



*The Mark of Excellence for the
Convenience Services Industry*

Candidate Handbook

Overview

What is the NCE Credential?

The NAMA Certified Executive (NCE) is the designation awarded by the National Automatic Merchandising Association (NAMA) to individuals who have satisfied industry leadership, continuing education, and experience requirements, and conform to [NAMA's Ethical Standards](#).

Who can apply?

The certification program is designed for NAMA members who have a minimum of 8 years of experience in the vending/coffee service/food service industry or in a related convenience services field. This includes vending/coffee service/food service management professionals, industry suppliers, consultants, manufacturers and service providers.

Why NCE?

Earning the NCE gives designees a competitive professional advantage in the marketplace. The NCE designation signifies accomplishment, initiative and professionalism, and represents leadership, drive, and a commitment to the industry and one's own professional growth.

How to Earn the NCE Credential

Please read this NCE Candidate Handbook in its entirety to understand the policies and procedures of the NAMA NCE program, as well as the exam application and registration processes. If you have additional questions after reviewing this information, please contact NAMA at elarson@namanow.org.

NCE Candidates must complete an application documenting industry-related work experience, continuing education, and leadership activities. These activities are added up according to a system of points. Once the minimum number of points is earned, the candidate is then eligible to take the NCE exam.

How to Apply

Professionals interested in earning the designation must initiate the process by submitting an [online application](#). Documents supporting the NCE Application must be forwarded to elarson@namanow.org.

After the application is reviewed, a written notification is sent to the applicant informing them as to whether the minimum required number of points has been achieved. Those eligible to take the exam will receive an email with further instructions on how to take the online exam. NCE candidates must pay a non-refundable, non-transferable \$500.00 examination fee, which is due prior to taking the exam. Candidates will not be able to take the exam without paying the required fee.

Applicants who do not earn the minimum number of points and disagree with the scoring will have 30 days from the date of the notification letter to submit a written appeal to the NCE Certification Commission, through the NAMA Education Department. To ensure confidentiality, the applicant's name and company affiliation will be removed from the application form prior to submission to the NCE Certification Commission.

Applicants who do not meet the minimum number of points required for eligibility may submit a new application within one year of the time they received notification of their initial ineligibility at no additional charge.

Applicants who do not take the exam within one year (12 months) after being deemed eligible to sit for the exam must submit a new application.

Candidate data will be used only for the NCE process. Data will not be transferred to any other database or used for any other purpose.

Exam results and application information are completely confidential and only the name, title and company of a new NCE is released once the exam process is complete and the certification is awarded.

The Examination

The exam is based on the NCE Competencies and Body of Knowledge (BOK). The purpose of the BOK is to identify those areas of information, knowledge and expertise with which an NCE should be familiar. By meeting the standards of innovative service and professional management envisioned by this document, NCEs will be leaders in moving their organizations successfully into the future.

Study guides, reference tools and a wide range of training and development opportunities are available to help candidates prepare for the NCE exam.

Candidates must take the exam within 12 months of their application/eligibility being approved. Applicants requiring special accommodations for examinations must submit their requests in writing to the NAMA Education Department, including a note from their treating physician on physician letterhead.

The exam is offered online and consists of 150 multiple choice questions. Exam results are reported immediately, to the candidate, at the completion of the exam.

Upon successful completion of the exam, candidates will be notified of their pass/fail status in writing. Candidates who do not receive the minimum required passing score may re-take the exam up to two more times, by submitting a \$250 reexamination fee. After a total of three failed attempts at the exam, a new application with full fee will be required before being deemed eligible to sit for the exam again.

Once you have been approved and registered to take the NCE online exam, the following information applies:

- This is an open book exam. You should have your NCE study guide available.
- The exam is timed; you will have 3 hours to complete. If you do not complete the exam within 3 hours, it will automatically be submitted.
- Once you begin the exam, you must complete it in its entirety. You will not have the option to start on one day and finish on a later date.
- There are 15 sections and a total of 150 multi-choice questions. Each section must be submitted separately. Once you answer all the questions in a section and submit, you will not have the option to change your answers in that section. You can only change answers within a section that has not already been submitted.
- The system will not allow you to submit a section with unanswered questions. Please answer all questions prior to submitting each section.

Recertification

NCEs must recertify every five years; by December 31st of the fifth year after the date of certification and every five years thereafter. Recertification requires 600 continuing professional credits/points to be reported and documented on the recertification application. A \$250 recertification fee is required at the time of application. No exam is required to recertify.

Use of Designation

The NAMA Certified Executive designation is a valuable asset to NAMA and its designees. Use of this designation is governed by policies and guidelines set by NAMA and the NCE Commission. In order to safeguard the NCE program and logo, NAMA requires all designees to strictly adhere to these guidelines. Any improper use of the NCE designation will result in termination of the NAMA Certified Executive designation.

- The NCE designation is an individual certification program not a company program.
- The NCE designation should be characterized by the letters NCE following the last name on stationary, business cards, e-mail, bio and in signature.
- The NCE logo may not be copied or used on official documents.
- Designees may only use the NCE designation if they are an active NCE. If the certification lapses due to non-recertification, the designation letters may no longer be used.
- Upon retirement, a designee who is at least 60 years of age and who has held the designation for at least five years may qualify for life status. A designee who has held the credential for 15 years (renewed the credential three times) may qualify for life status.
- A designee who leaves the industry loses the right to hold the designation.

Recognition

As an NCE, you will become a member of a group of recognized industry leaders that signifies accomplishment, commitment, achievement and initiative. It can lead to new opportunities within the industry and open doors to business opportunities.

Stand apart from your competition by displaying your designation proudly:

- Add to your promotional materials and presentations for clients
- Add the designation after your name on your business cards and e-mail signature
- Add the designation to your by-line in trade publication articles/advertisements
- Your name in the registry of NCEs on the NAMA website

Apply for the exam [now](#) »

NAMA Skill Competencies

Food/Beverage

Product Control (Purchasing/Receiving/Storing/Issuing)

Calculating Actual Food/Beverage Costs

Menu Planning/Merchandising

Sanitary Food Handling

Coffee

Leadership: Communication

Informing

Presentation Skills

Written Communication

Listening

Leadership: Time Management

Management of Time

Delegation

Staff Scheduling

Priority Setting

Leadership: Interpersonal Skills

Peer Relationships

Interpersonal Savvy

Boss Relationships

Direction (Supervision)

Accountability

Negotiating Relationships

Understanding Others

Comfort Around Top Management

Leadership: Conflict Management

Conflict Management Techniques

Confronting Direct Reports

Command Skills

Leadership: Employee Training and Professional Development

Employee Orientation and Training

Coaching

Developing Subordinates

Work Improvement

Learning Leader

Technical Learning

Managing Change

Human Resources

Diversity

Hiring and Staffing

Selecting Human Resources

Team Building

Planning Human Resource Needs

Legal Issues (Human Resources)

Accounting/Financial Management

Cost Concepts/Breakeven

Pricing Concepts

Revenue (Cash) Systems Management

Organizational Budgeting

Cash Flow Forecasting

Financial Statements

Financial Analysis

Implementing Labor Cost Controls

Budgeting

Compensation/Benefit Administration

Multi-unit Management

Capital Budgeting

General Management: Decision-Making

Results

Goal Setting and Planning

Decision Quality

Problem Solving

Decision Making

General Management: Work Performance

Organizing

Process Management

Job Analysis/Design

Managing and Measuring

General Management: Other Skills

Creates Vision

Strategic Agility

Business Acumen

Crisis Management

Organizational "Agility"

Managing Through Systems

Industry Vision

Marketing

Logistics/Supply Chain Management

Strategic Marketing Planning

Service Marketing Principles

Market Research

Community Relations

Sales Management

Customer Relationships

Sales

New Client Development

Prospect/Opportunity Management

Key Account Management

Safety, Security and Asset Management

Controlling Product Theft

Preventing Revenue Theft

Safety/Security

Truck (Fleet) Management

Vending Equipment Management

Security of Vending Equipment

Insurance/Risk Management

Vending – Specific Legal Concerns

Cleaning/Maintenance

Contracted Services

Managing Preventive Maintenance

Technology

Management of Technology

V-Commerce

Technology Trends/Future

Technology (Hardware/Software)

NAMA Body of Knowledge

Food/Beverage

Product Control (Purchasing/Receiving/Storing/Issuing) — Can apply basic principles of product purchasing (including the use of buying groups) and receiving to assure that quality specifications are met and that purchase costs are controlled; can apply basic principles of product storing (including product rotation) and issuing (including warehousing) to maintain product quality and to minimize costs.

Calculating Actual Food/Beverage Costs — Can accurately determine actual food and beverage product (including coffee) costs incurred to generate applicable revenue for the accounting period.

Menu Planning — Can use effective strategies to plan and determine the variety and quantity of vended products/categories on a day-to-day basis.

Sanitary Food Handling — Can describe food and beverage handling procedures incorporating general knowledge of microorganisms to help prevent food borne illness; recognizes the competitive advantage of consistently effective food handling.

Leadership: Communication

Informing — Provides the information people must know to do their jobs and to feel good about being a member of the team, unit, and/or the organization; provides direct feedback and timely information to individuals so that they can make accurate decisions; understands the role of technology including e-mail, websites and data management in effective communication.

Presentation Skills — Is effective in a variety of formal presentation settings: one-on-one, small and large groups, with peers, subordinates and bosses; is effective both inside and outside the organization on both cool data and hot and controversial topics; commands attention and can manage group processes during the presentation; can change tactics midstream when something isn't working.

Written Communication — Is able to write clearly and succinctly in a variety of communication settings and styles; can get messages across that have the desired effect.

Listening — Practices attentive and active listening; has the patience to hear people out; can accurately restate the opinions of others even when he/she disagrees.

Leadership: Time Management

Time Management— Uses time effectively and efficiently; sets priorities; values time; separates the critical few from the trivial many and concentrates efforts accordingly; effectively uses technology to manage time.

Delegation — Establishes clear goals; comfortably delegates both routine and important tasks and decisions; broadly shares both responsibility and accountability; trusts people to perform but checks progress; lets subordinates finish their own work.

Staff Scheduling — Can identify tasks and time requirements when planning employees' work.

Priority Setting — Spends own time and that of others on what's important; quickly zeros in on the critical few and puts the trivial many aside; can quickly sense what will help or hinder accomplishing a goal; eliminates roadblocks; creates focus.

Leadership: Interpersonal Skills

Peer Relationships — Can quickly find common ground and solve problems for the good of all; can represent his/her own interests and yet be fair to other groups; can solve problems with peers with a minimum of noise; is seen as a team player and is cooperative; easily gains trust and support of peers; encourages collaboration; can deliver bad news effectively to peers.

Interpersonal Savvy — Relates well to all kinds of people (up, down, sideways, inside and outside the organization); builds appropriate rapport; listens; builds constructive and effective relationships; uses diplomacy and tact; truly values people; can diffuse even high-tension situations comfortably.

Boss Relationships — Responds and relates well to bosses; would go out of his/her way to work hard for a good boss; is open to learning from bosses who are good coaches and who provide autonomy; likes to learn from those who have been there before; easy to challenge and develop; is comfortably coachable.

Direction (Supervision) — Is a servant-leader who can establish clear directions; set stretching objectives; distribute the workload appropriately; lay out work in a well-planned and organized manner; maintain two-way dialogue with subordinates on work and results; bring out the best in people.

Accountability — Recognizes that responsibility cannot be delegated and that managers must be held accountable for their own work and that of subordinates.

Negotiating Relationships — Can negotiate skillfully in tough situations with both internal and external groups; can settle differences with minimum noise; can win concessions without damaging relationships; can be both direct and forceful as well as diplomatic; gains trust quickly of other parties to the negotiations; has a good sense of timing, recognizes the need for executives to be involved in the development of important business opportunities.

Understanding Others — Listens carefully to understand various points of view; suspends judgment until others have had their say; can clearly state opposing views of others even if he/she doesn't accept them; accepts diversity in others; can predict what others will say or do across different situations.

Comfort Around Top Management — Can deal comfortably with senior executives; can present bad news to top management without undue tension and nervousness; understands how top executives think and process; can determine the best way to get things done with executives by talking their language and by responding to their needs; can craft approaches likely to be seen as appropriate and positive.

Leadership: Conflict Management

Conflict Management Techniques — Steps up to conflicts and sees them as opportunities for improvement; can hammer out tough agreements and settle disputes equitably; good at focused listening; understands others quickly; can find common ground and obtain cooperation with minimum noise.

Confronting Direct Reports — Deals with problem direct reports firmly and in a timely manner; doesn't allow problems to fester; regularly reviews performance and holds timely discussions; can make negative decisions when all other efforts fail; deals effectively with troublemakers.

Command Skills — Is not afraid to take charge when issues arise; does whatever is appropriately required to get the job done despite resistance; takes unpopular stands if necessary; faces difficult situations with guts and tenacity; encourages direct and tough debate but isn't afraid to end it and move on; is looked to for direction in a crisis; relishes leading.

Leadership: Employee Training and Professional Development

Employee Orientation and Training — Can plan/implement effective orientation/training programs.

Coaching — Demonstrates ability to influence the willingness and ability of subordinates and peers to successfully accomplish critical tasks while recognizing and adapting to the various readiness levels of people to perform.

Developing Subordinates — Provides challenging and stretching tasks and assignments; holds frequent development discussions; is aware of each subordinate’s career goals; constructs compelling development plans and executes them; pushes subordinates to accept developmental moves; will coach and mentor subordinates; brings out the best in people; is a people builder.

Work Improvement — Can effectively train employees to perform better when new procedures are implemented.

Learning Leader — Advocates the need for continual learning and professional development as a competitive strategy linked to long-term company survival and industry professionalism.

Technical Learning — Picks up on technical things quickly; can learn new skills and knowledge; is good at learning new vending industry, company, product, or technical knowledge as well as business skills; does well in technical courses and business seminars.

Managing Change — Can use effective methods to determine the need for change including knowledge of organizational cultural elements that drive behavior; understands and uses change management strategies including the solicitation of input from affected staff members.

Human Resources

Diversity — Manages all kinds and classes of people equitably; deals effectively with all races, nationalities, cultures, handicaps, ages and genders; hires variety and diversity without regard to class; supports equal and fair treatment and opportunity for all.

Hiring and Staffing — Has critical skills and experience and can adapt to the vending organization’s culture when hiring/staffing; understands the job descriptions and hires the best people available from inside or outside; is not afraid of selecting strong people; assembles talented staff; works to make the vending organization the “Employer of Choice” within the community.

Selecting Human Resources — Makes the best possible employment decisions based upon those applicants recruited for a position; considers education, experience and other attributes of applicants relative to those position characteristics judged most important to potential success in the position.

Team Building — Recognizes and utilizes various team strategies and behaviors to empower teams to work effectively and efficiently in leveraging the talents and resources of the organization for common goals and purpose.

Planning Human Resource Needs — Can effectively manage future human resource needs by identifying factors affecting labor supply, undertaking a human resources “audit” and planning professional development activities.

Legal Issues (Human Resources) — Can explain federal laws regulating the workplace and can discuss legal concerns in employment including Americans with Disabilities Act, harassment and discrimination.

Accounting/Financial Management

Cost Concepts/Breakeven — Can identify different types of costs and use breakeven analysis for management decision-making.

Pricing Concepts — Can use objective pricing methods to establish selling prices for vended products.

Revenue (Cash) Systems Management — Can design and monitor systems to control cash received in multiple locations and processed in the organization’s money room.

Organizational Budgeting — Can effectively plan and use the organization’s operating budget and can use budget data to control financial aspects of the vending company.

Cash Flow Forecasting — Can explain the importance of and how to manage cash including differences between income and cash flows, functions of a cash budget and calculations of working capital.

Financial Statements — Can read balance sheets, statements of changes in financial position, and income statements with special emphasis on issues of concern to vending organizations.

Financial Analysis — Can explain the functions/uses of liquidity, profitability and other common operating ratios specifically as they apply to a vending organization; can develop and monitor necessary operational reports to identify units where corrective action is required; familiarity with key indicators (financial markers) of success.

Implementing Labor Cost Controls — Can control labor costs by establishing labor standards, determining productivity rates and developing/using staffing guides specifically applicable to a vending organization.

Budgeting — Can effectively interact with unit managers to develop budgets for each unit which identify financial goals and accountability.

Compensation/Benefit Administration — Can identify major concepts influencing compensation administration including external/internal equity for pay rates/ranges, methods of evaluating jobs, determining pay scales and comparable worth.

Multi-unit Management — Can compare financial aspects of multiple accounts (locations) to take within-unit corrective actions as necessary.

Capital Budgeting — Can explain basics of capital expense budgeting and can describe budgeting models including accounting rate of return, net present value and internal rate of return.

General Management: Decision-Making

Results — Can be counted on to exceed goals successfully; is constantly and consistently one of the organization's top performers; bottom-line oriented; steadfastly pushes self and others for results.

Goal Setting and Planning — Accurately scopes out length and difficulty of tasks and projects; sets objectives and goals; breaks work down into the process steps; develops schedules and task/people assignments; anticipates and adjusts for problems and roadblocks; measures performance against goals; utilizes organizational history as input to the planning process; evaluates results.

Decision Quality — Makes good decisions based upon a mixture of analysis, wisdom, experience and judgment; most solutions and suggestions turn out to be correct and accurate when judged over time; sought out by others for advice and solutions.

Problem Solving — Solves difficult problems with effective solutions; asks good questions and probes all fruitful sources for answers; can see underlying or hidden problems and patterns; is excellent at honest analysis; looks beyond the obvious and doesn't stop at the first answers.

Decision-Making — Can utilize techniques of independent, consultative and consensus decision-making; makes tough decisions in a timely manner, sometimes with incomplete information and under tight deadlines and pressure; has a bias for action.

General Management: Work Performance

Organizing — Can marshal resources (people, funding, material, support) to get things done; can orchestrate multiple activities at once to accomplish a goal; uses resources effectively and efficiently; arranges information in a useful manner.

Process Management — Good at figuring out the processes necessary to get things done; knows how to organize people and activities; understands productivity analysis: how to separate and combine tasks into efficient work flow; knows what to measure and how to measure it; can see opportunities for synergy and integration where others can't; can simplify complex processes; gets more out of fewer resources.

Job Analysis/Design — Can analyze jobs in efforts to increase productivity, make work as easy as possible to perform while enhancing the productivity (output) of the position and reduce accidents while satisfying employees and customers.

Managing and Measuring — Clearly assigns responsibility for tasks and decisions; sets clear objectives and measures; monitors process, progress and results appropriately; delivers timely and objective feedback on accomplishments.

General Management: Other Skills

Creates Vision — Creates and communicates a compelling and inspired vision or sense of core purpose; sees beyond today to assess possibilities; is optimistic; creates mileposts and symbols to rally support behind the vision; makes the vision sharable by everyone; can inspire and motivate entire units or organizations; is charismatic.

Strategic Agility — Sees ahead clearly; can anticipate future consequences and trends accurately; has broad knowledge and perspective; is future-oriented; can articulately paint credible pictures and visions of possibilities and likelihoods; can create competitive and breakthrough strategies and plans.

Business Acumen — Knowledgeable in current and possible future policies, practices, trends, and information affecting the vending industry and the organization; knows the competition; is aware of how strategies and tactics work in the marketplace.

Crisis Management — Is skilled at situation analysis and can make effective (or, at least, sufficient) decisions; can guide decisions to address crises which occur.

Organizational "Agility" — Knowledgeable about how organizations function; knows how to get things done through both formal and informal channels; understands the origin and reasoning behind key policies, practices and procedures.

Managing Through Systems — Can design practices, processes, and procedures which allow remote management; is comfortable allowing things to manage themselves without intervening personally; can make things work through others without being there; can impact people and results by remote communication.

Industry Vision — Understands the interrelationships of the various corporate players/segments in the industry, how each player/segment creates value, and has network contacts crossing the boundaries of all industry segments.

Marketing

Logistics/Supply Chain Management — Understands major trends in supply chain logistics and their implications on the vending industry.

Strategic Marketing Planning — Can use principles of strategic marketing to develop an effective marketing plan for the organization including market segmentation and positioning to build a competitive market advantage.

Service Marketing Principles — Can explain components of effective service management for the vending industry and his/her organization; can use marketing principles critical for the success of the organization.

Market Research — Can use principles for conducting an organizational analysis and for analyzing the competition, markets and product choices.

Community Relations — Can tell the how vending organization can be a good “citizen” within the local business community.

Sales Management

Customer Relationships — Is dedicated to proactively meeting the expectations and requirements of internal and external customers; gets first-hand customer information and uses it to enhance the customers’ buying experience; talks and acts with customers in mind; establishes and maintains effective relationships with customers and gains their trust and respect; handles customer complaints; develops effective customer service training.

Sales — Knows and uses direct and indirect channel selling strategies and tactics effectively to generate new accounts.

New Client Development — Knows and uses effective and practical strategies and tactics including the “art and science” of negotiations to generate new accounts (location); is effective at gaining and retaining market share.

Prospect / Opportunity Management — Monitors “cold call” successes; focuses sales staff on closing accounts; knows the importance of managing sales as a system/process rather than as an individual event.

Key Account Management — Can use special techniques which emphasize the priority needed to retain those accounts generating a significant percentage of business for the organization.

Safety, Security and Asset Management

Controlling Product Theft — Can control (minimize) product theft by employees of the organization and by customers in account locations.

Preventing Revenue Theft — Can control (minimize) cash theft by employees of the organization and by customers in account locations.

Safety/Security — Can create and maintain an environment of reasonable care for the safety/security of employees, customers and other constituencies served by the vending organization.

Truck (Fleet) Management — Can explain concerns important in managing the fleet: acquisition, insurance, maintenance, ensuring efficient operations, route management, etc.

Vending Equipment Management — Can describe basics of “managing” equipment including functions/features, warranty factors and preventive maintenance procedures.

Security of Vending Equipment — Can implement effective procedures to safeguard vending equipment and its contents at client’s sites.

Insurance/Risk Management — Can describe risk management/liability issues and the manager’s role in managing risk.

Vending – Specific Legal Concerns — Can review legal issues specific to the vending industry including uniform sales tax concerns and vending within the school system.

Cleaning/Maintenance — Can describe basic procedures for cleaning/maintaining food service/other facilities.

Contracted Services — Can effectively manage refuse, pest control, telephone and grounds maintenance services.

Managing Preventive Maintenance — Can use effective preventive maintenance plans for all physical/mechanical systems.

Technology

Management of Technology — Can explain the role of computers in accounting/finance including accounts receivable/payable and applications for inventory management, purchasing and financial reporting.

V-Commerce — Knows and effectively utilizes key industry statistical information to benchmark and improve key areas of effectiveness.

Technology Trends/Future — Can relate future applications of technology including communications, operations and accounting/finance, marketing and other business-related applications.

Technology (Hardware/Software) — Can describe hardware/software useful for current and anticipated changes in future business applications.