

Human Services: Consumer Services Focus Area

Obtain necessary credentials, licensures or state-specific requirements to prepare for a career in consumer services. [HUCS01](#)

- 1 Examine consumer services laws and ethics to prepare for careers that require state licensure and/or careers that require specific credentials or skills. [HUCS01.01.01.01](#)
- 2 Attend education classes to prepare for licensure examinations. [HUCS01.01.01.02](#)
- 3 Pass examinations for licensures and maintain licensures with continuing education credits. [HUCS01.01.01.03](#)
- 4 Plan educational program to assure career requirements are met. [HUCS01.01.01.04](#)
- 5 Complete continuing education requirements. [HUCS01.02.01.01](#)
- 6 Document completion of continuing education classes. [HUCS01.02.01.02](#)
- 7 Maintain current and marketable business skills. [HUCS01.02.01.03](#)

Communicate product or equipment features that meet the needs of clients and consumers. [HUCS02](#)

- 1 Demonstrate product/equipment features to clients and consumers. [HUCS02.01.01.01](#)
- 2 Confirm clients/consumers' understanding of product/equipment features. [HUCS02.01.01.02](#)
- 3 Answer client and consumer questions confidently and accurately. [HUCS02.01.01.03](#)
- 4 Conduct research on products and services. [HUCS02.01.01.04](#)
- 5 Locate and synthesize product/service information. [HUCS02.01.01.05](#)
- 6 Discuss research findings in everyday language. [HUCS02.01.01.06](#)

Make consumer services recommendations meeting the needs of clients or customers. [HUCS03](#)

- 1 Motivate clients. [HUCS03.01.01.01](#)
- 2 Listen attentively. [HUCS03.01.01.02](#)
- 3 Speak courteously and respectfully. [HUCS03.01.01.03](#)

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- 4 Include clients/consumers in planning.** HUCS03.01.01.04

 - 5 Defuse clients/consumer's anger or skepticism.** HUCS03.01.01.05

 - 6 Resolve conflicting interests.** HUCS03.01.01.06

 - 7 Respond to client/consumer objections or complaints so that client/consumer shows satisfaction.** HUCS03.01.01.07

 - 8 Apply client/consumer service techniques to complete transactions.** HUCS03.02.01.01

 - 9 Manage objections with courtesy and defuse them.** HUCS03.02.01.02

 - 10 Facilitate clients/consumer's follow-through with the transaction.** HUCS03.02.01.03

 - 11 Maintain client/consumer relationship as client/consumer returns for services and refers others.** HUCS03.02.01.04

 - 12 Elicit financial information and preferences through interviews with clients/consumers.** HUCS03.03.01.01

 - 13 Obtain all necessary information.** HUCS03.03.01.02

 - 14 Identify client/consumer preferences.** HUCS03.03.01.03

 - 15 Advise customers using appropriate and relevant information.** HUCS03.04.01.01

 - 16 Respond to questions appropriately.** HUCS03.04.01.02

 - 17 Evaluate risk/reward relationships of consumer's preferences.** HUCS03.04.01.03

 - 18 Recommend options related to situation.** HUCS03.04.01.04

 - 19 Follow up with client/consumer on outcome of plan implementation.** HUCS03.04.01.05

Analyze financial/economic situations when making recommendations about consumer services. HUCS04

- 1 Evaluate client/consumer resources versus product costs and client risk tolerance level.** HUCS04.01.01.01

- 2 Evaluate client/consumer resources versus cost.** HUCS04.01.01.02

- 3 Educate client/consumer about most beneficial choices.** HUCS04.01.01.03

- 4 Recommend best products, plans, or services for client/consumer.** HUCS04.01.01.04

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- 5 Synthesize economic principles, client/consumer data, and math skills to produce comprehensive budgets, purchasing plans, and/or financial plans.** HUCS04.02.01.01

 - 6 Produce attainable and manageable plans.** HUCS04.02.01.02

 - 7 Produce plans showing benefits for clients/consumers.** HUCS04.02.01.03

 - 8 Create plan to balance purchases, budgets, businesses, real estate investments, or portfolio investments.** HUCS04.03.01.01

 - 9 Produce balanced plan, explaining to client/consumer how the plan provides balance.** HUCS04.03.01.02

 - 10 Consult with co-workers or those knowledgeable in a field of expertise when needed to expedite solutions to problems.** HUCS04.04.01.01

 - 11 Refer client/consumer to others if client/consumer will be better served.** HUCS04.04.01.02

 - 12 Develop client/consumer recommendations using the appropriate investing or purchasing strategy.** HUCS04.05.01.01

 - 13 Analyze clients/consumer's assets and purchasing power.** HUCS04.05.01.02

 - 14 Evaluate options and choose options for maximum return and minimum risk.** HUCS04.05.01.03

 - 15 Synthesize elements to produce purchase or investment recommendations that satisfy clients/consumers.** HUCS04.05.01.04
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Use standard business processes or procedures to create consumer service information and facilitate client interactions. HUCS05

- 1 Manage numerical information using a calculator.** HUCS05.01.01.01

- 2 Add, subtract, multiply, divide accurately.** HUCS05.01.01.02

- 3 Perform complex transactions accurately.** HUCS05.01.01.03

- 4 Use appropriate computer applications.** HUCS05.02.01.01

- 5 Use Internet to access current information.** HUCS05.02.01.02

- 6 Use Microsoft Word, Power Point, and Excel.** HUCS05.02.01.03

- 7 Write, send, and receive e-mail.** HUCS05.02.01.04

- 8 Use specialized software to prepare needed documents, accurately representing market analyses, contracts, projected outcomes, amortization, etc.** HUCS05.02.01.05

- 9 Use desktop software to produce advertising materials.** HUCS05.02.01.06

10 Create documents for client/consumer and office use. HUCS05.02.01.07

11 Create website for Internet advertising. HUCS05.02.01.08

12 Use computer technology to maintain product and client information. HUCS05.03.01.01

13 Create product information such as brochures. HUCS05.03.01.02

14 Establish and update customer database. HUCS05.03.01.03

Use a variety of methods to educate audiences about consumer services. HUCS06

1 Present comprehensive subject or product information. HUCS06.01.01.01

2 Provide customized oral presentations and visual materials to specific audiences. HUCS06.01.01.02

3 Confirm clients'/customers' understanding of product/equipment features. HUCS06.01.01.03

4 Select and use key information to advertise consumer services. HUCS06.02.01.01

5 Use the concept of 3-4 primary "info bites" for advertising in various forms of media. HUCS06.02.01.02

Demonstrate knowledge of ethical and legal responsibilities associated with providing consumer services. HUCS07

1 Model behaviors that demonstrate stewardship of client/consumer assets. HUCS07.01.01.01

2 Provide beneficial help and suggestions to client/consumer. HUCS07.01.01.02

3 Recognize when a client/consumer needs an advocate, and follow through with meeting these needs. HUCS07.01.01.03

4 Model ethical behaviors in the relationship with a consumer services client/consumer. HUCS07.02.01.01

5 Offer prompt, honest, and efficient services. HUCS07.02.01.02

6 Protect client/consumer from fraud, deceit, or misrepresentation. HUCS07.02.01.03

7 Immediately disclose any conflicts of interest. HUCS07.02.01.04

8 Make recommendations for service based on the preferences and needs of the client/consumer. HUCS07.02.01.05

9 Comply with the letter and spirit of laws and regulations related to retail, governmental, or private services. HUCS07.03.01.01

10 Document any questionable conduct. HUCS07.03.01.02

11 Inform clients and customers about protection agencies and their rights related to fraudulent practices. HUCS07.04.01.01

12 Identify agencies and contact information of consumer protection agencies. HUCS07.04.01.02

Apply business procedures and utilize equipment and facilities to produce satisfying client outcomes. HUCS08

1 Manage funds. HUCS08.01.01.01

2 Provide accurate records of receipts and disbursements. HUCS08.01.01.02

3 Recommend options regarding investments, insurance, retirement, etc. HUCS08.01.01.03

4 Create financial plan or purchasing plan for client. HUCS08.01.01.04

5 Advise clients using appropriate and relevant information. HUCS08.02.01.01

6 Complete paperwork for orders/purchases with accuracy. HUCS08.02.01.02

7 Provide desired product to consumer. HUCS08.02.01.03

8 Demonstrate product/equipment features to clients and customers. HUCS08.02.01.04

9 Provide a safe, accessible, and psychologically suitable environment for client/consumer. HUCS08.03.01.01

10 Evaluate accessibility to transportation. HUCS08.03.02

11 Evaluate safety and security of the location. HUCS08.03.03

12 Implement elements of a non-threatening environment. HUCS08.03.04
