

# Career Bands, Career Levels, Functions and Disciplines

## General Overview

This section provides job matching documentation used for this survey report.

- Career Band Summary Description for the Business Support Career Band (U)
- The Global Grade(s) aligned with each level also are noted. Global Grade differentiators are shaded since North America survey participants only match to Career Levels.
- Function and Discipline Listing
- Function and Discipline Descriptions

NOTE: The job matching methodology presented here is for survey purposes only and is not a job evaluation process. Although this survey methodology is related to the Willis Towers Watson Career Map and Global Grading methodologies, it may not align directly with specific client implementation of one of these leveling methodologies. Therefore it is critical to align your internal levels to the survey levels based on a careful review of the survey definitions to ensure proper job matching.

Career Map and the Global Grading System, when formally implemented, enable the alignment of reward and talent management programs across businesses. When used as internal leveling tools, these methodologies take into account the specific organizational context of a job and the detailed set of associated accountabilities and demands. The outcomes of these processes are highly organization-specific, while survey job descriptions and levels are by their nature generic. Therefore, organizations that use Career Map or the Global Grading System as their internal leveling tool are still required to match their jobs to this survey using the job matching process outlined in this Participant Guide.

An organization's internal Global Grade or Career Level may act as a starting point, but as the Career Levels and Global Grades contained in these surveys represent a typical or generic organization, there may be differences between the internal value a specific organization places on a job and where the job should be mapped for purposes of external comparison.

Career Bands, Career Levels, Functions and Disciplines

## Career Band Summary Descriptions

### Business Support Career Band (U)

- Performs clerical/administrative or specialized support tasks in an office or field setting
- May require vocational training or the equivalent experience, but does not require a university degree

## Career Bands, Career Levels, Functions and Disciplines

# Career Level General Profiles

### Business Support Career Band (U)

#### U4 Lead/Advanced (aligns with Global Grades 8 and 9)

- Has advanced and specialized expertise, typically developed through a combination of job-related training and considerable work experience
- May act as a lead, coordinating and facilitating the work of others, but is not a supervisor
- Works autonomously within established procedures and practices
- May support the development of new and innovative solutions to complex problems
- Spends a majority of working time performing the same work processes and activities as employees on team

#### Global Grade 9 Differentiators

- Performs a variety of the most complex tasks and/or may lead one or more teams
- Supports the delivery of new solutions complex problems where precedent may not exist

#### Global Grade 8 Differentiators

- Performs a variety of complex tasks and/or may lead a team in the performance of a variety of tasks that are often routine
- May support the development of solutions to complex problems of a recurring nature

#### U3 Senior (aligns with Global Grade 7)

- Has full proficiency gained through job-related training and considerable work experience
- Completes work with a limited degree of supervision
- Likely to act as an informal resource for colleagues with less experience
- Identifies key issues and patterns from partial/conflicting data
- Takes a broad perspective to problems and spots new, less obvious solutions

#### U2 Intermediate (aligns with Global Grade 6)

- Has working knowledge and skills developed through formal training or considerable work experience
- Works within established procedures with a moderate degree of supervision
- Identifies the problem and all relevant issues in straightforward situations, assesses each using standard procedures and makes sound decisions

#### U1 Entry (aligns with Global Grades 4 and 5)

- Has little or no prior relevant training or work experience
- Acquires basic skills to perform routine tasks
- Work is prescribed and completed with little autonomy
- Works with either close supervision or under clearly defined procedures

#### Global Grade 5 Differentiators

- Has limited prior relevant training or work experience
- Has limited discretion to vary from established procedures

#### Global Grade 4 Differentiators

- Has no prior relevant training or work experience
- Has no discretion to vary from established procedures

Career Bands, Career Levels, Functions and Disciplines

## Functions and Disciplines Listing

### **AAS Administrative Services**

|        |  |
|--------|--|
| AAS000 | Administrative Services Generalist/Multidiscipline                   |
| AAS010 | Office/Location/Post and Messenger Services                          |
| AAS011 | Clerical   |
| AAS012 | Word Processing/Presentations  |
| AAS013 | Print Services   |
| AAS020 | Library/Information Services   |
| AAS030 | Reception/Switchboard  |
| AAS041 | Secretarial/Administrative Assistance                                |
| AAS042 | Secretarial/Executive Administrative Assistance                      |
| AAS043 | Secretarial/Administrative Assistance to the Chief Executive Officer |
| AAS050 | Travel Services  |
| AAS070 | Food and Beverage Administration                                     |
| AAS999 | Administrative Services - No Applicable Discipline                   |

### **AAT Transportation Services and Administration**

|        |   |
|--------|---|
| AAT000 | Transportation Services and Administration Generalist/Multidiscipline |
| AAT010 | Vehicle Fleet Management  |
| AAT020 | Driver/Chauffeur  |
| AAT999 | Transportation Services and Administration - No Applicable Discipline |

### **AAY Security**

|         |                                     |
|---------|-------------------------------------|
| AA Y000 | Security Generalist/Multidiscipline |
| AA Y002 | Security Armed                      |
| AA Y003 | Security Unarmed                    |
| AA Y010 | Business Continuation               |
| AA Y999 | Security - No Applicable Discipline |

### **AFB Accounting**

|        |                                       |
|--------|---------------------------------------|
| AFB000 | Accounting Generalist/Multidiscipline |
| AFB010 | General Accounting                    |
| AFB015 | Systems Accounting                    |
| AFB040 | Cost Accounting                       |
| AFB050 | Bookkeeping/Account Maintenance       |
| AFB060 | Accounts Payable/Receivable           |
| AFB061 | Accounts Payable                      |
| AFB062 | Accounts Receivable                   |
| AFB070 | Payroll                               |
| AFB999 | Accounting - No Applicable Discipline |

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## Functions and Disciplines Listing (continued)

### **AFC Credit and Collections**

|        |   |
|--------|---|
| AFC000 | Credit and Collections Generalist/Multidiscipline |
| AFC010 | Credit  |
| AFC020 | Collections                                       |
| AFC030 | Call Center Collections                           |
| AFC999 | Credit and Collections - No Applicable Discipline |

### **AHR Human Resources**

|        |  |
|--------|--|
| AHR000 | HR Generalist/Consultant Generalist/Multidiscipline      |
| AHR010 | Compensation and Benefits Generalist/Multidiscipline     |
| AHR020 | Compensation Generalist/Multidiscipline                  |
| AHR060 | Benefits   |
| AHR130 | Employee Development/Training Generalist/Multidiscipline |
| AHR131 | Employee Development/Talent Management                   |
| AHR140 | Recruitment Generalist/Multidiscipline                   |
| AHR150 | Human Resources Information Systems                      |
| AHR999 | Human Resources - No Applicable Discipline               |

### **ALS Legal Support**

|        |   |
|--------|---|
| ALS000 | Legal Support Generalist/Multidiscipline    |
| ALS020 | Contract Administration                     |
| ALS040 | Legal Secretarial/Administrative Assistance |
| ALS999 | Legal Support - No Applicable Discipline    |

### **AMK Marketing**

|        |  |
|--------|--|
| AMK000 | Marketing Generalist/Multidiscipline                     |
| AMK020 | Advertising/Marketing Communications                     |
| AMK025 | Advertising  |
| AMK026 | Marketing Promotions                                     |
| AMK040 | Market Research/Intelligence                             |
| AMK041 | Customer Insight and Research Generalist/Multidiscipline |
| AMK042 | Customer Data Management                                 |
| AMK043 | Customer Research Analytics and Modeling                 |
| AMK050 | Product Management                                       |
| AMK060 | Direct Marketing   |
| AMK100 | Trade Shows/Events                                       |
| AMK110 | Digital Marketing Generalist/Multidiscipline             |
| AMK111 | Internet Search Optimization                             |
| AMK112 | Social Media Marketing                                   |
| AMK113 | Online Community Management                              |
| AMK120 | Web Content Management/Production                        |
| AMK150 | Web Creative Writing                                     |
| AMK999 | Marketing - No Applicable Discipline                     |

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## Functions and Disciplines Listing (continued)

### **AMS Customer Support/Operations**

|        |  |
|--------|--|
| AMS000 | Customer Support/Operations Generalist/Multidiscipline |
| AMS010 | Customer Service                                       |
| AMS020 | Customer Contact Center Generalist/Multidiscipline     |
| AMS024 | Customer Contact Center Planning and Monitoring        |
| AMS026 | Customer Contact Center Process Improvement            |
| AMS999 | Customer Support/Operations - No Applicable Discipline |

### **ARE Real Estate and Facilities**

|        |   |
|--------|---|
| ARE000 | Real Estate and Facilities Generalist/Multidiscipline |
| ARE010 | Real Estate/Property Management                       |
| ARE020 | Facilities Management                                 |
| ARE999 | Real Estate and Facilities - No Applicable Discipline |

### **ASC Supply Chain and Logistics**

|        |   |
|--------|---|
| ASC000 | Supply Chain and Logistics Generalist/Multidiscipline |
| ASC012 | Supplier Development                                  |
| ASC015 | Materials Planning/Scheduling                         |
| ASC020 | Materials Management                                  |
| ASC025 | Inventory Control                                     |
| ASC030 | Logistics   |
| ASC035 | Import/Export   |
| ASC060 | Purchasing Generalist/Multidiscipline                 |
| ASC999 | Supply Chain and Logistics - No Applicable Discipline |

### **CTS Telesales**

|        |                                      |
|--------|--------------------------------------|
| CTS000 | Telesales Generalist/Multidiscipline |
| CTS010 | Telesales - Inbound/Inside           |
| CTS020 | Telesales - Outbound                 |
| CTS999 | Telesales - No Applicable Discipline |

### **CUS Sales Support and Administration**

|        |   |
|--------|---|
| CUS000 | Sales Support and Administration Generalist/Multidiscipline |
| CUS010 | Sales Training  |
| CUS020 | Product Sales Financing                                     |
| CUS030 | Sales Planning/Forecasting                                  |
| CUS999 | Sales Support and Administration - No Applicable Discipline |

Career Bands, Career Levels, Functions and Disciplines

## Functions and Disciplines Definitions

Code      Function  
**AAS**      **Administrative Services**

Provides various office and location support activities. Identifies, enhances and follows specific processes and procedures to maximize the efficiencies of the business to which the support is being provided; ensures the correct functioning of facilities, office and/or business support services.

Applicable Career Bands

**M** (Supervisory/Management)

**P** (Professional)

**T** (Technical Support)

**U** (Business Support)

**W** (Production/Manual Labor)\*

*\*(for AAS072 and AAS074 only)*

Discipline

- AAS000**      **Administrative Services Generalist/Multidiscipline**
  - Supports general business operations by providing various administrative support activities as a generalist or in a combination of Disciplines in the Administrative Services Function
- AAS010**      **Office/Location/Post and Messenger Services**
  - Coordinates the administrative activities of an office
  - Evaluates office production and devises alternative methods to improve workflow
  - Oversees opening, sorting and routing of incoming and makes preparations for outgoing correspondence, post, mail and packages; organizes special mailings
  - Coordinates the receipt, storage and issuance of stationary and office supplies; oversees periodic inventories and reorders items as required
  - Acts as the first point of contact for internal facilities issues and logs all maintenance, cleaning and office/location services and refers related issues to the appropriate personnel; negotiates contracts for services such as cleaning and maintenance
- AAS011**      **Clerical**
  - Performs routine clerical duties, such as filing, tabulating, compiling and/or posting records and photocopying using an array of business software applications such as a word processor or spreadsheet
- AAS012**      **Word Processing/Presentations**
  - Uses appropriate software packages to prepare standard and/or complex documents from various sources of written or dictated input which may include page layouts and difficult charts
  - Enters corrections and revisions and proofreads material for accuracy and completeness, applying knowledge of department terminology and organization practices
  - May operate desktop publishing equipment and utilize integrated software packages to complete various assignments
  - Produces various types of presentations such as word processing documents, slides, charts, graphs, etc.
- AAS013**      **Print Services**
  - Operates and maintains a range of printing equipment (e.g., photocopier, digital printing press) and finishing equipment (e.g., trimmer, binder) to print quantities of various documents
- AAS020**      **Library/Information Services**
  - Provides timely delivery of information services, including printed, nonprinted and electronic materials
  - Classifies and catalogues various types of media
  - Conducts research and prepares summaries of findings to requesting personnel
  - Determines the need for and purchases additional source materials and information services
  - May develop and maintain record retention policies, practices and procedures

## Career Bands, Career Levels, Functions and Disciplines

# Functions and Disciplines Definitions (continued)

| <u>Code</u>       | <u>Function</u>  |
|-------------------|--|
| <b>AAS</b>        | <b>Administrative Services (continued)</b>   |
| <b>Discipline</b> |  |
| <b>AAS030</b>     | <b>Reception/Switchboard</b> <ul style="list-style-type: none"><li>• Greets clients and visitors at front desk</li><li>• Answers incoming calls and typically operates a multi-line telephone system</li><li>• Organizes meeting room, taxi and chauffeur bookings</li><li>• Completes security procedures (e.g., issues badges, ensures proper completion of visitors' log)</li><li>• May perform clerical tasks (e.g., mail distribution, word processing)</li></ul>   |
| <b>AAS041</b>     | <b>Secretarial/Administrative Assistance</b> <ul style="list-style-type: none"><li>• Provides secretarial/administrative support to nonexecutive employees or groups in the organization</li><li>• Uses business software applications (e.g., word processing, presentation and spreadsheet) to prepare correspondence, reports, presentations, agendas, minutes, etc.</li><li>• Receives, screens and directs incoming calls, visitors, mail and email</li><li>• Maintains files, records, calendars and diaries</li><li>• May arrange business travel, coordinate meeting arrangements, and/or track expenses</li></ul>  |
| <b>AAS042</b>     | <b>Secretarial/Executive Administrative Assistance</b> <ul style="list-style-type: none"><li>• Provides secretarial/administrative support directly to executives (excluding CEO), exercising confidentiality, tact and diplomacy</li><li>• Uses business software applications (e.g., word processing, presentation and spreadsheet) to prepare correspondence, reports, presentations, agendas, minutes, etc.; may prepare responses to routine correspondence and inquiries</li><li>• Receives, screens and directs incoming calls, visitors, mail and email</li><li>• Maintains files, records, calendars and diaries; typically arranges business travel, coordinates meeting arrangements and tracks expenses</li><li>• Participates in the development and implementation of secretarial standards, policies and practices for the organization</li></ul>     |
| <b>AAS043</b>     | <b>Secretarial/Administrative Assistance to the Chief Executive Officer</b> <ul style="list-style-type: none"><li>• Provides or leads a full range of secretarial/administrative support to the Chief Executive Officer (CEO) of the organization, exercising confidentiality, tact and diplomacy</li><li>• Communicates directives and information from the CEO to executives, managers and others in the organization and follows up on the status of assignments</li><li>• Receives, screens and directs incoming calls, visitors, mail and email</li><li>• Maintains files, records, calendars and diaries; typically arranges business travel, coordinates meeting arrangements and tracks expenses</li><li>• Participates in the development and implementation of secretarial/administrative standards, policies and practices for the organization</li></ul> |
| <b>AAS050</b>     | <b>Travel Services</b> <ul style="list-style-type: none"><li>• Coordinates travel arrangements for employees consistent with established policies and cost guidelines</li><li>• Ensures that reservations for air travel, car rentals and overnight accommodations are accurate and that itineraries, tickets and instructions are available to employees on a timely basis</li><li>• Analyzes services provided by travel vendors and recommends changes as appropriate</li><li>• May utilize an outside travel agency and/or an online reservation system</li></ul>  |
| <b>AAS070</b>     | <b>Food and Beverage Administration</b> <ul style="list-style-type: none"><li>• Plans menus to accommodate all employees</li><li>• Determines food service budget expenditures</li><li>• Coordinates purchases and ensures that adequate supplies of food are maintained</li><li>• Assesses food service activities and recommends modifications to improve operating efficiency</li></ul>   |



Career Bands, Career Levels, Functions and Disciplines

## Functions and Disciplines Definitions (continued)

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| <u>Code</u> | <u>Function</u>                            |
|-------------|--|
| <b>AAS</b>  | <b>Administrative Services (continued)</b> |

Discipline

|               |  |
|---------------|--|
| <b>AAS999</b> | <b>Administrative Services - No Applicable Discipline</b> <ul style="list-style-type: none"><li>Responsibilities are within the Administrative Services Function but are not described in other Discipline summaries</li></ul> |
|---------------|--|

Career Bands, Career Levels, Functions and Disciplines

## Functions and Disciplines Definitions (continued)

| <u>Code</u>  | <u>Function</u>                                   |
|--|---|
| <b>AAT</b>   | <b>Transportation Services and Administration</b> |
| Provides and administers passenger transportation and vehicle services such as vehicle fleet management, chauffeur services, aircraft management and operations. |   |

Applicable Career Bands

**M** (Supervisory/Management)

**T** (Technical Support)

**U** (Business Support)

Discipline

|               |   |
|---------------|---|
| <b>AAT000</b> | <p><b>Transportation Services and Administration Generalist/Multidiscipline</b></p> <ul style="list-style-type: none"> <li>Supports general business operations by providing various transportation and related support activities as a generalist or in a combination of Disciplines in the Transportation Services and Administration Function</li> </ul>   |
| <b>AAT010</b> | <p><b>Vehicle Fleet Management</b></p> <ul style="list-style-type: none"> <li>Operates and maintains motor vehicles and equipment</li> <li>Schedules and dispatches the organization's vehicles and drivers</li> <li>Prepares reports on inspection findings and ensures proper vehicle maintenance to comply with prescribed safety regulations</li> <li>Develops design specifications for vehicle requisitions</li> <li>May negotiate vehicle and/or equipment purchase terms in coordination with the procurement function</li> </ul> |
| <b>AAT020</b> | <p><b>Driver/Chauffeur</b></p> <ul style="list-style-type: none"> <li>Picks up and transports employees or visitors as directed</li> <li>May be the designated driver of a manager or executive within the organization</li> <li>Occasionally picks up and delivers packages</li> </ul>   |
| <b>AAT999</b> | <p><b>Transportation Services and Administration - No Applicable Discipline</b></p> <ul style="list-style-type: none"> <li>Responsibilities are within the Transportation Services and Administration Function but are not described in other Discipline summaries</li> </ul>   |

Career Bands, Career Levels, Functions and Disciplines

**Functions and Disciplines Definitions (continued)**

| <u>Code</u> | <u>Function</u> |
|-------------|-----------------|
| <b>AAY</b>  | <b>Security</b> |

Protects the organization's employees, properties and all items of value on the organization's premises from any preventable harm or danger.

Applicable Career Bands

**M** (Supervisory/Management)                      **P** (Professional)                      **U** (Business Support)

Discipline

|               |  |
|---------------|--|
| <b>AAY000</b> | <p><b>Security Generalist/Multidiscipline</b></p> <ul style="list-style-type: none"> <li>• Protects the organization's employees, properties and all items of value on premises from any preventable harm or danger</li> <li>• Develops security policies and procedures that comply with government guidelines and standards</li> <li>• Conducts investigations to protect organization assets</li> <li>• Responds to contingency events, including bomb threats, sabotage and severe weather conditions through on-site security force or with the assistance of government law enforcement agencies</li> <li>• Recommends hiring of outside security contractors as necessary and may oversee contract guard force</li> <li>• Responsibilities are within the Security Function as a generalist or in a combination of Disciplines</li> </ul> |
| <b>AAY002</b> | <p><b>Security Armed</b></p> <ul style="list-style-type: none"> <li>• Guards property against damage, fire, theft, trespassing and illegal entry</li> <li>• Makes periodic tours around buildings and grounds, examining doors, windows and gates to ensure that they are properly secured</li> <li>• Ensures identification of employees or visitors by fingerprinting, photographing, interviewing and preparing badges</li> <li>• Investigates disturbances, may serve as a liaison with police and maintains order and safety of personnel in the event of an emergency</li> <li>• Holds a valid firearms license and carries a firearm at all times when on duty</li> </ul>   |
| <b>AAY003</b> | <p><b>Security Unarmed</b></p> <ul style="list-style-type: none"> <li>• Guards property against damage, fire, theft, trespassing and illegal entry</li> <li>• Makes periodic tours around buildings and grounds, examining doors, windows and gates to ensure that they are properly secured</li> <li>• Ensures identification of employees or visitors by fingerprinting, photographing, interviewing and preparing badges</li> <li>• Investigates disturbances, may serve as a liaison with police and maintains order and safety of personnel in the event of an emergency</li> </ul>   |
| <b>AAY010</b> | <p><b>Business Continuation</b></p> <ul style="list-style-type: none"> <li>• Develops and implements plans and practices to achieve efficient and effective communication and restoration of operations during emergencies</li> <li>• Conducts assessments to identify gaps in business continuity, emergency and disaster recovery plans</li> <li>• Develops and tests infrastructure protection strategies and incident response exercises</li> <li>• Coordinates disaster recovery initiatives and plans with staff and line functions</li> <li>• Develops and coordinates prevention and emergency preparation plans with government safety and security agencies (e.g., police, fire, military)</li> </ul>  |
| <b>AAY999</b> | <p><b>Security - No Applicable Discipline</b></p> <ul style="list-style-type: none"> <li>• Responsibilities are within the Security Function but are not described in other Discipline summaries</li> </ul>  |

Career Bands, Career Levels, Functions and Disciplines

## Functions and Disciplines Definitions (continued)

Code      Function  
**AFB**      **Accounting**

Establishes and maintains accounting policies and controls, fiscal controls, preparing financial reports and safeguarding the organization's assets. Maintains accounting and financial records and reports, including general ledger, financial statements, regulatory and management reports.

Applicable Career Bands

**M** (Supervisory/Management)

**P** (Professional)

**U** (Business Support)

Discipline

- AFB000      Accounting Generalist/Multidiscipline**
  - Establishes and maintains accounting policies and controls, fiscal controls, preparing financial reports and safeguarding the organization's assets
  - Responsibilities are within the Accounting Function as a generalist or in a combination of Disciplines
- AFB010      General Accounting**
  - Performs general accounting activities, including the preparation, maintenance and reconciliation of ledger accounts and financial statements such as balance sheets, profit-and-loss statements and capital expenditure schedules
  - Prepares, records, analyzes and reports accounting transactions and ensures the integrity of accounting records for completeness, accuracy and compliance with accepted accounting policies and principles
  - Provides financial support, including forecasting, budgeting and analyzing variations from budget
  - Analyzes and prepares statutory accounts, financial statements and reports
  - Conducts or assists in the documentation of accounting projects
- AFB015      Systems Accounting**
  - Performs detailed review, design, development and implementation of accounting systems (both manual and computerized), systems documentation and procedures/instructions
  - Possesses accounting knowledge and works closely with accountants
  - Plays a key role in ensuring systems operate effectively
- AFB040      Cost Accounting**
  - Prepares, records, analyzes and reports on the cost of producing the organization's products and services
  - Analyzes capital budget requests
  - Maintains ledgers and financial statements
- AFB050      Bookkeeping/Account Maintenance**
  - Performs bookkeeping, data entry and verification procedures
  - Prepares and maintains records of amounts owed or receivable
- AFB060      Accounts Payable/Receivable**
  - Prepares, records, verifies, analyzes and reports accounts payable/receivable transactions
  - Pays vendor invoices and receives and posts customer payments on a timely basis
  - Maintains and reconciles accounts payable/receivable ledger accounts, financial statements and reports
  - Prepares analyses and reconciliations of bill runs to detect fraud
  - Ensures that transaction entry verification procedures are followed
  - May prepare and deliver low-volume customer billing and respond to resulting queries
- AFB061      Accounts Payable**
  - Prepares, records, verifies and pays vendor invoices for goods and services on a timely basis and responds to vendor queries
  - Maintains, analyzes and reconciles accounts payable ledger accounts, financial statements and reports
  - Develops, directs, plans and evaluates accounts payable policies and procedures, and ensures external and internal controls and policies are adhered to
  - May process employee expenses reimbursement requests for payment

Career Bands, Career Levels, Functions and Disciplines

## Functions and Disciplines Definitions (continued)

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| <u>Code</u>       | <u>Function</u>  |
|-------------------|--|
| <b>AFB</b>        | <b>Accounting (continued)</b>  |
| <br>              |  |
| <b>Discipline</b> |  |
| <b>AFB062</b>     | <b>Accounts Receivable</b> <ul style="list-style-type: none"><li>• Prepares, records, verifies, analyzes and reports accounts receivable transactions, and posts customer payments on a timely basis</li><li>• Maintains and reconciles accounts receivable ledger accounts, financial statements and reports</li><li>• Develops, directs, plans and evaluates accounts receivable policies and procedures, and ensures external and internal controls and policies are adhered to</li><li>• Produces reports of accounts that are in arrears and analyses of bad debt, and prepares analyses and reconciliations of bill runs to detect fraud</li><li>• May be responsible for low-volume customer billing, including preparation, delivery and responding to resulting queries</li></ul> |
| <b>AFB070</b>     | <b>Payroll</b> <ul style="list-style-type: none"><li>• Prepares, documents and disburses payroll checks, payroll taxes and employee benefit payments</li><li>• Evaluates current systems, and recommends and develops operating efficiency improvements</li><li>• Monitors and ensures proper documentation of employee benefit payments</li><li>• Prepares reports illustrating payroll expenditures, including such items as tax payments and benefit plan disbursements</li></ul>   |
| <b>AFB999</b>     | <b>Accounting - No Applicable Discipline</b> <ul style="list-style-type: none"><li>• Responsibilities are within the Accounting Function but are not described in other Discipline summaries</li></ul>   |

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**Functions and Disciplines Definitions (continued)**

| <u>Code</u>   | <u>Function</u>  |
|---|--|
| <b>AFC</b>  | <b>Credit and Collections</b>  |
| Minimizes financial risk to the organization by assessing and advising on creditworthiness of prospective and existing customers. Negotiates and advises on collection of overdue bills and takes appropriate action to recover overdue payments. |  |
| Applicable Career Bands<br><b>M</b> (Supervisory/Management) <b>P</b> (Professional) <b>U</b> (Business Support)  |  |
| Discipline  |  |
| <b>AFC000</b>   | <b>Credit and Collections Generalist/Multidiscipline</b> <ul style="list-style-type: none"> <li>Minimizes financial risk to the organization by assessing and advising on creditworthiness of prospective and existing customers</li> <li>Investigates credit applications and approves applications within established guidelines for companies and individuals</li> <li>Liaises with corporate customers and other departments to resolve credit problems</li> <li>May collect and negotiate terms of payment on overdue accounts</li> <li>Responsibilities are within the Credit and Collections Function as a generalist or in a combination of Disciplines</li> </ul> |
| <b>AFC010</b>   | <b>Credit</b> <ul style="list-style-type: none"> <li>Minimizes financial risk to the organization by assessing and advising on creditworthiness of prospective and existing customers</li> <li>Investigates credit applications and approves applications within established guidelines for companies and individuals</li> <li>Liaises with corporate customers and other departments to resolve credit problems</li> <li>May collect and negotiate terms of payment on overdue accounts</li> </ul>  |
| <b>AFC020</b>   | <b>Collections</b> <ul style="list-style-type: none"> <li>Collects and negotiates terms of payment on overdue accounts with corporate and individual clients</li> <li>Conducts investigations and collection activities from an office or in the field</li> </ul>  |
| <b>AFC030</b>   | <b>Call Center Collections</b> <ul style="list-style-type: none"> <li>Makes a high volume of telephone calls to customers regarding the collection of delinquent accounts due to the organization for goods and/or services rendered</li> <li>Determines the reason for the delinquent account and arranges terms of Deferred Payment Arrangement (DPA)</li> <li>Performs the necessary follow-up with customers who have not met the terms of the DPA</li> <li>May refer certain accounts to collection agencies</li> </ul>   |
| <b>AFC999</b>   | <b>Credit and Collections - No Applicable Discipline</b> <ul style="list-style-type: none"> <li>Responsibilities are within the Credit and Collections Function but are not described in other Discipline summaries</li> </ul>   |

Career Bands, Career Levels, Functions and Disciplines

## Functions and Disciplines Definitions (continued)

Code      Function  
**AHR**      **Human Resources**

Designs, implements and monitors human resource programs and policies, including recruitment, learning and development, performance management, compensation, benefits, equal opportunity and diversity, etc. Anticipates and plans for long-term human resource needs and trends.

Applicable Career Bands

**M** (Supervisory/Management)

**P** (Professional)

**U** (Business Support)

Discipline

|               |  |
|---------------|--|
| <b>AHR000</b> | <p><b>HR Generalist/Consultant Generalist/Multidiscipline</b></p> <ul style="list-style-type: none"> <li>• Designs, implements and monitors a variety of human resource programs</li> <li>• Anticipates and plans for long-term human resource needs and trends in partnership with business management</li> <li>• Responsibilities are within the Human Resources Function as a generalist or in a combination of Disciplines</li> </ul>  |
| <b>AHR010</b> | <p><b>Compensation and Benefits Generalist/Multidiscipline</b></p> <ul style="list-style-type: none"> <li>• Plans, designs, evaluates and administers employee compensation and benefit programs such as salaries, short- and long-term incentives, job evaluations, performance appraisals, retirement plans, and life, health and disability insurance</li> </ul>  |
| <b>AHR020</b> | <p><b>Compensation Generalist/Multidiscipline</b></p> <ul style="list-style-type: none"> <li>• Develops, implements and administers compensation such as salaries, short- and long-term incentives, job evaluations, performance appraisals, salary increases and salary surveys</li> <li>• May provide services in Executive Compensation, International Compensation, Sales Compensation and other specialized areas of compensation</li> </ul>  |
| <b>AHR060</b> | <p><b>Benefits</b></p> <ul style="list-style-type: none"> <li>• Develops, implements and administers cost-effective benefits programs such as pension plans and life, health and disability insurance</li> </ul>   |
| <b>AHR130</b> | <p><b>Employee Development/Training Generalist/Multidiscipline</b></p> <ul style="list-style-type: none"> <li>• Develops, implements and evaluates employee development plans and programs to support organizational needs as a generalist or in a combination of Disciplines such as management development, talent management, succession planning, technical or nontechnical training, or e-learning</li> <li>• Monitors employee development and training programs, assesses needs and results, develops new programs and modifies existing programs</li> </ul>  |
| <b>AHR131</b> | <p><b>Employee Development/Talent Management</b></p> <ul style="list-style-type: none"> <li>• Identifies and develops talents of employees based upon current and future business objectives</li> <li>• Identifies required skills within the organization and develops training and procedures to ensure the current skills remain within the organization</li> </ul>   |
| <b>AHR140</b> | <p><b>Recruitment Generalist/Multidiscipline</b></p> <ul style="list-style-type: none"> <li>• Sources, recruits, screens, interviews and recommends external and/or internal candidates for all level jobs, including entry level, experienced professional/technical, IT, support staff and hourly, and possibly management</li> <li>• May utilize the services of employment agencies</li> <li>• Places employment ads in appropriate sources, including the Internet and print media</li> <li>• Ensures the maintenance of accurate and concise records and reports concerning all phases of the recruitment process, including EEO statistics</li> <li>• May recruit from colleges, technical schools and job fairs</li> </ul> |

Career Bands, Career Levels, Functions and Disciplines

## Functions and Disciplines Definitions (continued)

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| <u>Code</u> | <u>Function</u>                    |
|-------------|------------------------------------|
| <b>AHR</b>  | <b>Human Resources (continued)</b> |

Discipline

|               |  |
|---------------|--|
| <b>AHR150</b> | <b>Human Resources Information Systems</b> <ul style="list-style-type: none"><li>• Processes the organization's human resource information using the most efficient and cost-effective computer systems and applications</li><li>• Researches, analyzes, designs and maintains information systems in support of human resource administration and projects</li><li>• Monitors HR information needs and designs new or modifies existing systems to meet changing requirements</li></ul> |
| <b>AHR999</b> | <b>Human Resources - No Applicable Discipline</b> <ul style="list-style-type: none"><li>• Responsibilities are within the Human Resources Function but are not described in other Discipline summaries</li></ul>   |



Career Bands, Career Levels, Functions and Disciplines

## Functions and Disciplines Definitions (continued)

| <u>Code</u> | <u>Function</u>      |
|-------------|----------------------|
| <b>ALS</b>  | <b>Legal Support</b> |

Provides support for a variety of law-related activities that do not require a law degree, including legal or factual research, contract administration, document preparation and analysis, citation checking and trial preparation.

Applicable Career Bands

**M** (Supervisory/Management)                      **P** (Professional)                      **U** (Business Support)

Discipline

- |               |  |
|---------------|--|
| <b>ALS000</b> | <p><b>Legal Support Generalist/Multidiscipline</b></p> <ul style="list-style-type: none"> <li>Provides support for a variety of law-related activities that do not require a law degree, including legal or factual research, contract administration, document preparation and analysis, citation checking and trial preparation</li> <li>Responsibilities are within the Legal Support Function as a generalist or in a combination of Disciplines</li> </ul>  |
| <b>ALS020</b> | <p><b>Contract Administration</b></p> <ul style="list-style-type: none"> <li>Participates in the development and fulfillment of contract requirements in the purchase or sale/delivery of equipment, materials, products or services</li> <li>Evaluates contract compliance and advises others on contractual rights and obligations</li> <li>Requests or approves amendments to contract terms or contract extensions</li> <li>Prepares bids or requests for proposals (RFPs), including specifications and requirements; negotiates contract terms and participates in the determination of acceptable bids</li> </ul> |
| <b>ALS040</b> | <p><b>Legal Secretarial/Administrative Assistance</b></p> <ul style="list-style-type: none"> <li>Performs secretarial duties that require knowledge of legal procedures and terminology</li> <li>Prepares papers and correspondence such as contracts, briefs, summonses, complaints and motions</li> <li>May maintain files and calendars, schedule appointments, schedule meetings and make travel arrangements</li> </ul>   |
| <b>ALS999</b> | <p><b>Legal Support - No Applicable Discipline</b></p> <ul style="list-style-type: none"> <li>Responsibilities are within the Legal Support Function but are not described in other Discipline summaries</li> </ul>  |

Career Bands, Career Levels, Functions and Disciplines

## Functions and Disciplines Definitions (continued)

Code      Function  
**AMK**      **Marketing**

Markets the organization's products, brands and/or services. Designs, develops and implements communication programs to advertise the organization's products/brands/services using media (e.g., print, broadcast, digital), events and sales promotions. Develops and evaluates pricing strategies and structures. Designs and maintains websites to promote and sell the organization's products through the Internet.

Applicable Career Bands

**M** (Supervisory/Management)

**P** (Professional)

**U** (Business Support)

Discipline

**AMK000**

**Marketing Generalist/Multidiscipline**

- Designs, develops and implements marketing programs and/or pricing strategies to support the organization's products, services or market sector
- Uses specific marketing strategies and media (e.g., print, broadcast, digital) to launch and position products and services in a sector
- Identifies and implements marketing strategies and programs in collaboration with sales and technical teams
- Responsibilities are within the Marketing Function as a generalist or in a combination of Disciplines

**AMK020**

**Advertising/Marketing Communications**

- Coordinates the development of advertising/marketing communications materials by creative design and creative writing services to effectively represent the products, services, brands and/or the organization to customers and prospects
- Applies various communication strategies to create an impression, raise awareness, and encourage a preference and response by the target audience for the organization and its products, services and brands
- Develops and coordinates multimedia packages (e.g., letters, brochures, video, point-of-purchase displays)
- May involve use of sponsorship, events and sales promotions

**AMK025**

**Advertising**

- Promotes the sale of the organization's products, services, brands and/or the organization through various advertising media (e.g., print, broadcast, digital) and other methods
- Oversees creation and placement of advertisements using various media and coordinates efforts with advertising agencies
- Designs, develops and implements advertising/promotion policies and monitors results
- Coordinates with internal clients (e.g., product/brand managers, business unit managers) to source and produce advertising materials

**AMK026**

**Marketing Promotions**

- Plans, recommends and implements promotions and events designed to increase sales and awareness for the organization's products and/or services
- Identifies promotion targets and specific offers; coordinates end-to-end campaign life-cycle
- Collaborates with and participates in promotion-related marketing and sales efforts, including merchandising, advertising and on-site visits to targets and/or events
- Maintains promotion-related documentation (e.g., promotion codes, discounts, promotion calendar)
- Develops and maintains budgets to oversee costs and metrics to evaluate the effectiveness of promotions and events

**AMK040**

**Market Research/Intelligence**

- Performs analyses and prepares forecasts and recommendations in the areas of product preferences, sales coverage, market penetration, market practices and sales trends
- Researches market conditions to determine potential sales of a product

Career Bands, Career Levels, Functions and Disciplines

## Functions and Disciplines Definitions (continued)

| <u>Code</u>       | <u>Function</u>   |
|-------------------|---|
| <b>AMK</b>        | <b>Marketing (continued)</b>  |
| <b>Discipline</b> |   |
| <b>AMK041</b>     | <b>Customer Insight and Research Generalist/Multidiscipline</b> <ul style="list-style-type: none"><li>• Undertakes detailed quantitative analyses of consumer databases and external data sources and develops a data driven insight into customers, their behaviors, buying preferences and patterns</li><li>• Identifies and communicates initiatives that enhance the positioning and offering of products and services to customers</li><li>• Performs multiple functions of analytics, modeling, data management or reporting solutions</li></ul>  |
| <b>AMK042</b>     | <b>Customer Data Management</b> <ul style="list-style-type: none"><li>• Develops and maintains customer information database (usually specific data marts) to support analysis, application development and data driven marketing techniques</li><li>• Manages information security, data protection, data quality and exchange</li><li>• Liaises with the IT and other data management functions as required both internally and externally</li></ul>  |
| <b>AMK043</b>     | <b>Customer Research Analytics and Modeling</b> <ul style="list-style-type: none"><li>• Undertakes detailed analysis of data and mining for insights and employs modeling techniques that offer actionable marketing benefits informing the organization's or client's strategy</li><li>• Integrates data analysis and models into commercial systems which support marketing and product management/development decision making</li><li>• Develops new analysis methodologies and influences design of technologies supporting future analytical capabilities</li></ul>  |
| <b>AMK050</b>     | <b>Product Management</b> <ul style="list-style-type: none"><li>• Develops and directs marketing programs for a significant product or product category</li><li>• Compiles and evaluates research on the market's product requirements and identifies enhancements to current features and functionality</li><li>• Establishes marketing strategies, including product direction, advertising, packaging, pricing, expense budgets, profit plans and future product development, to manage a product or product category's life cycle</li><li>• Interfaces with engineers, designers, suppliers and customers to develop product requirements and specifications</li><li>• Prepares and coordinates product introductions and updates</li></ul> |
| <b>AMK060</b>     | <b>Direct Marketing</b> <ul style="list-style-type: none"><li>• Markets the organization's products and services using customer marketing databases</li><li>• Creates direct mail marketing plans, targeting specific market segments with specialized offers</li><li>• Collaborates with market research in developing response models and other database improvements</li><li>• May conduct data mining analyses of customer data to develop marketing trends</li></ul>   |
| <b>AMK100</b>     | <b>Trade Shows/Events</b> <ul style="list-style-type: none"><li>• Plans, develops and oversees marketing events (e.g., trade shows, conventions, sales meetings) for internal and/or external clients</li><li>• Coordinates customer invitation solicitations, advanced and on-site registration, and post-event follow-up and evaluations</li><li>• Researches available venues and recommends event sites; investigates, selects, negotiates and coordinates services with vendors, including catering and event support</li><li>• Prepares budgets and forecasts and compiles summaries of total event costs, cost-per-contact, audience profiles and attendees' comments</li></ul>  |

## Career Bands, Career Levels, Functions and Disciplines

### Functions and Disciplines Definitions (continued)

| <u>Code</u>       | <u>Function</u>  |
|-------------------|--|
| <b>AMK</b>        | <b>Marketing (continued)</b>   |
| <b>Discipline</b> |  |
| <b>AMK110</b>     | <b>Digital Marketing Generalist/Multidiscipline</b> <ul style="list-style-type: none"><li>• Develops marketing, merchandising and creative strategies and affiliated programs to promote the organization's products and services through the Internet or other digital channels to increase exposure to and business from the target audience</li><li>• Manages the implementation of digital marketing programs and analyzes their effectiveness</li><li>• Establishes and manages the relationships with search engines and portal sites that are strategically aligned with the digital goals</li><li>• Tracks usage trends of the organization's websites, including number and quality of visitors and advertising campaign impact</li><li>• Develops and maintains website graphic designs and layout to support the organization's image, identity and brands through a diverse mix of web material, graphical user interfaces and multimedia delivered for the web</li><li>• Ensures that the organization's website provides up-to-date and comprehensive product/service information that is easily available to existing and potential customers</li><li>• May be responsible for social media marketing and online community management</li></ul> |
| <b>AMK111</b>     | <b>Internet Search Optimization</b> <ul style="list-style-type: none"><li>• Analyzes the results of the leading search engines to understand what keywords influence results rankings in order to optimize traffic to the organization's online/digital sites</li><li>• Develops visible content and hidden tags in online/digital sites to improve the volume and/or quality of traffic to a site from search engines from unpaid search results by analyzing traffic and search results</li><li>• Ensures that online content is labeled in the way that best serves users' needs in finding content and exploring the website</li><li>• Advises and trains content management staff on best practices for labeling content</li></ul>  |
| <b>AMK112</b>     | <b>Social Media Marketing</b> <ul style="list-style-type: none"><li>• Plans and implements marketing strategies and campaigns through social media optimization (SMO)</li><li>• Builds brand identification through penetration of social media</li><li>• Solicits, creates and posts content that attracts attention and encourages readers to share it with their social networks</li><li>• Establishes and maintains relationships with social network members, bloggers and the online community</li><li>• Participates in building websites that include integration points to various social networking and microblogging sites and tools</li></ul>  |
| <b>AMK113</b>     | <b>Online Community Management</b> <ul style="list-style-type: none"><li>• Builds, grows and manages internal and/or external online community relationships across a variety of platforms (e.g., social media, blogs, message boards, email groups) to generate brand awareness, encourage loyalty to the organization and increase engagement of target audiences</li><li>• Generates and posts social media content and sponsors online community events (e.g., webinars, group discussions)</li><li>• Monitors and engages community targets in online conversations, fields questions and offers solutions</li><li>• Monitors, evaluates and reports on online community trends</li><li>• Continually monitors content developed internally and/or posted by users to ensure content is appropriate for target audience</li></ul>   |

Career Bands, Career Levels, Functions and Disciplines

## Functions and Disciplines Definitions (continued)

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| <u>Code</u>           | <u>Function</u>   |
|-----------------------|---|
| <b>AMK</b>            | <b>Marketing (continued)</b>  |
| <br><i>Discipline</i> |   |
| <b>AMK120</b>         | <b>Web Content Management/Production</b> <ul style="list-style-type: none"><li>• Ensures that the organization's websites provide up-to-date and comprehensive product/service information that is easily available to existing and potential customers</li><li>• Establishes and maintains an information architecture that is well organized, user-friendly, and presents a consistent corporate look and feel</li><li>• Coordinates the development, integration, format design and release of content from writers and designers</li><li>• Analyzes the use of website content and design; takes steps as necessary and affordable to improve information content architecture and design</li><li>• Employs focus groups, surveys, web statistics, email, etc., to elicit feedback and improve website content and organization</li></ul> |
| <b>AMK150</b>         | <b>Web Creative Writing</b> <ul style="list-style-type: none"><li>• Develops creative, clearly-written material for the organization's websites in support of the organization's marketing programs in accordance with the established editorial and style guidelines</li><li>• Plans, develops and publishes online marketing communications for websites such as descriptions of the organization's products and services, FAQs (frequently asked questions) and electronic brochures</li></ul>   |
| <b>AMK999</b>         | <b>Marketing - No Applicable Discipline</b> <ul style="list-style-type: none"><li>• Responsibilities are within the Marketing Function but are not described in other Discipline summaries</li></ul>  |

Career Bands, Career Levels, Functions and Disciplines

**Functions and Disciplines Definitions (continued)**

| <u>Code</u>   | <u>Function</u>                    |
|---|------------------------------------|
| <b>AMS</b>  | <b>Customer Support/Operations</b> |
| Provides new and existing customers with the best possible service in relation to billing inquiries, service requests, suggestions and complaints. Includes Call Center - Outbound, Call Center/Customer Service and e-Commerce Customer Service. |                                    |

Applicable Career Bands

**M** (Supervisory/Management)                      **P** (Professional)                      **U** (Business Support)

Discipline

|               |  |
|---------------|--|
| <b>AMS000</b> | <p><b>Customer Support/Operations Generalist/Multidiscipline</b></p> <ul style="list-style-type: none"> <li>• Provides new and existing customers with the best possible service in relation to billing inquiries, service requests, suggestions and complaints</li> <li>• Resolves customer inquiries and complaints fairly and effectively</li> <li>• Provides product and service information to customers and identifies upselling opportunities to maintain and increase income streams from customer relationships</li> <li>• Recommends and implements programs to support customer needs</li> <li>• Responsibilities are within the Customer Support/Operations Function as a generalist or in a combination of Disciplines</li> </ul> |
| <b>AMS010</b> | <p><b>Customer Service</b></p> <ul style="list-style-type: none"> <li>• Provides customer services relating to sales, sales promotions, installations and communications</li> <li>• Ensures that good customer relations are maintained and customer claims and complaints are resolved fairly, effectively and in accordance with the consumer laws</li> <li>• Develops organization-wide initiatives to proactively inform and educate customers</li> <li>• Develops improvement plans in response to customer surveys</li> </ul>  |
| <b>AMS020</b> | <p><b>Customer Contact Center Generalist/Multidiscipline</b></p> <ul style="list-style-type: none"> <li>• Provides timely responses to customer inquiries by telephone and/or email in an in- or outbound service center, consistent with service and quality standards</li> <li>• Processes customer orders, bills and accounts, and applications for service, maintenance and termination</li> <li>• Troubleshoots and resolves customer complaints</li> </ul>   |
| <b>AMS024</b> | <p><b>Customer Contact Center Planning and Monitoring</b></p> <ul style="list-style-type: none"> <li>• Plans and monitors customer contact center schedules and operations</li> <li>• Provides management information and productivity forecasts by observing customer call patterns</li> <li>• Develops, monitors and analyzes key performance indicators</li> <li>• May schedule call center equipment maintenance and repair appointments</li> </ul>  |
| <b>AMS026</b> | <p><b>Customer Contact Center Process Improvement</b></p> <ul style="list-style-type: none"> <li>• Analyzes and measures the effectiveness of existing contact center processes and develops sustainable, repeatable and quantifiable process improvements</li> <li>• Collects and analyzes contact center activity data and initiates, develops and recommends improvements to systems, processes and procedures to increase productivity and reduce cost</li> <li>• Monitors resource requirements, call volume, quality and efficiency of customer contact center operations</li> <li>• Collaborates with training resources to provide training on improved processes</li> </ul>   |
| <b>AMS999</b> | <p><b>Customer Support/Operations - No Applicable Discipline</b></p> <ul style="list-style-type: none"> <li>• Responsibilities are within the Customer Support/Operations Function but are not described in other Discipline summaries</li> </ul>  |

Career Bands, Career Levels, Functions and Disciplines

## Functions and Disciplines Definitions (continued)

| <u>Code</u> | <u>Function</u>                   |
|-------------|-----------------------------------|
| <b>ARE</b>  | <b>Real Estate and Facilities</b> |

Plans, controls and directs real estate activities such as site location and acquisition, right-of-way negotiation, building and land acquisition and disposition, space leasing, property management and maintenance of properties.

Applicable Career Bands

**M** (Supervisory/Management)                      **P** (Professional)                      **U** (Business Support)

Discipline

|               |   |
|---------------|---|
| <b>ARE000</b> | <p><b>Real Estate and Facilities Generalist/Multidiscipline</b></p> <ul style="list-style-type: none"> <li>Plans, controls and directs real estate activities; identifies, acquires or leases land and buildings for the organization's operations</li> <li>May negotiate right-of-way easements</li> <li>Ensures the optimal utilization of the organization's facilities</li> <li>Disposes of facilities that are no longer required by the organization</li> <li>Responsibilities are within the Real Estate and Facilities Function as a generalist or in a combination of Disciplines</li> </ul> |
| <b>ARE010</b> | <p><b>Real Estate/Property Management</b></p> <ul style="list-style-type: none"> <li>Manages real estate to ensure maximum return and profitability</li> <li>Advises and assists with site selection, site acquisition, leasing space and other functions relating to land acquisition, negotiation and sale</li> </ul>   |
| <b>ARE020</b> | <p><b>Facilities Management</b></p> <ul style="list-style-type: none"> <li>Ensures the optimal utilization of the organization's facilities</li> <li>Assesses and evaluates the physical space requirements of the organization and recommends plans to meet needs</li> <li>Ensures proper functioning of facilities through ongoing inspection and maintenance</li> </ul>  |
| <b>ARE999</b> | <p><b>Real Estate and Facilities - No Applicable Discipline</b></p> <ul style="list-style-type: none"> <li>Responsibilities are within the Real Estate and Facilities Function but are not described in other Discipline summaries</li> </ul>   |

Career Bands, Career Levels, Functions and Disciplines

**Functions and Disciplines Definitions (continued)**

| <u>Code</u> | <u>Function</u>                   |
|-------------|-----------------------------------|
| <b>ASC</b>  | <b>Supply Chain and Logistics</b> |

Performs supply chain and logistics functions, which may include, but are not limited to, material procurement, production planning, inventory control, outsourcing, vendor selection and distribution. Creates integrated processes among internal functions such as operations, purchasing and logistics, and outside suppliers. Focuses resources on continuous improvement of the movement of materials through various production processes and establishes key performance metrics and benchmarks relating to supply chain planning/forecasting to measure actual performance against goals on a regular basis. Promotes alignment by understanding and communicating customer needs and requirements throughout the organization.

Applicable Career Bands

- M** (Supervisory/Management)
- P** (Professional)
- T** (Technical Support)
- U** (Business Support)
- W** (Production/Manual Labor)

Discipline

|               |  |
|---------------|--|
| <b>ASC000</b> | <p><b>Supply Chain and Logistics Generalist/Multidiscipline</b></p> <ul style="list-style-type: none"> <li>● Performs supply chain and logistics functions such as material procurement, production planning, inventory control, outsourcing, vendor selection and distribution</li> <li>● Creates integrated processes among internal functions (e.g., operations, purchasing and logistics) and outside suppliers</li> <li>● Responsibilities are within the Supply Chain and Logistics Function as a generalist or in a combination of Disciplines</li> </ul>                                       |
| <b>ASC012</b> | <p><b>Supplier Development</b></p> <ul style="list-style-type: none"> <li>● Coordinates the development of new products, materials and/or services with suppliers</li> <li>● Provides specifications and collaborates with suppliers on the organization's technical, operational and quality requirements</li> <li>● Collaborates with suppliers on technical aspects of development work such as selecting materials</li> <li>● Administers a roster of approved suppliers</li> </ul>  |
| <b>ASC015</b> | <p><b>Materials Planning/Scheduling</b></p> <ul style="list-style-type: none"> <li>● Plans, schedules and monitors inbound movement of materials from suppliers</li> <li>● Determines material requirements and coordinates the efficient movement of materials with purchasing, production and engineering</li> <li>● Develops specifications for new contract orders</li> </ul>  |
| <b>ASC020</b> | <p><b>Materials Management</b></p> <ul style="list-style-type: none"> <li>● Coordinates incoming and outgoing movement and storage of raw materials, finished products and parts that include functions such as warehousing, shop and delivery services to ensure material availability and delivery when needed to meet production schedules</li> <li>● Compiles data on order volume, production schedules and forecasts and applies statistical methods to estimate future materials requirements</li> </ul>  |
| <b>ASC025</b> | <p><b>Inventory Control</b></p> <ul style="list-style-type: none"> <li>● Ensures that inventories are secure, properly identified and readily accessible to authorized personnel</li> <li>● Maintains controls over various types of inventories (e.g., raw materials, subassemblies, finished goods)</li> <li>● Conducts physical inventory counts and reconciles results with inventory records</li> <li>● Ensures that quantities of incoming and outgoing shipments are correct</li> <li>● Conducts analyses of inventory levels and coordinates with production and sales requirements</li> </ul> |



Career Bands, Career Levels, Functions and Disciplines

## Functions and Disciplines Definitions (continued)

| <u>Code</u>       | <u>Function</u>  |
|-------------------|--|
| <b>ASC</b>        | <b>Supply Chain and Logistics (continued)</b>  |
| <b>Discipline</b> |  |
| <b>ASC030</b>     | <b>Logistics</b> <ul style="list-style-type: none"><li>• Coordinates inbound and outbound logistical operations, including inventory management, warehousing and transportation to ensure sufficient supply of goods and products</li><li>• Controls the commercial impact of the complete range of activities from receiving, locating and dispatching, sourcing, purchasing and optimizing inventory levels</li><li>• Administers an effective system that meets the organization's inventory control needs through efficient transportation of raw materials, component parts and/or finished goods</li></ul>   |
| <b>ASC035</b>     | <b>Import/Export</b> <ul style="list-style-type: none"><li>• Administers the efficient and economical movement of goods (e.g., materials, products, equipment) across international borders in accordance with organizational policies and in compliance with relevant local, country and international customs laws and processes</li><li>• Prepares, reviews, approves and maintains files for import/export documents (e.g., customs declarations, a PO (purchase order), packing list, commercial invoice, SLI (shipper's letter of instruction), SED (shipper's export declaration), BOL (bill of lading), AWB (air waybill), IC (import certificate), etc.) required for the lawful completion of import/export activities</li><li>• Ensures that commercial and sales invoices are accurate in accordance with physical shipment and customer's SLI, quantities, value of goods, country of origin and other regulatory requirements</li><li>• Serves as an import/export liaison for international customers/subsidiaries, distribution, procurement, planning, manufacturing, intercompany finance, regulatory and import/export compliance functions</li></ul> |
| <b>ASC060</b>     | <b>Purchasing Generalist/Multidiscipline</b> <ul style="list-style-type: none"><li>• Negotiates favorable terms, volume discounts and long-term contracts with suppliers and prepares and processes requisitions and purchase orders for the procurement of goods, services and supplies for customer-related business processes or for internal use as a generalist or in a combination of Purchasing Disciplines</li></ul>   |
| <b>ASC999</b>     | <b>Supply Chain and Logistics - No Applicable Discipline</b> <ul style="list-style-type: none"><li>• Responsibilities are within the Supply Chain and Logistics Function but are not described in other Discipline summaries</li></ul>   |

Career Bands, Career Levels, Functions and Disciplines

**Functions and Disciplines Definitions (continued)**

Code            Function  
**CTS**            **Telesales**

Initiates and answers inbound and/or outbound sales calls directly from/to prospective and/or existing customers. Responds to customer questions and takes orders. Builds rapport with customers by probing for needs and recommending appropriate solutions. Achieves monthly, quarterly and annual sales objectives while ensuring optimum customer experience and satisfaction.

Applicable Career Bands

**M** (Supervisory/Management)    **S** (Customer/Client Management and Sales)    **U** (Business Support)

Discipline

- CTS000            Telesales Generalist/Multidiscipline**
  - Initiates and answers inbound and/or outbound sales calls directly from/to prospective and/or existing customers
  - Accepts orders, closes sales, maintains customer records and completes required documentation
  - Identifies and qualifies prospective customers and records sales prospecting activity in computer-based tracking systems
  - May have an assigned product line that may overlap other sales teams' territories
  - May have an individual or team sales quota and is likely to have a target earnings bonus or sales incentive opportunity
  
- CTS010            Telesales - Inbound/Inside**
  - Answers inbound customer calls regarding product and service information and identifies upselling opportunities from such calls
  - Accepts orders, closes sales, maintains customer records and completes required documentation
  - Identifies and qualifies prospective customers and records sales prospecting activity in computer-based tracking systems
  - May have an assigned product line that may overlap other sales teams' territories
  - May have an individual or team sales quota and is likely to have a target earnings bonus or sales incentive opportunity
  
- CTS020            Telesales - Outbound**
  - Performs outbound sales calls, including cold calling, lead follow-up and sales qualification, to develop a portfolio of buying customers and meet or exceed daily outbound call quotas
  - Accepts orders, closes sales, maintains customer records and completes required documentation
  - Identifies and qualifies prospective customers and records sales prospecting activity in computer-based tracking systems
  - May have an assigned product line that may overlap other sales teams' territories
  - May have an individual or team sales quota and is likely to have a target earnings bonus or sales incentive opportunity
  
- CTS999            Telesales - No Applicable Discipline**
  - Responsibilities are within the Telesales Function but are not described in other Discipline summaries

Career Bands, Career Levels, Functions and Disciplines

**Functions and Disciplines Definitions (continued)**

| <u>Code</u>  | <u>Function</u>                         |
|--|---|
| <b>CUS</b>   | <b>Sales Support and Administration</b> |
| Supports sales representatives and channel partners in administrative areas such as order processing, sales quotes, sales information management, product training and financing. Tracks transactions and prepares reports regarding information such as order status, sales results, leads, sales quotas and sales representative earnings. |   |

Applicable Career Bands

**M** (Supervisory/Management)                      **P** (Professional)                      **U** (Business Support)

Discipline

|               |  |
|---------------|--|
| <b>CUS000</b> | <p><b>Sales Support and Administration Generalist/Multidiscipline</b></p> <ul style="list-style-type: none"> <li>Supports sales representatives and channel partners in administrative areas such as order processing, customer quotes, sales information management, product training and financing</li> <li>Responsibilities are within the Sales Support and Administration Function as a generalist or in a combination of Disciplines</li> </ul>  |
| <b>CUS010</b> | <p><b>Sales Training</b></p> <ul style="list-style-type: none"> <li>Develops, plans and conducts training on techniques for selling the organization's products and/or services for sales representatives and reseller partners</li> <li>Designs training classes and training materials and prepares documentation</li> <li>Conducts sales training needs assessments and analyzes employee training needs to determine requirements for new program development</li> <li>Monitors and evaluates sales training programs, assesses results and implements enhancements as needed to ensure effectiveness of programs</li> </ul>   |
| <b>CUS020</b> | <p><b>Product Sales Financing</b></p> <ul style="list-style-type: none"> <li>Negotiates terms and financial structures of the organization's leasing and other financing services for customers</li> <li>Coordinates the completion of all necessary documentation for the financing arrangement</li> </ul>  |
| <b>CUS030</b> | <p><b>Sales Planning/Forecasting</b></p> <ul style="list-style-type: none"> <li>Prepares and analyzes sales forecasts and results reports and presentations, including analyses of variances vs. budget forecasts</li> <li>Supports periodic sales revenue target setting and forecasting and may conduct research to estimate market demand</li> <li>Supports sales teams in preparing and evaluating deal scenarios and contract terms</li> <li>Collaborates with sales, IT and finance to develop, create and maintain reporting requirements and ensure that the revenue recognition and forecasting systems provide accurate and timely data</li> <li>May track sales vs. quota information to determine commissions</li> </ul> |
| <b>CUS999</b> | <p><b>Sales Support and Administration - No Applicable Discipline</b></p> <ul style="list-style-type: none"> <li>Responsibilities are within the Sales Support and Administration Function but are not described in other Discipline summaries</li> </ul>  |