

SVQ 3 in Retail Skills (Sales Professional) at SCQF Level 6 (2008-31)

December 2011 Version 1.0



Qualification at a glance

Subject area	Retail (Sales Professional)
City & Guilds number	2008
Age group approved	16-18, 19+
Entry requirements	None
Assessment	By portfolio of evidence
Fast track	Fast track approval does not apply. There will be automatic approval for centres approved to offer N/SVQ in Retail (1008)
Support materials	Centre handbook
Registration and certification	Consult the Walled Garden/Online Catalogue for last dates

Title and level	City & Guilds number	Accreditation number
SVQ Retail (Sales Professional) at SCQF Level 6	2008-31	GE2N 23



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1 Introduction

This document tells you what you need to do to deliver the qualification:

Area	Description
Who is the qualification for?	It is for candidates who work or want to work as a sales professional in the retail sector
What does the qualification cover?	It allows candidates to learn, develop and practise the skills required for employment and/or career progression in the retail sector.
Is the qualification part of a framework or initiative?	The SVQ Retail qualifications at Level 3 serve as the competency element, in the Scottish Retail Modern Apprenticeship framework.
Who did we develop the qualification with?	The qualification was developed in collaboration with Skillsmart Retail, the Sector Skills Council for the Retail Sector and other Awarding Organisations.
What opportunities for progression are there?	It allows candidates to progress into employment or to the following qualifications: Leadership and management qualifications offered by our sister organisation ILM www.i-l-m.com

Structure

To achieve the **SVQ 3 in Retail (Sales Professional) at SCQF Level 6** learners must achieve a total of **6** units.

Unit options	City & Guilds unit number	
1 mandatory	301	
5 optional	4 units at Level 6 or above in the Sales Professional pathway	4 from 302-306, 308-309, 311-321, 328-329, 401-405
	and 1 further unit from	
	a selection of optional units at SCQF Level 5	1 from 211, 213-214, 216-217, 220-221, 236-238, 245-251, 258-259
	or	
	Level 6 or above in the Sales Professional pathway	1 from 302-306, 308, 309, 311-321, 328-329, 401-405

Note: Customer Service*

Only **one** of the following units can count towards the qualification:

- Level 6 units 317-320
- Level 7 unit 405

City & Guilds unit	SSC ref	Unit title	SCQF level
Level 6		Mandatory	
301	E.08	Work effectively in your retail organisation	6

Optional units

Candidates must achieve a further **five** units.

A **maximum of one** can be chosen from the following SCQF **Level 5** units

City & Guilds unit	SSC ref	Unit title	SCQF level
Level 5		Optional	
		Food and drink	
211	B.10	Process bake-off products for sale in a retail environment	5
213	B.12	Process greengrocery products for sale in a retail environment	5
214	B.13	Finish meat products by hand in a retail environment	5
216	B.31	Hand-process fish in a retail environment	5
217	B.32	Contribute to the control and efficiency of dough production in a retail environment	5
236	B.33	Select, weigh and measure bakery ingredients	5
237	B.34	Hand divide, mould and shape fermented doughs	5
248	C.54	Help customers to choose delicatessen products in a retail outlet	5
249	C.55	Portion delicatessen products in a retail outlet to meet individual customer requirements	5
251	C.49	Promote sales of food or drink products by offering samples to customers	5
		Clothing and footwear	
220	C.17	Provide the lingerie fitting service in a retail environment	5
250	C.48	Provide service to customers in the dressing room of a retail store	5
		Other (Product Expertise)	
221	C.35	Promote beauty products to retail customers	5
		Finance and administration	
238	C.46	Cash up in a retail store	5

City & Guilds unit	SSC ref	Unit title	SCQF level
		Home and garden	
245	C.40	Establish customer needs and provide advice regarding tiling products	5
246	C.41	Advise customers upon measuring and planning for the fixing of tiles	5
247	C.42	Advise customers upon the fixing of tiles	5
		Sales	
258	C.47	Promote the store's credit card to customers	5
259	C.52	Help customers to apply for the store's credit card and associated insurance products	5
At least four units must be taken from the following units at SCQF Level 6 or above			
Level 6		Optional	
		Sales	
302	C.07	Process part-exchange sales transaction in a retail environment	6
303	C.56	Help customers choose specialised products in a retail environment	6
304	C.30	Develop individual retail service opportunities	6
305	C.31	Provide a personalised sales and after-sales service to your retail clients	6
316	C.57	Demonstrate specialist products to customers in a retail environment	6
		Finance and administration	
306	E.21	Monitor and support secure till use during trading hours	6
314	C.15	Enable customers to apply for credit and hire purchase facilities	6
		Food and drink	
308	B.22	Monitor and help improve food safety in a retail environment	6
313	C.45	Help customers to choose alcoholic beverages in a retail store	6
		Other (Product expertise)	
309	C.38	Assist customers to obtain appropriate insurance	6
		Organisational effectiveness	
321	E.11	Help to monitor and maintain the security of the retail unit	6
		Merchandising	
311	C.13	Maintain the availability of goods for sale to customers in a retail environment	6

		Management and leadership	
312	E.09	Help to manage a retail team	6
328	E.10	Contribute to the continuous improvement of retail operations	6
329	E.15	Develop productive working relationships with colleagues	6
		Customer service*	
315	E.17	Monitor and evaluate the quality of service provided to your customers by external suppliers	6
317*	D.13	Organise the delivery of reliable customer service	6
318*	D.14	Improve the customer service relationship	6
319*	D.15	Work with others to improve customer service	6
320*	D.16	Monitor and solve customer service problems	6
Level 7		Stock Management	
401	B.14	Organise the receipt and storage of goods in a retail environment	7
402	B.15	Audit stock levels and stock inventories in a retail environment	7
		Sourcing	
403	B.16	Source required goods and services in a retail environment	7
		Management and leadership	
404	E.12	Plan, monitor and adjust staffing levels and schedules in a retail environment	7
		Customer service*	
405*	D.17	Promote continuous improvement	7



2 Centre requirements

Approval

Centre already offering City & Guilds Qualifications

If your Centre is approved to offer qualification Level 3 N/SVQ in Retail Skills (1008) you will be granted automatic approval for SVQ in Retail (Sales Professional) at SCQF Level 6 (2008-31) and will be able to make registrations straight away.

Centre NOT already offering City & Guilds Qualifications

To offer this qualification, new centres will need to gain both centre and qualification approval. Please refer to the *Centre Manual - Supporting Customer Excellence* for further information.

Centre staff should familiarise themselves with the structure, content and assessment requirements of the qualification before designing a course programme.

Resource requirements

Physical resources and site agreements

Centres must have access to sufficient equipment in the college, training centre or workplace to ensure candidates have the opportunity to cover all of the practical activities.

Centre staffing

The role of supervisors and managers in the assessment process

Wherever possible, assessment is conducted by colleagues, supervisors and/or managers in a workplace environment. Where the skill or capability of these individuals is inadequate to deliver the requirements of the organisation or the quality infrastructure, external services (to the work unit or organisation) may be introduced (peripatetic assessors). If the candidate is employed in the Retail sector, in no circumstances may a Retail SVQ be delivered without the involvement of the candidate's line manager or the owner/manager to confirm the candidate's competence.

Where in-store line managers carry out the assessment or internal verification roles, retail stores with the agreement of City & Guilds may choose between:

- a achieving the appropriate regulatory body approved unit qualifications for assessment and internal verification **or**
- b demonstrating that the company's training and development activity undertaken to prepare, validate and review these assessment / verification roles, maps 100% to the National Occupational Standards which these qualifications are based on. The mapping process must be agreed by City & Guilds as

providing the equivalent level of rigour and robustness as the achievement of the unit qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units in the Retail Sector, must be confined in application to an 'organisation by organisation' and 'qualification by qualification' basis. Prospective organisations must be able to confirm that their in-house practices conform to the requirements of the standards in association with City & Guilds.

The role of peripatetic assessors/internal verifiers in the assessment process

Peripatetic assessors and internal verifiers must hold or be working towards the appropriate regulatory body approved qualifications for assessment and internal verification.

The services offered by the peripatetic assessor must complement the activity of a line manager or owner/manager and the competence of a candidate employed in the Retail sector may not be confirmed without the participation of a line manager or owner/manager in the process.

The role of expert witnesses in the assessment process

There are occupations within the retail store which are undertaken by specialists e.g. beauty consultants, bakers and visual merchandisers. These specialist occupations are reflected in the retail National Occupational Standards which means that in many cases assessors will not be competent in performing the occupational requirements of the standards.

In these instances the assessor must use an expert witness to provide evidence in confirming to the candidate's competence. The assessor will make the final judgement.

See Appendix 1 for a list of those units for which expert witness testimony is required, should the assessor lack the necessary occupational competence.

Occupational competence of expert witnesses

Expert witnesses can be drawn from a wide range of people who can attest to performance in the workplace, including line managers and experienced colleagues from inside the candidate's organisation.

Skillsmart Retail requires that expert witnesses must be able to demonstrate practical experience and knowledge in the unit being assessed.

It is unlikely that a person could become a full expert in less than six to twelve months of being employed in the retail sector. However a person could become expert in a unit very quickly if this was the focus of their job role e.g. preparing fresh produce for sale. The assessor should make a judgement as to the level of expertise held by the expert witness and where necessary confirm this with a member of the store management team.

Occupational competence of assessors

Skillsmart Retail requires that assessors are required to be competent in performing the occupational requirements of the retail generic standards, in terms of performance and knowledge, and also demonstrate an in-depth knowledge of both the generic and specialist standards they are assessing.

The acquisition of this competence will have been gained either from direct employment in the same occupational role as the national occupational standards or in an operational supervisory, managerial or in-company trainer position of employees carrying out this role.

Skillsmart Retail requirements for the occupational competence of assessors in the retail industry is that they must have worked in a retail company either as a retail assistant, as a supervisor/team leader/manager or as an in-company trainer of retail assistants.

It is unlikely that retail assistants would have achieved occupational competence in less than twelve months, or less than six months if employed in a managerial position, but individuals with less experience could be considered as assessors if sufficiently occupationally competent.

Occupational competence of verifiers

Skillsmart Retail requires that internal verifiers are required to have a current understanding of the content, structure and occupational requirements of the standards that they are internally verifying. The acquisition of this understanding will have been gained while working directly within the retail occupational area in either an operational or a support function.

The level of understanding should be sufficient to allow them to make a judgement as to whether the assessor has fully assessed candidates against all the performance and knowledge evidence requirements for the national occupational standards.

It is unlikely that a person could have gained this level of understanding in less than six months of being employed in the retail sector, but individuals with less experience could be considered as internal verifiers if they have the required level of understanding.

Centre staff may undertake more than one role, eg tutor and assessor or internal verifier, but cannot internally verify their own assessments.

Continuing professional development (CPD)

Centres must support their staff to ensure that they have current knowledge of the occupational area, that delivery, mentoring, training, assessment and verification is in line with best practice, and that it takes account of any national or legislative developments.

Continuing professional development of peripatetic assessors and verifiers

The sector also requires that individuals involved in these activities maintain currency of skill and understanding of the sector, in line with the role they are fulfilling. It is a Skillsmart Retail requirement that guidance on

CPD of peripatetic assessors and verifiers must be implemented, in that all assessors and verifiers, if not currently employed within a Retail sector company, will need to prove they have a current working knowledge of the sector they are assessing or verifying. This can be demonstrated by maintaining records of evidence from occupational updating activities such as:

- internal or external work experience
- internal or external work shadowing opportunities
- other relevant CPD activities with the prior approval of the awarding bodies

Note: Retailers who have chosen not to use the appropriate regulatory body approved qualifications for assessment and internal verification are encouraged to offer the unit qualifications as CPD.

Candidate entry requirements

City & Guilds does not set entry requirements for this qualification. However, centres must ensure that candidates have the potential and opportunity to gain the qualification successfully.

Candidates must have access to a workplace or work placement.

Age restrictions

City & Guilds cannot accept any registrations for candidates under 16 as this qualification is not approved for under 16s.



3 Delivering the qualification

Initial assessment and induction

An initial assessment of each candidate should be made before the start of their programme to identify:

- if the candidate has any specific training needs
- support and guidance they may need when working towards their qualification
- any units they have already completed, or credit they have accumulated which is relevant to the qualification
- the appropriate type and level of qualification.

We recommend that centres provide an induction programme so the candidate fully understands the requirements of the qualification, their responsibilities as a candidate, and the responsibilities of the centre. This information can be recorded on a learning contract.

Support materials

For further information to assist with the planning and development of the programme, please refer to the following:

Skillsmart Retail

5th Floor
40 Duke Street
London W1A 1AB
Telephone 020 7399 3450
Website **www.skillsmartretail.com**

Imported units and the Standards Setting Bodies and Sector Skills Councils

There are imported units from other Standards Setting Bodies and Sector Skills Councils within this qualification; their contact details are:

Financial Skills Partnership (FSP)

51 Gresham Street
London EC2V 7HQ
Telephone: 0845 257 3772/020 7367 9542
E-mail: **info@financialskillspartnership.org.uk**

Improve Ltd

Ground Floor
Providence House
2 Innovation Close
Heslington
York YO10 5ZF
Telephone 0845 644 0448
e-mail: info@improveltd.co.uk

Institute of Customer Service

2 Castle Court
St Peter's Street
Colchester
Essex CO1 1EW
Telephone: 01206 571716
e-mail: enquiries@icsmail.co.uk

People 1st

2nd Floor
Armstrong House
38 Market Square
Uxbridge
Middlesex UB8 1LH
Telephone: 01895 817000
e-mail: info@people1st.co.uk

Apprenticeships

Please contact Skillsmart Retail for any further information.

Recording documents

Candidates and centres may decide to use a paper-based or electronic method of recording evidence. City & Guilds endorses several ePortfolio systems, including our own, **Learning Assistant**, an easy-to-use and secure online tool to support and evidence learners' progress towards achieving qualifications. Further details are available at:
www.cityandguilds.com/eportfolios.



4 Assessment

The assessment strategy for the Retail SVQs is available from Skillsmart Retail.

Key Principles

A set of key principles inform the assessment strategies which should be used in interpreting their application:

Evidence of competence is based on workplace activity

SVQs recognise competence in the workplace; as such evidence should reflect workplace activity and aim to reflect attainment within an organisational context.

Assessing National Occupational Standards and SCQF Levels

Assessment should assess the achievement of National Occupational Standards but must also ensure that the methods employed are those that are most relevant for the level being assessed and sector expectations of candidates at that level. For example, this means that, whilst observation should be the principle method to assess individuals at SCQF level 5, other methods like professional discussion and assignments might well be employed to assess individuals at SCQF level 6 and above.

Developing a skilled workforce

Assessment practice should contribute to the development of a skilled workforce and the choice and application of assessment methods must reflect this ideal.

Integrating systems for capturing evidence of competence

Skills formation in the Retail sector, delivered through staff induction and ongoing training and development programmes, is required by organisations to capture the unique character and culture that the organisation wishes to project. Assessment systems for SVQs should, where possible, be integrated with organisations' training and HR models for developing and recognising the competence of their workforce.

Assessment strategy

The use and application of simulation

In broad terms, the Retail sector holds the view that simulation is a practical and effective tool for establishing skill and understanding, where naturally occurring evidence of competence is unavailable or infrequent. However, there is very little that can be assessed by simulation with the exception of:

- some aspects of Health & Safety and Security, and
- some basic functions which do not involve interaction with customers.

SVQs are only suitable for individuals who are in some form of working capacity in the sector, or, in a limited set of contexts, are being prepared for work and will be assessed in a realistic working environment.

Simulation cannot be used as the sole form of evidence for any unit of an SVQ, except where allowed for specific units in Appendix 2.

Evidence towards an SVQ should come from the workplace except where simulation is expressly allowed in the evidence requirements for a particular unit. Workplace evidence may be gathered in the context of full, part-time, casual or voluntary employment. Assessment may be undertaken in a 'work placement' (i.e. fulltime students placed into a working environment for a day per week) although supporting evidence from a supervisor or manager, associated with some form of work activity must supplement the assessment process.

Providing Realistic Working Environments (RWE)

Where simulation is used it must be undertaken in a Realistic Working Environment which provide an environment which replicates the key characteristics of the workplace in which the skill to be assessed is normally employed.

A realistic working environment (for the purpose of simulated work activities) is regarded as one that replicates a real working environment. For example, a college shop that operates on a commercial basis (i.e. it has a profit and loss account) is acceptable for retail environments but a shop laid out in a classroom environment isn't. However, simulated activity may be used within a retail setting itself, for assessment purposes in order to prevent any barriers to achievement.

Units which are required to be assessed through performance

Assessment for the SVQ must always be carried out in a retail environment except where a realistic working environment is permitted for simulation. Simulation is allowed only where:

- the assessment criteria require the learner to respond to an emergency
- a unit covers a limited selection of basic functions which need not involve interacting with customers
- a unit originates from another SSC or SSB and the originator expressly allows simulation to be used for that unit.

See Appendix 2 for a list of those units for which simulation is allowed.

Recognition of prior learning (RPL)

Recognition of prior learning means using a person's previous experience or qualifications which have already been achieved to contribute to a new qualification. RPL is recognition of prior learning, achievement and/or experience identified at initial assessment and is encouraged.



5 Units

Availability of units

The following units can be obtained from the centre resources section of the City & Guilds website.

Structure of units

These units each have the following:

- City & Guilds reference number
- title
- level
- credit value
- endorsement by a sector skills council or other appropriate body
- unit summary
- information on evidence requirements
- learning outcomes which are comprised of a number of assessment criteria
- supporting information.

Glossary of words used in the units

The following key words and terms are used in the units.

Term	Definition
Expert witness	Is an experienced peer of the candidate, or the candidate's line manager. The expert witness is not consulted as a professional assessor, but as someone who is expert in the occupation to be assessed.
Realistic work environments	Provide an environment which replicates the key characteristics of the workplace in which the skill to be assessed is normally employed.

Unit 211

Process bake-off products for sale in a retail environment

Level:	5
Credit value:	6
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit.
Unit assessment:	Specialist Unit: If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.
Summary:	<p>This unit is about processing ready-prepared goods such as bread, pastry, biscuits and scones, and covers two stages of the preparation process.</p> <p>The first involves baking ready-prepared goods and checking their quality. The second is about following instructions for decorating ready-prepared goods.</p>

Learning outcome
1. Bake products for sale (bake-off) in a retail environment
Performance indicator
You need to: <ul style="list-style-type: none">1.1 use approved methods to bake the correct quantity and quality of products1.2 use approved procedures for checking that the quantity and quality of baked products is satisfactory1.3 follow procedures for dealing with products that fail to meet the product specification1.4 store products at the correct temperature for the next stage in the bakery process
Knowledge and understanding
You need to know and understand: <ul style="list-style-type: none">1.1 the factors that affect baking including temperature, time, humidity, density, weight and shape1.2 the behaviour of ingredients during baking and their effect on baking1.3 why baked products must be cooled in the correct conditions and what these conditions are1.4 approved procedures for baking products

1.5	approved procedures for checking the quality of products
1.6	how to recognise products that are not fit for sale and what to do about them
1.7	the legal and company requirements you must follow when baking products for sale
1.8	procedures for reporting problems with baking processes

Learning outcome	
2.	Glaze, coat and decorate bake-off products in a retail environment
Performance indicator	
You need to:	
2.1	check that products are in the right condition for coating, glazing or decorating
2.2	make sure that finishing materials have the right texture, thickness, colour and temperature
2.3	check that coated, glazed and decorated products meet the specification and are correctly positioned for the next stage in the bakery process
2.4	follow procedures for dealing with finished products that fail to meet the product specification
2.5	make the amount of coated, glazed and decorated products needed
2.6	follow company procedures for re-using and recycling waste materials
Knowledge and understanding	
You need to know and understand:	
2.1	types of finishing materials for bake-off and how to use them
2.2	how to apply coatings, glazes and decorative materials
2.3	how to maintain the quality of coatings, glazes and decorative materials while applying them
2.4	how to recognise products that are not fit to sell and how to deal with them
2.5	the legal and company requirements you must follow in your working practices
2.6	procedures for reporting problems with finishing bake-off products

Unit 213

Process greengrocery products for sale in a retail environment

Level:	5
Credit value:	9
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit. Greengrocery products are to include vegetables, fruit and salad.
Unit assessment:	Specialist Unit: If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.
Summary:	This unit is about two aspects of putting greengrocery products on display in a store. Firstly, it is about unpacking products, checking their quality and preparing them for display. Secondly, it is about checking and rotating stock regularly so that it remains attractive to customers. You need to show you do all this with vegetables, fruit and salad.

Learning outcome
1. Prepare greengrocery products in a retail environment for selling to customers
Performance indicator
You need to: <ul style="list-style-type: none">1.1 remove unwanted packaging1.2 follow legal and company procedures for recycling unwanted packaging and waste from greengrocery products1.3 always handle greengrocery products hygienically and in a way that protects them from damage1.4 choose only those greengrocery products that match the quality of the store sells1.5 correctly deal with greengrocery products that do not match the requirements for quality1.6 correctly weigh, classify and package greengrocery products1.7 remove unwanted parts of greengrocery products to make them as attractive as possible to customers

Knowledge and understanding

You need to know and understand:

- 1.1 the greengrocery products that are sold in your store and how to handle them without damaging them
- 1.2 how to handle greengrocery products hygienically
- 1.3 legal and company procedures for recycling unwanted packaging and waste from greengrocery products
- 1.4 why you must handle greengrocery products hygienically and without damaging them
- 1.5 company quality standards for greengrocery products
- 1.6 how to recognise greengrocery products that must be rejected or reclassified
- 1.7 how to recognise parts of greengrocery products that must be removed to make the product more attractive to customers

Learning outcome

2. Display greengrocery products to attract retail sales

Performance indicator

You need to:

- 2.1 check that display areas are clean and in the correct condition for stock to be displayed
- 2.2 make displays attractive enough to interest customers
- 2.3 place specific greengrocery products in the correct display areas
- 2.4 regularly check the quality and shelf life of greengrocery products on display
- 2.5 follow legal and company procedures for recycling items that have little or no shelf life or that have deteriorated in quality
- 2.6 correctly rotate the stock of greengrocery items according to their shelf life
- 2.7 check that ticketing and coding is accurate and correct
- 2.8 regularly check the condition and cleanliness of displays and correct them if needed

Knowledge and understanding

You need to know and understand:

- 2.1 the greengrocery products that are sold in your store and how they should be displayed
- 2.2 why greengrocery products need displaying in the correct display areas
- 2.3 why you must regularly check the quality and shelf life of greengrocery products, and how to do so
- 2.4 why stock needs rotating
- 2.5 how to rotate stock
- 2.6 how to price and display greengrocery products with limited shelf life to encourage customers to buy them
- 2.7 legal and company procedures for recycling greengrocery products that cannot be sold because they have deteriorated or are past their shelf life
- 2.8 how to clean and maintain display areas, including chillers

Unit 214

Finish meat products by hand in a retail environment

Level:	5
Credit value:	9
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this Unit Finishing is to include both meat and poultry.
Unit assessment:	Specialist Unit: If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.
Summary:	This unit is about three aspects of finishing meat products by hand. The first is about checking that meat products are suitable for processing. The second is about choosing suitable tools and preparing your work area so that you can process meat safely and hygienically. The third aspect of the unit is about processing meat by hand so that you get the required quantity and quality of finished products.

Learning outcome
1. Check the suitability of meat products for finishing in a retail environment
Performance indicator
You need to: 1.1 effectively carry out product quality checks against specifications for process, ingredients and products 1.2 identify and reject products that are unsuitable for finishing by hand, and put them in a suitable place away from other products 1.3 safely and hygienically deal with rejected products 1.4 keep products at the specified temperature during transfer and storage once they have been passed as suitable for finishing by hand 1.5 accurately record relevant information
Knowledge and understanding
You need to know and understand: 1.1 the sources of meat and other ingredients 1.2 how to carry out quality checks on products and recognise when meat and ingredients are fit for purpose 1.3 the reasons you should reject meat and other ingredients

- 1.4 the temperatures at which meat should be held during handling, transfer and storage, and the reasons for this
- 1.5 why you need to keep accurate records
- 1.6 the reasons for checking records and why you must identify and report problems
- 1.7 how to refer to and use the quality and safety management manuals

Learning outcome

- 2. Prepare to finish meat products in a retail environment

Performance indicator

You need to:

- 2.1 get the finishing instructions and organise your work in line with them
- 2.2 keep the work area free from dangers and organise it to meet safety and processing needs
- 2.3 choose hand tools and equipment in line with safety and processing requirements
- 2.4 prepare tools and equipment in line with safety and processing requirements
- 2.5 identify faulty tools and equipment and follow procedures for dealing with them
- 2.6 follow safe and hygienic working practices at all times

Knowledge and understanding

You need to know and understand:

- 2.1 the dangers associated with particular tools and equipment and the safety precautions to take
- 2.2 why it is important to use the correct tools and equipment
- 2.3 which tools and equipment are used for hand finishing
- 2.4 reasons for maintaining tools and equipment
- 2.5 how to keep tools and equipment clean, sharp and in good working order
- 2.6 what to do about faulty tools and equipment.

Learning outcome

- 3. Achieve meat product yield and finish in a retail environment

Performance indicator

You need to:

- 3.1 achieve the finished product specification within the time allowed
- 3.2 achieve the product yield needed
- 3.3 identify and reject products that don't meet the specification, and put them in a suitable place away from other products
- 3.4 deal safely and hygienically with finished products which have been rejected
- 3.5 keep finished products at the specified temperature and store them safely, securely and hygienically
- 3.6 clean and store tools and equipment in line with safety and processing requirements
- 3.7 follow safe and hygienic working practices at all times

Knowledge and understanding
<p>You need to know and understand:</p> <ul style="list-style-type: none">3.1 the temperatures at which meat should be held during handling, transfer and storage, and the reasons for this3.2 reasons for rejecting finished products3.3 procedures to deal with finished products which have been rejected3.4 how to clean tools and equipment3.5 reasons for storing tools and equipment as instructed

Unit 216

Hand-process fish in a retail environment

Level:	5
Credit value:	8
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit. Candidates need to be able to fillet both a flat and a round fish. By 'processing' we mean skinning, heading, scaling, gutting, boning, portioning and steaking either flat or round fish.
Unit assessment:	Specialist Unit: If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.
Summary:	This unit is about preparing fish in a retail outlet, for sale to customers. This involves identifying and hand-processing common types of flat and round fish. Safe and hygienic work practices are an important aspect of this unit.

Learning outcome
1. Hand-process fish in a retail environment
Performance indicator
You need to:
1.1 organise your work area, equipment and tools so that you can hand-process fish safely, hygienically and efficiently
1.2 maintain hygienic working conditions when checking and hand-processing fish
1.3 check that the fish you have been asked to prepare are of saleable quality
1.4 hand process fish in ways that: <ul style="list-style-type: none">• achieve specifications for yield and quality• minimise waste• keep fish in a saleable condition throughout processing• maintain your own and other people's health and safety
1.5 dispose of waste in ways that are safe and hygienic and that meet legal and company requirements for recycling
1.6 follow the company's schedule for cleaning and tidying your work

area, tools and equipment
1.7 put processed products that meet specifications into containers that will keep the products in a saleable condition
Knowledge and understanding
<p>You need to know and understand:</p> <ul style="list-style-type: none"> 1.1 the importance of hygiene in relation to hand-processing fish 1.2 the company's hygiene policy relating to hand-processing fish 1.3 safe working practices relating to hand-processing fish 1.4 why it is important to follow safe working practices when hand-processing fish 1.5 the dangers and disadvantages of using unsafe and blunt tools to hand-process fish 1.6 the types of accident and injury associated with hand-processing fish 1.7 the procedures for dealing with accidents and injuries that occur when hand-processing fish 1.8 the company's cleaning schedule for your work area 1.9 why it is important to follow the company's cleaning schedule for your work area 1.10 procedures for disposing safely and hygienically of waste resulting from hand-processing fish 1.11 legal and company requirements for recycling waste resulting from hand-processing fish 1.12 how to recognise the species of fish commonly sold in UK retail outlets 1.13 how the arrangement of body parts of a flat fish differs from that of a round fish 1.14 how the different arrangement of body parts affects the way that flat and round fish are hand-processed 1.15 hand-processing techniques that are safe and hygienic and that produce the yield and quality of fish required

Unit 217

Contribute to the control and efficiency of dough production in a retail environment

Level:	5
Credit value:	4
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit.
Unit assessment:	Specialist Unit: If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.
Summary:	<p>This unit is about two aspects of dough production within a retail store. First, it involves organising your own work to meet the dough production schedules you are given. Secondly, it is about the contribution you make to improving the efficiency and effectiveness of dough processing.</p> <p>The type of dough you work with may be fermented or non-fermented. Common types of fermented dough include those used for bread, plain and fruited buns, Danish pastries and croissants. Common types of non-fermented dough include those used for sweet and savoury pastes, puff pastry, scones and biscuits.</p>

Learning outcome
1. Organise your own work to meet a dough production schedule in a retail store
Performance indicator
You need to:
1.1 check you have all the instructions you need for your dough production schedule
1.2 within the limits of your authority and responsibility, organise your work within the dough production schedule to make best use of your time and other resources
1.3 tell the right person about any problems with the quantity or quality of resources available to you
1.4 tell the right person if your dough production schedule does not

<p>seem to be realistically achievable</p> <p>1.5 work within the relevant requirements for health and safety and food safety</p>
<p>Knowledge and understanding</p> <p>You need to know and understand:</p> <p>1.1 how to organise your work efficiently within a dough production schedule, including re-organising your work to meet changing dough production needs</p> <p>1.2 how to organise your work so as to avoid delays which result in dough no longer being in the required condition</p> <p>1.3 how to get the instructions you need for your dough production schedule</p> <p>1.4 the limits of your authority and responsibility for organising your work within the dough production schedule</p> <p>1.5 how to organise your work within the dough production schedule to make best use of your time and other resources</p> <p>1.6 where and when to get help and advice about problems with dough production schedules and resources</p> <p>1.7 the requirements for health and safety and food safety which apply to your work within the dough production schedule, and why you must follow them</p>

<p>Learning outcome</p> <p>2. Contribute to improving the efficiency and effectiveness of dough processing in a retail store</p>
<p>Performance indicator</p> <p>You need to:</p> <p>2.1 in relation to the efficiency and effectiveness of dough processing, make suggestions for improvement which are:</p> <ul style="list-style-type: none"> • realistic • based on accurate information <p>2.2 share your suggestions for improvement with the right person</p> <p>2.3 explain your suggestions positively and in enough detail for further action to be agreed</p> <p>2.4 react positively to feedback about your suggestions</p>
<p>Knowledge and understanding</p> <p>You need to know and understand:</p> <p>2.1 why constant improvement to dough processing is necessary in both the short and long term</p> <p>2.2 company procedures for making constructive suggestions for improvements to dough processing</p> <p>2.3 how to spot ways in which dough processing could realistically be improved</p> <p>2.4 how to explain your suggestions positively and in enough detail for further action to be agreed</p> <p>2.5 how to react positively to feedback</p>

Unit 220

Provide the lingerie fitting service in a retail environment

Level:	5
Credit value:	8
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit. It is highly unlikely that this unit will be able to be observed therefore the evidence generated will be around the training undertaken and testimony of the Expert Witness to confirm the candidate's competence.
Unit assessment:	Specialist Unit: If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.
Summary:	This unit is about two aspects of the lingerie fitting service. Firstly, it is about explaining the lingerie fitting service and finding out what type of bra the customer needs, sometimes when the customer is unclear about their own needs. Secondly, the unit involves carrying out the bra fitting service including measuring the customer and helping the customer to choose suitable products.

Learning outcome
1. Identify the retail customer's needs for lingerie
Performance indicator
You need to: 1.1 approach customers on the lingerie department and accurately find out what they are looking for from the information they give you 1.2 describe accurately to customers the process and benefits of the lingerie-fitting service 1.3 offer customers the lingerie-fitting service or, if the customer prefers, book a later appointment
Knowledge and understanding
You need to know and understand: 1.1 how to approach customers on the lingerie department 1.2 what is involved in the lingerie-fitting service and how long a fitting

	session is likely to take
1.3	questioning techniques used to clarify and agree customers' buying needs
1.4	how to build trust and relax customers you are working with
1.5	how to talk to different types of customers and help them to understand the information you provide

Learning outcome	
2.	Measure and fit the retail customer for lingerie
Performance indicator	
You need to:	
2.1	Create a rapport with the customer while assessing their fitting needs
2.2	clearly and tactfully explain to the customer that you cannot guarantee an accurate fit if measurements are taken on top of the customer's clothing
2.3	position yourself and the customer correctly so you can: <ul style="list-style-type: none"> • take accurate measurements • adjust the product to fit the customer • allow the customer to see the product when worn and correctly fitted
2.4	meet the customer's needs for privacy and help while they are trying products on
2.5	measure the chest accurately
2.6	accurately choose and offer a range of products in the customer's size and that meet the customer's needs
2.7	adjust and fit the product to provide customer comfort and prolong the life of the product
2.8	check the fit of the product and whether the customer is satisfied with the product
2.9	explain other possible courses of action if you cannot find a bra to fit the customer
Knowledge and understanding	
You need to know and understand:	
2.1	basic styles, shapes and sizes of bra
2.2	the different parts of bras and their technical names
2.3	brands, colours, fabrics, trims and price range of available products
2.4	the size range and fit of the bras in stock and where you can find different types of bra
2.5	the features, advantages and benefits of different bras
2.6	the ordering service using in-house systems or brand catalogues for lines either not in stock or not carried by the store
2.7	solution dressing – what to wear under different outfits
2.8	accessories such as enhancers and co ordinating garments
2.9	manufacturers' guidance on washing and caring for products
2.10	scheduled delivery dates for new products
2.11	trends in design, technological solutions and fabrics
2.12	how to assess the customer's body size and age
2.13	the equipment and layout needed for the lingerie fitting room
2.14	how and where to measure for the customer's band size using a

tape measure
2.15 how to estimate the cup size needed
2.16 how to choose the correct bras for the fitting
2.17 how to educate the customer on band sizes, cup sizes and correct fitting using the bras you have chosen
2.18 body shapes and breast sizes
2.19 how to adjust and fit the bra both inside and outside the fitting room
2.20 how to build trust and relax customers you are working with
2.21 how to talk to different types of customers and help them understand the information you provide
2.22 how to deal with challenging situations, including unusual body shape, body odour, disability, mastectomy and maternity
2.23 the importance of customer confidence and loyalty to the organisation and how you contribute to them

Learning outcome
3. Check the customer's preferences and buying decisions when making retail sales
Performance indicator
<p>You need to:</p> <p>3.1 give customers enough time to evaluate products and ask questions</p> <p>3.2 handle customers' questions in a way that promotes sales and keeps the customer's confidence</p> <p>3.3 identify the need for additional and associated products and take the opportunity to increase sales</p> <p>3.4 clearly acknowledge the customer's buying decisions</p> <p>3.5 clearly explain any customer rights that apply</p> <p>3.6 when necessary, clearly explain to the customer where to pay for their purchases</p>
Knowledge and understanding
<p>You need to know and understand:</p> <p>3.1 how to recognise buying signals from customers</p> <p>3.2 how to handle customers' questions confidently and effectively</p> <p>3.3 techniques for closing the sale</p> <p>3.4 why customer confidence and loyalty matter to the store and how you contribute towards these</p> <p>3.5 legal rights and responsibilities of retailers and customers to do with returning of unsatisfactory goods</p>

Unit 221

Promote beauty products to retail customers

Level:	5
Credit value:	10
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this Unit. The evidence should take into account the training provided by the cosmetic house that the candidate is working for where this occurs.
Unit assessment:	Specialist Unit: If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.
Summary:	This unit is about two aspects of the retail sale of make-up and skincare products. Firstly, it is about demonstrating the features and benefits of make-up and skincare products to customers. This involves making the demonstration a pleasant experience for the customer, maintaining safety and hygiene during the demonstration, and gaining the customer's interest in making a purchase. The second aspect of the unit is about keeping accurate and up-to-date records of customers to help you provide a more effective service to them and so that promotional mail-outs will reach the right people and be more likely to increase sales.

Learning outcome
1. Demonstrate beauty products to retail customers
Performance indicator
You need to:
1.1 gather together all the tools, materials and products you need for an effective and hygienic demonstration
1.2 gain the customer's permission to carry out the demonstration
1.3 explain to the customer clearly and in enough detail which products you are going to apply and why
1.4 ask the customer whether they are allergic to any products or ingredients, and take care not to apply any of these products
1.5 follow the company grooming guidelines and maintain your own

	personal hygiene
1.6	protect the customer's hair and clothing from coming into contact with the products you are demonstrating
1.7	apply products in a logical sequence, using effective and hygienic techniques
1.8	explain clearly the features and benefits you think are needed to gain the customer's interest in making a purchase
1.9	complete the demonstration bearing in mind the customer's time pressures
1.10	check whether the customer wants you to make any adjustments to the products you have applied
1.11	promptly clear away the equipment and products at the end of the demonstration while not keeping customers waiting too long
1.12	give the customer the opportunity to look in a mirror at the end of the demonstration and make sure that the light and angle of mirror do justice to the products you have applied

Knowledge and understanding

You need to know and understand:

- 1.1 the purpose and value of demonstrations in promoting and selling make-up and skincare products
- 1.2 the tools, materials and products you need for demonstrating make-up and skincare products effectively and hygienically
- 1.3 how your own personal hygiene and grooming contribute to making the demonstration comfortable for the customer
- 1.4 why you must get the customer's permission for the demonstration
- 1.5 how to protect the customer's hair and clothing from contact with the products you are demonstrating
- 1.6 the feelings and concerns that customers typically have about demonstrations of make-up and skincare products, and how to tackle these
- 1.7 the difference between features and benefits of products
- 1.8 the features and benefits of the make-up and skincare products you are responsible for demonstrating
- 1.9 techniques for applying products effectively and hygienically
- 1.10 how to organise demonstrations into logical steps and stages, and the importance of doing so
- 1.11 how to communicate clear and accurate information before and during demonstrations
- 1.12 why you should clear equipment and products away promptly at the end of the demonstration without keeping customers waiting too long

Learning outcome

2. Maintain the customer record card system in a retail store

Performance indicator

You need to:

- 2.1 identify suitable opportunities to ask customers whether you may set up a record card for them
- 2.2 explain clearly to customers the benefits to them of being on file
- 2.3 record information clearly and accurately
- 2.4 update the record-card system often enough to keep it useful

- 2.5 keep information about customers confidential
- 2.6 follow company rules and procedures for setting up and updating customer record cards
- 2.7 ask customers whether they have any product or ingredient allergies, and record this information accurately
- 2.8 if a customer has an allergy, identify which products in your range contain this ingredient and note the products on the record card as unsuitable for the customer
- 2.9 identify your top customers from the record-card system and use this information to help you to boost sales
- 2.10 while setting up new record cards, offer customers opportunities to make appointments for return visits to your counter

Knowledge and understanding

You need to know and understand:

- 2.1 how using a customer record-card system can help you meet your sales targets
- 2.2 any company rules and procedures relating to the customer record-card system
- 2.3 the benefits to the customer of the record-card system
- 2.4 the importance of updating the record card system regularly
- 2.5 how to find time in your working day to update the record-card system
- 2.6 the relevant aspects of current data protection laws and the importance of keeping to these laws
- 2.7 how to identify opportunities to make follow-up appointments
- 2.8 the importance of asking customers about any allergies to products and ingredients so that they can be noted on the record card
- 2.9 where to find information about product ingredients and how to interpret this information

Unit 236

Select, weigh and measure bakery ingredients

Level:	5
Credit value:	6
Endorsement by a sector or regulatory body:	This unit is endorsed by Improve, the Sector Skills Council for the food & drink manufacturing sector.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit. See Supporting Information.
Unit assessment:	Specialist Unit: If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.
Summary:	<p>This unit is about identifying, selecting, weighing and measuring by hand a variety of bakery ingredients, important in the processing of bakery mixtures, in a non-automated bakery production environment.</p> <p>You need to show that you can identify and select the correct ingredients, required by a product specification or recipe. You will need to check the condition of the ingredients, weigh or measure the correct quantities and store these in preparation for the mixing process or later use in production. Complying with health & safety, food safety and organisational requirements are essential features of this unit.</p>

Knowledge and understanding which relates to the whole of this unit

You need to know and understand:

- 1.1 to what standards of health & safety and food safety you are required to work, why it is important that you do so and what might happen if they are not met
- 1.2 common factors affecting quality of ingredients, during handling, weighing, measuring and storage
- 1.3 the importance of handling and preparing ingredients at the optimum temperature and conditions for effective weighing, measuring and eventually mixing
- 1.4 how to avoid contamination of ingredients during handling, weighing, measuring and storage and what might happen if this is not done
- 1.5 how to recognise and report substandard ingredients, signs of contamination, infestation or damage to ingredients and packaging

1.6	what the lines and methods of effective communication are and why it is important to use them
1.7	what the documentation requirements are and why it is important to meet them.
1.8	personal protective clothing/equipment and working practices which are useful in combating potentially harmful effects of dust from ingredients and allergies from skin contact with ingredients
1.9	how to use work instructions and product specifications or recipes to calculate or adjust the ratio of ingredients required and ensure these meet production needs
1.10	the importance of working within time constraints required by production schedule
1.11	how to report non availability of ingredients and source alternative supplies of ingredients or alternative ingredients as permitted
1.12	the importance of using the correct type of weighing and measuring equipment according to the types and quantities of ingredients used
1.13	how to safely label and store ingredients ready for mixing or further processing

Learning outcome
1. Identify ingredients
Performance indicator
<p>You need to:</p> <p>1.1 identify the specified ingredients</p> <p>1.2 check quantities according to your instructions and specifications</p> <p>1.3 carry out any calculations necessary to establish quantities of ingredients required to meet production needs</p>

Learning outcome
2. Select ingredients
Performance indicator
<p>You need to:</p> <p>2.1 select ingredients to meet production needs and check their condition for use</p> <p>2.2 isolate and report ingredients of substandard quality, condition or quantity to the relevant personnel</p> <p>2.3 take action where ingredients are not available to source alternative supplies or establish whether alternative ingredients can be utilised where permitted</p> <p>2.4 store and position ingredients correctly ready for further processing</p> <p>2.5 comply with health, safety, food safety and organisational requirements</p>

Learning outcome
3. Weigh and measure ingredients
Performance indicator
<p>You need to:</p> <ul style="list-style-type: none"> 3.1 check selected ingredients against your instructions and specifications 3.2 select and check the accuracy of bakery weighing and measuring equipment 3.3 weigh and measure the required ingredients accurately, avoiding contamination 3.4 place the weighed and measured ingredients in the correct conditions and label storage containers or mixing bowls, where required, ready for further processing 3.5 comply with health, safety, food safety and organisational requirements 3.6 operate within the limits of your own authority and capabilities

Unit 236 **Select, weigh and measure bakery ingredients**

Supporting information

Performance evidence must include at least one observation by the assessor, and may also include:

- written and oral questioning
- evidence from company systems (e.g. Food Safety Management System)
- reviewing the outcomes of work
- checking any records of documents completed
- checking accounts of work that the candidate or others have written.

Evidence must be provided of:

- hand dividing **two** types of fermented dough according to workplace procedures
- hand moulding and shaping **three** types of bread shapes, e.g. tin, bloomer, cottage, farmhouse, round and stick, according to workplace procedures.

Evidence of knowledge and understanding should be collected during observation of performance in the workplace. Where it cannot be collected by observing performance, other assessment methods should be used.

Unit 237

Hand divide, mould and shape fermented doughs

Level:	5
Credit value:	6
Endorsement by a sector or regulatory body:	This unit is endorsed by Improve, the Sector Skills Council for the food & drink manufacturing sector.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit. See Supporting Information.
Summary:	<p>This unit is about dividing, moulding and shaping fermented dough by hand in a non automated bakery production environment. Fermented dough processed by hand typically may include bread, roll and stick dough, plain and fruited bun dough and doughnuts.</p> <p>You need to show that you can hand divide dough using a knife and scales, and a manually operated dough portioning device. You will need to demonstrate hand moulding skills, and the shaping of dough by hand and using rolling pins. Complying with health & safety, food safety and organisational requirements are essential features of this unit.</p>

Knowledge and understanding which relates to the whole of this unit

You need to know and understand:

- 1.1 to what standards of health & safety and food safety you are required to work, why it is important that you do so, and what might happen if they are not met
- 1.2 requirements of bread weight regulations and the importance of accurate dividing and check weighing of fermented dough to comply with these regulations
- 1.3 why it is important to follow work instructions and product specifications or recipes throughout dough processing to ensure successful dough processing
- 1.4 how to seek advice and make process adjustments to dough, to take into account minor changes in ingredient performance, production timing and environmental conditions, necessary to keep a dough within specification
- 1.5 common sources of dough contamination during processing
- 1.6 how to avoid contamination during dough processing and what might happen if this is not done
- 1.7 how to recognise and report dough that does not meet specification during processing

- 1.8 the procedure for rejecting and isolating failed dough and dough portions
- 1.9 what the lines and methods of effective communication during processing are and why it is important to use them correctly
- 1.10 what the documentation requirements during processing are and why it is important to meet them
- 1.11 personal protective clothing/equipment and working practices which are useful in combating the potentially harmful effects of dust and allergies resulting from breathing or skin contact with ingredients or dough
- 1.12 how to maintain dough condition and deal with time constraints and variations to conditions throughout processing
- 1.13 the correct method for loading and unloading trays in racks

Learning outcome
1. Hand divide fermented dough
Performance indicator
<p>You need to:</p> <ul style="list-style-type: none"> 1.1 check the available dough against your instructions and specifications and take prompt action on discovering any discrepancy 1.2 obtain and check the condition of dividing tools and the accuracy of equipment 1.3 hand divide dough accurately and reliably 1.4 work with practice which minimizes waste and correctly deal with scrap material 1.5 position and maintain divided dough portions correctly for further processing 1.6 comply with health, safety, food safety, bread weight regulations and organisational requirements throughout dividing operations

Learning outcome
2. Hand mould and shape fermented dough
Performance indicator
<p>You need to:</p> <ul style="list-style-type: none"> 2.1 check the available portioned dough against your instructions and specifications and take prompt action on discovering any discrepancy 2.2 prepare and maintain an appropriate table surface for moulding and shaping 2.3 hand mould and shape portioned dough accurately and reliably 2.4 wash and dress shaped dough surfaces as required to specification 2.5 work with practice which minimizes waste and correctly deal with scrap material 2.6 place dough in the correct condition and location, for further processing 2.7 comply with health, safety, food safety and organisational requirements throughout moulding and shaping operations 2.8 operate within the limits of your own authority and capabilities

Unit 237 Hand divide, mould and shape fermented doughs

Supporting information

Performance evidence must include at least one observation by the assessor, and may also include:

- written and oral questioning
- evidence from company systems (e.g. Food Safety Management System)
- reviewing the outcomes of work
- checking any records of documents completed
- checking accounts of work that the candidate or others have written.

Evidence must be provided of:

- identifying **three** different types of ingredients, e.g. powders, liquids, fruits, yeast
- a production schedule or product specification
- selecting **three** different types of ingredients in accordance with workplace procedures
- weighing and measuring **three** different types of ingredients in accordance with workplace procedures.

Evidence of knowledge and understanding should be collected during observation of performance in the workplace. Where it cannot be collected by observing performance, other assessment methods should be used.

Level:	5
Credit value:	2
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit.
Summary:	This unit is about your responsibility for cashing up one or more tills. This includes identifying and dealing with overages and shortages. It is very important that you keep cash and cash equivalents secure when cashing up.

Learning outcome
1. Cash up in a retail store
Performance indicator
<p>You need to:</p> <ul style="list-style-type: none"> 1.1 cash up in line with company routines and procedures 1.2 identify till overages and shortages and deal with these in line with company procedures and within the limits of your authority 1.3 where you are not authorised to resolve problems with overages and shortages yourself, report these promptly to the right person 1.4 follow company procedures for keeping cash, cash equivalents and yourself secure throughout the cashing-up process 1.5 use cashing-up equipment safely, effectively and efficiently
Knowledge and understanding
<p>You need to know and understand:</p> <ul style="list-style-type: none"> 1.1 company routines and procedures for cashing up 1.2 how to check for any overages and shortages 1.3 the reasons why overages and shortages occur 1.4 the level of your authority to deal with overages and shortages 1.5 who to contact regarding those discrepancies you cannot deal with yourself 1.6 company procedures for keeping cash, cash equivalents and yourself secure throughout the cashing-up process 1.7 what equipment to use for cashing-up and how to use it safely, effectively and efficiently

Unit 245

Establish customer needs and provide advice regarding tiling products

Level:	5
Credit value:	6
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit.
Unit assessment:	Specialist Unit: If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.
Summary:	This unit is about finding out how customers intend to use tiles for specific tiling projects. It involves establishing the customer's needs and advising them on tiling solutions which are suitable for the intended use and which will achieve the visual effect required by the customer.

Learning outcome
1. Establish customer needs and provide advice regarding tiling products
Performance indicator
You need to:
1.1 establish correctly where the customer intends to use the tiles, and why tiles are being considered
1.2 determine the customer's budget and delivery timescale for the tiles
1.3 establish the nature of the surface to be tiled, and determine correctly any consequent considerations regarding the suitability of particular tiles and how they might be fixed
1.4 identify whether the customer requires any fixtures or fittings and advise the customer accordingly
1.5 establish how the tiled surfaces are to be used, and advise the customer correctly upon the available types of tile suited to the intended use
1.6 explore and determine the customer's preferred colours, styles, design and layout of tiles
1.7 provide customers with samples of appropriate tiles and displays
1.8 advise, with sensitivity, why certain styles may be better suited to

particular types of homes
1.9 advise the customer correctly regarding the relevant tiling finishes available, including appropriate trims and beadings
1.10 determine correctly whether the customer is seeking other requirements such as underfloor heating
1.11 create a rapport with the customer and demonstrate an interest in the customer's needs
1.12 listen actively and promote understanding by using words that are clear, concise and suited to the customer's needs
Knowledge and understanding
<p>You need to know and understand:</p> <p>1.1 the different locations where tiles are used, and the factors to consider when determining which tiles are suitable</p> <p>1.2 the relative advantages and disadvantages of a tiled floor compared with the principal other types of flooring</p> <p>1.3 the constituent materials and general manufacturing process of the tiles which you are involved in selling</p> <p>1.4 the delivery times for the tiles which you are involved in selling</p> <p>1.5 the implications of building regulations and sustainability for the tiles which your organisation offers</p> <p>1.6 the principal types of adhesives and grouts and for what these are used</p> <p>1.7 the principal types of integral fittings and accessories available and which can be installed during or after tiling</p> <p>1.8 procedures for cutting and drilling through tiles</p> <p>1.9 the reasons for possible differences in sizes and shading of tiles, and the purpose of batch numbers</p> <p>1.10 current trends in tiling design and fashion</p> <p>1.11 the types of tile fixing, trim and beading and those most appropriate for different applications</p> <p>1.12 the circumstances when it is important to use silicone sealants</p> <p>1.13 where to seek information appropriate to customers' needs, particularly non-standard requirements</p> <p>1.14 the principal forms of underfloor heating, and those floor finishes which are suitable</p>

Unit 246

Advise customers upon measuring and planning for the fixing of tiles

Level:	5
Credit value:	6
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit.
Unit assessment:	Specialist Unit: If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.
Summary:	This unit is about helping customers to buy the products they need for specific tiling projects. This involves advising customers on how to measure the area to be tiled; working out the quantity of tiles the customer needs to buy; telling the customer about any additional products they will need; and working out the total price of the products you are recommending.

Learning outcome
1. Advise customers upon measuring and planning for the fixing of tiles
Performance indicator
You need to: <ul style="list-style-type: none">1.1 determine correctly the nature of the location being tiled, and the subsequent use to which the tiled surfaces are to be put1.2 identify correctly the nature of the materials suited for the intended location1.3 check and confirm, where possible, the accuracy of measurements provided by the customer, using tact and sensitivity1.4 calculate correctly the area of the surface to be tiled1.5 calculate correctly the number of tiles required, taking into account the intended design and any use of motif and border tiles1.6 determine correctly the amount of trim, edging material and sealants required1.7 calculate correctly the amount and type of adhesive needed1.8 identify correctly the number and size of spacers required1.9 determine correctly the type, colour and amount of grout required1.10 calculate correctly how any other requirements, such as underfloor

<p>heating, will affect the measuring and planning process</p> <p>1.11 provide an accurate estimate for the customer, explaining clearly and correctly its component parts</p> <p>1.12 listen actively and encourage questions from the customer towards promoting the customer's understanding</p>
<p>Knowledge and understanding</p>
<p>You need to know and understand:</p> <p>1.1 why measuring, setting out and planning for tiling is important, and the general procedures for doing this</p> <p>1.2 the principal types of tools and materials required for measuring, planning and setting out, and their respective purposes</p> <p>1.3 the information to be sought from customers when advising upon tiling different locations</p> <p>1.4 the importance of ensuring that tiles are from the same batch, and the potential difficulties that might arise where this does not occur</p> <p>1.5 how to measure the surfaces to be tiled, and the factors to be determined in identifying the number of tiles required</p> <p>1.6 how to convert between metric and imperial measures</p> <p>1.7 methods for planning for incorporating motif and border tiles</p> <p>1.8 the types of tile fixing trim, and those most appropriate for different applications</p> <p>1.9 the types and methods of applying adhesive</p> <p>1.10 the types of grout available</p> <p>1.11 methods for calculating the size of the electrical underfloor heating system required</p> <p>1.12 where to seek help or information for customers' non-standard or particular requirements</p>

Unit 247

Advise customers upon the fixing of tiles

Level:	5
Credit value:	6
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit.
Unit assessment:	Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.
Summary:	This unit is about promoting sales and increasing customer confidence and satisfaction by explaining to customers how to fix tiles and helping them to choose suitable products for this.

Learning outcome
1. Advise customers upon the fixing of tiles
Performance indicator
You need to: <ul style="list-style-type: none">1.1 determine required details about the surfaces upon which the tiles are to be fixed, establishing the nature of the surface being tiled1.2 advise the customer correctly regarding any required preparation of the surface1.3 establish how the finished tiled surfaces are to be used1.4 identify and select appropriate adhesives and grout to meet the customer's needs1.5 ensure that customers are fully informed about the products that will be used, including the order of application and how products are to be applied1.6 identify whether there are any existing or planned fixtures, fittings, pipework and cabling, and establish correctly their potential impact for the fixing of the proposed tiles1.7 agree with the customer how best to accommodate any existing or planned fixtures, fittings, pipework or cabling1.8 ensure that customers are briefed on safe working and best practice techniques1.9 determine whether there is, or will be, underfloor heating and determine correctly the impact for the fixing of the proposed tiles1.10 explore with the customer and gain agreement on how the tiled

<p>surfaces are to be finished off</p> <p>1.11 explain correctly how to take care of the tiled surfaces</p> <p>1.12 offer the appropriate cleaning and maintenance products to the customer, where relevant</p> <p>1.13 provide confidence to the customer that the decisions taken throughout the process will meet the customer's expectations and tiling requirements</p>
<p>Knowledge and understanding</p> <p>You need to know and understand:</p> <p>1.1 the general principles of preparing surfaces on which tiles are to be fixed including fixing and using battens, and the circumstances when it is important to waterproof walls before tiling, and how to do this</p> <p>1.2 those surfaces which are not suited for tiling, including flaking paint and wallpaper, the reasons why and what can be done to make them suitable</p> <p>1.3 the types of flooring most commonly found in domestic and office buildings, and the conditions that must be satisfied for tiling to be appropriate</p> <p>1.4 the purpose of movement joints and how these are sited</p> <p>1.5 what a tanking system is, and the circumstances when it is required</p> <p>1.6 the principal types of adhesives, grouts and admixes, the relative advantages of these and the suitability of the different types for different applications and locations when tiling, including suitability for wet areas</p> <p>1.7 the principal methods for applying adhesives and grout and the importance of following manufacturers' instructions</p> <p>1.8 the terms "slip, open time, drying/curing time" and their relevance to the use of adhesives and grouts</p> <p>1.9 the principal types of tools used in the fixing, grouting and finishing of tiles</p> <p>1.10 the principal types of tools and materials required for tile cutting and drilling, the respective purposes of these and how to use tools and materials safely including the use of tile cutters and tile nippers</p> <p>1.11 how to cut and drill tiles safely and effectively and which tiles cannot be cut or drilled and why</p> <p>1.12 methods and materials for fitting, fixing and sealing electrical underfloor heating systems</p> <p>1.13 how to finish tiled surfaces off upon completion of tiling</p> <p>1.14 the principal methods for undertaking routine cleaning and maintenance of all tiled surfaces including tiles and grouting, and how to recognise and deal with problems such as mildew, discolouration of tiles and grouting</p> <p>1.15 the various cleaning and maintenance products available, the applications of these and how to use them safely</p>

Unit 248

Help customers to choose delicatessen products in a retail outlet

Level:	5
Credit value:	6
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit.
Unit assessment:	Specialist Unit: If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.
Summary:	<p>This unit is about helping customers to choose delicatessen products in a specialist retail outlet or on a specialist counter within a more general retail outlet such as a supermarket or department store.</p> <p>For the purposes of this unit, delicatessen products are ready-to-serve products such as cheese, cold cooked meats and salads.</p> <p>The unit involves providing information about products to help customers to make choices, as well as spotting opportunities to recommend additional products. Where products cannot be portioned in the way the customer requests, alternatives need to be tactfully suggested.</p>

Learning outcome
1. Help customers to choose delicatessen products in a retail outlet
Performance indicator
You need to:
1.1 use effective questioning techniques to establish a rapport with customers and find out what they are looking for
1.2 match products as closely as possible to customers' stated requirements, from the products available
1.3 support your product recommendations with factually correct information which is likely to give customers confidence in your recommendations
1.4 compare and contrast products in ways that help customers choose the products that best meet their requirements

1.5	recognise and act on suitable opportunities to recommend to customers associated or additional products
1.6	tactfully suggest alternative portion sizes or products when customers' requests are impractical
Knowledge and understanding	
You need to know and understand:	
1.1	how to establish a rapport with customers
1.2	the kinds of questions you need to ask customers in order to find out their requirements
1.3	where to find reliable information about the products you are responsible for selling
1.4	effective ways of comparing and contrasting products for customers
1.5	how to recognise opportunities to recommend associated or additional products
1.6	practical limits on portion weight, size or shape
1.7	how to explain tactfully to customers when portion requirements cannot be met, and what alternatives can be offered

Unit 249

Portion delicatessen products in a retail outlet to meet individual customer requirements

Level:	5
Credit value:	6
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit.
Unit assessment:	Specialist Unit: If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.
Summary:	<p>This unit is about portioning delicatessen products in a specialist retail outlet or on a specialist counter within a more general retail outlet such as a supermarket or department store.</p> <p>For the purposes of this unit, delicatessen products are ready-to-serve products such as cheese, cold cooked meats and salads. The customer specifies the portion size or weight and expects the resulting portions to be very close to the specified size or weight and to be in a presentable condition.</p>

Learning outcome
1. Portion delicatessen products in a retail outlet to meet individual customers' requirements
Performance indicator
<p>You need to:</p> <p>1.1 handle and portion products in ways which comply with all relevant food safety requirements</p> <p>1.2 use tools and utensils suited to the product</p> <p>1.3 cut products so as to:</p> <ul style="list-style-type: none">• produce conventionally acceptable portion shapes• maintain the attractiveness of the product• minimise waste• comply with all relevant health and safety requirements <p>1.4 when weighing portions, take into account the weight of any</p>

	additional items on the scales such as containers
1.5	check that the customer is satisfied with the portioned product before it is wrapped
1.6	place portioned products in suitable packaging
1.7	check that the product from which portions have been taken is still in saleable condition, and adjust, remove or replace it as needed
1.8	dispose of any unsaleable products in line with all relevant health and safety requirements, including food safety requirements
Knowledge and understanding	
You need to know and understand:	
1.1	the food safety and general health and safety requirements to be complied with when handling, portioning and disposing of products
1.2	which tools and utensils to use with which products and why
1.3	how to cut products safely and in ways which achieve the required portion whilst minimising waste
1.4	the conventionally accepted portion shapes for the products you are responsible for portioning
1.5	how to use weighing scales, including how to allow for the weight of additional items such as containers
1.6	how to choose packaging to suit the product type and portion size
1.7	accepted standards of presentation for products from which portions have been taken
1.8	when and how to adjust or dispose of remaining products

Unit 250

Provide service to customers in the dressing room of a retail store

Level:	5
Credit value:	1
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit.
Summary:	<p>This unit is about your responsibility for the dressing room area. By providing a pleasant and welcoming environment for the customer you will enhance their shopping experience and encourage them to buy.</p> <p>You are responsible for preparing the dressing room for use and monitoring it whilst in use. You create sales opportunities by offering assistance and telling customers about in-store promotions and offers. Using your customer service skills you:</p> <ul style="list-style-type: none">• make customers feel valued• help customers find the products they need. <p>Whilst enhancing the whole shopping experience for the customer you are also monitoring security and minimising stock loss.</p>

Learning outcome
1. Use the dressing room facilities to create sales opportunities
Performance indicator
You need to: <ul style="list-style-type: none">1.1 monitor the sales floor for customers who may be interested in trying clothes on1.2 welcome customers in a friendly manner when they approach the dressing room1.3 check how many items are being taken into the cubicle, and follow company policy for restricting the number of items when necessary1.4 politely but firmly advise the customer of the store policy regarding how many items of clothing are allowed in a cubicle at any one time and deal with any disputes1.5 let the customer know how to get further help if needed1.6 take suitable opportunities to tell customers about special offers and promotions1.7 take suitable opportunities to suggest matching items and

accessories
1.8 keep track of the number of cubicles that are in use whilst carrying out your other duties
1.9 politely check that the customer has brought all the items of clothing out of the cubicle which they took into it in case of any discrepancies
1.10 if there is a discrepancy promptly follow the store procedures on how to deal with possible stock loss
1.11 acknowledge customers who are waiting to use the dressing room and direct them to alternative facilities if these are available
Knowledge and understanding
You need to know and understand:
1.1 how many cubicles there are and what other facilities are available
1.2 when a dressing room is likely to be busy and needs to be open and when it is not so it can be closed
1.3 how to greet customers in a welcoming manner
1.4 store policy on checking how many items are being taken into the dressing room area and how to deal with customers who dispute the policy
1.5 how to keep yourself informed about in-store offers and promotions and how to advise the customer about them
1.6 how to engage the customer in conversation in order to suggest additional purchases
1.7 how to monitor customers entering and leaving the cubicles so none remain empty whilst customers are waiting
1.8 company procedures for dealing with suspected stock loss
1.9 the right person to contact if you suspect stock loss has occurred
1.10 how to check whether alternative dressing room areas are available at busy times

Learning outcome
2. Keep dressing room facilities ready for customer use
Performance indicator
You need to:
2.1 before opening a dressing room area check it is in a fit state for customers to use, in line with the company's standards for cleanliness, tidiness and hygiene
2.2 clean and tidy cubicles as needed, using suitable equipment and materials and safe and effective procedures
2.3 report to the right person any problems with the dressing room area which you cannot sort out yourself
2.4 whilst the dressing room is open, regularly and discreetly check that the cubicles and dressing room area are clean, tidy and free from obstructions in line with company safety and security policies
2.5 when merchandise needs returning to the shop floor and this cannot be done immediately, place it in the designated area
2.6 prepare unsold merchandise for prompt return to the shop floor
2.7 follow company procedures for dealing with merchandise that is no longer of saleable quality

Knowledge and understanding

You need to know and understand:

- 2.1 why it is important to keep the dressing room area clean, tidy, and in good working order
- 2.2 the company's standards for the cleanliness, tidiness and hygiene of the dressing room area
- 2.3 who can help to resolve problems with the dressing room area which you are unable to deal with yourself
- 2.4 where cleaning materials are kept and how to clean the dressing room area safely and effectively
- 2.5 how to routinely check in a discreet manner that the dressing room and cubicles are clean and tidy, whilst customers are using the area
- 2.6 where to store unsold merchandise before preparing it for return to the shop floor
- 2.7 how to prepare merchandise for return to the shop floor
- 2.8 how to recognise merchandise that is no longer of saleable quality
- 2.9 company procedures for dealing with merchandise that is no longer of saleable quality

Unit 251

Promote sales of food or drink products by offering samples to customers

Level:	5
Credit value:	2
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit.
Summary:	This unit is about offering customers samples of food or drink products to consume immediately, as a way of promoting sales. You need to select suitable products and prepare and display them so they look appealing. You also need to actively encourage customers to sample and buy products. You need to comply with food safety requirements when preparing, displaying and disposing of product samples.

Learning outcome
1. Promote sales of food or drink products by offering samples to customers
Performance indicator
You need to:
1.1 spot suitable opportunities to promote sales by making samples available to customers
1.2 select suitable products for sampling
1.3 prepare product samples in line with company procedures and standards for preparation and presentation
1.4 follow company procedures for giving customers information about potentially allergenic ingredients
1.5 spot suitable opportunities to encourage individual customers to sample products
1.6 use persuasive words and body language to encourage customers to sample and buy products
1.7 explain clearly to customers, when necessary, where they can buy the products sampled
1.8 monitor the freshness of samples on display and remove samples which no longer meet requirements for freshness
1.9 dispose of waste products in line with company and legal food safety requirements

1.10 follow company procedures and legal requirements for recording food disposals

Knowledge and understanding

You need to know and understand:

- 1.1 how the opportunity to sample products helps to promote sales
- 1.2 the criteria for selecting products for sampling, including product type and sell-by date
- 1.3 the company's procedures and standards for preparing and displaying samples
- 1.4 the required temperatures for safely storing and serving samples
- 1.5 the information you must give customers about potentially allergenic ingredients, and the company's procedures for giving this information
- 1.6 how to spot opportunities to encourage customers to sample products
- 1.7 how to use words and body language to encourage customers to sample and buy products
- 1.8 where customers can buy the products sampled and how to explain this clearly to customers
- 1.9 why it is important to monitor the freshness of samples on display, and how to do so
- 1.10 legal requirements and the company's procedures for disposing of waste products and recording food disposals

Unit 258

Promote the store's credit card to customers

Level:	5
Credit value:	3
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit.
Unit assessment:	Specialist Unit: If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.
Summary:	<p>This unit is about knowing how to encourage customers to apply for your store's credit card.</p> <p>Credit cards are financial products and are subject to strict laws which you must comply with at all times. You also need to understand the features and benefits of your store's card and explain these to customers persuasively and within the limits of the law.</p> <p>A credit card is not simply a card which offers rewards such as points or discounts, although it may have these additional features. The difference between a credit card and a card which is purely a loyalty card is that the customer incurs a financial debt when using a credit card to pay for purchases. This debt must eventually be paid, and can cost the customer extra money in the form of interest if payment is not made in full on the due date. If the store's card cannot be used in this way then this unit is not suitable for you.</p>

Learning outcome
1. Promote the store's credit card to customers
Performance indicator
You need to:
1.1 take suitable opportunities and use effective questioning techniques to find out if customers have credit cards with your store
1.2 where customers aren't already card holders, tell them in a

	persuasive manner about the benefits to them of having the card
1.3	where customers are already card holders, acknowledge this and remind them in a friendly and persuasive manner of the benefits of using the card
1.4	where customers express an interest in having the card, give them clear and factually accurate information about the features of the card including: <ul style="list-style-type: none"> • the costs involved • the repayment terms • the customer's right to cancel the card
1.5	where customers express concern about the card, address their concerns honestly whilst continuing to stress the benefits of the card
Knowledge and understanding	
	You need to know and understand:
1.1	the benefits to your store of having card holders
1.2	the opportunities you can take to ask customers if they are already card holders
1.3	friendly and engaging questioning techniques you can use to find out if customers are card holders
1.4	the benefits to the customer of having your store's credit card
1.5	how to explain to customers in a persuasive manner the benefits to them of being card holders
1.6	who is eligible to apply for the card
1.7	the features of your store's credit card including: <ul style="list-style-type: none"> • the costs involved • the repayment terms • the customer's right to cancel the card
1.8	typical concerns which customers might have about the card
1.9	how to respond to customers' concerns honestly whilst continuing to stress the benefits of the card
1.10	why it is important to the business to make existing card holders feel special and to continue to promote to them the benefits of the card

Unit 259

Help customers to apply for the store's credit card and associated insurance products

Level:	5
Credit value:	4
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit.
Unit assessment:	Specialist Unit: If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.
Summary:	<p>This unit is about helping customers with the process of applying for your store's credit card and any associated insurance products you are authorised to offer the customer. Credit cards and insurance are financial products and are subject to strict laws which you must comply with at all times.</p> <p>A credit card is not simply a card which offers rewards such as points or discounts, although it may have these additional features. The difference between a credit card and a card which is purely a loyalty card is that the customer incurs a financial debt when using a credit card to pay for purchases. This debt must eventually be paid, and can cost the customer extra money in the form of interest if payment is not made in full on the due date. If the store's card cannot be used in this way then this unit is not suitable for you.</p>

Learning outcome
1. Offer customers insurance products associated with the store's credit card
Performance indicator
You need to: 1.1 use compliant wording to give credit card applicants consistent, clear, unbiased and factually correct information about the associated insurance products available, including: <ul style="list-style-type: none">• whether or not the insurance is optional

<ul style="list-style-type: none"> • the cost of the insurance • the cover available • significant and unusual exclusions • the customer's right to cancel the insurance <p>1.2 offer customers the policy summary and explain clearly the benefits of reading it</p> <p>1.3 allow customers enough time to read the policy summary if they wish</p> <p>1.4 politely check that customers are eligible for the insurance products you are offering</p> <p>1.5 in response to customers' requests for advice or recommendations, clearly and politely explain that you cannot answer these yourself and tell the customer who they can contact for further help</p> <p>1.6 check that the customer understands the product information by listening carefully to what they say and observing their body language</p>	<p>Knowledge and understanding</p> <p>You need to know and understand:</p> <p>1.1 the difference between informing and advising customers about insurance products, and why you must give information and not advice</p> <p>1.2 which insurance products you are authorised to offer, and to whom</p> <p>1.3 product features which you must tell the customer about, including:</p> <ul style="list-style-type: none"> • whether or not the insurance is optional • the cost of the insurance • the cover available • significant and unusual exclusions • the customer's right to cancel the insurance <p>1.4 how to give customers information about insurance products which is:</p> <ul style="list-style-type: none"> • consistent • clear • unbiased • factually correct • compliant with relevant legislation, regulations and guidelines <p>1.5 the benefits to the customer of reading the policy summary</p> <p>1.6 legal requirements for offering the customer the opportunity to read the policy summary</p> <p>1.7 who is eligible for the insurance products you offer and how to check eligibility</p> <p>1.8 how to deal with customers' requests for advice and recommendations concerning insurance products</p> <p>1.9 who the customer can contact for help with queries which you are not authorised to deal with yourself</p> <p>1.10 why it is important to check that the customer understands the product information you give, and the verbal and non-verbal indications to listen and look for</p>
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Learning outcome
2. Help customers to apply for the store's credit card and associated insurance products
Performance indicator
<p>You need to:</p> <p>2.1 meet legal and company requirements for giving customers information about the application process</p> <p>2.2 if customers wish to take the application form away to consider, make it clear that they are welcome to do so and follow procedures for voiding the blank form</p> <p>2.3 ask customers politely for proof of identity and check that suitable proof is provided</p> <p>2.4 keep the customer's personal data secure throughout the application process</p> <p>2.5 process applications in line with the procedures agreed between the store and the insurer</p> <p>2.6 where an application is accepted, confirm clearly to the customer:</p> <ul style="list-style-type: none"> • the decision • the customer's credit limit • the Annual Percentage Rate which applies <p>2.7 follow procedures to enable accounts to be set up for customers whose applications have been accepted</p> <p>2.8 where an application is declined, tell the customer tactfully and explain how they can enquire about the reasons</p> <p>2.9 where technical problems occur with the application system or equipment, deal with these in line with procedures and report promptly to the right person any problems you can't resolve yourself</p>
Knowledge and understanding
<p>You need to know and understand:</p> <p>2.1 the legal and company requirements for giving customers information about the application process</p> <p>2.2 why customers may wish to take application forms away to study in detail and why this is to be welcomed</p> <p>2.3 why you must void blank application forms and how to do so</p> <p>2.4 why customers must prove their identity and what proofs you can accept</p> <p>2.5 why you must keep customers' personal data secure during the application process and how to do this</p> <p>2.6 the procedures agreed between the store and the insurer for processing applications</p> <p>2.7 the procedures to follow when an application is accepted</p> <p>2.8 how to treat customers with courtesy and tact when their applications have been declined</p> <p>2.9 why you must not try to guess with customers about the possible reasons why their applications have been declined</p> <p>2.10 the contact details you can give to customers who want to enquire further about declined applications</p> <p>2.11 how to use the application system and equipment and how to deal with technical problems that may occur with these</p>

Level:	6
Credit value:	9
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit. This unit can be achieved in isolation of other units. However evidence for this unit will be generated holistically whilst the candidate is working towards competence in their selected units for the qualification.
Summary:	<p>This unit is about being an effective member of your team, including taking some responsibility for helping colleagues to learn. The unit involves supporting your team's efforts by sharing the workload fairly, making realistic commitments and doing your best to keep them, and contributing to team morale and good working relations. The unit is also about being an effective learner in the workplace. It assumes that you receive some help and support in planning and carrying out your learning plans. Your responsibilities are to contribute to the planning process, carry out your plan and report on your progress.</p> <p>Finally, the unit is about helping colleagues to gain the information and skills they need to do their jobs. It involves passing on to colleagues your own knowledge and skills as you go about your day-to-day work. This standard is not about being a professional trainer and you are not expected to assess your colleagues' performance formally.</p>

Learning outcome
1. Support effective team working in a retail environment
Performance indicator
<p>You need to:</p> <p>1.1 share work fairly with colleagues, taking account of your own and others' preferences, skills and time available</p> <p>1.2 make realistic commitments to colleagues and do what you have promised you will do</p> <p>1.3 let colleagues know promptly if you will not be able to do what you have promised and suggest suitable alternatives</p>

1.4	encourage and support colleagues when working conditions are difficult
1.5	encourage colleagues who are finding it difficult to work together to treat each other fairly, politely and with respect
1.6	follow the company's health and safety procedures as you work
Knowledge and understanding	
You need to know and understand:	
1.1	your team's purpose, aims and targets
1.2	your responsibility for contributing to the team's success
1.3	your colleagues' roles and main responsibilities
1.4	the importance of sharing work fairly with colleagues
1.5	the factors that can affect your own and colleagues' willingness to carry out work, including skills and existing workload
1.6	the importance of being a reliable team member
1.7	the factors to take account of when making commitments, including your existing workload and the degree to which interruptions and changes of plan are within your control
1.8	the importance of maintaining team morale, the circumstances when morale is likely to flag, and the kinds of encouragement and support that are likely to be valued by colleagues
1.9	the importance of good working relations, and techniques for removing tension between colleagues
1.10	the importance of following the company's policies and procedures for health and safety, including setting a good example to colleagues

Learning outcome
2. Help to plan and organise your own learning in a retail environment
Performance indicator
You need to:
2.1 discuss and agree with the right people goals that are relevant, realistic and clear
2.2 identify the knowledge and skills you will need to achieve your goals
2.3 agree action points and deadlines that are realistic, taking account of your past learning experiences and the time and resources available for learning
2.4 regularly check your progress and, when necessary, change the way you work
2.5 ask for feedback on your progress from those in a position to give it, and use their feedback to improve your performance
Knowledge and understanding
You need to know and understand:
2.1 who can help you set goals, help you plan your learning, and give you feedback about your progress
2.2 how to identify the knowledge and skills you will need to achieve your goals
2.3 how reflecting on your past learning experiences can help you to plan your future learning, and techniques for doing so
2.4 how to work out how much time you need to devote to learning and how much time you can make available for learning
2.5 how often to check your progress and how to do this

- | | |
|-----|---|
| 2.6 | how to adjust your plans as needed to help you meet your goals |
| 2.7 | why you should ask for feedback on your progress, how to do so, and how to respond positively |

Learning outcome

3. Help others to learn in a retail environment

Performance indicator

You need to:

- | | |
|-----|--|
| 3.1 | encourage colleagues to ask you for work-related information or advice that you are likely to be able to provide |
| 3.2 | notice when colleagues are having difficulty performing tasks at which you are competent, and tactfully offer advice |
| 3.3 | give clear, accurate and relevant information and advice relating to tasks and procedures |
| 3.4 | explain and demonstrate procedures clearly, accurately and in a logical sequence |
| 3.5 | encourage colleagues to ask questions if they don't understand the information and advice you give them |
| 3.6 | give colleagues opportunities to practise new skills, and give constructive feedback |
| 3.7 | check that health, safety and security are not compromised when you are helping others to learn |
| 3.8 | recognise when you are not the most appropriate person to advise colleagues in their learning and guide them to suitable sources of help |

Knowledge and understanding

You need to know and understand:

- | | |
|-----|---|
| 3.1 | your role in helping others to learn in the workplace |
| 3.2 | how to work out what skills and knowledge you can usefully share with others |
| 3.3 | how and when to offer help and advice to colleagues who are learning |
| 3.4 | methods of helping others to learn on the job, and how to choose suitable methods for different learning situations |
| 3.5 | health, safety and security risks that are likely to arise when people are learning on the job, and how to reduce these risks |
| 3.6 | sources of help within your organisation for people who are learning, and how to access them |

Unit 302

Process part-exchange sales transaction in a retail environment

Level:	6
Credit value:	12
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit.
Summary:	This unit is about three aspects of part-exchange sales transactions. Firstly, it is about following company guidelines for valuing items offered in part exchange. Secondly, it involves negotiating part exchange sales transactions and working out the balance the customer needs to pay. Thirdly, it is about taking payment and providing service at point of sale.

Learning outcome
1. Decide on the value of items offered in part exchange by retail customers
Performance indicator
You need to: <ul style="list-style-type: none">1.1 thoroughly inspect the item being offered1.2 protect the item from damage while handling it1.3 identify accurately any repairs and cleaning needed and the costs involved1.4 work out the exchange value of the item accurately within company guidelines1.5 explain to the customer clearly and accurately the part exchange value of the item and the benefits of a part-exchange arrangement1.6 tell the customer politely that the item is not acceptable for part exchange, when this applies1.7 treat the customer politely throughout the valuation process
Knowledge and understanding
You need to know and understand: <ul style="list-style-type: none">1.1 the type and quality of items you can accept in part exchange1.2 relevant aspects of the law relating to ownership and re sale of goods1.3 how to check that items are clean and operate normally, including different kinds of checks and when to use them1.4 the potential for re-selling the item offered in part exchange

1.5	the company's pricing policy for part exchange items
1.6	the benefits to the customer of part exchange arrangements
1.7	how to treat the customer politely, including telling the customer the item cannot be accepted in part exchange

Learning outcome
2. Negotiate part-exchange sales transactions with retail customers
Performance indicator
<p>You need to:</p> <p>2.1 follow company policies and procedures for checking who owns the item</p> <p>2.2 work out accurately the balance the customer should pay on the item they want to buy</p> <p>2.3 accept or refuse the customer's offers according to company policies and the discretion you are allowed</p> <p>2.4 end the transaction politely if the customer is not willing to go ahead</p> <p>2.5 explain clearly and accurately the terms and conditions of the sale</p> <p>2.6 fill in the paperwork for the transaction</p> <p>2.7 treat the customer politely throughout negotiations</p>
Knowledge and understanding
<p>You need to know and understand:</p> <p>2.1 company policies and procedures for checking who owns the item</p> <p>2.2 what might happen if you do not check ownership properly</p> <p>2.3 the terms and conditions of sale for items the store buys</p> <p>2.4 how to deal with customer objections</p> <p>2.5 how to treat the customer politely during negotiations</p> <p>2.6 how to fill in the paperwork when buying part exchange items</p>

Learning outcome
3. Provide service at point of sale in a retail store
Performance indicator
<p>You need to:</p> <p>3.1 tell customers the correct amount to pay</p> <p>3.2 check accurately the amount and means of payment offered by the customer</p> <p>3.3 where the payment is acceptable, process the payment in line with company procedures</p> <p>3.4 tell the customer tactfully when payment cannot be approved</p> <p>3.5 offer additional services to the customer where these are available</p> <p>3.6 treat customers politely throughout the payment process</p> <p>3.7 balance the need to give attention to individual customers with the need to acknowledge customers who are waiting for help</p>
Knowledge and understanding
<p>You need to know and understand:</p> <p>3.1 how to keep cash and other payments secure</p> <p>3.2 the types of payment that you are authorised to receive</p> <p>3.3 procedures for authorising non-cash transactions</p> <p>3.4 how to check for and identify counterfeit payments</p>

- 3.5 how to check for stolen cash equivalents
- 3.6 how to deal with customers offering suspect payments
- 3.7 relevant legal rights, duties and responsibilities
- 3.8 company procedures for taking payments
- 3.9 company procedures for dealing with suspected fraud

Unit 303

Help customers choose specialised products in a retail environment

Level:	6
Credit value:	7
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this Unit.
Summary:	This unit is for you if you are a sales assistant working in retail and you give expert advice to customers on specialist products. Specialist products are ones for which many customers will welcome in-depth advice to help them to choose the products that best meet their needs.

Learning outcome
1. Help customers to choose specialist products in a retail environment
Performance indicator
You need to: <ul style="list-style-type: none">1.1 judge from customers' body language and immediate circumstances whether they are likely to respond positively to an attempt to engage them in conversation1.2 adapt your speech and body language so as to establish and maintain a rapport with individual customers1.3 interact with customers in ways that support the company's brand values1.4 explore customers' requirements with them to establish what the customer is looking for1.5 provide customers with product information that is clear, factually correct, legally compliant and selected for its relevance to the customer's needs1.6 match the features and benefits of available products as closely as possible to customers' needs1.7 compare and contrast products in ways that help customers to choose the products that best meet their needs1.8 respond to customers' questions in a confident manner and in ways that are likely to promote sales and goodwill1.9 recommend to customers related products that are likely to enhance their experience of the product they are purchasing1.10 keep abreast of new products and product trends in your area of expertise

1.11 actively seek ways of maintaining your own enthusiasm for the products in your area of expertise

Knowledge and understanding

You need to know and understand:

- 1.1 your company's brand values in relation to its product offer, pricing and service
- 1.2 how your company compares with its competitors on product offer, pricing and service
- 1.3 the customer profiles for your store
- 1.4 the elements of a positive customer experience in relation both to your company and to the products you sell
- 1.5 how customers' circumstances, such as who they are with or the time of day, affect their willingness to engage in conversation with a salesperson
- 1.6 how to recognise from customers' body language whether they are likely to respond positively to an approach from a salesperson
- 1.7 how to establish and maintain a rapport with individual customers
- 1.8 the meaning of specialist terminology that knowledgeable customers are likely to use in relation to the products you sell
- 1.9 how the products you sell are produced or obtained, and how these methods affect the nature and quality of the products
- 1.10 any legal restrictions relating to the products you sell, such as where the products come from or who can buy or use the products, and how to explain these to customers
- 1.11 any health and safety considerations that customers must be warned about, or are likely to ask about, in relation to the products you sell
- 1.12 any ethical and environmental concerns that customers are likely to have about the products you sell, and how to address these
- 1.13 what related products are available from your organisation that would enhance customers' experience of the products you sell
- 1.14 sources of up-to-date production information and how to access and use these
- 1.15 the sources of after-sales advice and support that are available to customers
- 1.16 the customer's legal rights and the organisation's policy concerning returns
- 1.17 the importance of maintaining your own enthusiasm for the products you sell
- 1.18 how to search for and evaluate opportunities to maintain your enthusiasm for the products you sell

Unit 304

Develop individual retail service opportunities

Level:	6
Credit value:	6
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit. It is highly unlikely that this unit will be able to be observed therefore the evidence generated will come from professional discussion supported by statistics relating to performance and testimony from an Expert Witness to confirm the candidate's competence.
Unit assessment:	Specialist Unit: If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.
Summary:	This unit is for personal shoppers and is about developing your client database. Firstly, you need to plan how to find new clients you can develop a business relationship with. You need to understand what type of clients you should be meeting, and how to go about meeting them in ways that use your time effectively and are likely to help you meet your sales targets. Secondly, you need to approach potential clients and get them interested in you and your service. You need to tailor your approach to different people so that you can quickly develop a rapport and gain their interest. You also need to gain their trust in you and your company by keeping your promises and keeping personal information strictly confidential.

Learning outcome
1. Make plans for finding new retail clients
Performance indicator
You need to: 1.1 identify the types of client who would benefit from your service and whose custom would help you achieve your sales targets 1.2 suggest ideas for building the client base that are suitable for the client profiles and achievable bearing in mind the budget and time

available and company image and policy
1.3 follow company policies and procedures for building the client base
1.4 review your progress against your plans at suitable intervals
1.5 recognise whether you are achieving the results you need and adjusting your plans when necessary
1.6 give your manager clear and accurate reports of your progress at the agreed times
Knowledge and understanding
You need to know and understand:
1.1 your sales targets and when you should achieve them by
1.2 client profiles relevant to the brands and services you are personally responsible for selling
1.3 the number and types of clients you are likely to need in order to meet your sales targets
1.4 company policies and procedures for developing business relationships with clients
1.5 how best to balance your time between finding new clients and selling to existing clients
1.6 how often to review your progress in finding new clients
1.7 how to measure your progress in ways that help you decide if you need to change your approach
1.8 when and how you should report your progress to your manager

Learning outcome
2. Market your service to potential retail clients
Performance indicator
You need to:
2.1 spot suitable opportunities to approach potential clients
2.2 approach potential clients in a way that projects your company's image effectively and is likely to help create a business relationship
2.3 quickly create a rapport with potential clients
2.4 talk to potential clients in a persuasive way about your services
2.5 compare your service with competitors' services in ways that make clear the advantages of your service while being honest and fair
2.6 exchange relevant information with potential clients when appropriate
2.7 record client information promptly, accurately and in a way that allows you to use the information effectively
2.8 store and use client information in line with data protection laws and company policy
2.9 when it is not possible to keep promises to potential clients, tell them promptly and offer any other suitable information or help
Knowledge and understanding
You need to know and understand:
2.1 the type of business relationships you need to create with potential clients
2.2 the image your company wants to promote to customers
2.3 the difference between features and benefits
2.4 the features and benefits of the service you provide
2.5 how to talk to potential clients in a persuasive way about your

service

- 2.6 how to find out about competitors' services
- 2.7 how to compare competitors' services with yours, so that potential clients can understand how using your service would benefit them
- 2.8 how to identify suitable opportunities for approaching potential clients
- 2.9 how to approach potential clients in a way that creates a positive impression of you and your company and is likely to help create a business relationship
- 2.10 how to create a rapport quickly with prospective clients
- 2.11 the information you need to exchange with potential clients
- 2.12 why you need to keep any promises you make to potential clients, for example sending them information they have asked for
- 2.13 how to record information about potential clients so that you can use it effectively
- 2.14 why client confidentiality is important to the business relationship
- 2.15 relevant aspects of the data protection laws and company policy to do with client confidentiality

Unit 305

Provide a personalised sales and after-sales service to your retail clients

Level:	6
Credit value:	8
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	<p>Simulation is not allowed for any performance evidence within this unit.</p> <p>It is highly unlikely that this unit will be able to be observed therefore the evidence generated will come from professional discussion supported by statistics relating to performance and testimony from an Expert Witness to confirm the candidate's competence.</p>
Unit assessment:	Specialist Unit: If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.
Summary:	<p>This unit is for personal shoppers and is all about providing the personal shopping experience and building clients' loyalty to you and to the store.</p> <p>Firstly, it involves getting to know clients so that you can recommend and sell products according to clients' individual needs, preferences and budgets. Selling in this way is known as consultative selling or relationship selling, and involves developing a business relationship with clients so that they will trust you, take your advice and keep coming back to buy from you. To be able to provide a personalised service effectively you need an extensive knowledge of your store's products and services including seasonal trends and special promotions.</p> <p>The second aspect of the unit is concerned with building clients' loyalty by following up client consultations. This involves keeping client records up-to-date and using them to keep in touch with clients so that they remain aware of your service and interested in doing business with you. It also involves providing a service and keeping clients' trust</p>

by doing the things you have promised clients you will do, such as placing orders or contacting them when new items are available.

Learning outcome
1. Provide a personalised service to retail clients
Performance indicator
<p>You need to:</p> <ol style="list-style-type: none"> 1.1 use available information in the client records to help you prepare for consultations 1.2 before starting a consultation, check that the work area is clean and tidy and that all the equipment you need is to hand 1.3 quickly create a rapport with the client at the start of the consultation 1.4 talk and behave towards the client in ways that project the company image effectively 1.5 ask questions that encourage the client to tell you about their buying needs, preferences and priorities 1.6 where appropriate, tactfully check how much the client wants to spend 1.7 explain clearly to the client the features and benefits of the products or services you are recommending and relate these to the client's individual needs 1.8 identify suitable opportunities to sell additional or related products or services that are suited to the client's needs 1.9 make recommendations to the client in a confident and polite way and without pressurising them 1.10 pace client consultations so you make good use of your selling time while maintaining good relations with the client 1.11 meet your company's customer service standards in your dealings with the client
Knowledge and understanding
<p>You need to know and understand:</p> <ol style="list-style-type: none"> 1.1 what consultative selling is, and how this is different from other kinds of retail selling 1.2 your company's desired image and how to project this to clients 1.3 how to use information in client records to prepare for client visits 1.4 how to create and maintain a rapport with clients, both new and existing 1.5 the types of question to ask clients to find out about their buying needs, preferences and priorities 1.6 when and how to ask clients tactfully how much they want to spend 1.7 how to keep yourself informed about the brands and services you are expected to sell, including: <ul style="list-style-type: none"> • seasonal trends • new brands or services • promotions • stock levels • competitor comparisons • additional services such as store cards, gift wrapping or

	delivery
1.8	how to relate the features and benefits of products or services to the client's needs
1.9	how to identify suitable opportunities to sell additional or related products
1.10	how to make recommendations to clients in a way that encourages them to take your advice, without pressurising them
1.11	why you need to balance the need to make immediate sales with the need to maintain good business relations with the client, and how to do so
1.12	the company's customer service standards and how to apply these when providing a personalised service to clients

Learning outcome	
2. Provide an after-sales service to retail clients	
Performance indicator	
You need to:	
2.1	follow the company's procedures for keeping client records up-to-date
2.2	record client information accurately and store it in the right places in your company's system
2.3	keep client information confidential and share it only with people who have a right to it
2.4	keep to clients' wishes as to how and when you may contact them
2.5	follow your company's policy and procedures for contacting clients
2.6	where you cannot keep promises to clients, tell them promptly and offer any other suitable products or services
Knowledge and understanding	
You need to know and understand:	
2.1	why you need to keep client records up-to-date and store them correctly
2.2	company procedures for updating client records
2.3	company systems and procedures for recording and storing client information
2.4	relevant aspects of the data protection laws and company policy for client confidentiality
2.5	why you should keep to clients' wishes as to how and when you may contact them
2.6	why you need to keep your promises to clients

Level:	6
Credit value:	3
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit.
Summary:	<p>This unit is about your responsibility for maintaining the secure use of the till during trading hours. The unit refers to a single till and service area, but you should take this to mean all the tills and service areas you are responsible for at any one time.</p> <p>You contribute to keeping cash, staff and data secure, both by monitoring the service area and carrying out transactions and adjustments within the limits of your authority. You do this during trading hours, so you need to ensure that customers are not kept waiting any longer than necessary and that you project a positive image of your company at all times.</p>

Learning outcome
1. Monitor and support secure till use during trading hours
Performance indicator
<p>You need to:</p> <ol style="list-style-type: none"> 1.1 during trading hours, check the till and service area often enough to ensure that personal data is kept confidential 1.2 authorise till transactions and adjustments within the limits of your authority and in line with company procedures for: <ul style="list-style-type: none"> • customer service • security • stock control 1.3 refer till transactions and adjustments promptly to the right person when you cannot authorise these yourself 1.4 top up the change in the till in a timely fashion and in line with company security procedures 1.5 check the authorisation of anyone who draws cash or cash equivalents from the till during trading hours 1.6 prioritise your tasks so as to minimise customer waiting times and queue size

Knowledge and understanding

You need to know and understand:

- 1.1 the till and service area for which you are responsible
- 1.2 why it is important to keep personal data confidential
- 1.3 the data security risks which can arise at the till and how to minimise these
- 1.4 the types of till transactions and adjustments you are authorised to carry out
- 1.5 how to carry out the till transactions and adjustments for which you are responsible
- 1.6 who can authorise a transaction that is outside your level of authority, and how to contact that person
- 1.7 how to top up the change in the till, including company procedures for keeping cash and yourself secure in the process
- 1.8 how to monitor the till and service area whilst completing your other tasks
- 1.9 who is authorised to draw cash and cash equivalents from the till during trading hours

Unit 308

Monitor and help improve food safety in a retail environment

Level:	6
Credit value:	12
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit. The candidate may have undertaken formal food safety training that may contribute to the evidence for this unit.
Unit assessment:	Specialist Unit: If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.
Summary:	This unit is for you if you supervise staff who handle or prepare wrapped or unwrapped food, including food subject to temperature control. The unit is firstly about monitoring food safety in line with your company's food safety procedures. Secondly, the unit is about making a contribution to continuously improving food safety in your work area.

Knowledge and understanding which relates to the whole of this unit

You need to know and understand:

- 1.1 what the relevant food safety management principles are and why it is important to follow them
- 1.2 what critical control points, control points, critical limits and relevant variance are
- 1.3 why it is important to monitor critical control points and control points, and how to do so
- 1.4 your responsibilities under your organisation's food safety procedures, including the critical control points relating to your work activity
- 1.5 how to communicate responsibilities for food safety procedures to staff and make sure they understand these
- 1.6 how to make sure staff receive appropriate training to meet their food safety responsibilities

- 1.7 the impact of variance at critical control points and control points on food safety, public health and your organisation
- 1.8 the type and frequency of checks that you should perform to control food safety within your work activities, and how to obtain verification of those checks
- 1.9 the reporting procedures when control measures fail
- 1.10 the records required for controlling food safety and how to maintain them
- 1.11 how traceability works and why it is important to food safety
- 1.12 types and methods of corrective action to reduce, control or eliminate food safety hazards
- 1.13 why it is important to have food safety procedures in place
- 1.14 what continuous improvement is and why it is important to contribute to the improvement process

Learning outcome

1. Monitor food safety at critical control points

Performance indicator

You need to:

- 1.1 identify and monitor critical control points, which means you:
 - identify relevant food safety control measures
 - allocate and supervise food safety responsibilities
 - identify and meet staff training needs
 - complete all specified operational controls and checks at the set time frequency
 - keep accurate and complete records of checks
 - obtain verification for completed checks, following set procedures
- 1.2 troubleshoot, which means you:
 - take suitable corrective action with the appropriate degree of urgency when control measures fail
 - report to the appropriate person any procedures that are out of line with critical limits
 - seek expert advice and support for matters outside your own level of authority or expertise

Learning outcome

2. Contribute to continuous improvement of food safety

Performance indicator

You need to:

- 2.1 highlight areas for improvement, which means you:
 - identify and report any factors or issues that arise in your work activities which may affect the safety of food
 - identify and report any factors or issues within the environment, supplies or product which may affect the safety of food
- 2.2 contribute to improving food safety, which means you:
 - contribute to team meetings with ideas and suggestions to improve procedures or processes

- contribute to introducing new procedures and/or reviewing existing ones in order to improve food safety
- 2.3 interpret and use food safety management procedures, which means you:
- check that you understand and can use any new control measures that are introduced relating to food safety

Unit 308

Unit 308 Monitor and help improve food safety in a retail environment

Supporting information

Glossary

The glossary contains definitions of the terms used in unit 308. These definitions do not constitute range.

Control measures	Actions required to prevent or eliminate a food safety hazard or reduce it to an acceptable level.
Control point	A step in the food preparation process which can be controlled, but would <i>not</i> result in an unacceptable health risk if control was not exercised
Corrective action	The action to be taken when a critical limit is breached
Critical control point	A step in the food control or preparation process where you must deal with a food safety hazard by preventing it, removing it or reducing it to an acceptable level.
Critical limit	The minimum and maximum limits allowed in order to control a particular task or process
Food safety hazards	Something which may cause harm to the consumer and can be: <ul style="list-style-type: none">• microbiological (for example, bacteria, moulds, viruses)• chemical (for example, pesticides used on fruit and vegetables, chemicals used in cleaning or for pest control)• physical (for example, insects, parasites, glass, nails)• allergenic (for example, nuts, milk, eggs)
Food safety management	Putting into practice the policies, procedures, practices, controls and documentation that ensure that food is safe for consumers
Procedures	A series of clear steps or instructions on how to do things; rules. Some companies document their procedures formally in writing, and others simply have procedures that all staff understand and follow but which are not written down.
Training	Bringing an individual up to a desired level or standard of proficiency. This can be done by means of instruction or by formal training courses.
Variance	The difference between the planned or standard limits allowed and the actual values monitored

Verification	Using a selection of methods, procedures and tests to show and confirm that the system is operating in line with the plan
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Unit 309

Assist customers to obtain appropriate insurance

Level:	6
Credit value:	12
Endorsement by a sector or regulatory body:	This unit is endorsed by The Financial Skills Partnership the sector skills council representing the finance, accountancy and financial services sector.
Specific evidence requirement:	<p>Simulation is not allowed for any performance evidence within this unit.</p> <p>The FSA, in particular, the FSA Training and Competence Sourcebook states that some assessment of both knowledge and of practical application of knowledge and skills will be required when assessing employees as competent.</p>
Unit assessment:	<p>Specialist Unit: the assessment must be carried out by 'the approved person (as defined by FSA regulations)', or someone designated by the approved person.</p> <p>If the Verifier does not have the technical competence, expert support must be sought from a person with suitable experience, to confirm the verification decision.</p>
Summary:	<p>This unit is for you if you sell extended warranties on domestic electrical goods. The provision of insurance products by retailers is regulated by the Financial Services Authority (FSA) and therefore a key aspect of this unit is to understand and comply with FSA requirements relating to the sale of insurance. You also need to understand the relevant principles and concepts of insurance.</p> <p>The unit is also about four aspects of selling and administering extended warranties. Firstly, it involves identifying suitable products for individual customers and giving them accurate information on products you are authorised to deal with. Secondly, it is about calculating the costs of extended warranties and explaining these costs to customers. The third aspect involves helping customers complete their applications for extended warranties and providing customers with the necessary documentation. Finally, the unit involves helping customers to make claims under extended warranties they bought through your store.</p>

Knowledge and understanding which relates to the whole of this unit

You need to know and understand:

- 1.1 the principles and practice of insurance (an introductory knowledge only) including:
 - utmost good faith
 - insurable interest
 - indemnity
 - subrogation
 - contribution
 - risk as it relates to insurance
 - contract and agency
 - proximate cause
 - compulsory insurance
- 1.2 the legal and regulatory requirements relating to securing insurance products and arrangements, including:
 - an awareness of FSA rules and powers (for example Insurance Conduct of Business Rules)
 - your own and the company's responsibility for complying with all legislation including FSA rules, and the consequences of failing to comply
 - money laundering rules and cash limits
 - Data Protection Act (DPA)
 - consumer protection
 - financial promotions
 - crime prevention measures relating to insurance:
 - ABI data sharing project
 - guidelines on the exchange of information between the police, insurers and loss adjusters
 - acceptance criteria and guidelines for the reporting of suspected fraudulent insurance claims to the police
- 1.3 the limits of your own responsibility for dealing with insurance arrangements, complaints and claims

Learning outcome

2. Identify the customer's insurance needs

Performance indicator

You need to:

- 2.1 advise the customer of your status and your company's status in relation to the products you offer
- 2.2 accurately find out what the customer requires to meet his/her insurance needs
- 2.3 recognise any requests for product information that you are not authorised to deal with and promptly pass them to an appropriate authority

2.4	accurately complete and store all initial documentation in accordance with procedures
2.5	comply at all times with relevant legal and regulatory requirements
Knowledge and understanding	
You need to know and understand:	
2.1	the procedure for advising customers of your status and your company's status in relation to the products you offer
2.2	how to assist different types of customer: <ul style="list-style-type: none"> • retail/consumer/commercial • on the telephone, face-to-face • advised/non-advised basis
2.3	policies and procedures for obtaining and supplying information to customers, and keeping records of requests
2.4	when and how to pass requests for product information to a higher authority
2.5	the documentation that needs to be issued, and/or completed and stored, in durable medium, that may included: <ul style="list-style-type: none"> • status disclosure • demands and needs statements • key fact statement
2.6	legal and regulatory requirements relating to insurance products and their sale

Learning outcome	
3. Agree insurance policies with the customer to enable them to be appropriately insured	
Performance indicator	
You need to:	
3.1	identify the types of insurance products that can be offered to the customer that meet their needs
3.2	clearly and accurately describe the details of the product offered and provide a policy summary
3.3	provide details of exclusions and cancellation rights and complaints and claims procedures
3.4	where necessary, supply accurate written quotations for insurance cover in the required format
3.5	accurately calculate and confirm with the customer the premium due and arrange payment in accordance with procedures
3.6	where necessary, refer issues that arise during the arrangement of insurance to an appropriate authority
3.7	issue legible and accurate confirmation of cover where this is appropriate
3.8	accurately complete and store all necessary documentation in accordance with procedures
3.9	identify additional insurance services where appropriate and relevant to the needs of the customer
3.10	comply at all times with relevant legal and regulatory requirements
Knowledge and understanding	
You need to know and understand:	
3.1	how to identify the type of customer (retail/consumer or

	commercial)
3.2	how to identify the insurance products which best suit the customer
3.3	how to select different insurance products for different types of insurance needs and customer preferences, including: <ul style="list-style-type: none"> • types of insurance • types of cover • features and benefits of different types of insurance • terms and conditions of policies • exclusions and limitations on insurance cover • cancellation rights • duration of insurance cover • premiums and fees • complaints procedures • compensation schemes
3.4	how to prepare, present and record written and verbal quotes for insurance agreements
3.5	different methods of payment and their effect on total cost
3.6	cancellation of cover costs
3.7	when you must disclose commission
3.8	how to calculate the premium and any other associated fees if appropriate
3.9	your company's procedures for the handling of client money

Learning outcome
4. Process insurance applications
Performance indicator
<p>You need to:</p> <p>4.1 gather all necessary information to enable applications for insurance to proceed</p> <p>4.2 send documentation and other necessary information to the insurers, or others, within the time agreed</p> <p>4.3 where necessary, obtain further information from the customer where checks reveal inconsistencies or discrepancies in details supplied by the customer</p> <p>4.4 where problems occur with insurance applications, seek advice and assistance from an appropriate authority</p> <p>4.5 deal promptly with any complaints, refer issues to an appropriate authority and keep accurate records</p> <p>4.6 keep the customer informed of progress at all stages</p> <p>4.7 check and issue all documents to the customer within the time required</p> <p>4.8 make accurate and complete records at all stages and store them correctly in the customer file</p> <p>4.9 comply at all times with relevant legal and regulatory requirements</p>
Knowledge and understanding
<p>You need to know and understand:</p> <p>4.1 how and when to carry out credit checks</p> <p>4.2 how to recognise inconsistencies and discrepancies in information</p>

- and the correct action to take
- 4.3 common problems that occur with insurance applications and when you need to seek advice on how to deal with them or refer them
 - 4.4 policies and procedures for dealing with and recording complaints
 - 4.5 how to inform customers of decisions about insurance arrangements
 - 4.6 the information and documentation that is needed, in the required format and in durable medium, in order to progress insurance applications, which may include:
 - statement of price
 - demands and needs statements
 - key fact statement
 - proposal form
 - certificate of insurance
 - policy summary
 - policy booklet
 - policy schedule
 - 4.7 where and how to store completed documentation
 - 4.8 legal and regulatory requirements relating to processing insurance applications

Learning outcome
5. Assist customers with claims
Performance indicator
<p>You need to:</p> <ul style="list-style-type: none"> 5.1 where appropriate, disclose whether you are acting on behalf of an insurer in relation to a claim 5.2 give customers appropriate guidance, according to procedures, to help them to make a claim 5.3 gather all necessary information to allow a valid claim, or to direct the claim to the appropriate people 5.4 where necessary, complete accurately the required documentation to process the claim 5.5 where appropriate, inform the customer of the progress of the claim and any outcome 5.6 deal with complaints or pass them to the appropriate authority 5.7 if necessary, refer issues to an appropriate authority 5.8 make accurate and complete records at all stages and store them correctly 5.9 comply at all times with relevant legal and regulatory requirements
Knowledge and understanding
<p>You need to know and understand:</p> <ul style="list-style-type: none"> 5.1 when to disclose conflicts of interest and how to manage them 5.2 policies and procedures for giving guidance to customers on claims, and keeping appropriate records 5.3 policies and procedures for directing claims to the appropriate people 5.4 documentation that needs to be completed in order to process a claim 5.5 your company's complaints procedure 5.6 the role of the Financial Ombudsman Service 5.7 when and how to pass issues to a higher authority 5.8 policies and procedures for keeping and storing accurate records about claims 5.9 legal and regulatory requirements relating to claims

Unit 311

Maintain the availability of goods for sale to customers in a retail environment

Level:	6
Credit value:	11
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit.
Summary:	This unit is for team leaders responsible for organising and monitoring the display of goods. Firstly, the unit is about briefing colleagues about display requirements and supervising the assembly of displays. Secondly, the unit is about assessing the effectiveness of displays prepared by colleagues under your supervision. The third aspect of the unit is concerned with keeping stock replenished and accurately priced, and making suggestions for improving displays. You do not need specialist visual merchandising skills for this unit.

Learning outcome
1. Organise staff to display goods for retail sale
Performance indicator
You need to:
1.1 confirm the purpose of the display and any relevant requirements and standards and, where necessary, check them with the appropriate authority
1.2 clearly explain to staff the purpose of the display and any relevant requirements and standards
1.3 provide opportunities for staff to check they understand the requirements and standards of the display
1.4 check that staff prepare the display area and put the display together in a way that causes the least inconvenience to customers
1.5 provide constructive feedback to staff on their performance
1.6 check that the assembled display conforms to company requirements and standards
1.7 obtain permission from the appropriate authority to modify or change the display
1.8 monitor that information has been placed accurately and legally, and is chosen and positioned to promote sales effectively
1.9 keep complete, accurate and up to date records of displays

Knowledge and understanding

You need to know and understand:

- 1.1 how different types of display help the store to reach its sales targets
- 1.2 how you can position information so that it helps to promote sales
- 1.3 how the layout of the selling area affects sales
- 1.4 the legal requirements for pricing goods for sales
- 1.5 the company's standards for putting displays together, including standards for cleaning and preparation
- 1.6 how to work out what type and quantity of resources you need to set up displays
- 1.7 how to brief staff in a way that encourages their involvement
- 1.8 how to check the work of staff preparing and putting displays together and how to give feedback to staff on their performance
- 1.9 the security, health and safety requirements and procedures relating to displaying goods
- 1.10 the customer's legal rights and the company's legal duties and responsibilities in relation to the display of goods including descriptions of goods
- 1.11 how to check that the information in displays is accurate and legal
- 1.12 how to use different price marking methods and technologies

Learning outcome

2. Assess how effective displays are in a retail environment

Performance indicator

You need to:

- 2.1 identify what standards the display should meet
- 2.2 check displays against all the relevant standards to decide how effective they are
- 2.3 encourage staff to make helpful comments and identify changes that may make the display more appealing to customers
- 2.4 ask the right person for permission to make any changes that you cannot authorise yourself
- 2.5 give staff clear instructions and encouragement so that they can make any changes needed to the display
- 2.6 take prompt and suitable action to deal with any risks to security or health and safety that your assessment has revealed

Knowledge and understanding

You need to know and understand:

- 2.1 the standards you should apply when assessing how effective displays are
- 2.2 how to assess displays against the relevant standards
- 2.3 how to identify displays that are unsafe or not secure enough
- 2.4 how to correct displays that are unsafe or not secure enough
- 2.5 who can authorise changes in the display
- 2.6 how to involve staff in assessing and changing displays

Learning outcome
3. Keep products available and maintain their quality in a retail environment
Performance indicator
<p>You need to:</p> <ul style="list-style-type: none"> 3.1 collect and record accurate information on price changes 3.2 give accurate, up-to-date price information to the staff who need it 3.3 regularly check price marking and promptly sort out any pricing problems you spot 3.4 make sure that stock replenishment plans are up-to-date and realistic 3.5 deal with out-of-date or deteriorating stock in line with company policy and any relevant laws 3.6 involve staff in spotting potential improvements to the way stock is organised and presented 3.7 spot realistic and effective ways of improving how stock is organised and presented 3.8 get permission from the right person, where necessary, to improve the way stock is organised and presented 3.9 make sure that you maintain customer goodwill and staff morale while stock is being re-organised
Knowledge and understanding
<p>You need to know and understand:</p> <ul style="list-style-type: none"> 3.1 how to collect and record information about prices 3.2 how to check stock rotation and the quality of goods on display 3.3 what can happen to stock that is not stored correctly or renewed as needed 3.4 how to replenish and rotate stock and deal with sub-standard goods 3.5 how to check pricing and price marking, correct mistakes and change prices 3.6 why it is important to record price changes accurately

Level:	6
Credit value:	11
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit.
Summary:	This unit is about managing a team when you are not a full time team leader. For example, you might lead a team responsible for a special event, sales preparation, stock-taking or emergency situations. You are expected to manage the smooth running of the team's work. You need to understand and act within the limits of your responsibility when acting as team leader, and to ask your manager for advice whenever you need it. The unit does not require you to take responsibility for formally developing or disciplining team members.

Learning outcome
1. Help to manage a retail team
Performance indicator
<p>You need to:</p> <ul style="list-style-type: none"> 1.1 set an example for the team by following company procedures and policies at all times 1.2 check that team members are following company procedures and policies 1.3 take prompt and suitable action when team members are not following company procedures and policies 1.4 give clear information and instructions to your team 1.5 use methods suited to individual team members' levels of motivation and expertise, when encouraging them to complete tasks 1.6 recognise when team members need support 1.7 choose and apply suitable methods for supporting team members 1.8 praise good performance promptly and tell your manager about it 1.9 manage your own time so that you carry out both your management duties and your other duties 1.10 recognise when you should treat information as confidential and release it only to those who have a right to it 1.11 share work and privileges fairly between team members 1.12 act within the limits of your responsibility and authority

1.13 promptly ask the right person for advice when problems are beyond your responsibility, authority or expertise to resolve

Knowledge and understanding

You need to know and understand:

- 1.1 company procedures and policies relating to the work of your team and the way your team's daily activities are managed, including:
 - health and safety
 - security
 - staffing levels
 - absence reporting
 - timekeeping
 - personal appearance
 - handling customer complaints
- 1.2 laws and regulations relating to the products your team sells
- 1.3 why you should set an example to team members by following the company's procedures and policies at all times
- 1.4 how to check that team members follow the company's procedures and policies
- 1.5 what you must do when team members are not following the company's procedures and policies
- 1.6 how clear communication helps teams to work effectively
- 1.7 how to give instructions so that team members will readily understand them and feel motivated to follow them
- 1.8 why you need to be approachable as a team leader
- 1.9 different ways of motivating and encouraging staff, and how to choose which method to use
- 1.10 the kinds of support team members are likely to need, what kinds of support you can provide and how to do so
- 1.11 how to plan, prioritise and delegate so that you can fulfil your management duties as well as your other duties
- 1.12 the types of confidential information to which team leaders have access, and the importance of respecting confidentiality
- 1.13 why you must treat all team members fairly
- 1.14 the challenges involved in managing people who also know you as a friend or fellow team member, and techniques for resisting pressure from team members to abuse your responsibilities
- 1.15 the limits of your responsibility and authority when managing the team
- 1.16 who can help to sort out problems that are beyond your responsibility, authority or expertise
- 1.17 the kinds of information your manager needs from you, when it is needed and in what format

Unit 313

Help customers to choose alcoholic beverages in a retail store

Level:	6
Credit value:	6
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit.
Unit assessment:	Specialist Unit: If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.
Summary:	This unit is about knowing how to help customers to choose the alcoholic beverages that best match their requirements. This involves knowing how to find out what customers are looking for, how to match products to requirements and how to support your recommendations with relevant product information. You also need to know how to establish a rapport with customers and how to recognise opportunities to increase sales by recommending associated or additional products where appropriate. Strict laws apply to the sale of alcohol in stores in the UK and you need to comply at all times with these and your store's policies.

Learning outcome
1. Help customers to choose alcoholic beverages in a retail store
Performance indicator
You need to: <ul style="list-style-type: none">1.1 follow all relevant laws and your store's policies relating to the sale of alcoholic beverages1.2 when necessary, explain clearly and politely to customers the law and your store's policies relating to the sale of alcoholic beverages1.3 use effective questioning techniques to establish a rapport with customers and find out what they are looking for1.4 match products as closely as possible to customers' stated requirements, from the products available1.5 support your product recommendations with factually correct information which is likely to give customers confidence in your

	recommendations
1.6	compare and contrast products in ways that help customers choose the products that best meet their requirements
1.7	encourage customers to ask you questions and respond to their questions, comments and objections in ways that promote sales and goodwill
1.8	recognise and act on suitable opportunities to recommend to customers associated or additional products
1.9	constantly check the store for security and potential sales whilst helping customers
Knowledge and understanding	
You need to know and understand:	
1.1	the laws and the store's policies relating to the sale of alcoholic beverages
1.2	why you must follow the law and your store's policies for selling alcohol and what can happen to you and to the company if these are not followed
1.3	when and how to explain to customers the law and your store's policies for selling alcohol
1.4	how to establish a rapport with customers
1.5	the kinds of questions you need to ask customers in order to find out their requirements
1.6	where to find reliable information about the alcoholic content of the alcoholic beverages the store carries
1.7	the characteristics of different alcoholic beverages and how to match these to customers' requirements
1.8	how product information can give customers confidence in your product recommendations
1.9	how to decide which product features are relevant and how much detail the customer needs to help them choose products
1.10	effective ways of comparing and contrasting products for customers
1.11	why it is important to encourage customers to ask questions about products
1.12	how to respond to customers' questions in ways which promote sales and goodwill
1.13	how to recognise opportunities to recommend associated or additional products
1.14	why it is important to check the store for security and potential sales whilst helping customers

Unit 314

Enable customers to apply for credit and hire purchase facilities

Level:	6
Credit value:	12
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit. Where the application for credit involves additional insurance products being offered the FSA rules need to be adhered to.
Unit assessment:	Specialist Unit: If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.
Summary:	This unit is about three aspects of enabling customers to apply for credit and hire purchase facilities. The first involves agreeing with the customer how much they will pay as a deposit and working out the remaining balance including any interest. Secondly, the unit is about explaining to customers how your store's borrowing facilities work. Lastly, the unit involves processing applications for credit or hire-purchase facilities, including making any credit checks needed.

Learning outcome
1. Identify the retail customer's credit or hire-purchase requirements
Performance indicator
You need to: <ul style="list-style-type: none">1.1 agree with the customer the deposit they need to pay to qualify for borrowing facilities1.2 accurately work out the balance the customer needs to borrow so they can pay in full1.3 accurately work out the interest the customer will have to pay on the amount they have borrowed1.4 agree the customer's borrowing needs with them1.5 identify the options you can offer to the customer in relation to their borrowing needs

1.6	strictly follow legal requirements in relation to borrowing in all aspects of the transaction
Knowledge and understanding	
You need to know and understand:	
1.1	the range of borrowing facilities your company offers
1.2	the legal requirements for all aspects of the borrowing transaction
1.3	the terms and conditions that apply to specific borrowing facilities
1.4	how to work out the annual percentage rate (APR) and the difference between the annual percentage rate and simple interest
1.5	how to carry out credit checks and authorise credit applications

Learning outcome	
2. Advise retail customers on the features of borrowing facilities	
Performance indicator	
You need to:	
2.1	explain to the customer clearly and accurately the terms and conditions of the borrowing facility
2.2	check with the customer that they understand their responsibilities in relation to the borrowing facility
2.3	give customers the chance to check they understand and to ask questions about the borrowing facility
2.4	give customers chance to compare the benefit and value of different borrowing options where they are available
2.5	give the customer accurate written quotations together with all the information your company and the law say you must provide
2.6	deal with the customer politely and in a way that promotes goodwill and confidence in you and the store
Knowledge and understanding	
You need to know and understand:	
2.1	the terms and conditions of the borrowing facilities you are authorised to offer customers
2.2	why you must help customers to understand their responsibilities in relation to the borrowing facility
2.3	how to explain the terms and conditions of borrowing facilities in ways that different customers can understand
2.4	how to give customers the chance to ask questions and check they understand
2.5	how to prepare accurate written quotations from the information the customer has given
2.6	the information that your company and the law need you to provide to customers in relation to borrowing facilities, and where you can get this
2.7	how to talk to customers about borrowing facilities in ways that promote goodwill and confidence in you and the store

Learning outcome
3.1 Process credit or hire purchase applications on behalf of retail customers
Performance indicator
<p>You need to:</p> <ul style="list-style-type: none"> 3.1 accurately fill in all the documents needed for the credit application 3.2 complete the necessary credit checks and authorisation procedures 3.3 tactfully and politely ask for more information from the customer where credit checks reveal problems in any information given 3.4 keep customer information strictly confidential 3.5 refer problems with applications to the right person when you are not authorised to sort out problems yourself 3.6 tell the customer politely and clearly the decision about their application to access credit or borrow funds 3.7 tactfully give reasons to the customer when credit has been refused and give contact details so that the customer can query or complain about the decision 3.8 offer additional or associated services to the customer where appropriate 3.9 keep a suitable level of confidentiality when processing information about customers
Knowledge and understanding
<p>You need to know and understand:</p> <ul style="list-style-type: none"> 3.1 the documents you need for credit or hire-purchase applications, and how to fill them in accurately 3.2 how to check for problems with information about customers, and how to question the customer tactfully about any problems 3.3 the credit checks you need to carry out and how to do this 3.4 company procedures for authorising credit applications 3.5 legal requirements that apply to credit or hire purchase including data protection 3.6 reasons why credit applications may be refused 3.7 how to explain tactfully to customers that credit applications have been refused 3.8 additional or associated services you are authorised to offer to customers, and how to spot suitable opportunities to offer these 3.9 the limits of your authority to make judgements about credit applications 3.10 who can help sort out problems with processing applications

Unit 315

Monitor and evaluate the quality of service provided to your customers by external suppliers

Level:	6
Credit value:	9
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit. It is highly unlikely that this unit will be able to be observed therefore the evidence generated will come from professional discussion supported by significant activity and testimony from an Expert Witness to confirm the candidate's competence.
Summary:	This unit involves monitoring the service provided by external suppliers your store places customer orders with. This involves checking the progress of orders, keeping customers informed and getting customer feedback about the service provided. The unit is also about using customer feedback to decide how the service provided by external suppliers could be improved, and encouraging suppliers to make improvements.

Learning outcome
1. Monitor the quality of customer service provided by external suppliers to your retail customers
Performance indicator
You need to: <ul style="list-style-type: none">1.1 keep accurate and up-to-date records of the customer orders sent from your store to external suppliers1.2 regularly check the progress of orders to identify any difficulties or delays in dealing with them1.3 when service is delayed, get an explanation and tell your customer promptly and accurately what is happening1.4 accurately identify whether your customer is satisfied with the ordering service provided1.5 identify and accurately note any customer dissatisfaction with the ordering service and the causes of this1.6 tactfully explain when the problem is your customer's responsibility

1.7	clearly and accurately explain your customer's rights when the cause of the problem lies with the external supplier
1.8	regularly collect and accurately report, to those who need to know, feedback on the quality of suppliers' service
Knowledge and understanding	
You need to know and understand:	
1.1	which services external suppliers are giving your customers
1.2	the records you need to keep, including those the company needs
1.3	how to get feedback from customers
1.4	how to find out what is making customers dissatisfied
1.5	how to deal with dissatisfied customers in ways that promote goodwill and future sales

Learning outcome	
2. Evaluate and improve external suppliers' service to your retail customers	
Performance indicator	
You need to:	
2.1	assess information fairly to identify external suppliers' overall quality of service to customers
2.2	make evaluations which are consistent with the weight of evidence you have
2.3	use evaluations to develop realistic and cost-effective improvements to customer service
2.4	present the results of evaluations and suggestions for improvement clearly to external suppliers
2.5	invite external suppliers to suggest improvements they can make
2.6	accurately note, and report to your manager, agreements to improve customer service
2.7	make an accurate report to your manager, together with your recommendations for action, if suppliers do not improve service
Knowledge and understanding	
You need to know and understand:	
2.1	what the level of customer satisfaction is with individual suppliers
2.2	how to evaluate the quality of service given to customers
2.3	typical problems with services provided by external suppliers
2.4	how to present evaluations and suggestions to suppliers
2.5	what you can do when suppliers refuse to improve the quality of service

Unit 316

Demonstrate specialist products to customers in a retail environment

Level:	6
Credit value:	5
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit.
Summary:	This unit is about creating and making the most of opportunities to demonstrate specialist products to customers. Specialist products are ones for which many customers will welcome in-depth advice to help them to choose the products that best meet their needs.

Learning outcome
1. Demonstrate specialist products to customers in a retail environment
Performance indicator
You need to: <ul style="list-style-type: none">1.1 judge from customers' body language and immediate circumstances whether they are likely to respond positively to an invitation to watch or take part in a product demonstration1.2 organise product demonstrations in ways that ensure a smoothly-run, efficient demonstration that meets health and safety requirements1.3 give demonstrations that clearly show the customer the use and value of the product1.4 offer customers the opportunity to use the product themselves, when it is safe, legal and cost-effective to do so1.5 encourage customers to ask questions about the products being demonstrated1.6 respond to customers' comments and questions during demonstrations in ways that promote sales and goodwill1.7 take the necessary steps, within the limits of your own authority, to minimise any security risks associated with the demonstrations you carry out
Knowledge and understanding
You need to know and understand: <ul style="list-style-type: none">1.1 how demonstrations can help to promote and sell specialist products1.2 the elements of a positive customer experience in relation both to

your company and to the specialist products you demonstrate to customers

- 1.3 how customers' circumstances, such as who they are with or the time of day, affect their willingness to watch or take part in a product demonstration
- 1.4 how to recognise from customers' body language whether they are likely to respond positively to an invitation to watch or take part in a product demonstration
- 1.5 how to establish a rapport with individual customers and maintain this throughout a product demonstration
- 1.6 the health and safety requirements that apply to the demonstrations you give
- 1.7 what constitutes a smoothly-run and efficient product demonstration
- 1.8 how to keep customers interested during product demonstrations
- 1.9 how to respond to customers' comments and questions during demonstrations in ways that promote sales and goodwill
- 1.10 the steps you are authorised to take to minimise the security risks associated with product demonstrations

Unit 317

Organise the delivery of reliable customer service

Level:	6
Credit value:	6
Endorsement by a sector or regulatory body:	This unit is endorsed by CfA, the Sector Skills Council for Business Skills.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit. See Supporting Information.
Summary:	This unit is about how you deliver and maintain excellent and reliable customer service. Your role may or may not involve supervisory or management responsibilities but you are expected to take some responsibility for the resources and systems you use which support the service that you give. In your job you must be alert to customer reactions and know how they can be used to improve the service that you give. In addition, customer service information must be recorded to support reliable service.

Knowledge and understanding which relates to the whole of this unit

You need to know and understand:

- 1.1 organisational procedures for unexpected situations and your role within them
- 1.2 resource implications in times of staff sickness and holiday periods and your responsibility at these times
- 1.3 the importance of having reliable and fast information for your customers and your organisation
- 1.4 organisational procedures and systems for delivering customer service
- 1.5 how to identify useful customer feedback and how to decide which feedback should be acted on
- 1.6 how to communicate feedback from customers to others
- 1.7 organisational procedures and systems for recording, storing, retrieving and supplying customer service information
- 1.8 legal and regulatory requirements regarding the storage of data

Learning outcome
1. Plan and organise the delivery of reliable customer service
Performance indicator
<p>You need to:</p> <ul style="list-style-type: none"> 1.1 plan, prepare and organise everything you need to deliver services or products to different types of customers 1.2 organise what you do to ensure that you are consistently able to give prompt attention to your customers 1.3 reorganise your work to respond to unexpected additional workloads

Learning outcome
2. Review and maintain customer service delivery
Performance indicator
<p>You need to:</p> <ul style="list-style-type: none"> 2.1 maintain service delivery during very busy periods and unusually quiet periods 2.2 maintain service delivery when systems, people or resources have let you down 2.3 consistently meet your customers' expectations 2.4 balance the time you take with your customers with the demands of other customers seeking your attention 2.5 respond appropriately to your customers when they make comments about the products or services you are offering 2.6 alert others to repeated comments made by your customers 2.7 take action to improve the reliability of your service based on customer comments 2.8 monitor the action you have taken to identify improvements in the service you give to your customers

Learning outcome
3. Use recording systems to maintain reliable customer service
Performance indicator
<p>You need to:</p> <ul style="list-style-type: none"> 3.1 record and store customer service information accurately following organisational guidelines 3.2 select and retrieve customer service information that is relevant, sufficient and in an appropriate format 3.3 quickly locate information that will help solve a customer's query 3.4 supply accurate customer service information to others using the most appropriate method of communication

Unit 317

Organise the delivery of reliable customer service Organise the delivery of reliable customer service

Supporting information

Evidence collected in a realistic working environment or a work placement is not permissible for this unit.

Evidence must be collected over a sufficient period of time with different customers on different occasions for the assessor to be confident that you are competent.

You need to include evidence that you have dealt with a variety of customers including:

- customers who are easy to deal with
- customers who are difficult to deal with
- existing customers
- new customers.

Your evidence must show that you have:

- taken responsibility for your own actions in the delivery of customer service
- used spontaneous customer feedback to improve customer service
- used customer feedback that you have requested to improve customer service.

The system you use for recording data can be manual or electronic.

Level:	6
Credit value:	7
Endorsement by a sector or regulatory body:	This unit is endorsed by CfA, the Sector Skills Council for Business Skills.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit. See Supporting Information.
Summary:	To improve relationships with your customers you need to deliver consistent and reliable customer service. In addition, customers need to feel that you genuinely want to give them high levels of service and that you make every possible effort to meet or exceed their expectations. This encourages loyalty from external customers or longer-term service partnerships with internal customers. You need to be proactive in your dealings with your customers and to respond professionally in all situations. You need to negotiate between your customers and your organisation or department in order to find some way of meeting your customers' expectations. In addition you need to make extra efforts to delight your customers by exceeding their customer service expectations.

Knowledge and understanding which relates to the whole of this unit

You need to know and understand:

- 1.1 how to make best use of the method of communication chosen for dealing with your customers
- 1.2 how to negotiate effectively with your customers
- 1.3 how to assess the costs and benefits to your customer and your organisation of any unusual agreement you make
- 1.4 the importance of customer loyalty and/or improved internal customer relationships to your organisation

Learning outcome
1.1 Improve communication with your customers
Performance indicator
<p>You need to:</p> <ul style="list-style-type: none"> 1.1 select and use the best method of communication to meet your customers' expectations 1.2 take the initiative to contact your customers to update them when things are not going to plan or when you require further information 1.3 adapt your communication to respond to individual customers' feelings

Learning outcome
2.1 Balance the needs of your customer and your organisation
Performance indicator
<p>You need to:</p> <ul style="list-style-type: none"> 2.1 meet your customers' expectations within your organisation's service offer 2.2 explain the reasons to your customers sensitively and positively when their expectations cannot be met 2.3 identify alternative solutions for your customers either within or outside the organisation 2.4 identify the costs and benefits of these solutions to your organisation and to your customers 2.5 negotiate and agree solutions with your customers which satisfy them and are acceptable to your organisation 2.6 take action to satisfy your customers with the agreed solution when balancing their needs with those of your organisation

Learning outcome
3.1 Exceed customer expectations to develop the relationship
Performance indicator
<p>You need to:</p> <ul style="list-style-type: none"> 3.1 make extra efforts to improve your relationship with your customers 3.2 recognise opportunities to exceed your customers' expectations 3.3 take action to exceed your customers' expectations within the limits of your own authority 3.4 gain the help and support of others to exceed your customers' expectations

Unit 318

Improve the customer relationship Improve the customer service relationship

Supporting information

Evidence collected in a realistic working environment or a work placement is not permissible for this unit.

Evidence must be collected over a sufficient period of time with different customers on different occasions for the assessor to be confident that you are competent.

Your evidence must include examples of using:

- organisational procedures
- exceptions to standard practice that are legal and benefit your organisation.

You need to provide evidence that you have dealt with customers who:

- have different needs and expectations
- appear angry or confused
- behave unusually.

Unit 319

Work with others to improve customer service

Level:	6
Credit value:	8
Endorsement by a sector or regulatory body:	This unit is endorsed by CfA, the Sector Skills Council for Business Skills.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit. See Supporting Information.
Summary:	Teamwork is a key component of delivering and improving excellent customer service. The people you work with to improve customer service may include one or more of the following: team members; colleagues; suppliers; service partners; supervisors; managers; team leaders. The delivery of excellent customer service depends on your skills and those of others. It involves communicating with each other and agreeing how you can work together to give a more effective service. You need to work together positively. You must also monitor your own and the team's performance and change the way you do things if that improves customer service. This unit is about how you develop a relationship with others to improve your customer service performance.

Knowledge and understanding which relates to the whole of this unit

You need to know and understand:

- 1.1 who else is involved either directly or indirectly in the delivery of customer service
- 1.2 the roles and responsibilities of others in your organisation
- 1.3 the roles of others outside your organisation who have an impact on your services or products
- 1.4 what the goals or targets of your organisation are in relation to customer service and how these are set
- 1.5 how your organisation identifies improvements in customer service

Learning outcome
1. Improve customer service by working with others
Performance indicator
<p>You need to:</p> <ul style="list-style-type: none"> 1.1 contribute constructive ideas for improving customer service 1.2 identify what you have to do to improve customer service and confirm this with others 1.3 agree with others what they have to do to improve customer service 1.4 co-operate with others to improve customer service 1.5 keep your commitments made to others 1.6 make others aware of anything that may affect plans to improve customer service

Learning outcome
2. Monitor your own performance when improving customer service
Performance indicator
<p>You need to:</p> <ul style="list-style-type: none"> 2.1 discuss with others how what you do affects customer service performance 2.2 identify how the way you work with others contributes towards improving customer service

Learning outcome
3. Monitor team performance when improving customer service
Performance indicator
<p>You need to:</p> <ul style="list-style-type: none"> 3.1 discuss with others how teamwork affects customer service performance 3.2 work with others to collect information on team customer service performance 3.3 identify with others how customer service teamwork could be improved 3.4 take action with others to improve customer service performance

Unit 319

Work with others to improve customer service Work with others to improve customer service

Supporting information

Evidence collected in a realistic working environment or a work placement is not permissible for this unit.

Evidence must be collected over a sufficient period of time with different customers on different occasions for the assessor to be confident that you are competent.

Your evidence must include examples of agreeing customer service roles and responsibilities which are:

- part of your own role
- part of other people's roles

You must provide evidence that you have worked with two of these groups of people:

- team members or colleagues
- suppliers or service partners
- supervisors, team leaders or managers.

Your evidence must show that your work with others involves communication by two of these methods as expected within your job role:

- face to face
- in writing
- by telephone
- using text messages
- by e-mail
- using the internet (including social networking)
- using an intranet.

Level:	6
Credit value:	6
Endorsement by a sector or regulatory body:	This unit is endorsed by CfA, the Sector Skills Council for Business Skills.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit. See Supporting Information.
Summary:	Your job involves delivering and organising excellent customer service. However good the service provided, some of your customers will experience problems and you will spot and solve other problems before your customers even know about them. This unit is about the part of your job that involves solving immediate customer service problems. It is also about changing systems to avoid repeated customer service problems. Remember that some customers judge the quality of your customer service by the way that you solve customer service problems. You can impress customers and build customer loyalty by sorting out those problems efficiently and effectively. Sometimes a customer service problem presents an opportunity to impress a customer in a way that would not have been possible if everything had gone smoothly.

Knowledge and understanding which relates to the whole of this unit

You need to know and understand:

- 1.1 organisational procedures and systems for dealing with customer service problems
- 1.2 organisational procedures and systems for identifying repeated customer service problems
- 1.3 how the successful resolution of customer service problems contributes to customer loyalty with the external customer and improved working relationships with service partners or internal customers
- 1.4 how to negotiate with and reassure customers while their problems are being solved

Learning outcome
1. Solve immediate customer service problems
Performance indicator
<p>You need to:</p> <ul style="list-style-type: none"> 1.1 respond positively to customer service problems following organisational guidelines 1.2 solve customer service problems when you have sufficient authority 1.3 work with others to solve customer service problems 1.4 keep customers informed of the actions being taken 1.5 check with customers that they are comfortable with the actions being taken 1.6 solve problems with service systems and procedures that might affect customers before they become aware of them 1.7 inform managers and colleagues of the steps taken to solve specific problems

Learning outcome
2.1 Identify repeated customer service problems and options for solving them
Performance indicator
<p>You need to:</p> <ul style="list-style-type: none"> 2.1 identify repeated customer service problems 2.2 identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option 2.3 work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of your organisation

Learning outcome
3. Take action to avoid the repetition of customer service problems
Performance indicator
<p>You need to:</p> <ul style="list-style-type: none"> 3.1 obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated 3.2 action your agreed solution 3.3 keep your customers informed in a positive and clear manner of steps being taken to solve any service problems 3.4 monitor the changes you have made and adjust them if appropriate

Unit 320

Monitor and solve customer service problems Monitor and solve customer service problems

Supporting information

Evidence collected in a realistic working environment or a work placement is permissible for this unit.

Evidence must be collected over a sufficient period of time with different customers on different occasions for the assessor to be confident that you are competent.

Your evidence must include examples of problems which are:

- brought to your attention by customers
- are identified first by you and/or by a colleague.

The problems included in your evidence must include examples of a:

- difference between customer expectations and what is offered by your organisation
- problem resulting from a system or procedure failure
- problem resulting from a shortage of resources or human error.

You must show that you have considered the options of solving problems from the point of view of:

- your customer
- the potential benefits to your organisation
- the potential risks to your organisation.

You must provide evidence that you have made use of options that:

- follow organisational procedures or guidelines
- make agreed and authorised exceptions to usual practice.

Level:	6
Credit value:	11
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	<p>It is expected that simulation will be used to gather evidence for taking action to deal with or contain security risks, threats & breaches and incidents of theft.</p> <p>This unit can be achieved in isolation of other units. However evidence for this unit will be generated holistically whilst the candidate is working towards competence in their selected units for the qualification. The evidence should take into account specialist training for evacuation.</p>
Summary:	<p>This unit is about two aspects of your responsibility for keeping the store secure. Firstly, it is about monitoring and maintaining the security of people, property, premises and cash as part of your daily routine. As well as personally checking the security of the work area and sorting out any problems you identify, you need to make sure that staff are clear about their own responsibilities for maintaining security and that they understand the security procedures they must follow.</p> <p>The second part of the unit is about your responsibility for monitoring levels of stock, equipment, cash and cash equivalents and identifying and investigating any losses. It also involves drawing conclusions about how wastage and losses can be prevented in future, taking preventive measures and training staff to help reduce wastage and losses as far as possible.</p>

Learning outcome
1. Put procedures into practice to maintain security in a retail environment
Performance indicator
<p>You need to:</p> <p>1.1 monitor the work area often enough to identify possible problems with security</p>

1.2	identify problems with security and deal with them promptly, legally and in line with company requirements
1.3	brief and update staff clearly and often enough about security procedures and their responsibilities for maintaining security
Knowledge and understanding	
You need to know and understand:	
1.1	the security procedures to put into practice when opening, operating and closing your retail unit
1.2	the security threats most likely to happen in a retail unit
1.3	the company's policies for responsibility for security
1.4	different methods of briefing staff about security arrangements, and when it is appropriate to use each method
1.5	who has authority to stop and search staff and customers and how to contact the relevant authorities

Learning outcome	
2. Monitor and investigate losses in a retail environment	
Performance indicator	
You need to:	
2.1	monitor levels of stock, equipment, cash and cash equivalents thoroughly and often enough, using methods that are consistent with security policy and procedures
2.2	identify losses, record them accurately and investigate their causes promptly
2.3	identify and investigate ways of preventing wastage and loss and put them into practice
2.4	evaluate loss control thoroughly and accurately, using valid and reliable information
2.5	explain clearly to staff the nature and extent of wastage and losses, the problems caused by wastage and losses and how staff can help to reduce wastage and losses
Knowledge and understanding	
You need to know and understand:	
2.1	the company's security policy and procedures
2.2	procedures for identifying and recording losses
2.3	the company's investigation procedures and its definition of unacceptable losses
2.4	how unacceptable losses are likely to happen in a retail unit
2.5	items most likely to be at risk in the retail unit
2.6	the purpose of loss-control and stock taking systems
2.7	different strategies for preventing wastage and loss and when to use each one
2.8	how to check loss evaluations

Unit 328

Contribute to the continuous improvement of retail operations

Level:	6
Credit value:	10
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	<p>Simulation is not allowed for any performance evidence within this unit.</p> <p>It is highly unlikely that this unit will be able to be observed therefore the evidence generated will come from professional discussion supported by oral reports of real achievements and testimony from an Expert Witness to confirm the candidate's competence</p>
Summary:	<p>This unit is about helping your store to improve the way it operates, so that you or they can achieve or improve on sales targets and standards of service. You will need to have a thorough knowledge of day-to-day operations in your area of responsibility and be able spot things that could be improved and suggest practical and cost effective ways of improving them.</p> <p>The unit is also about presenting your recommendations persuasively to management. Finally, you need to put improvements into practice. This involves working with other people and sometimes experiencing their resistance to new ways of doing things. As a result, you need to communicate your plans persuasively, support staff through the change and demonstrate your own commitment to the change.</p>

Learning outcome
1. Identify opportunities for solving problems and improving retail operations
Performance indicator
You need to:
1.1 get accurate, up-to-date information from relevant sources about operations you are responsible for
1.2 accurately identify the causes of problems where operations are not meeting quality standards or sales targets
1.3 clearly and accurately identify the scope for further development

	where operations are achieving quality standards and sales targets
1.4	accurately assess possible improvements to see if they are practical, consistent with company policy and style, and easy to put into practice
1.5	identify the ideas that offer the greatest benefits for the organisation and its customers

Knowledge and understanding

You need to know and understand:

- 1.1 the company's standards for customer service
- 1.2 the sales targets your unit is expected to reach
- 1.3 company policies, procedures and computerised systems affecting your work
- 1.4 the main characteristics of the company's customer base and products or services
- 1.5 different sources of facts and opinions about operational performance and how useful each one is
- 1.6 common causes of failure to achieve quality standards and sales targets
- 1.7 how to identify aspects of customer service and sales that could be improved
- 1.8 how to generate ideas for improving customer service and sales
- 1.9 how to evaluate the benefits of potential improvements and how urgent they are
- 1.10 how to work out what resources you would need to put improvements into practice
- 1.11 how to weigh the costs of your improvements against the benefits

Learning outcome

2.1 Recommend ways of improving retail operations

Performance indicator

You need to:

- 2.1 offer recommendations to management that are clear, concise, in a suitable format and supported by relevant information
- 2.2 clearly and honestly acknowledge recommendations that are based on suggestions from other people
- 2.3 clearly explain the benefits the recommended improvements could bring and the resources needed to put them into practice
- 2.4 discuss recommendations with the relevant decision makers

Knowledge and understanding

You need to know and understand:

- 2.1 how to present your recommendations to management clearly, concisely and in a suitable format
- 2.2 the types of questions and concerns management are likely to have when considering your recommendations, and how to handle these
- 2.3 why it is important to encourage staff and colleagues to suggest ideas for improvement, and why it is important to make sure they get the credit if their ideas are put into practice

Learning outcome
3.1 Contribute to putting improvements in retail operations into practice
Performance indicator
<p>You need to:</p> <p>3.1 explain plans to staff in a way which encourages understanding and involvement</p> <p>3.2 give appropriate support, encouragement, advice and training to members of staff for as long as they need it</p> <p>3.3 promptly ask for appropriate advice and support when you have problems putting improvements into practice</p> <p>3.4 consistently show staff by your behaviour that you are committed to achieving the benefits of the improvement</p>
Knowledge and understanding
<p>You need to know and understand:</p> <p>3.1 why it is important for staff to understand the purpose and intended benefits of improvements</p> <p>3.2 different ways of explaining plans to staff, and how to decide which one to use</p> <p>3.3 how your manner and behaviour while explaining improvements can affect your staff's response to plans</p> <p>3.4 why it is important to show enthusiasm and lead by example when putting improvements into practice</p> <p>3.5 how and why different people will need different levels of support, encouragement, advice and training to put improvements into practice</p> <p>3.6 how to identify problems with putting improvements into practice and who to ask for advice and support</p>

Level:	6
Credit value:	9
Endorsement by a sector or regulatory body:	This unit is endorsed by CfA, the Sector Skills Council for Business Skills.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit. See Supporting Information.
Summary:	<p>This unit is about developing working relationships with colleagues, within your own organisation and within other organisations, that are productive in terms of supporting and delivering your work and that of the overall organisation.</p> <p>‘Colleagues’ are any people you are expected to work with, whether they are at a similar position or in other positions, including your manager.</p> <p>The NOS in this unit are from the Management and Leadership suite of NOS, overseen by CfA Business Skills @ Work.</p>

Learning outcome
1.1 Develop productive working relationships with colleagues
Performance indicator
<p>You need to:</p> <ul style="list-style-type: none"> 1.1 establish working relationships with all colleagues who are relevant to the work being carried out 1.2 recognise, agree and respect the roles and responsibilities of colleagues and, particularly in situations of matrix management, their managers’ requirements 1.3 understand and take account of the priorities, expectations, and authority of colleagues in decisions and actions 1.4 create an environment of trust and mutual respect where you have no authority, or shared authority, over those you are working with 1.5 understand difficult situations and issues from your colleague’s perspective and provide support, where necessary, to move things forward 1.6 fulfil agreements made with colleagues and let them know 1.7 advise colleagues promptly of any difficulties or where it will be impossible to fulfil agreements 1.8 identify and sort out conflicts of interest and disagreements with

<p>colleagues in ways that minimise damage to work being carried out</p> <p>1.9 exchange information and resources with colleagues to make sure that all parties can work effectively</p> <p>1.10 provide feedback to colleagues on their performance and seek feedback from colleagues on your own performance in order to identify areas for improvement</p>
<p>Knowledge and understanding</p> <p>You need to know and understand:</p> <p>1.1 the benefits of developing productive working relationships with colleagues</p> <p>1.2 the importance of creating an environment of trust and mutual respect where you have no authority, or shared authority, over those you are working with</p> <p>1.3 the importance of understanding difficult situations and issues from your colleague's perspective and providing support, where necessary, to move things forward</p> <p>1.4 principles of effective communication and how to apply them in order to communicate effectively with colleagues</p> <p>1.5 how to identify disagreements with colleagues and the techniques for sorting them out</p> <p>1.6 how to identify conflicts of interest with colleagues and the measures that can be used to manage or remove them</p> <p>1.7 how to take account of diversity and inclusion issues when developing working relationships with colleagues</p> <p>1.8 the importance of exchanging information and resources with colleagues</p> <p>1.9 how to get and make use of feedback on your performance from colleagues</p> <p>1.10 how to provide colleagues with useful feedback on their performance</p> <p>Industry/sector specific knowledge and understanding</p> <p>1.11 regulations and codes of practice that apply in the industry or sector</p> <p>1.12 standards of behaviour and performance in the industry or sector</p> <p>1.13 working culture of the industry or sector</p> <p>Context specific knowledge and understanding</p> <p>1.14 current and future work being carried out</p> <p>1.15 colleagues who are relevant to the work being carried out, their work roles and responsibilities</p> <p>1.16 processes within the organisation for making decisions</p> <p>1.17 line management responsibilities and relationships within the organisation</p> <p>1.18 the organisation's values and culture</p> <p>1.19 power, influence and politics within the organisation</p> <p>1.20 standards of behaviour and performance expected in the organisation</p> <p>1.21 information and resources that different colleagues might need</p> <p>1.22 agreements with colleagues</p>

Behaviours which underpin effective performance
<p>You need to:</p> <ul style="list-style-type: none">2.1 present information clearly, concisely, accurately and in ways that promote understanding2.2 seek to understand people's needs and motivations2.3 make time available to support others2.4 clearly agree what is expected of others and hold them to account2.5 work to develop an atmosphere of professionalism and mutual support2.6 model behaviour that shows respect, helpfulness and co-operation2.7 keep promises and honour commitments2.8 consider the impact of your own actions on others2.9 say 'no' to unreasonable requests2.10 show respect for the views and actions of others

Unit 329

Develop productive working relationships with colleagues

Supporting information

Possible sources of evidence for this unit are:

- (a) Records of activities and agreements with work colleagues that you have completed successfully:
 - notes, minutes or other records of formal and informal meetings with colleagues relating to agreements for action by you and your performance in relation to these agreements
 - e-mails, memos and other correspondence with colleagues relating to actions you have agreed to undertake and your performance in relation to these agreements
 - personal statements (reflections on the nature and effectiveness of your relationships with work colleagues and your fulfilment of your commitments to them)
 - witness statements (comments by colleagues on the nature and effectiveness of your relationships with them and your fulfilment of your commitments to them).
- (b) Records of relationship difficulties or conflicts at work that you have successfully addressed and feedback you have given and received:
 - notes, minutes or other records of formal and informal meetings with colleagues relating to relationship difficulties or conflicts
 - e-mails, memos and other correspondence with colleagues relating to relationship difficulties or conflicts
 - notes or other records of verbal feedback and copies of memos, e-mails and letters you have sent in which you have given feedback to colleagues
 - notes or other records of verbal feedback and copies of memos, e-mails and letters you have received in which colleagues have given feedback to you
 - personal statements (reflections on your ability to deal effectively with relationship difficulties or conflicts)
 - witness statements (comments by colleagues on your ability to deal effectively with relationship difficulties or conflicts).

Unit 401

Organise the receipt and storage of goods in a retail environment

Level:	7
Credit value:	11
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit.
Summary:	This unit is firstly about organising staff to receive goods, for example when preparing for seasonal intake of stock. Secondly, the unit involves organising storage facilities and training and supervising staff in the use of the storage system.

Learning outcome
1. Organise staff to receive and check incoming deliveries in a retail environment
Performance indicator
You need to: <ul style="list-style-type: none">1.1 gather enough competent staff and brief them well enough before deliveries are received1.2 make sure that the area for receiving goods is prepared and that you have enough storage space for the delivery1.3 check that deliveries are unloaded safely and securely1.4 make sure that goods are promptly checked against requirements1.5 make sure that delivery records are complete and accurate and processed promptly1.6 use delivery records to check that each supplier has met your company's service needs1.7 spot problems with deliveries and sort them out properly
Knowledge and understanding
You need to know and understand: <ul style="list-style-type: none">1.1 how to prepare to receive and handle different types of goods1.2 procedures for receiving goods, including dealing with incorrect, damaged and late deliveries1.3 which staff are involved in or are affected by a delivery schedule and the information they need to receive goods efficiently1.4 the company's standards for acceptable goods1.5 why incoming goods must be checked against requirements straight after unloading

1.6	recording and control system including procedures for checking goods received
1.7	safety and security procedures for receiving goods

Learning outcome
2. Organise and maintain storage facilities in a retail environment
Performance indicator
<p>You need to:</p> <p>2.1 organise storage facilities to take account of day-to-day work, safety requirements and the need to keep goods secure and in a saleable condition</p> <p>2.2 give staff accurate, up-to-date information and suitable training so they can use the storage system securely, safely and in line with relevant legal requirements</p> <p>2.3 give staff clear roles and responsibilities for storing and moving goods and check they understand these roles and responsibilities</p> <p>2.4 develop and update plans to cope with unforeseen storage problems</p> <p>2.5 check regularly that staff are storing and moving goods competently, safely, securely and in line with relevant legal requirements</p> <p>2.6 keep complete, accurate and up-to-date stock records that can be found easily by everyone who needs them</p>
Knowledge and understanding
<p>You need to know and understand:</p> <p>2.1 how effective storage systems contribute to reducing stock loss</p> <p>2.2 how to work out what storage facilities are needed for goods on order</p> <p>2.3 how to protect goods from various causes of deterioration and damage</p> <p>2.4 how to work out suitable storage layouts and solve storage problems efficiently, safely and securely</p> <p>2.5 how to run the stock recording and controlling systems efficiently and accurately, including using them to monitor and record stock loss</p> <p>2.6 the legal requirements for storing stock, including health and safety requirements</p>

Learning outcome
3. Check the storage and care of stock in a retail environment
Performance indicator
<p>You need to:</p> <p>3.1 keep up a routine for checking storage facilities and stock</p> <p>3.2 carry out spot checks of storage facilities and stock at suitable intervals</p> <p>3.3 make sure staff have the information and training they need to spot stock that is out of date or at risk of deteriorating, and to deal with it in line with legal and company requirements</p>

- 3.4 check the storage and movement of stock to make sure that stock is reaching the shop floor as it is needed
- 3.5 evaluate the storage, care and movement of stock and find ways of running storage and movement systems more profitably

Knowledge and understanding

You need to know and understand:

- 3.1 when and how to check stock and storage, including both routine and spot checks
- 3.2 legal and company requirements for removing out-of-date stock
- 3.3 the company's requirements for storing and moving stock, and how to check that these requirements are being met
- 3.4 how to work out if ideas for improving the ways stock is stored and moved are likely to be profitable
- 3.5 the causes of stock deterioration and damage and how these affect products
- 3.6 the company's requirements and quality standards for storage
- 3.7 the information colleagues need to be able to use the storage system effectively
- 3.8 company policy and procedures for protecting goods that are at risk of damage or deterioration
- 3.9 the company's systems and procedures for moving and storing stock

Unit 402

Audit stock levels and stock inventories in a retail environment

Level:	7
Credit value:	6
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit.
Summary:	This unit involves organising an audit, managing the audit team and preparing an audit report. The audit team may consist of people who don't normally work together, and you need not necessarily be a team leader in your day-to-day work.

Learning outcome
1. Put an audit programme into practice in a retail environment
Performance indicator
You need to: <ul style="list-style-type: none">1.1 find out and make sure you understand when to carry out an audit, why it is needed, what it should cover and who needs the audit report1.2 find out how the report should be laid out and the level of detail needed1.3 find out what resources are available to carry out the audit1.4 spot any problems that are likely to prevent you from carrying out the audit effectively in the time available, and sort them out before you start the audit1.5 choose staff to help with the audit, check their availability and give responsibilities to each of them1.6 brief your audit team so that they know what their responsibilities are during the audit, and how to carry out those responsibilities1.7 plan the work of the audit team so you make sure it is accurate and will cause as little disruption as possible to normal work1.8 check on the audit team's progress at suitable intervals and help them to sort out any problems they may be having in completing the audit
Knowledge and understanding
You need to know and understand: <ul style="list-style-type: none">1.1 why it is important to audit levels of stock inventories1.2 how often you need to carry out audits

- 1.3 the information held in the stock inventory and how to access it
- 1.4 how to interpret information and correct mistakes in the stock inventory
- 1.5 the types of situation that can make it difficult to carry out an effective audit in the time available, and how to prevent them
- 1.6 the resources you need to be able to carry out an audit
- 1.7 when and how to tell colleagues that an audit is to take place, and how it is likely to affect colleagues' work
- 1.8 how to choose people to help you with the audit and give them responsibilities
- 1.9 how to explain to your audit team what their responsibilities are during the audit and how you want these responsibilities to be carried out
- 1.10 how to check on the progress of the audit

Learning outcome

- 2. Report the findings of a retail stock audit

Performance indicator

You need to:

- 2.1 organise your findings so that you can easily spot any problems
- 2.2 spot problems and note them clearly for investigation
- 2.3 work out which problems are most important and should be investigated first
- 2.4 investigate problems methodically and sort them out as far as you can within the scope of the audit and with the resources available
- 2.5 prepare your final report in the layout needed and include comments on any problems which still exist
- 2.6 give or send your report to the people who need to see it, so that each person receives it on time

Knowledge and understanding

You need to know and understand:

- 2.1 how to organise audit findings so that problems can be easily identified
- 2.2 methods for spotting problems in audit findings
- 2.3 the types of problem that can happen and how to sort them out
- 2.4 the layout needed for the audit report
- 2.5 who needs to see the report
- 2.6 how to distribute the report so that each person receives it on time

Unit 403

Source required goods and services in a retail environment

Level:	7
Credit value:	10
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit.
Summary:	This unit is suitable for you if you order stock for a small, independent store and you are responsible for choosing the store's suppliers as well as ordering stock directly from them. The unit involves working out what needs replenishing and choosing which suppliers to use. It also involves ordering stock, checking that the right stock is delivered on time, and evaluating supplier's performance.

Learning outcome
1. Choose suppliers and order stock for retail sale
Performance indicator
You need to: <ul style="list-style-type: none">1.1 check the stock records at suitable intervals and spot which stock needs replenishing1.2 follow a suitable routine for asking colleagues if they expect to have any special orders1.3 compare purchase requisitions to spot items you can order together1.4 use the purchasing records to find out who the regular suppliers have been, if any1.5 choose suitable suppliers to use, taking account of stock availability, prices, delivery times and the extent to which the supplier's practices are compatible with your company's sustainability policy1.6 order items accurately, promptly and from suitable suppliers1.7 accurately work out the total cost of an order1.8 keep complete, accurate and up-to-date purchasing records1.9 store purchasing records so that they can be easily found by the people who need them

Knowledge and understanding

You need to know and understand:

- 1.1 the types of goods the company normally needs
- 1.2 how to use the stock records to find out what needs to be ordered
- 1.3 the suppliers currently being used
- 1.4 the suppliers who have been used in the past and why they are no longer being used
- 1.5 how to find possible new suppliers and check whether they are suitable
- 1.6 company policy for choosing suppliers, including relevant aspects of your company's sustainability policy
- 1.7 what makes a legally binding contract
- 1.8 why you need to check suppliers' terms and conditions
- 1.9 company procedures for placing orders
- 1.10 company procedures for keeping records of orders

Learning outcome

2. Check and evaluate the performance of suppliers of stock for retail sale

Performance indicator

You need to:

- 2.1 promptly match deliveries with orders so you can spot overdue items
- 2.2 spot items which are overdue and promptly contact the supplier about them
- 2.3 tell colleagues promptly if their orders will not be fulfilled on time and tell them what choices they have
- 2.4 follow procedures for returning goods and getting them replaced
- 2.5 check the quality, price and times of deliveries against the company's requirements
- 2.6 ask colleagues for comments about the quality and delivery times of items received from suppliers
- 2.7 provide accurate comments to suppliers on the level of service they provide

Knowledge and understanding

You need to know and understand:

- 2.1 company systems and procedures for returning goods
- 2.2 the company's legal rights as a buyer
- 2.3 company policy for paying creditors, and who to consult in the accounts department if a supplier suspends the account
- 2.4 the records your company keeps about suppliers' performance and how to find and use them
- 2.5 who in your company can comment on the quality and delivery time of goods or services received, and when and how to ask for their comments
- 2.6 how to complain to suppliers
- 2.7 how to respond positively when colleagues complain to you about the speed or quality of suppliers' performance

Unit 404

Plan, monitor and adjust staffing levels and schedules in a retail environment

Level:	7
Credit value:	11
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit.
Unit assessment:	Specialist Unit: If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.
Summary:	<p>This unit is about working out how many staff need to be on duty in the store to maintain the levels of customer service and profitability needed.</p> <p>You need to produce plans and schedules that take account of all the relevant factors and that are easy to understand and use. You also need to collect, analyse and evaluate information about progress towards work targets, and make justifiable recommendations for changes in staffing.</p>

Learning outcome
1. Plan staffing levels and prepare work schedules for a retail team
Performance indicator
You need to:
1.1 produce staffing plans and schedules that cover all operational needs and take account of operational limits
1.2 produce staffing plans and schedules that include accurate numbers and realistic levels of skill, work allocation, places where people will work and start and finish times
1.3 schedule hours of work that keep to relevant laws, company policy and contracts of employment
1.4 produce plans that are easy for the relevant people to understand and use
1.5 include realistic emergency plans to cope with abnormal situations

Knowledge and understanding

You need to know and understand:

- 1.1 why staffing plans are needed
- 1.2 relevant laws, company policy and contract terms and conditions which affect the hours that staff must work
- 1.3 the relationship between staffing plans and work targets
- 1.4 how to work out staffing requirements
- 1.5 how to produce and present staffing plans in a form suitable for the needs of the relevant people
- 1.6 how to schedule work so that you meet operational needs and take account of operational limits

Learning outcome

2. Monitor staffing levels and schedules against the work targets of a retail team

Performance indicator

You need to:

- 2.1 collect and organise enough information about the staff available and the work they are doing
- 2.2 assess realistically whether you have enough staff for the targets you need to achieve
- 2.3 find out what progress is being made towards achieving your work targets
- 2.4 use the information about staffing and progress towards targets to make realistic and justifiable assessments of how effective staff are
- 2.5 adjust staffing levels and schedules so that you can meet targets
- 2.6 clearly and promptly recommend changes in staffing to your manager
- 2.7 promptly pass on the results of assessments to the people who need them
- 2.8 use the results of assessments to encourage staff to reach their targets

Knowledge and understanding

You need to know and understand:

- 2.1 how staffing levels and the way in which staff are used can affect the work that can be done
- 2.2 how to collect and evaluate information on staffing
- 2.3 how to adjust staffing levels and schedules
- 2.4 the factors, other than staffing, that may affect progress towards work targets, and the effect these are likely to have
- 2.5 how to justify assessments of effectiveness
- 2.6 how your manner and behaviour when presenting the results of assessments is likely to influence staff's response to them

Unit 405

Promote continuous improvement

Level:	7
Credit value:	7
Endorsement by a sector or regulatory body:	This unit is endorsed by CfA, the Sector Skills Council for Business Skills.
Specific evidence requirement:	Simulation is not allowed for any performance evidence within this unit. See Supporting Information.
Summary:	This unit covers the key competence of the customer service professional. You must be dedicated to the continuous improvement of customer service and this involves organising changes in the way customer service is delivered over and over again. You need to identify potential changes, think through their consequences and make them work. Above all, this unit covers the competence of organising and seeing through change that is sustainable and is in the spirit of continuous improvement in customer service.

Knowledge and understanding which relates to the whole of this unit

You need to know and understand:

- 1.1 how service improvements in your area affect the balance between overall customer satisfaction, the costs of providing service and regulatory requirements
- 1.2 how customer experience is influenced by the way service is delivered
- 1.3 how to collect, analyse and present customer feedback
- 1.4 how to make a business case to others to bring about change in the products or services you offer

Learning outcome

1. Plan improvements in customer service based on customer feedback

Performance indicator

You need to:

- 1.1 gather feedback from customers that will help to identify opportunities for customer service improvement
- 1.2 analyse and interpret feedback to identify opportunities for

	customer service improvements and propose changes
1.3	discuss with others the potential effects of any proposed changes for your customers and your organisation
1.4	negotiate changes in customer service systems and improvements with somebody with sufficient authority to approve trial or full implementation of the change

Learning outcome	
2.	Implement changes in customer service
Performance indicator	
You need to:	
2.1	organise the implementation of authorised changes
2.2	implement the changes following organisational guidelines
2.3	inform people inside and outside your organisation who need to know of the changes being made and the reasons for them
2.4	monitor early reactions to changes and make appropriate fine-tuning adjustments

Learning outcome	
3.	Review changes to promote continuous improvement
Performance indicator	
You need to:	
3.1	collect and record feedback on the effects of changes
3.2	analyse and interpret feedback and share your findings on the effects of changes with others
3.3	summarise the advantages and disadvantages of the changes
3.4	use your analysis and interpretation of changes to identify opportunities for further improvement
3.5	present these opportunities to somebody with sufficient authority to make them happen

Unit 405

Promote continuous improvement Promote continuous improvement

Supporting information

Evidence collected in a realistic working environment or a work placement is not permissible for this unit.

Evidence must be collected over a sufficient period of time with different customers on different occasions for the assessor to be confident that you are competent.

You must show that your proposals for improvements:

- are based on planned and analysed customer feedback
- take into account all relevant regulations
- take into account the costs and benefits to the organisation.

You may carry out this work alone or with colleagues. However, you must provide evidence that you have taken an active role in:

- collecting and analysing feedback
- proposing initiatives for change
- implementing the change
- evaluating and reviewing the change.

Your evidence must clearly show the part you have played in each step of the continuous improvement process.

The changes that you propose and initiate may be changes in how services or products are supplied or in how you and your colleagues behave when delivering services or products.



Appendix 1 SVQ units and expert witness testimony

Following is a list of SVQ units for which expert witness testimony is required if the assessor is not an expert in the specialism covered by the unit:

City & Guilds ref	Unit ref	Unit title
104	B.20	Contribute to food safety in a retail environment
110	C.58	Provide a counter/takeaway service (People 1 st)
206	C.12	Promote loyalty schemes to customers in a retail environment
211	B.10	Process bake-off products for sale in a retail environment
213	B.12	Process greengrocery products for sale in a retail environment
214	B.13	Finish meat products by hand in a retail environment
216	B.31	Hand-process fish in a retail environment
217	B.32	Contribute to the control and efficiency of dough production in a retail environment
218	B.21	Maintain food safety while working with food in a retail environment
219	C.11	Assemble retail products in customer's home/workplace
220	C.17	Provide the lingerie fitting service in a retail environment
221	C.35	Promote beauty products to retail customers
222	C.37	Help customers to buy National Lottery products in a retail environment
225	C.18	Follow guidelines for planning and preparing visual merchandising displays
226	C.19	Follow guidelines for dressing visual merchandising displays
227	C.20	Order graphic materials for visual merchandising displays
228	C.21	Dismantle and store visual merchandising displays
229	C.22	Make props for visual merchandising displays
230	C.23	Put visual merchandising displays together
232	C.09	Process payments and credit applications for purchases in a retail environment
233	C.10	Process cash and credit transactions in a retail environment
236	B.33	Select, weigh and measure bakery ingredients (Improve)
237	B.34	Hand divide, mould and shape fermented doughs (Improve)
241	C.43	Maintain a display of cut flowers in a retail store

City & Guilds ref	Unit ref	Unit title
242	B.23	Receive driver-controlled deliveries of fuel on a petrol forecourt
243	B.24	Control deliveries of motor fuel on a forecourt
244	C.39	Process the self-service dispensing and purchase of motor fuel on a forecourt
245	C.40	Establish customer needs and provide advice regarding tiling products
246	C.41	Advise customers upon measuring and planning for the fixing of tiles
247	C.42	Advise customers upon the fixing of tiles
248	C.54	Help customers to choose delicatessen products in a retail outlet
249	C.55	Portion delicatessen products in a retail outlet to meet individual customers' requirements
258	C.47	Promote the store's credit card to customers
259	C.52	Help customers to apply for the store's credit card and associated insurance products
304	C.30	Develop individual retail service opportunities
305	C.31	Provide a personalised sales and after-sales service to your retail clients
308	B.22	Monitor and help improve food safety in a retail environment
309	C.38	Assist customers to obtain appropriate insurance (FSSC)
313	C.45	Help customers to choose alcoholic beverages in a retail store
314	C.15	Enable customers to apply for credit and hire purchase facilities
322	C.24	Choose merchandise to feature in visual merchandising displays
323	C.25	Plan, monitor and control how graphics are used in visual merchandising displays
324	C.26	Monitor the effect of visual merchandising displays and layouts
325	C.27	Allocate, monitor and control visual merchandising project resources against budgets
326	C.28	Contribute to developing and putting into practice the company's visual merchandising policy
327	C.29	Create plans, elevations and drawings to realise visual merchandising ideas
404	E.12	Plan, monitor and adjust staffing levels and schedules in a retail environment

Appendix 2 SVQ units and simulated activities

Following is a list of SVQ units for which simulated activities are allowed:

City & Guilds ref	Unit ref	Unit title
101	E.03	Work effectively in your retail team
102	B.01	Move goods and materials manually in a retail environment
105	B.02	Keep stock at required levels in a retail environment
106	C.01	Wrap and pack goods for customers in a retail environment
107	E.01	Help to keep the retail unit secure
108	E.02	Help to maintain health and safety in a retail environment
109	E.04	Keep the retail environment clean and hygienic (non-food)
239	E.06	Help to maintain health and safety in a retail environment
240	E.07	Help to keep the retail unit secure
242	B.23	Receive driver-controlled deliveries of fuel on a petrol forecourt
243	B.24	Control deliveries of motor fuel on a forecourt
244	C.39	Process the self-service dispensing and purchase of motor fuel on a forecourt
310	E.18	Monitor and maintain health and safety in a retail environment
321	E.11	Help to monitor and maintain the security of the retail unit



Appendix 3 Sources of general information

The following documents contain essential information for centres delivering City & Guilds qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the **Centres and Training Providers homepage** on **www.cityandguilds.com**.

Centre Manual - Supporting Customer Excellence contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve 'approved centre' status, or to offer a particular qualification, as well as updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document includes sections on:

- The centre and qualification approval process
- Assessment, internal quality assurance and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Management systems
- Maintaining records
- Assessment
- Internal quality assurance
- External quality assurance.

Our Quality Assurance Requirements encompasses all of the relevant requirements of key regulatory documents such as:

- Regulatory Arrangements for the Qualifications and Credit Framework (2008)
- SQA Awarding Body Criteria (2007)
- NVQ Code of Practice (2006)

and sets out the criteria that centres should adhere to pre and post centre and qualification approval.

Access to Assessment & Qualifications provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

The **centre homepage** section of the City & Guilds website also contains useful information such on such things as:

- **Walled Garden:** how to register and certificate candidates on line
- **Qualifications and Credit Framework (QCF):** general guidance about the QCF and how qualifications will change, as well as information on the IT systems needed and FAQs
- **Events:** dates and information on the latest Centre events
- **Online assessment:** how to register for e-assessments.

Useful contacts

UK learners General qualification information	T: +44 (0)844 543 0033 E: learnersupport@cityandguilds.com
International learners General qualification information	T: +44 (0)844 543 0033 F: +44 (0)20 7294 2413 E: intcg@cityandguilds.com
Centres Exam entries, Certificates, Registrations/enrolment, Invoices, Missing or late exam materials, Nominal roll reports, Results	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: centresupport@cityandguilds.com
Single subject qualifications Exam entries, Results, Certification, Missing or late exam materials, Incorrect exam papers, Forms request (BB, results entry), Exam date and time change	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 F: +44 (0)20 7294 2404 (BB forms) E: singlesubjects@cityandguilds.com
International awards Results, Entries, Enrolments, Invoices, Missing or late exam materials, Nominal roll reports	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: intops@cityandguilds.com
Walled Garden Re-issue of password or username, Technical problems, Entries, Results, e-assessment, Navigation, User/menu option, Problems	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: walledgarden@cityandguilds.com
Employer Employer solutions, Mapping, Accreditation, Development Skills, Consultancy	T: +44 (0)121 503 8993 E: business@cityandguilds.com
Publications Logbooks, Centre documents, Forms, Free literature	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413

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City & Guilds Group

The City & Guilds Group is a leader in global skills development. Our purpose is to help people and organisations to develop their personal and economic growth. Made up of City & Guilds, City & Guilds Kineo, The Oxford Group and ILM, we work with education providers, businesses and governments in over 100 countries.

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City & Guilds

1 Giltspur Street

London EC1A 9DD

T +44 (0)844 543 0000

F +44 (0)20 7294 2413

www.cityandguilds.com

HB-03-2008