

# 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

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

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  - 6 Resolve conflicting interests.** HUCS03.01.01.06

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

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

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

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

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

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

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

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

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

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

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

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

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

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**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

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

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

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- 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

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

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

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

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

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

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

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

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

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

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  - 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

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

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

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

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

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

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

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

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

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

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**11 Create website for Internet advertising.** HUCS05.02.01.08

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

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**13 Create product information such as brochures.** HUCS05.03.01.02

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**14 Establish and update customer database.** HUCS05.03.01.03

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

**1 Present comprehensive subject or product information.** HUCS06.01.01.01

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

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

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

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

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**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

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

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

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

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

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

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**7 Immediately disclose any conflicts of interest.** HUCS07.02.01.04

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

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

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**10 Document any questionable conduct.** HUCS07.03.01.02

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

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

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

**1 Manage funds.** HUCS08.01.01.01

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

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

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

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

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

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**7 Provide desired product to consumer.** HUCS08.02.01.03

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

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

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**10 Evaluate accessibility to transportation.** HUCS08.03.02

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

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

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