the applicable automation solution to the client

Elements and Performance Criteria

Demonstrate the applicable automation solution to the client

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

PC1. Analyse audience's needs, pain points, and priorities. Tailor the presentation to address their specific challenges and interests

PC2. Organize the presentation with a clear structure: introduction, main points, supporting details, and conclusion. Use headings and bullet points to make it easy to follow

PC3. Highlight the key benefits and value propositions of available automation solution sync with client requirement. Clearly explain how it addresses the client's pain points and improves their operations

PC4. Engage your audience by making it interactive during the presentation. Encourage questions and discussions. Use anecdotes or real-world examples to illustrate key points.

PC5. Ensure that any printed materials, brochures, or handouts you provide are professionally designed and error-free.

PC6. Include live demonstrations of available automation solutions to showcase their functionality and benefits.

PC7. Adhere to a professional dress code that aligns with your industry and the expectations of your clients. Dress slightly more formal than your audience to convey respect and professionalism.

PC8. Present financial assumptions and its comparison with other solution provider

PC9. Add question and answer session to get proper feedback

Knowledge and Understanding (KU)

The individual on the job needs to know and understand:

KU1. About instrumentation and automation industry and solution

KU2. Review similar 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 key function

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

Assessment Criteria

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
Demonstrate the applicable automation solution to the client	**30**	**60**	-	**10**
PC1. Analyse audience's needs, pain points, and priorities. Tailor the presentation to address their specific challenges and interests	5	8	-	2
PC2. Organize the presentation with a clear structure: introduction, main points, supporting details, and conclusion. Use headings and bullet points to make it easy to follow	5	8	-	2
PC3. Highlight the key benefits and value propositions of available automation solution sync with client requirement. Clearly explain how it addresses the client's pain points and improves their operations	5	8	-	2
PC4. Engage your audience by making it interactive during the presentation. Encourage questions and discussions. Use anecdotes or real-world examples to illustrate key points.	5	8	-	2
PC5. Ensure that any printed materials, brochures, or handouts you provide are professionally designed and error-free.	2	8	-	2
PC6. Include live demonstrations of available automation solutions to showcase their functionality and benefits.	2	6	-	-
PC7. Adhere to a professional dress code that aligns with your industry and the expectations of your clients. Dress slightly more formal than your audience to convey respect and professionalism.	2	4	-	-
PC8. Present financial assumptions and its comparison with other solution provider	2	4	-	-
PC9. Add question and answer session to get proper feedback	2	6	-	-
NOS Total	**30**	**60**	-	**10**

National Occupational Standards (NOS) Parameters

NOS Code	IAS/N8011
NOS Name	Presentation & professional appearance
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

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:

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.

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

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

Assessment Criteria

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
Introduction to Employability Skills	1	1	-	-
PC1. identify employability skills required for jobs in various industries	-	-	-	-
PC2. identify and explore learning and employability portals	-	-	-	-
Constitutional values – Citizenship	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	-	-	-	-
Becoming a Professional in the 21st Century	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	-	-	-	-
Basic English Skills	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	-	-	-	-
Career Development & Goal Setting	1	2	-	-

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	-	-	-	-
Communication Skills	**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	-	-	-	-
Diversity & Inclusion	**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	-	-	-	-
Financial and Legal Literacy	**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	-	-	-	-
Essential Digital Skills	**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	-	-	-	-

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
Entrepreneurship	**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	-	-	-	-
Customer Service	**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	-	-	-	-
Getting ready for apprenticeship & Jobs	**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**	**-**	**-**

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	31/08/2023
Next Review Date	31/08/2026
NSQC Clearance Date	31/08/2023

IAS/N8007: Analyse the technical need of automation solutions

Description

Individual in this job will be able to analyse the need of automation solution and to offer tailored solutions that align with a customer's specific requirements. He/she will thoroughly analyze the technical needs of the customers in the automation industry and provide solutions.

Scope

The scope covers the following :

- Identify and analyse the need of automation solution

Elements and Performance Criteria

Identify the need of automation solution

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

PC1. Identify the potential client industry where automation process is applicable and priorities them

PC2. Conduct a comprehensive needs assessment with the customer. Engage in open and active communication to understand their unique challenges, pain points, and objectives. Ask questions about their current processes, production goals, and any issues they want to address.

PC3. Gain a deep understanding of the customer's existing processes and workflows. Identify areas where automation can bring improvements, such as increasing efficiency, reducing errors, enhancing safety, or lowering operational costs.

PC4. Develop expertise in the customer's specific industry within the automation sector. Different industries may have distinct technical requirements, compliance standards, and best practices. For instance, automation needs in manufacturing differ from those in healthcare or logistics.

PC5. Stay updated with the latest technologies and trends in automation, including industrial IoT, robotics, machine learning, and AI. This knowledge will enable him/her to recommend cutting-edge solutions that can address evolving technical needs.

PC6. Be prepared to offer customized automation solutions. Recognize that one size does not fit all in the automation industry, and customers often require tailored systems that integrate seamlessly with their existing infrastructure.

PC7. Assess whether the proposed automation solution can scale to accommodate future growth and changing requirements. Flexibility in automation systems is essential to adapt to evolving technical needs.

PC8. Be aware of competitors and their offerings in the automation industry. Highlight the unique technical advantages of the solutions and demonstrate how they outperform alternatives.

PC9. Define customer profile based on industry, company size, pain points, and automation requirements.

PC10. Utilize market research, industry reports, and trends to identify sectors that are actively adopting automation solutions.

Analyse technical need in the industry

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

PC11. Research industries that heavily benefit from automation, such as manufacturing, healthcare, finance, and logistics.

PC12. Analyze the existing user data to identify patterns that can guide your targeting efforts, Determine the pain points and challenges that potential clients are facing in their operations.

PC13. Align available automation solutions with these pain points to demonstrate value.

PC14. Develop compelling presentations that showcase your automation solutions and their benefits also tailor these presentations to address the unique challenges of each potential client.

PC15. Approach potential clients with a consultative mindset, aiming to understand their needs and challenges before presenting your solutions. Recommend the right automation strategies based on their specific requirements.

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 key function
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

Assessment Criteria

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
Identify the need of automation solution	**20**	**30**	**-**	**10**
PC1. Identify the potential client industry where automation process is applicable and priorities them	2	3	-	1
PC2. Conduct a comprehensive needs assessment with the customer. Engage in open and active communication to understand their unique challenges, pain points, and objectives. Ask questions about their current processes, production goals, and any issues they want to address.	2	3	-	1
PC3. Gain a deep understanding of the customer's existing processes and workflows. Identify areas where automation can bring improvements, such as increasing efficiency, reducing errors, enhancing safety, or lowering operational costs.	2	3	-	1
PC4. Develop expertise in the customer's specific industry within the automation sector. Different industries may have distinct technical requirements, compliance standards, and best practices. For instance, automation needs in manufacturing differ from those in healthcare or logistics.	2	3	-	1
PC5. Stay updated with the latest technologies and trends in automation, including industrial IoT, robotics, machine learning, and AI. This knowledge will enable him/her to recommend cutting-edge solutions that can address evolving technical needs.	2	3	-	1
PC6. Be prepared to offer customized automation solutions. Recognize that one size does not fit all in the automation industry, and customers often require tailored systems that integrate seamlessly with their existing infrastructure.	2	3	-	1
PC7. Assess whether the proposed automation solution can scale to accommodate future growth and changing requirements. Flexibility in automation systems is essential to adapt to evolving technical needs.	2	3	-	1

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
PC8. Be aware of competitors and their offerings in the automation industry. Highlight the unique technical advantages of the solutions and demonstrate how they outperform alternatives.	2	3	-	1
PC9. Define customer profile based on industry, company size, pain points, and automation requirements.	2	3	-	1
PC10. Utilize market research, industry reports, and trends to identify sectors that are actively adopting automation solutions.	2	3	-	1
Analyse technical need in the industry	**10**	**30**	**-**	**-**
PC11. Research industries that heavily benefit from automation, such as manufacturing, healthcare, finance, and logistics.	2	6	-	-
PC12. Analyze the existing user data to identify patterns that can guide your targeting efforts, Determine the pain points and challenges that potential clients are facing in their operations.	2	6	-	-
PC13. Align available automation solutions with these pain points to demonstrate value.	2	6	-	-
PC14. Develop compelling presentations that showcase your automation solutions and their benefits also tailor these presentations to address the unique challenges of each potential client.	2	6	-	-
PC15. Approach potential clients with a consultative mindset, aiming to understand their needs and challenges before presenting your solutions. Recommend the right automation strategies based on their specific requirements.	2	6	-	-
NOS Total	**30**	**60**	**-**	**10**

Qualification Pack

National Occupational Standards (NOS) Parameters

NOS Code	IAS/N8007
NOS Name	Analyse the technical need of automation solutions
Sector	Instrumentation
Sub-Sector	Instrumentation & Automation
Occupation	Product Engineering/System Design
NSQF Level	4
Credits	4
Version	1.0
Last Reviewed Date	31/08/2023
Next Review Date	31/08/2026
NSQC Clearance Date	31/08/2023

IAS/N8008: Explain complex technical information to the customer

Description

A Technical Sales Executive in the automation industry will be able to explain complex technical information to customers to build trust, making informed purchasing decisions, and closing sales.

Scope

The scope covers the following :

- Discuss with client business partner

Elements and Performance Criteria

Discuss need of automation need with the client

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

PC1. Analyse client's business processes, challenges, and goals. This will help in tailor conversation to their specific needs and pain points.

PC2. Highlight areas in their current processes where manual tasks, inefficiencies, errors, and delays occur. These pain points will serve as the foundation for explaining how automation can address these issues.

PC3. Articulate the benefits of automation that are relevant to client's business.

PC4. Share real-world examples of other businesses that have successfully implemented automation to solve similar problems. These success stories can serve as inspiration and help your client visualize the potential benefits.

PC5. Discuss the potential return on investment from automation. Break down the costs involved (initial setup, software/tools, training) and compare them to the expected benefits, such as cost savings, increased revenue, and improved operational efficiency.

PC6. Explain that automation solutions can be tailored to fit the specific needs of the client's business. Discuss how customization can ensure that the automation aligns with existing processes and workflows.

PC7. Ensuring safety and compliance with industry regulations is critical in the automation industry. B2B providers may offer solutions that incorporate safety features and help businesses adhere to relevant standards and regulations

PC8. Break down complex processes or systems into smaller, manageable steps. Guide the customer through each step, illustrating how they fit together to achieve the desired outcome.

PC9. Offer written materials, such as product manuals, technical specifications, and whitepapers, to support verbal explanations. These can serve as references for customers to review later.

PC10. Follow up with the customer to see if they have any additional questions or need further clarification. This demonstrates individual commitment to their understanding and satisfaction.

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 key functions
GS2. Analyse the clients production value chain
GS3. Analyse available technology in use by client organisation
GS4. Measure available solution / platform readily available to offer
GS5. Demonstrate value addition with available solution
GS6. Listen attentively to understand the information being shared
GS7. Communicate politely and professionally

Assessment Criteria

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
Discuss need of automation need with the client	**30**	**50**	**-**	**20**
PC1. Analyse client's business processes, challenges, and goals. This will help in tailor conversation to their specific needs and pain points.	3	5	-	2
PC2. Highlight areas in their current processes where manual tasks, inefficiencies, errors, and delays occur. These pain points will serve as the foundation for explaining how automation can address these issues.	3	5	-	2
PC3. Articulate the benefits of automation that are relevant to client's business.	3	5	-	2
PC4. Share real-world examples of other businesses that have successfully implemented automation to solve similar problems. These success stories can serve as inspiration and help your client visualize the potential benefits.	3	5	-	2
PC5. Discuss the potential return on investment from automation. Break down the costs involved (initial setup, software/tools, training) and compare them to the expected benefits, such as cost savings, increased revenue, and improved operational efficiency.	3	5	-	2
PC6. Explain that automation solutions can be tailored to fit the specific needs of the client's business. Discuss how customization can ensure that the automation aligns with existing processes and workflows.	3	5	-	2
PC7. Ensuring safety and compliance with industry regulations is critical in the automation industry. B2B providers may offer solutions that incorporate safety features and help businesses adhere to relevant standards and regulations	3	5	-	2
PC8. Break down complex processes or systems into smaller, manageable steps. Guide the customer through each step, illustrating how they fit together to achieve the desired outcome.	3	5	-	2

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
PC9. Offer written materials, such as product manuals, technical specifications, and whitepapers, to support verbal explanations. These can serve as references for customers to review later.	3	5	-	2
PC10. Follow up with the customer to see if they have any additional questions or need further clarification. This demonstrates individual commitment to their understanding and satisfaction.	3	5	-	2
NOS Total	**30**	**50**	**-**	**20**

National Occupational Standards (NOS) Parameters

NOS Code	IAS/N8008
NOS Name	Explain complex technical information to the customer
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

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.

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

Assessment Criteria

Assessment Criteria for Outcomes	Theory Marks	Practical Marks	Project Marks	Viva Marks
Reporting Practice	**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

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**

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

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:

• 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

• 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/N8009.Preparing and compiling proposal and reports	30	50	0	20	100	20
IAS/N8011.Presentation & professional appearance	30	60	0	10	100	10
DGT/VSQ/N0102.Employability Skills (60 Hours)	20	30	-	-	50	10
IAS/N8007.Analyse the technical need of automation solutions	30	60	-	10	100	20
IAS/N8008.Explain complex technical information to the customer	30	50	-	20	100	20
IAS/N8006.Updating records and reporting to management	30	40	-	30	100	20

National Occupational Standards	Theory Marks	Practical Marks	Project Marks	Viva Marks	Total Marks	Weightage
Total	**170**	**290**	**-**	**90**	**550**	**100**

Acronyms

NOS	National Occupational Standard(s)
NSQF	National Skills Qualifications Framework
QP	Qualifications Pack
TVET	Technical and Vocational Education and Training

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.

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.