



SMALL BUSINESS OWNER OPERATORS (NOC 0123, 0621, 0631, 0632, 0712)

Job Definition¹:

Small business owner operators plan, organize, direct, control and evaluate all aspects of their business. They establish policies and procedures; monitor budgets, inventory and assets; respond to inquiries or complaints; negotiate and manage contracts; and hire, train and supervise staff.

Additional Occupational Information²:

Small business owner operators plan, organize, direct, control and evaluate all aspects of their business. Their responsibilities include, but are not limited to, establishing policies and procedures; monitoring budgets, inventory and assets; responding to inquiries or complaints; negotiating and managing contracts; and hiring, training and supervising staff.

Overview:

This Occupational Language Analysis (OLA) presents Canadian Language Benchmarks (CLB) competencies and typical listening, speaking, reading and writing tasks performed at a competent level by Small Business Owner/Operators. The tasks are illustrative only, and do not provide a complete sample of what a Small Business Owner/Operator does on the job. Other essential skills such as numeracy and computer skills are beyond the scope of the OLA. The content of the OLA was validated by people employed in the occupation and by CLB experts. It was developed by a Registered OLA Analyst using four key resources:

- the *Canadian Language Benchmarks 2000*, Centre for Canadian Language Benchmarks and Citizenship and Immigration Canada
- the *National Occupational Standards for Small Business Owner/Operator*, Canadian Tourism Human Resources Council
- the *Essential Skills Profile for Small Business Owner/Operator*, Human Resources and Skills Development Canada

¹ *Essential Skills Profile for Small Business Owner/Operator (NOC 0123, 0621, 0631, 0632, 0712)*, Human Resources and Skills Development Canada

² *National Occupational Standards for the Small Business Owner/Operator (Canadian Tourism Human Resources Council)*

For a more complete picture of the competencies that are needed to perform this occupation, refer to these source documents.

How to Read this Occupational Language Analysis:

The titles, numbers and sequence of categories are based on the *Canadian Language Benchmarks 2000*, which address four major skill areas Speaking, Listening, Reading and Writing. CLB competencies (language descriptors) are entered at the left margin and followed by a number indicating the benchmark level (1 - 12) for each competency. Sample occupational tasks (work/task descriptors) drawn from the Essential Skills Profile or the National Occupational Standards are indented and italicized underneath each competency and referenced to their source, as follows:

Task Source	Reference	Example
Essential Skills Profile	ES + the first letters of the profile section	(ES-DU) = Essential Skills Profile, Document Use section
National Occupational Standard	NOS + the section/subsection	(NOS-B2.5) = National Occupational Standard, Major Category B, Skill 2; Subskill 5

Comparative Ratings:

The following chart compares typical and most complex essential skills ratings for Small Business Owner/Operators, based on the Essential Skills Profile, to the corresponding range of CLB ratings, as suggested in *Relating Canadian Language Benchmarks to Essential Skills: A Comparative Framework*³. These are general ranges and there may be some language tasks that fall outside of this range.

Skill Area	Typical		Most Complex	
	Essential Skills	CLB	Essential Skills	CLB
Speaking	2	6 - 8	3	9 - 10
Listening	2	7 - 8	3	9 - 10
Reading	1 - 3	3 - 9	3	7 - 9
Writing	2	6 - 7	4	9

Common Conditions of Communication:

Condition	Description
Purpose	–serving customers, making sales, managing staff, negotiating, networking, presenting, training, problem-solving
Audience	– customers, clients, employees, suppliers, professionals (lawyers, accountants, etc)
Context	– varied; alone in office, with groups of clients and/or employees; formal, semi-formal, casual
Topic	– ranges from immediate, concrete, familiar to time-delay and unfamiliar
Mode	– generally face-to-face, telephone, email

³ *Relating Canadian Language Benchmarks to Essential Skills: A Comparative Framework*; Centre for Canadian Language Benchmarks, 2005

Skill: Speaking

I. Social Interaction

Interpersonal Competencies

Greet, introduce self and ask about the other person. (CLB 3)

- ❑ *interact with staff everyday to greet (ES-OC); greet employees in positive manner (NOS-C4.7b)*
- ❑ *interact with customers everyday...to greet (ES-OC); be ready to meet and greet...customers (ES-TS); acknowledge customer (NOS-E2.1a)*

Introduce two persons. (CLB 4)

- ❑ *introduce co-workers (NOS-C3.1d)*

Answer the phone. (CLB 4)

- ❑ *answer [call] promptly; greet caller (NOS-G2.5a)*
- ❑ *when answering call: identify business name and self...thank caller (NOS-G2.5b)*

Leave a short simple message. (CLB 4)

- ❑ *leave complete [message] information, e.g. area code, complete name, company name (NOS-G2.5b)*
- ❑ *record [outgoing answering machine/voice mail] announcement: keep message concise and professional (NOS-G2.5b)*

Extend, accept or decline an invitation or offer. (CLB 5)

- ❑ *invite customer to return (NOS-E2.1h)*

Express and respond to compliments or congratulations. (CLB 5)

- ❑ *pass on compliments; say "thank you" for good work (NOS-C4.7d)*
- ❑ *thank customers for business (NOS-E1.3d); [be] courteous, e.g. thank people for calling your business (NOS-G1.1b); thank customer for business (NOS-E2.1h); thank guest (NOS-F1.2h)*

Express/respond to apology, regrets and excuses. (CLB 6)

- ❑ *apologize for inconvenience (NOS-E2.2d)*

Express and respond to gratitude, appreciation, complaint, disappointment, dissatisfaction, satisfaction and hope. (CLB 7)

- ❑ *recognize employee's efforts (NOS-C5.2d)*
- ❑ *show appreciation for referred business (NOS-D2.6f)*
- ❑ *thank customer for voicing concern or complaint (NOS-E2.2d)*
- ❑ *contact supplier or carrier immediately to report irregularities (NOS-F3.2d)*

Respond to a minor conflict or complaint. (CLB 8)

- ❑ *address concerns and misconceptions (NOS-C3.3b)*
- ❑ *acknowledge and respond to concern or complaint as soon as possible (NOS-E2.2b); talk with other parties involved (NOS-E2.2c); notify customer of action to be taken (NOS-E2.2h)*

Conversation Management

Confirm own comprehension. (CLB 7)

- ❑ *communicate with various federal, provincial/territorial and municipal government regulatory representatives to clarify requirements of legislation that affect business (ES-OC); find information about changes or updates to legislation by...contacting government (ES-TS);*
- ❑ *ensure comprehension of specific customer needs such as food allergies or other health concerns (ES-OC)*
- ❑ *ensure applicant...is aware of working conditions (NOS-C2.2b)*
- ❑ *determine customer's needs, e.g. ask questions (NOS-E2.1b); ask questions to elaborate or clarify listener's needs; summarize points by reviewing what has been said; ask for feedback to ensure understanding (NOS-G2.1c); contact customer to clarify [business] needs, if necessary (NOS-F2.3b); confirm understanding, e.g. paraphrase, ask questions to clarify (NOS-G2.2e)*

Manage conversation. Check comprehension. (CLB 8)

- ❑ *clarify policies and procedures [with customers] (ES-OC)*
- ❑ *ensure understanding and agreement by all parties (NOS-A4.3a); ensure that listener understands meaning (NOS-G2.1d)*
- ❑ *check for understanding of: operation; job responsibilities (NOS-C3.1g)*
- ❑ *conduct exit interview (NOS-C5.2d); conduct interview [with job applicant] (NOS-C2.2b)*
- ❑ *Encourage others to participate. (CLB 8)*

- ❑ *invite applicant to ask questions about business or position (NOS-C2.2b)*
- ❑ *encourage employees to share knowledge and experience with each other (NOS-C4.6e)*

Contribute to/co-manage a discussion or debate in a small formal group (work meeting, seminar). (CLB 9)

- ❑ *participate in formal discussions about work processes or product improvement (ES-WWO)*
- ❑ *organize meetings...lead discussion (NOS-G2.6d)*

Phone Competencies

Take phone messages with three to five details. (CLB 6)

- ❑ *take a message...verify information by repeating details back to caller (NOS-G2.5b)*

Take live phone messages with five to seven details. (CLB 7)

- ❑ *interact with customers everyday on the telephone (ES-OC)*
- ❑ *use other communication devices, e.g. walkie talkies, pagers, two way radios (NOS-G2.5g)*

Carry on a brief phone conversation in a professional manner. (CLB 8)

- ❑ *determine needs of caller; provide requested information; if information or party is not readily accessible, transfer call to someone who can help or offer to take a message (NOS-G2.5b)*
- ❑ *making call: identify self and business name; state purpose of call; inform other party you are calling long distance, if asked to hold; keep conversations professional and brief (NOS-G2.5g)*

II. Instructions

Give a set of instructions dealing with simple daily actions and routines where the steps are not presented as a point-form sequence of single clauses. (CLB 6)

- ❑ *give direction and assistance [to staff] (ES-OC)*

Give clear instructions and directions related to moderately complex familiar technical and non-technical tasks. (CLB 7)

- ❑ *direct and work with staff as a team to achieve the goals and objectives of the business (ES-WWO)*
- ❑ *inform workers or demonstrate to them how tasks are performed (ES-WWO)*
- ❑ *train staff (NOS-A4.4d); training and development (NOS-C1.1b); conduct in-house training sessions...explain: training objectives and rationale; knowledge and skills to be learned (NOS-C3.3b)*
- ❑ *explain activities as necessary (NOS-G2.1)*

Give/pass on instructions about an established familiar process or procedure (technical and non-technical). (CLB 8)

- ❑ *explain emergency procedures (NOS-C3.1d)*
- ❑ *describe job responsibilities and performance expectations (NOS-C3.1e)*

III. Suasion (Getting Things Done)

Ask for, offer, and accept assistance. (CLB 3)

- ❑ *offer assistance (NOS-E1.2d)*
- ❑ *request assistance or instruction...e.g. ask colleagues how to use computer program (NOS-G1.3c)*

Request, accept or reject goods or services, assistance or offer in a service or sales situation. (CLB 4)

- ❑ *place, revise or cancel orders for products from suppliers (ES-OC)*
- ❑ *ask for supporting identification (NOS-F1.4c)*
- ❑ *request customer signature on transaction receipt (NOS-F1.4f)*
- ❑ *if transaction is declined, request another form of payment (NOS-F1.4j)*
- ❑ *ask customer to complete transaction, for example: verify amount...add gratuity (NOS-F1.5c)*

Give simple informal advice. (CLB 5)

- ❑ *refer tourists to community or visitor information services when necessary (NOS-G3.2i)*

Call for emergency assistance. (CLB 5)

- ❑ *call emergency authority (NOS-F6.2d)*

Make a simple formal suggestion; provide reason. (CLB 6)

- ❑ *suggest products and/or services (ES-OC); make sale...present information about products and services (NOS-E1.2d); speak positively about product (NOS-G1.1b)*
- ❑ *make suggestions for alternatives (ES-TS)*

- explain necessity of reporting details [of emergency situations], e.g., date, time, action taken (NOS-F6.1)

Make a verbal request for an item. (CLB 6)

- seek commitment [from interviewee] for term required (NOS-C2.2b)
- ask for sale, e.g. "May I book those dates for you?" (NOS-E1.2h)
- ask suppliers to provide resources (NOS-F3.4a)
- ask individuals to complete tasks (NOS-G2.6e)

Give and respond to a warning; discourage others. (CLB 7)

- reinforce to staff the importance of arriving on time (ES-TS)
- explain the dangers of beaching kayaks [in business activities such as sea kayaking] (ES-TS)

Request a word. Ask for and respond to recommendations or advice. (CLB 7)

- refer customers to specific competitors (ES-OC); provide customers with the name and directions to another business that may be able to provide what the customers want (ES-TS); refer customers to partners (NOS-A7.1); refer customer to alternate source when unable to provide product or service (NOS-E2.1)
- encourage staff, customers, suppliers and other small business owner operators to share their experiences and opinions (ES-TS)
- communicate with business specialists, e.g. accountants, bankers, lawyers, insurance brokers, website designers, who can answer their questions, provide advice (ES-OC); consult a lawyer to finalize the content of the agreements (ES-W); develop business plan...seek professional assistance if necessary (NOS-A3.1g); consult appropriate professionals, e.g. accountant, tax planner (NOS-B2.8c); negotiate contracts; seek professional advice, if necessary (NOS-F2.2a); consult with professionals as necessary, e.g. accountant, lawyer (NOS-F2.4b);
- keep up to date with changes in legislation, for example: seek advice from legal and professional sources (NOS-A5.1e); identify policies and procedures needed for operations: consult with other operators, government agencies, trade associations and professional sources (NOS-A6.1a);
- check references for interview (NOS-C2.1d)
- seek feedback about orientation session (NOS-C3.1g)
- invite employee input on training needs (NOS-C3.2a); evaluate training program: seek feedback from employees (NOS-C3.3f); ask for feedback and recommendations for improvement (NOS-C5.2d)
- be aware of potential allegation of wrongful dismissal: seek legal advice, if required (NOS-C5.1a); handle customer concern or complaint: ask for customer's input (NOS-E2.2g)
- respond to feedback (NOS-C3.3g); follow up: ensure concern or complaint has been resolved (NOS-E2.2i)
- ask for [customer] referrals or testimonials (NOS-E1.3d)

Make an extended suggestion on how to solve an immediate problem or make an improvement. (CLB 7)

- sell/upsell products and/or services to customers by asking questions...in order to persuade the customer to purchase (ES-OC); ask open-ended questions to seek additional information (NOS-E1.2c); ask questions to gather more information, e.g., find reason for objection (NOS-E1.2e)
- give feedback in positive manner (NOS-C3.4c)
- confirm [customer's] needs were met: address concerns if needs were not met (NOS-E1.3d)

Propose/recommend that certain changes be made in a familiar area. (CLB 8)

- interact with staff...discuss issues, answer questions and solve problems (ES-OC)
- assess the customer's...experience...to formulate a recommendation (ES-TS)
- make suggestions on improving work processes (ES-WWO)
- provide feedback on skills, knowledge and attitudes (NOS-C5.2d)
- use suggestive selling, for example: identify other needs; recommend related items or services; offer higher quality items (NOS-E1.2f); offer other products and services that will enhance customer's experience (NOS-E2.1f)

Formally raise an issue with an individual or a group in authority. (CLB 9)

- discuss [legislation requirement] problems and violations and how to correct them (ES-OC)
- deal with problem employees (ES-TS); talk to the employee about the problem (ES-TS)
- query the financial institution about their reasons for declining the loan (ES-TS)
- discuss situation/issue with employees separately: discuss options to resolve conflict (NOS-C4.5g); discuss problem in private (NOS-C4.8b)
- ensure employee understands company policy, what the violation was, and consequences (NOS-C4.8h)
- advise employee of dismissal in private (NOS-C5.1b); state: reason for lay off...effective date (NOS-C5.2)

Ask for agreement/commitment. (CLB 9)

- ❑ *come to an agreement for a solution (ES-TS)*
- ❑ *negotiate with contractors that provide services for the business...come to an agreement on the terms and conditions of their contract (ES-OC); negotiate with their contractors (ES-TS)*
- ❑ *negotiate salary (NOS-C2.4b)*
- ❑ *monitor morale levels: acknowledge situation, e.g. give pep talk (NOS-C4.7g)*
- ❑ *ask for behaviour change: describe expected behaviour; outline consequences of noncompliance (NOS-C4.8e)*
- ❑ *negotiate contracts (NOS-F2.2)*

IV. Information

Presentations

Describe briefly a person, object, situation and daily routine. (CLB 3)

- ❑ *measure the air temperature in degrees Fahrenheit and Centigrade to inform customers (ES-N)*
- ❑ *handle cash payments: state total cash received from guest (NOS-F1.2d); count change back to guest (NOS-F1.2f)*

Give a presentation to describe and explain a complex structure, system or process based on research. Use a diagram to support the explanations. (CLB 8)

- ❑ *deliver presentations: use effective communication skills: explain purpose of presentation; present facts accurately (NOS-G2.3f)*

Interaction One-on-One

Ask for and provide information related to routine daily activities (e.g., personal, family, others, work). (CLB 5)

- ❑ *make bookings or...provide information (ES-DU)*
- ❑ *provide information to customers about activities available in the local area (ES-TS)*
- ❑ *offer personal recommendations when asked, if appropriate and allowed (NOS-G3.2h)*

Ask for and provide information in an interview related to daily activities. (CLB 6)

- ❑ *ask local community organizations, such as local theatres about their upcoming events, times and prices...provide this information to customers (ES-OC)*
- ❑ *seek feedback from customers, e.g....[conduct] interviews (NOS-A2.1b)*
- ❑ *research production options...talk to other business operators (NOS-D2.3b)*
- ❑ *handle customer concern or complaint...notify customer of action to be taken (NOS-E2.2h)*

Ask for and provide detailed information related to personal needs, varied daily activities and routine work requirements. (CLB 7)

- ❑ *talk with suppliers to gather information about their products and/or services (ES-OC); discuss products and services (NOS-D2.6f); contact suppliers regularly to obtain information (NOS-F3.1g)*
- ❑ *interact with staff everyday to...[e.g] provide work assignments (ES-OC)*
- ❑ *contact references for top ranking candidates to verify information (NOS-C2.3d)*
- ❑ *research information about shows, for example, contact: government agencies; chambers of commerce; business colleagues and competitors; industry associations (NOS-D2.5a)*

Ask for and/or provide detailed information related to personal needs, varied daily activities and routine work requirements. (CLB 8)

- ❑ *conduct interview: provide overview of business, e.g. business philosophy and goals (NOS-C2.2b)*

Discuss options. (CLB 8)

- ❑ *discuss needs [with suppliers, and] ask about service options (ES-OC)*
- ❑ *meet with institutions' managers to discuss banking needs and benefits to banking with that institution (NOS-B2.1); discuss options, e.g. bonuses, commission, profit sharing (NOS-C2.4)*
- ❑ *use negotiation skills...explain your viewpoint (NOS-G1.8d); discuss options, i.e. determine what you are willing to compromise and to what degree (NOS-G1.8f)*

Interaction in a Group

Participate in a small group discussion/meeting on non-personal familiar topics and issues: express opinions, feelings, obligation, ability, certainty. (CLB 6)

- *interact with local community organizations...share information (ES-OC)*
- *communicate expectations [to in-house workshop participants] (NOS-C3.2h)*

Participate in a small group discussion/meeting: express opinions and feelings; qualify opinion, express reservations, approval and disapproval. (CLB 7)

- *interact with local community organizations, tourism associations and other businesses to discuss concerns (ES-OC)*
- *be interactive: network with customers and industry members (NOS-D2.5g); network with industry members, e.g. attend conventions/trade shows, join and participate in associations (NOS-G1.3c)*

Participate in a debate/discussion/meeting on an abstract familiar topic or issue. (CLB 8)

- *participate in industry associations, e.g., chambers of commerce, seminars (NOS-A2.1c)*

Skill: Listening

I. Social Interaction

Identify factual details and inferred meanings in dialogues containing compliments, invitations, and offers; discussion of interests, likes/dislikes and preferences. (CLB 5)

- *[be] attentive, e.g. listen to customers (NOS-G1.1b)*

Identify mood/attitude of participants. (CLB 6)

- *listen to the tone of voice...in order to judge the mood of customers (ES-OC); respond to verbal and non-verbal cues of customers (NOS-E1.2c); [be] sensitive, e.g. respond to customers' and employees' moods (NOS-G1.1b); recognize speaker's feelings (NOS-G2.2b)*

Identify stated and unspecified details, facts and opinions about situation and relationship of participants containing expression of and response to gratitude and appreciation, complaint, hope, disappointment, satisfaction, dissatisfaction, approval and disapproval. (CLB 7)

- *listen carefully to...staff...to identify problems with...staff conflicts (ES-OC)*
- *make sale; communicate effectively: listen carefully (NOS-E1.2c)*

Identify stated and unspecified details about mood, attitude, situation and formality in discourse containing expression of and response to formal welcomes, farewells, toasts, congratulations on achievements and awards, sympathy and condolences. (CLB 8)

- *identify buying signals, e.g., positive body language, interest in specific products or services, verbal confirmation (NOS-E1.2g)*

II. Instructions

Understand simple messages left on voice-mail (with five to seven details). (CLB 7)

- *check answering machine/voice mail frequently for incoming messages (NOS-G2.5b)*

Follow an extended set of multi-step instructions on technical and non-technical tasks for familiar processes or procedures. (CLB 8)

- *follow instructions of emergency authority...assist as directed (NOS-F6.2d)*

III. Suasion (Getting Things Done)

Identify expressions used to ask and grant permission; advise of danger; ask for, offer, and accept assistance. (CLB 3)

- *listen for radio distress signals [in business activities such as boat tours, sea kayaking, back country guiding] (ES-OC)*

Demonstrate comprehension of details and speaker's purpose in directive requests, reminders, orders and pleas. (CLB 7)

- *listen carefully to their staff...to identify problems with working conditions (ES-OC)*
- *listen carefully to the customers' needs (ES-TS)*
- *deal with workers' grievances or complaints (ES-WWO)*
- *handle customer concern...listen to customer (NOS-E2.2a)*
- *listen to other parties' viewpoints (NOS-G1.8e)*

Evaluate the validity of a suggestion or proposed solution. (CLB 8)

- *listen to their customers carefully to...obtain feedback (ES-OC); consider feedback from staff and customers to inform their plans (ES-TS)*
- *gather information by word of mouth...[from] staff, customers, suppliers and other small business owner operators to share their experiences and opinions in order to identify good ideas and opportunities for improvement (ES-TS)*
- *be receptive to input (NOS-G1.5c); consider feedback received and questions asked (NOS-G2.1f)*

Evaluate extended oral suggestions for solutions to problems, recommendations and proposals in relation to their purpose and audience. (CLB 9)

- *keep up to date with changes in legislation...seek advice from legal and professional sources (NOS-A5.1e)*

IV. Information

Get the gist, key information and important factual details in a story about a personal experience; a description of a person, an object, a situation, a scene, or a daily routine. (CLB 3)

- *take customer contact information (ES-TS)*

Demonstrate comprehension of mostly factual details and some inferred meanings in a story about obtaining goods or services; a report or a forecast; a news item. (CLB 4)

- *listen to customers carefully to ensure understanding of...the details of the transaction (ES-OC)*
- *find information about local weather conditions from various media, e.g. radio, television...[and] other people (ES-TS)*

Identify main ideas, supporting details, statements and examples in a descriptive or narrative presentation, or in a group interaction (e.g., meeting, discussion). (CLB 6)

- *conduct secondary research, for example: participate in industry associations, e.g., chambers of commerce (NOS-A2.1c)*

Identify facts, opinions and attitudes in conversations about abstract and complex ideas on a familiar topic. (CLB 8)

- *listen to their customers carefully to ensure understanding of liability (ES-OC)*
- *find information about changes or updates to legislation...[by] participating in industry associations/events (ES-TS)*
- *attend association meetings to find out about industry and government initiatives...[and] research that may have a bearing on their business activities (ES-TS)*

Demonstrate critical comprehension of a lecture or presentation by one speaker: identify the main idea(s) and identify ways in which the supporting details develop the main idea(s). (CLB 9)

- *learn about new products through seminars provided by their suppliers (ES-CL)*
- *take courses; participate in workshops (NOS-G1.3c)*

Skill: Reading

I. Social Interaction Texts

Get information from personal notes, e-mail messages and letters. (CLB 4)

- ❑ read short email messages and text messages from potential customers requesting product information (ES-RT)

II. Instructions

Follow one- to six-step common everyday instructions and instructional texts. (CLB 4)

- ❑ read labels on containers of cleaning supplies, chemicals or food, for use and safety instructions or information (ES-RT)
- ❑ read [product] tags, labels (NOS-E1.1d)

Follow a set of common everyday instructions (up to 10 steps) when not presented completely in point form: sequence/order must be inferred. (CLB 6)

- ❑ use checklists to identify business opening or closing responsibilities completed on a daily basis (ES-DU)
- ❑ look up recipes (ES-TS)

Follow everyday instructional texts. (CLB 7)

- ❑ follow proper procedures for back up of electronic files (NOS-B2.10b)

Follow an extended set of multi-step instructions for established process. (CLB 8)

- ❑ read operating manuals for equipment (ES-RT); read manuals (NOS-E1.1b); read trade show exhibitor manual (NOS-D2.5e)

Follow formal instructions of advisory, instructional texts, and instructions for a familiar process/procedure that require integration of several pieces of information. (CLB 9)

- ❑ review: licensing requirements and renewal dates...registration requirements (NOS-A5.2a)
- ❑ identify discounts and penalties (NOS-B2.3b); review credit policies (NOS-B2.6c); review refund policy (NOS-E1.1a)
- ❑ review purchasing guidelines (NOS-B2.6d); review cash handling guidelines (NOS-B2.6e)
- ❑ review accounting procedures regularly, e.g. separate personal and business expenses, file taxes (NOS-B2.8a)

III. Business/Service Texts

Find information in formatted texts: forms, tables, schedules, directories. (CLB 3)

- ❑ read numbers on financial statements (ES-N)
- ❑ read dollar figures in bank statements (ES-N)
- ❑ check weather sites (ES-TS)

Get information from short business brochures, notices, form letters and flyers. (CLB 3)

- ❑ read flyers advertising products related to their business in order to find good deals (ES-RT)
- ❑ give incoming facsimile to intended party (NOS-G2.5c)

Find information in formatted texts: forms, tables, schedules, directories. (CLB 4)

- ❑ read timetables such as bus, rail and air transportation schedules (ES-DU); check airline sites to determine the status of flights and the arrival times (ES-TS)
- ❑ verify identification (ES-TS); verify: amount and type of currency, guest's identification...ensure: signatures match; cheque is payable to business; date is correct (NOS-F1.3c)
- ❑ find local tourism information for customers and tourists by checking...yellow pages and tourism directories (ES-TS); research suppliers...refer to sources, for example: yellow pages (NOS-F3.1b)

Identify factual details and some inferred meanings in moderately complex business/service texts, including formatted texts. (CLB 5)

- ❑ compare the supplier's invoices to their own purchase records (ES-N); compare invoice to purchase order: check for price variations (NOS-F3.2b); monitor receivables and payables (ES-N)
- ❑ check...tide tables (ES-TS)
- ❑ refer to comments and ratings from interview forms (NOS-C2.3a); review feedback from customers (NOS-C3.2a);
- ❑ review schedule to ensure all shifts and positions are covered (NOS-C4.3c)

Identify factual details and some inferred meanings in moderately complex texts containing advice, requests, specifications. (CLB 6)

- ❑ review applications on file (NOS-C2.1a)
- ❑ compare qualifications to job description (NOS-C2.1d)
- ❑ review job descriptions (NOS-C3.2a)
- ❑ refer to customer files to identify and meet preferences (NOS-E2.1f)

Identify factual details and some inferred meanings in moderately complex texts containing assessments, evaluations, advice. (CLB 7)

- ❑ scan government brochures or generic letters for information on changes that apply to their business (ES-RT)
- ❑ read competitors' brochures...to make a comparison to own business products and/or services and prices (ES-RT); research competitors, e.g. review promotional materials (NOS-A2.1b)
- ❑ find information about changes in technology and other industry practices by reading industry newsletters...find information about changes or updates to legislation by reading newsletters; read industry/professional newsletters (ES-TS); read publications, e.g. association newsletters (NOS-A5.1e)

Identify factual and inferred meanings in written proposed solutions, recommendations and proposals; and in statements of rules, regulations, laws and norms of behaviour. (CLB 8)

- ❑ read contracts to ensure that terms and conditions are being met for the products and/or services they are providing or that they are receiving; read banking or legal documents, such as leases or mortgages (ES-RT)
- ❑ read regulations from all levels of government related to their business (ES-RT); identify applicable legislation (NOS-A5.1a); review legislation (NOS-A5.1c); review: legislation; industry requirements (NOS-C1.2a)
- ❑ review the track record of their existing or past equipment, cost, new models, warranties and guarantees (ES-TS); evaluate...policies, e.g. refunds, warranties (NOS-A2.1f); review warranties and guarantees (NOS-E1.1a)

Locate and integrate three or four pieces of information contained in moderately complex formatted texts. (CLB 8)

- ❑ review market trends (ES-TS)
- ❑ review previous budgets (NOS-B1.1a); identify variances between budgeted and actual figures...determine causes of variances (NOS-B1.2e); evaluate budget allocations (NOS-B2.9)

Obtain information for key work/business tasks by locating and integrating several pieces of information in complex prose texts and formatted texts. (CLB 9)

- ❑ review business performance, e.g. sales figures (NOS-A3.3b); review previous year's business plan (NOS-A3.3d); review details of business, e.g., pricing structure (NOS-A3.3e); review business concept (NOS-A3.3f); review business plan (NOS-D1.1d); review...company goals and objectives, e.g. expansion; volume of business; changes in technology; budget; turnover rates; future training needs; seasonality of business; economic forecasts; labour market information (NOS-C1.2a)
- ❑ understand the potential impact of liability on a business (NOS-A4.2b); review...types of insurance coverage needed or recommended (NOS-A5.2a)
- ❑ review [business] policies and procedures as required (NOS-A6.1d)
- ❑ review benefits program (NOS-B2.5c); review compensation, including: wage or salary scales (NOS-C1.2c)
- ❑ review accounts payable, e.g. mortgage or rent, utilities, payroll (NOS-B2.6a); review accounts receivable, e.g. payment terms, receipts (NOS-B2.6b)
- ❑ review...funding available, e.g. government programs; work experience; co operative ventures; current skills of employees (NOS-C1.2a); review lease/buy options (NOS-E1.1a)
- ❑ ensure paperwork is complete and correct, e.g. credit applications, waivers (NOS-E1.3c)
- ❑ identify information sources for repair and maintenance, for example: operating manuals; reference book; building and safety codes; lists of contractors and trades people (NOS-F4.1b)

Obtain information in key work/business tasks by locating and integrating several pieces of explicit and implied information in multiple, complex prose texts and in complex forms and graphic displays. (CLB 10)

- ❑ review annual financial statement prior to year end (NOS-B2.8c); conduct research to determine: base cost; expected sales volume; profit margin; break even point (NOS-F3.3c)

Analyse and evaluate persuasiveness in business/service texts. (CLB 11)

- ❑ proofread [advertisement drafts] (NOS-D2.1d); proofread final copy and visuals [for promotional materials] (NOS-D2.3f); approve all written...material given to media (NOS-D2.6e); edit and proofread (NOS-G2.4f)

IV. Informational Texts

Demonstrate comprehension of standard maps, basic diagrams, basic graphs. (CLB 5)

- *read and interpret...road...maps (ES-DU)*

Show comprehension of a one-page moderately complex descriptive/narrative text on a familiar topic. (CLB 6)

- *read newspapers to keep up on local community events in order to provide information to customers (ES-RT); read publications, e.g. newspapers (NOS-A5.1e)*
- *read professional and industry association newsletters (ES-RT)*
- *read [product]...fact sheets (NOS-E1.1d)*

Demonstrate comprehension of a one- or two-page moderately complex extended description, report or narration on a familiar topic. (CLB 7)

- *find information about changes in technology and other industry practices by reading...trade magazines (ES-TS); seek learning opportunities...in trade magazines (ES-CL); read industry publications (NOS-G1.3c)*

Demonstrate comprehension of moderately complex tables, graphs, diagrams, and flow charts. (CLB 7)

- *reconcile their monthly bank statements by comparing them to the point-of-sales closing print out (ES-N); reconcile bank statements (NOS-B1.2c); review financial statements monthly (NOS-B2.8b)*
- *track daily sales over a period of time to compare sales figures from year to year (ES-N); compare monthly, daily and annual sales from previous years for specific products (ES-N); compare actual to forecasted sales (NOS-D1.2d)*
- *track income and expenses (ES-WWO)*
- *review government statistics, e.g. Stats Canada (NOS-A2.1c)*
- *compare invoices to purchase orders and statements (NOS-B2.3b)*

Demonstrate comprehension of factual details and inferred meanings in an extended description, report or narration when events are reported out of sequence. Draw conclusions. (CLB 8)

- *research sustainable environmental practices that apply to business (NOS-F5.1a)*

Comprehension of complex process flow charts, graphs, pictographs and diagrams by expressing them in alternate forms. (CLB 9)

- *read documents specific to their type of business activity, e.g...read and interpret...topographical maps (ES-DU)*
- *evaluate the plans for and development of a business website...ensure [website]...provide the desired information in a user-friendly manner (ES-TS)*

Trace, summarize and evaluate the development of arguments in complex expository or argumentative texts (e.g., in a rational inquiry paper or in a problem-solution paper). (CLB 10)

- *find information about changes in technology and other industry practices by reading...journals (ES-TS); read trade journals (NOS-A2.1c); read publications, e.g...trade journals (NOS-A5.1e); seek learning opportunities...in...journals (ES-CL)*
- *read...books [for professional development] (NOS-G1.3c)*

Express information/ideas in questionnaires and surveys in alternate forms. (CLB 10)

- *research customer base for: information on target market; perception of business (NOS-A3.3c)*

Information Literacy/Reference and Study Skills Competencies

Access and locate three or four pieces of information in on-line electronic reference sources (e.g., World Wide Web, library databases), if available, or from print reference sources. (CLB 7)

- *use a database. For example, to store and call up customer information (ES-WWO)*
- *find local tourism information for customers and tourists by checking the Internet (ES-TS)*
- *search the Internet to find information (ES-WWO); research suppliers: refer to sources, for example: internet (NOS-F3.1b)*

Access/locate several pieces of information in on-line electronic reference sources. (CLB 8)

- *read competitors'...websites to make a comparison to own business products and/or services and prices; collect data on comparable businesses (ES-N); research their competitors by reviewing their print material or checking out their websites (ES-TS)*
- *access government regulations...by going online...to determine applicability and compliance requirements (ES-TS); locate legislation, for example: libraries; government offices; internet (NOS-A5.1b)*
- *seek learning opportunities...on the Internet (ES-CL)*
- *learn about new products...by researching the Internet (ES-CL)*

Access and locate several pieces of information involving a complex search of on-line electronic reference sources (e.g., library databases) and of traditional sources. (CLB 10)

- *develop business plans...includes research (ES-W)*

- *research topic [for presentations] (NOS-G2.3c)*

Skill: Writing

I. Social Interaction

Convey a personal message in a formal short letter or note, or through e-mail, expressing or responding to invitations, quick updates, feelings. (CLB 5)

- *e-mail to communicate with customers (ES-WWO)*
- *communicate with employees, for example...emails (NOS-C4.4a)*

Convey a personal message in a formal short letter or note, or through e-mail, expressing or responding to appreciation, complaint, disappointment, satisfaction, dissatisfaction and hope. (CLB 7)

- *participate in blogs to market business (ES-WWO)*

II. Recording/Reproducing Information

Copy short texts from dictionaries, directories, schedules, instructions. (CLB 3)

- *record attendance [at in-house training sessions] (NOS-C3.3g)*
- *record [credit card] authorization number (NOS-F1.4e)*
- *select best supplier: record contact information (NOS-F3.1d)*

Copy short texts to record information for personal use, or to complete tasks, or to learn information. (CLB 4)

- *record amount paid, cheque or confirmation numbers and dates paid on invoices and statements (NOS-B2.3e); collect payment: note day received (NOS-B2.2f); record particulars, e.g. name, date, amount (NOS-B2.5b); record monetary transactions, for example: daily sales, credit card totals (NOS-F1.6f); record delivery time (NOS-F3.2a)*
- *record appointments, meetings and critical dates (NOS-G1.4a)*
- *use facsimile machine: clearly indicate on front page: sender; receiver; telephone and facsimile number; number of pages being sent (NOS-G2.5c)*

Take live phone messages, voice mail messages or pre-recorded information with five to seven details. (CLB 5)

- *[take phone messages:] record customer information such as arrival and departure dates, number in party, sizes and ages of individuals, special requests or requirements, room types, tee times, contact name and phone number and payment method (ES-DU); taking a message, record: caller's name and telephone number; name of person caller wishes to speak to; date and time of call; best time to call back (NOS-G2.5b)*
- *[when responding to inquiries] collect contact information about potential customers...ensure information gathered is clear and adequate, e.g., take detailed notes (NOS-E1.2b)*

Reduce a page of information to a list of seven to 10 important points. (CLB 5)

- *document purchasing procedures, e.g., purchasing deadline, delivery schedule (NOS-F3.1e)*
- *document maintenance and repairs, e.g., comply with warranties (NOS-F4.1g)*

Take notes from an oral presentation or a page of written information. (CLB 6)

- *[take] customer feedback (NOS-E1.3e); [take] notes of discussions with customer (NOS-E1.3f)*

Take notes in point form from an oral presentation. (CLB 7)

- *record comments and ratings on interview form (NOS-C2.2c); record information supplied by references (NOS-C2.3e)*

Write an outline or a summary of a longer text. (CLB 7)

- *conduct research for business...summarize findings (NOS-A2.1h);*

Write instructions about an established process or procedures given in a live demonstration, over the phone or from pre-recorded audio or video material. (CLB 8)

- *create checklists or charts (e.g. guest lists for checking off arrivals, supply checklists for trip preparations, clean-up duties for kitchens and bathrooms (ES-DU); create checklists for other staff to use to ensure the task is carried out correctly and in an orderly manner (ES-TS)*

Write an outline or a summary of a longer text. (CLB 8)

- *record ideas [for presentation] in logical order (NOS-G2.3d)*

Write a paragraph to summarize complex information in questionnaires, graphs, charts. (CLB 9)

- *document: costs; results, for example: attitudes toward business; attendance at promotions and presentations; customer comments; profitability; sales; market share [and] influencing factors, such as: economy; weather; competition (NOS-D1.2c)*

III. Business/Service Messages

Fill out simple forms. (CLB 3-4)

- track golf scores for club members (ES-N)
- write numbers on forms (ES-N)
- write dollar figures on invoices (ES-N)
- write out receipts (ES-TS)
- record [received goods] in inventory system (NOS-F3.2h)

Convey simple business messages as written notes. (CLB 3-4)

- design signs for their business to direct or inform customers (ES-DU)
- disperse petty cash: write a note, indicating: purpose; name of recipient; amount; date (NOS-B2.7d)
- prepare float for shift...note shortage or overage and initial or sign (NOS-F1.1c)

Fill out forms. (CLB 5)

- complete forms by marking check boxes, recording numerical information or entering words, phrases, sentences; enter information on tables, schedules or other table-like text (ES-DU)
- set up staff work schedule (ES-N); create schedules for organizing staffing requirements (ES-DU); set up their work schedule (ES-TS); draft schedule (NOS-C4.3b)
- prepare bank deposit slips by itemizing...payments (ES-N); complete deposit slip (NOS-F1.6e)
- prepare payroll (ES-N); record payroll information for each employee (NOS-B2.4a)
- order supplies (ES-TS)
- summarize and total purchases on petty cash report (NOS-B2.7f)
- [take] complete sales records, including: customer profile; dates of sale and/or delivery; products and services purchased (NOS-E1.3e)

Convey business messages as written notes. (CLB 5-6)

- use word processing...to write letters and memos (ES-WWO)
- prepare a list of items for discussion, e.g. set agenda (NOS-G2.6c)

Fill out moderately complex forms. (CLB 6-7)

- prepare distribution lists [for promotional material] (NOS-D2.4c)
- fill in forms to apply for licenses or permits such as liquor licenses or park permits; to make appropriate tax payments and submissions for payroll, benefits and contributions and to apply for insurance (ES-DU); obtain permits (NOS-A5.1d)
- fill in forms to record observations such as wildlife sightings...or to record activities such as details of pesticide/herbicide applications, for specific data collections purposes for regulatory agencies (ES-DU)
- develop action plan to launch business (NOS-A3.1f)
- issue record of employment to employee with last pay cheque and to Revenue Canada (NOS-B2.4d)
- update [payroll] records (NOS-B2.4c)
- update [benefits program] records, e.g. date forwarded and received (NOS-B2.5b)
- apply early for best booth location...specify requirements, e.g. space, size, materials (NOS-D2.5d)
- maintain accurate records, e.g. financial, warranty (NOS-G1.2g)

Convey business messages as written notes to pass on routine information, make requests, or respond to recommendations and warnings. (CLB 7)

- write e-mails responding to customer questions (ES-W)
- write letters to loyal customers to inform them of changes to business products, services, policies or procedures (ES-W)
- design job advertisement (NOS-C2.1b)

Convey business messages as written notes, memoranda, letters of request, or work record log entries, to indicate a problem, to request a change, or to request information. (CLB 8)

- create forms for managing different aspects of business operations such as purchasing, ordering, liability waivers, registration and customer satisfaction questionnaires (ES-W); develop application forms (NOS-B2.6c); update human resource documents; job application forms; interview forms (NOS-C1.2b)
- develop...job descriptions (NOS-C1.2b)
- provide written offer of employment (NOS-C2.4c)
- lay off...provide written notice, if required (NOS-C5.2b)
- provide letter of reference (NOS-C5.2c)

Fill out forms and other materials in pre-set formats with required brief texts. (CLB 8)

- ❑ *conduct market research, e.g. [develop] SWOT analysis (NOS-A2.2b);*
- ❑ *develop financial projections, outlining; capital investment...projected expenses and revenues (NOS-A3.1d); detail projected...costs (NOS-B1.1c)*
- ❑ *finalize employment documentation (NOS-C3.1f)*

Write short suggestions and reports as memos and pre-set form reports. (CLB 9)

- ❑ *complete forms by...entering...texts of a paragraph or more (ES-DU)*
- ❑ *record and file observations [after in-house training] (NOS-C3.3g)*
- ❑ *document details, for example: date; behaviour change requested; consequence outlined (NOS-C4.8i); record: concern or complaint; action taken (NOS-E2.2i); document details of issue, actions taken and results (NOS-G1.7i)*

Write semi-formal reports and proposals. (CLB 10)

- ❑ *write quotes or proposals for products and/or services (ES-W); prepare [business] proposal (NOS-F2.3g)*
- ❑ *write out terms and conditions for contract negotiations for products and/or services from contractors (ES-W)*
- ❑ *[in a guiding business] complete an environmental assessment with an environmental plan for mitigation of damage for each activity (ES-TS)*

Fill out complex forms and other materials in pre-set formats with one to five paragraphs of texts. (CLB 10)

- ❑ *complete income taxes (ES-N)*
- ❑ *create a budget for business operations (ES-N); create budget for upcoming fiscal year (NOS-B1.1b)*
- ❑ *reapply [for loan] with revisions to their application (ES-TS); make application for funding (NOS-A2.3d)*

Write sales/marketing letters. (CLB 11)

- ❑ *write the content for a business website...include basic information...as well as features, special events, special offers, staff profiles, business history, customer feedback and endorsements (ES-W); develop website...identify information to include on website, for example: business name; products and services; proximity to visitor services (NOS-D2.2a)*
- ❑ *compose...written...material given to media (NOS-D2.6e)*

Write formal business reports, requests for proposals and formal proposals. (CLB 11)

- ❑ *develop business plans that provide an overview of all aspects of their business when applying for financing...business plans require...writing and editing (ES-W); outline details of business, including: long-term goals...short-term objective statements...business requirements (NOS-A3.1b); develop executive summary [for business plan] (NOS-A3.1h);*
- ❑ *change their business plans (ES-TS); put together a new business plan, which may be used to apply for financing (ES-TS); update business plan...develop statement of purpose for update (NOS-A3.3a); revise other components as required, e.g. executive summary (NOS-A3.3k)*
- ❑ *develop marketing plan...create mission statement (NOS-A3.1a); revise other components as required, e.g....marketing plan (NOS-A3.3k); revise marketing plan and activities as needed (NOS-D1.2e)*

IV. Presenting Information

Write one or two paragraphs to: relate a familiar sequence of events, tell a story; provide a detailed description and comparison of people, places, objects and animals, plants, materials, or routines; or to describe a simple process. (CLB 6)

- ❑ *create information sheets for customers (ES-DU)*

Write two or three paragraphs to narrate a familiar sequence of events from the past; to tell a story; or to provide a detailed description, comparison. (CLB 7)

- ❑ *develop flyers to advertise special events or sales (ES-DU); use word processing...to write...text for flyers and brochures (ES-WWO)*
- ❑ *write the content for advertisements or announcements to be placed in local newspapers and community newsletters (ES-W); draft advertisement...outline product details...determine copy (NOS-D2.1d);*

Write a paper, essay, report to describe and compare complex ideas, phenomena or processes. (CLB 9)

- ❑ *write reports for professional associations for publication or presentation (ES-W)*

For more information about:

Canadian Language Benchmarks or
Occupational Language Analyses

Contact:

Centre for Canadian Language Benchmarks,
803 - 200 Elgin Street,
Ottawa, ON K2G 6Z2
Ph. (613) 230-7729
Fax: (613) 230-9305
info@language.ca
www.itsessential.ca

National Occupational Standards for Small Business
Owner/Operator

Canadian Tourism Human Resources Council
151 Slater Street
Ottawa, Ontario
K1P 5H3
Tel: (613) 231 - 6949
Fax: (613) 231 - 6853
Email: info@cthrc.ca

Essential Skills Profiles

Human Resources and Skills Development Canada
Skills Information Division
Human Resources Partnerships
Human Resources and Skills Development Canada
112 Kent Street, Tower B, 21st floor
Ottawa, Ontario
K1A 0J9

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Registered June 2010 in Ottawa