



Assessor's Guidelines for:

SVQ Retail Skills SCQF level 4 (GP1D 21)

SVQ Retail Skills SCQF level 5 (GP1E 22)

**SVQ Retail (Sales Professional) SCQF level 6
(GP1C 23)**

**SVQ Retail (Visual Merchandising) SCQF level
6 (GP1F 23)**

**SVQ Retail (Management) SCQF level 6 (GP1C
23)**

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About this guide

This guide provides some practical examples of how to assess your candidates for the SVQs in:

SVQ Retail Skills SCQF level 4	GP1D 21
SVQ Retail Skills SCQF level 5	GP1E 22
SVQ Retail (Sales Professional) SCQF level 6	GP1C 23
SVQ Retail (Visual Merchandising) SCQF 6	GP1F 23
SVQ Retail (Management) SCQF level 6	GP1A 23

You may be able to think of other ways of assessing your candidates and recording your decisions about their competence.

Using assessments based on these examples does not guarantee successful verification — it is still your responsibility to ensure that internal quality assurance procedures are followed.

Introduction

This introduction provides a brief overview of SVQs and how they are assessed in the workplace. If you are already familiar with the concept of SVQs, you may wish to go to the next section.

About SVQs and the SCQF

Scottish Vocational Qualifications (SVQs) are work-based qualifications which set the level of occupational competence for each sector of the economy and are usually delivered in the workplace or in partnership with a college or other training provider. The qualifications have been designed by standards-setting bodies made up of experienced practitioners who represent employers, professional bodies, trade unions, education and voluntary organisations.

Each standards-setting body is responsible for developing national standards which define *what* employees (or potential employees) must be able to do, *how well*, and *in what circumstances*, to show that they are competent in their work.

Each SVQ which a standards-setting body develops has to fit into a broad framework which allows qualifications in the UK and throughout Europe to be compared.

SVQs may be at differing SCQF levels and have differing amount of credit points, depending on the structure and context of the SVQ. SVQs are a means of recognising the skills and knowledge people need in employment ie, job competence. Successful completion of an SVQ provides clear evidence that the candidate works to nationally recognised occupational standards.

Each unit defines one aspect of a job or work-role, and says what it is to be competent in that aspect of the job. To be awarded a full SVQ, candidates must achieve each of the SVQ units which make it up by demonstrating that they are competent in that aspect of the job. The units which make up the SVQ can also be taken as freestanding awards. Some SVQs or SVQ units are incorporated into other awards or programmes including HNCs and Modern Apprenticeships.

Explanation of levels

SVQ 1 (SCQF level 4)	Competence involves the application of knowledge and skills in the performance of a range of varied work activities, most of which may be routine or predictable.
SVQ 2 (SCQF level 5)	Competence involves the application of knowledge and skills in a significant range of varied work activities, performed in a variety of contexts. At this level, there will be activities, which are complex or non-routine and there is some individual responsibility and autonomy. Collaboration with others, perhaps through membership of a work group or team, may often be a requirement.
SVQ 3 (either SCQF level 6 or 7)	Competence involves the application of knowledge and skills in a broad range of varied work activities, most of which are complex and non-routine. There is considerable responsibility and autonomy, and control or guidance of others is often present.
SVQ 4 (either SCQF level 8 or 9)	Competence involves the application of knowledge and skills in a broad range of complex technical or professional work activities, performed in a wide variety of contexts and with a substantial degree of personal responsibility and autonomy. Responsibility for the work of others and the allocation of resources is often present.
SVQ 5 (SCQF level 11)	Competence involves the application of skills and a significant range of fundamental principles across a wide and often unpredictable variety of contexts. Very substantial personal autonomy and often significant responsibility for the work of others and for the allocation of substantial resources feature strongly, as do personal accountability.

For further information on SCQF go to www.scqf.org.uk.

How are standards defined in SVQs?

The units define the broad functions carried out in the sector, and are made up of a number of performance statements and knowledge and understanding statements. The performance statements describe what the candidate has to do and how well they have to do it.

The knowledge and understanding statements describe what candidates must know and understand, and how this knowledge applies to their jobs.

Varying terminology may be used in different SVQs, depending on how the standard-setting body has defined the NOS, but all will be recognisable as either a performance statement or knowledge and understanding statement.

Who is involved in SVQs?

There are several roles:

- ◆ **the candidate:** the person who wants to achieve the SVQ (eg, an employee)
- ◆ **the assessor*:** the person who assesses the candidates and decides if they are competent (eg, supervisor)
- ◆ **the internal verifier*:** an individual nominated by the centre (eg, a company) who ensures that assessors apply the standards uniformly and consistently (eg, supervisor's line manager)
- ◆ **the external verifier*:** an individual appointed by SQA who ensures that standards are being applied uniformly and consistently across all centres offering the SVQ

*Assessors and verifiers in centres will be asked by SQA to prove they have the appropriate occupational competence to assess and verify the SVQ. Occupational competence has been defined by the standards-setting body in the assessment strategy for this SVQ(s) — see SQA's website: www.sqa.org.uk.

Assessors and verifiers are also expected to obtain an appropriate qualification in assessment and verification — this can be the assessor/verifier units (the national standards for assessment and verification), or an alternative qualification which SQA also recognises.

The steps involved in assessing a candidate for an SVQ

In deciding whether a candidate should achieve an SVQ, you will go through these stages:

- ◆ planning for assessment
- ◆ generating and collecting evidence of the candidate's competence in the units
- ◆ judging the evidence of the candidate's ability and making an assessment decision based on the evidence
- ◆ recording the assessment decision and the candidate's achievement

1 The SVQ in Retail Skills and Retail SCQF levels 4, 5 and 6

The SVQs in Retail Skills and Retail have been developed by the Sector Skills Council for this area, People 1st and are intended for people who work in the retail industry/profession.

These people may be working as:

- ◆ retail salespeople
- ◆ retail assistants
- ◆ counter assistants
- ◆ stockroom/warehouse assistants
- ◆ visual merchandisers
- ◆ cash point operators
- ◆ supervisors/teamleaders/managers in all of the above roles

They will require the appropriate skills and knowledge in retailing to meet the requirements of their selected SVQ level.

The SVQs are designed to be assessed in the workplace, or in conditions of the workplace. Examples of the settings or centres in which the SVQs are likely to be delivered include large and small retail outlets from the following list:

- ◆ department stores
- ◆ specialist retailers, for example: electrical, IT, mobile phones, fashion, beauty products, DIY stores
- ◆ food retailers, for example: greengrocers, fishmongers, bakers, butchers
- ◆ cash and carry outlets
- ◆ supermarkets

NB — The above list is not exhaustive and is intended only as a guide to possible settings.

Structure of the SVQs

This section lists the units which form the SVQ 1 and SVQ 2 Retail Skills, SVQ 3 Retail (Sales Professional), SVQ 3 Retail (Visual Merchandising) and SVQ 3 Retail (Management).

SVQ Retail Skills at SCQF level 4 (GP1D 21)

Candidates must complete a total of nine units:

Mandatory units

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J08W 04	4	1	PPL.E106	Follow a Training Plan for Your Own Learning to Improve Your Skills and Knowledge in a Retail Organisation
J08X 04	4	2	PPL.E109	Maintain Personal Hygiene in a Retail Organisation

Group A Options (SCQF level 4 units)

Candidates must take a minimum of three units from Group A Options

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J08Y 04	4	2	PPL.B101	Move Goods and Materials Manually in a Retail Organisation
J090 04	4	2	PPL.B102	Check Stock Levels in a Retail Organisation
J091 04	4	3	PPL.B103	Replenish Stock on the Sales Floor in a Retail Organisation
J092 04	4	4	PPL.B105	Sort and Prepare Donated Goods in a Retail-Charity Organisation for Selling or Recycling
J093 04	4	2	PPL.C101	Package Goods for Customers in a Retail Organisation
J094 04	4	2	PPL.C203	Label Displays of Stock in a Retail Organisation
J095 04	4	3	PPL.C207	Promote Particular Retail Products
J096 04	4	2	PPL.C213	Work Out The Price of Customers' Retail Purchases
J097 04	4	2	PPL.C221	Explain to Customers the Features and Benefits of a Retail Organisation's Loyalty Scheme and How The Scheme Works
J098 04	4	3	PPL.C237	Dismantle Retail Displays

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J099 04	4	1	PPL.C274	Keep Dressing Room Facilities Ready for Customer Use
J09A 04	4	3	PPL.C275	Promote Sales of Food or Drink Products by Offering Samples to Customers and Following Relevant Food Safety Requirements
J09B 04	4	2	PPL.C277	Contribute to Monitoring and Maintaining Ease of Shopping in a Retail Sales Area

Group B Options (SCQF level 5 units)

Candidates can take a maximum of four units from the Group B Options

SQA ref	SQA level	SCQF credit points	SSC ref	Title
H53W 04	5	5	CFACSA4	Give Customers a Positive Impression of Yourself and Your Organisation
J0CL 04	5	9	PPL.E105	Work Effectively As Part of a Team in a Retail Organisation
J0CM 04	5	3	PPL.E101	Identify and Report Security Risks in a Retail Organisation
J0CN 04	5	3	PPL.E102	Identify and Seek Assistance When Accidents and Emergencies Occur in a Retail Organisation
J0EF 04	5	5	PPL.E103	Maintain Health and Safety Procedures in a Retail Organisation
J0CP 04	5	3	PPL.E104	Manually Lift and Handle Goods and Materials Safely in a Retail Organisation
J0CT 04	5	4	PPL.E107	Keep Work Surfaces Clean in a Retail Organisation
J0CV 04	5	5	PPL.E108	Safely Remove and Dispose of Waste and Litter in a Retail Organisation
J0CW 04	5	5	PPL.E205	Help Maintain Security in a Retail Organisation
J0CX 04	5	4	PPL.E206	Deal with Accidents and Emergencies within the Limits of Your Authority in a Retail Organisation
J0CY 04	5	4	PPL.E207	Contribute to Reducing Risks to Health and Safety in a Retail Organisation

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J0CF 04	5	4	PPL.E307	Take a Safe and Active Role When Accidents and Emergencies Occur in a Retail Organisation
J0D1 04	5	4	PPL.C214	Provide a Payment Service at Point of Sale in a Retail Organisation
J0CS 04	5	5	PPL.C215	Process Applications From Retail Customers for Credit Facilities
J0D3 04	5	4	PPL.C217	Process Payments Made to Retail Customer Accounts
J0D4 04	5	7	PPL.C252	Follow Procedures for Retail Sales of Age-Restricted Products
J0CH 04	5	4	PPL.C269	Cash Up One or More Payment Registers
J0D5 04	5	4	PPL.C204	Help Retail Customers Find Products
J0D6 04	5	3	PPL.C208	Provide Information and Advice to Meet the Requirements of Retail Customers
J0D7 04	5	3	PPL.C209	Help Retail Customers Resolve Complaints
J0D8 04	5	4	PPL.C222	Gain Customer Commitment to a Retail Organisation's Loyalty Scheme and Assist Them in Completing the Application
J0D9 04	5	4	PPL.C223	Check the Customers' Preferences and Buying Decisions When Making Retail Sales
J0DA 04	5	3	PPL.C224	Provide Assistance at the Self-Service Payment Point in a Retail Organisation
J0DB 04	5	6	PPL.C280	Demonstrate Products to Customers in a Retail Organisation
HK21 04	5	5	CFACSD2	Support Customer Service Improvements
J0D2 04	5	5	PPL.B201	Prepare to Receive Deliveries in a Retail Organisation
J0DD 04	5	6	PPL.B204	Put Goods into Storage in a Retail Organisation
J0DF 04	5	3	PPL.B205	Check the Level of Goods on Sale in a Retail Organisation
J0DG 04	5	4	PPL.B208	Process Orders for Retail Customers
J0DH 04	5	3	PPL.B245	Pick Goods to Fulfil Customer Orders in a Retail Organisation
J0F9 04	5	3	PPL.E210	Prepare Newspapers and Magazines for Return to the Merchandiser

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J0DJ 04	5	2	PPL.C250	Identify the Retail Customers' Requirements for Lingerie
J0DK 04	5	8	PPL.C251	Measure and Fit Retail Customers for Lingerie
J0DL 04	5	6	PPL.B220	Bake (Bake-Off) Products for Sale in a Retail Organisation
J0DM 04	5	6	PPL.B221	Finish Bake-Off Products in a Retail Organisation
J0DN 04	5	3	PPL.B224	Prepare Greengrocery Products for Sale in a Retail Organisation
J0DC 04	5	5	PPL.B225	Display and Maintain Greengrocery Products to Attract Sales in a Retail Organisation
J0DT 04	5	6	PPL.B226	Quality Check the Suitability of Meat Products for Finishing in a Retail Organisation
J0DV 04	5	5	PPL.B227	Prepare to Finish Meat Products in a Retail Organisation
J0DW 04	5	5	PPL.B228	Achieve Meat Product Yield and Finish in a Retail Organisation
J0DX 04	5	5	PPL.B235	Maintain Food Safety While Working with Food in a Retail Organisation
J0DY 04	5	4	PPL.B243	Organise Your Work to Meet a Dough Production Schedule in a Retail Organisation
J0E0 04	5	5	IMPCB101	Select Weigh and Measure Ingredients in Bakery Operations
J0E1 04	5	6	IMPCB105	Divide, Mould and Shape Fermented Dough in Bakery Operations
J0E2 04	5	6	PPL.B248	Hand-Process Fish in a Retail Organisation
J0E3 04	5	7	PPL.C278	Help Customers to Choose Delicatessen Products in a Specialist Retail Organisation
J0E4 04	5	6	PPL.C279	Portion Delicatessen Products to Meet Individual Customers' Requirements in a Specialised Retail Organisation or Specialist Counter within a General Retail Organisation
J0E5 04	5	6	PPL.C262	Establish Retail Customers' Requirements and Provide Advice Regarding Tiling Products
J0E7 04	5	7	PPL.B238	Prepare to Receive Deliveries of Fuel (for Driver-Controlled Transfers) on a Forecourt

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J0E8 04	5	7	PPL.B239	Check That Driver-Controlled Fuel Transfers Have Been Completed
J0DP 04	5	5	PPL.C266	Authorise and Monitor the Self-Service Dispensing of Motor Fuel on a Forecourt
J0E9 04	5	4	PPL.B212	Prepare and Assemble Products for Selling to Retail Customers
J0EA 04	5	2	PPL.B246	Assist in Loading Customer Orders for Despatch in a Retail Organisation
J0EB 04	5	2	PPL.C254	Maintain the Retail Customer Record-Card System in a Retail Organisation
J0EC 04	5	3	PPL.C267	Maintain a Display of Cut Flowers in a Retail Organisation That Does Not Specialise in Floristry
J0ED 04	5	6	PPL.C276	Deliver Products to Customers' Premises Making the Best Use of Time and Resources

SVQ Retail Skills at SCQF level 5 (GP1E 22)

Candidates must complete a total of ten units

Mandatory

SQA ref	SQA level	SCQF credit points	SSC ref	Title
H53W 04	5	5	CFACSA4	Give Customers a Positive Impression of Yourself and Your Organisation
J0EF 04	5	5	PPL.E103	Maintain Health and Safety Procedures in a Retail Organisation
J0CL 04	5	9	PPL.E105	Work Effectively as Part of a Team in a Retail Organisation

Group A Options (SCQF level 5 and above units)

Candidates must take a minimum of three units from Group A options

SQA ref	SQA level	SCQF credit points	SSC ref	Title
Customer Service and Sales				
J0D5 04	5	4	PPL.C204	Help Retail Customers Find Products

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J0B2 04	6	5	PPL.C205	Help Retail Customers Choose Products
J0B3 04	6	4	PPL.C206	Identify Opportunities to Increase Sales of Particular Products
J0D6 04	5	3	PPL.C208	Provide Information and Advice to Meet the Requirements of Retail Customers
J0D7 04	5	3	PPL.C209	Help Retail Customers Resolve Complaints
J0D8 04	5	4	PPL.C222	Gain Customer Commitment to a Retail Organisation's Loyalty Scheme and Assist Them In Completing the Application
J0D9 04	5	4	PPL.C223	Check the Customers' Preferences and Buying Decisions When Making Retail Sales
J0DA 04	5	3	PPL.C224	Provide Assistance at the Self-Service Payment Point in a Retail Organisation
J0DB 04	5	6	PPL.C280	Demonstrate Products to Customers in a Retail Organisation
HK21 04	5	5	CFACSD2	Support Customer Service Improvements
FY7H 04	6	6	CFACSB10	Organise the Delivery of Reliable Customer Service
H5BN 04	6	7	CFACSB11	Improve the Customer Relationship
H9R4 04	6	8	CFACSD8	Work with Others to Improve Customer Service
J0B4 04	6	7	PPL.C311	Make and Review Plans for Finding New Retail Clients
J0B5 04	6	7	PPL.C312	Market a Retail Organisation's Services to Potential Clients
J0B6 04	6	6	PPL.C313	Provide a Consultative Selling Service to Retail Clients
J0B7 04	6	5	PPL.C315	Decide on the Value of Items Offered in Part-Exchange by Retail Customers
J0B8 04	6	5	PPL.C316	Negotiate Part-Exchange Sales Transactions with Retail Customers
J0B1 04	6	7	PPL.C355	Help Customers to Choose Specialist Products in a Retail Organisation
J0BA 04	6	6	PPL.C356	Demonstrate Specialist Products to Customers in a Retail Organisation

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J0CJ 04	5	4	PPL.E314	Monitor the Service Provided to Customers by External Suppliers of a Retail Organisation
Stock				
J0D2 04	5	5	PPL.B201	Prepare to Receive Deliveries in a Retail Organisation
J0EG 04	5	8	PPL.B202	Receive Deliveries and Check Storage Arrangements of Goods in a Retail Organisation
J0DD 04	5	6	PPL.B204	Put Goods into Storage in a Retail Organisation
J0DF 04	5	3	PPL.B205	Check the Level of Goods on Sale in a Retail Organisation
J0BD 04	6	4	PPL.B206	Replenish Goods on Sale in a Retail Organisation
J0BE 04	6	6	PPL.B207	Check the Availability of Goods for Customer Orders
J0DG 04	5	4	PPL.B208	Process Orders for Retail Customers
J0DH 04	5	3	PPL.B245	Pick Goods to Fulfil Customer Orders in a Retail Organisation
J0EH 04	5	2	PPL.B247	Count Stock Levels and Resolve Problems with Stock Levels in a Retail Organisation
J0AH 04	6	12	PPL.B301	Organise Staff to Receive, Check and Record Incoming Deliveries in a Retail Organisation
J0AK 04	6	5	PPL.B303	Check the Storage and Care of Stock in a Retail Organisation
J0C0 04	6	8	PPL.B304	Organise an Audit Programme and Put it into Practice with a Team in a Retail Organisation
J0AL 04	6	5	PPL.B305	Investigate Problems and Report the Findings of Stock Audits in a Retail Organisation
J0AM 04	6	7	PPL.B306	Choose and Contract with Suppliers and Order Stock in a Retail Organisation
J0AN 04	6	7	PPL.B307	Check and Evaluate the Performance of Suppliers of Stock
J0F9 04	5	3	PPL.E210	Prepare Newspapers and Magazines for Return to the Merchandiser

SQA ref	SQA level	SCQF credit points	SSC ref	Title
Product Expertise — Clothing				
J0DJ 04	5	2	PPL.C250	Identify the Retail Customers' Requirements for Lingerie
J0DK 04	5	8	PPL.C251	Measure and Fit Retail Customers for Lingerie
J0BG 04	6	2	PPL.C273	Use the Dressing Room Facilities to Create Sales Opportunities
Product Expertise — Food and Drink				
J0DL 04	5	6	PPL.B220	Bake (Bake-Off) Products for Sale in a Retail Organisation
J0DM 04	5	6	PPL.B221	Finish Bake-Off Products in a Retail Organisation
J0DN 04	5	3	PPL.B224	Prepare Greengrocery Products for Sale in a Retail Organisation
J0DC 04	5	5	PPL.B225	Display and Maintain Greengrocery Products to Attract Sales in a Retail Organisation
J0DT 04	5	6	PPL.B226	Quality Check the Suitability of Meat Products for Finishing in a Retail Organisation
J0DV 04	5	5	PPL.B227	Prepare to Finish Meat Products in a Retail Organisation
J0DW 04	5	5	PPL.B228	Achieve Meat Product Yield and Finish in a Retail Organisation
J0DX 04	5	5	PPL.B235	Maintain Food Safety While Working with Food in a Retail Organisation
J0DY 04	5	4	PPL.B243	Organise Your Work to Meet a Dough Production Schedule in a Retail Organisation
J0E0 04	5	5	IMPCB101	Select Weigh and Measure Ingredients in Bakery Operations
J0E1 04	5	6	IMPCB105	Divide, Mould and Shape Fermented Dough in Bakery Operations
J0E2 04	5	6	PPL.B248	Hand-Process Fish in a Retail Organisation
J0B0 04	6	8	PPL.B308	Monitor and Contribute to Improving Food Safety in a Retail Organisation
J0BH 04	6	8	PPL.C268	Help Customers to Choose Alcoholic Beverages in a Retail Organisation by Advising on and Recommending Relevant Products

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J0E3 04	5	7	PPL.C278	Help Customers to Choose Delicatessen Products in a Specialist Retail Organisation
J0E4 04	5	6	PPL.C279	Portion Delicatessen Products to Meet Individual Customers' Requirements in a Specialised Retail Organisation or Specialist Counter within a General Retail Organisation
Product Expertise — Home/DIY				
J0E5 04	5	6	PPL.C262	Establish Retail Customers' Requirements and Provide Advice Regarding Tiling Products
J0C7 04	6	8	PPL.C263	Advise Customers Upon Measuring and Planning for the Fixing of Tiles
J0BJ 04	6	8	PPL.C264	Advise Customers Upon the Fixing of Their Own Tiles
Product Services — Motor Fuel				
J0E7 04	5	7	PPL.B238	Prepare to Receive Deliveries of Fuel (for Driver-Controlled Transfers) on a Forecourt
J0E8 04	5	7	PPL.B239	Check That Driver-Controlled Fuel Transfers Have Been Completed
J0BK 04	6	8	PPL.B240	Receive Deliveries and Transfer Fuel on a Forecourt
J0DP 04	5	5	PPL.C266	Authorise and Monitor the Self-Service Dispensing of Motor Fuel on a Forecourt
Product Expertise — Other				
J0E9 04	5	4	PPL.B212	Prepare and Assemble Products for Selling to Retail Customers
J0EA 04	5	2	PPL.B246	Assist in Loading Customer Orders for Despatch in a Retail Organisation
J0B9 04	6	5	PPL.C220	Assemble Retail Products at Customers' Premises and Assist with Installation and Initial Use
J0BM 04	6	6	PPL.C253	Demonstrate Beauty Products to Retail Customers
J0EB 04	5	2	PPL.C254	Maintain the Retail Customer Record-Card System in a Retail Organisation
J0EC 04	5	3	PPL.C267	Maintain a Display of Cut Flowers in a Retail Organisation That Does Not Specialise in Floristry

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J0ED 04	5	6	PPL.C276	Deliver Products to Customers' Premises Making the Best Use of Time and Resources
Visual Merchandising				
J0EK 04	5	3	PPL.C201	Prepare Display Areas and Materials in a Retail Organisation in Line with Display Plans
J0EL 04	5	3	PPL.C202	Set Up and Dismantle Displays in Line with Display Plans in a Retail Organisation
J0EM 04	5	3	PPL.C230	Interpret Design Briefs for Retail Displays
J0EP 04	5	5	PPL.C231	Source Merchandise and Props to Be Featured in Retail Displays
J0ER 04	5	7	PPL.C232	Dress In-Store Retail Displays to Guidelines
J0ET 04	5	6	PPL.C233	Dress Window Displays Following a Retail Organisation's Guidelines
J0BN 04	6	6	PPL.C234	Evaluate and Improve Retail Displays
J0BP 04	6	5	PPL.C235	Order Graphic Materials to Meet Retail Display Requirements
J0EV 04	5	3	PPL.C236	Position Graphic Materials to Support Retail Displays
J0EJ 04	5	3	PPL.C238	Store Equipment, Props and Graphics for Retail Displays
J0EW 04	5	4	PPL.C244	Follow Guidelines for Putting Retail Display Layouts Together
J0C5 04	6	4	PPL.C301	Organise Staff to Display Goods for Retail Sale
J0C1 04	6	4	PPL.C302	Assess How Effective Displays Are in a Retail Organisation
J0CG 04	5	3	PPL.C303	Keep Stock Available, Correctly Priced and Maintain Quality Of Stock in a Retail Organisation
J0EX 04	5	2	PPL.C330	Interpret Requirements for Retail Displays
J0EY 04	5	3	PPL.C331	Choose and Agree Retail Merchandise to Be Featured in Retail Displays
J0BR 04	6	4	PPL.C332	Identify and Obtain Graphic Materials for Retail Displays
J0BS 04	6	4	PPL.C333	Co-ordinate How Graphic Materials Are Used in Retail Displays
J0F0 04	5	2	PPL.C334	Check How Graphic Materials Are Used in Retail Displays

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J0BT 04	6	5	PPL.C335	Gather Information About Retail Customers' Responses to Displays and Layouts
Finance and Administration				
J0D1 04	5	4	PPL.C214	Provide a Payment Service at Point of Sale in a Retail Organisation
J0CS 04	5	5	PPL.C215	Process Applications From Retail Customers for Credit Facilities
J0D3 04	5	4	PPL.C217	Process Payments Made to Retail Customer Accounts
J0F1 04	5	4	PPL.C218	Reconcile Retail Customers' Accounts
J0D4 04	5	7	PPL.C252	Follow Procedures for Retail Sales of Age-Restricted Products
J0CH 04	5	4	PPL.C269	Cash Up One or More Payment Registers
J0AT 04	6	6	PPL.C306	Identify the Retail Customer's Credit or Hire-Purchase Requirements
J0AV 04	6	5	PPL.C308	Process Credit or Hire-Purchase Applications on Behalf of Retail Customers
J0F3 04	5	3	PPL.E211	Monitor and Support Secure Use of the Payment Register and Service Area in a Retail Organisation
J0BV 04	6	5	PPL.E212	Check the Accuracy of Records of Hours Worked in a Retail Organisation
Health, Safety and Security				
J0CM 04	5	3	PPL.E101	Identify and Report Security Risks in a Retail Organisation
J0CN 04	5	3	PPL.E102	Identify and Seek Assistance When Accidents and Emergencies Occur in a Retail Organisation
J0CP 04	5	3	PPL.E104	Manually Lift and Handle Goods and Materials Safely in a Retail Organisation
J0CW 04	5	5	PPL.E205	Help Maintain Security in a Retail Organisation
J0CX 04	5	4	PPL.E206	Deal with Accidents and Emergencies within the Limits of Your Authority in a Retail Organisation
J0CY 04	5	4	PPL.E207	Contribute to Reducing Risks to Health and Safety in a Retail Organisation

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J0CE 04	5	5	PPL.E304	Monitor and Maintain Security in a Retail Organisation
J0CF 04	5	4	PPL.E307	Take a Safe and Active Role When Accidents and Emergencies Occur in a Retail Organisation
Management, Leadership and People				
J0AD 04	6	7	PPL.E002	Recruit and Retain Staff in a Retail Organisation
J0BX 04	6	6	PPL.E003	Plan and Allocate Work to Staff in a Retail Organisation
J0AE 04	6	7	PPL.E302	Recommend, Agree and Contribute to Implementing Improvements to Retail Operations
J0AF 04	6	6	PPL.E308	Plan Staffing Levels and Prepare Work Schedules for a Retail Organisation
J0BY 04	6	5	PPL.E309	Monitor Work Targets to Make Changes in Staffing Levels in a Retail Organisation
J0AG 04	6	5	PPL.E337	Help Colleagues to Learn in a Retail Organisation
J0BW 04	6	5	PPL.E338	Manage a Team on a Temporary Basis in a Retail Organisation
Multi-channel Retailing				
J0C3 04	6	8	PPL.MCR01	Work Productively with Colleagues in a Multi-Channel Retail Organisation
J0C4 04	6	6	PPL.MCR02	Work with Colleagues to Encourage Innovation in a Multi-Channel Retail Organisation
J0C6 04	6	3	PPL.MCR03	Update Product Information on a Trading Website
J0CD 04	6	5	PPL.MCR05	Provide Support to Individual Retail Customers of a Trading Website
J0CC 04	6	4	PPL.MCR06	Analyse Feedback from Retail Customers of a Multi-Channel Retail Organisation When Goods Are Returned
J0AW 04	6	4	PPL.MCR07	Manage a Social Network on a Trading Website
J0F6 04	5	9	PPL.MCR15	Use In-Store Online Facilities to Achieve Retail Sales
J0C8 04	6	7	PPL.MCR16	Advise and Support Customers in a Retail Organisation on the Use of Online Retail Facilities

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J0C9 04	6	7	PPL.MCR17	Motivate Colleagues to Promote Online Retail Facilities to Retail Customers

Group B Options (SCQF level 4 units)

Candidates can take a maximum of four units from Group B options

SQA ref	SQA level	SCQF credit points	SSC ref	Title
Customer Service and Sales				
J095 04	4	3	PPL.C207	Promote Particular Retail Products
J097 04	4	2	PPL.C221	Explain to Customers the Features and Benefits of a Retail Organisation's Loyalty Scheme and How the Scheme Works
Product Expertise — Clothing				
J099 04	4	1	PPL.C274	Keep Dressing Room Facilities Ready for Customer Use
Product Expertise — Food and Drink				
J09A 04	4	3	PPL.C275	Promote Sales of Food or Drink Products by Offering Samples to Customers and Following Relevant Food Safety Requirements
Product Expertise — Other				
J092 04	4	4	PPL.B105	Sort and Prepare Donated Goods in a Retail-Charity Organisation for Selling or Recycling
J09B 04	4	2	PPL.C277	Contribute to Monitoring and Maintaining Ease of Shopping in a Retail Sales Area
Visual Merchandising				
J094 04	4	2	PPL.C203	Label Displays of Stock in a Retail Organisation
J098 04	4	3	PPL.C237	Dismantle Retail Displays
Finance and Administration				
J096 04	4	2	PPL.C213	Work Out the Price of Customers' Retail Purchases

SVQ Retail (Management) at SCQF level 6 (GP1A 23)

Candidates must complete a total of ten units

Mandatory

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J0AB 04	6	4	PPL.E335	Support Effective Team Working in a Retail Organisation
J0AC 04	6	5	PPL.E336	Contribute to the Planning, Organisation and Evaluation of Your Own Learning in a Retail Organisation
FY7H 04	6	6	CFACSB10	Organise the Delivery of Reliable Customer Service

Options Group 1

Candidates must complete a total of three units

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J0AD 04	6	7	PPL.E002	Recruit and Retain Staff in a Retail Organisation
J0BX 04	6	6	PPL.E003	Plan and Allocate Work to Staff in a Retail Organisation
J09D 04	8	10	PPL.E301	Identify and Analyse Opportunities for Solving Problems and Improving Retail Operations
J0AE 04	6	7	PPL.E302	Recommend, Agree and Contribute to Implementing Improvements to Retail Operations
J0CE 04	5	5	PPL.E304	Monitor and Maintain Security in a Retail Organisation
J09N 04	8	6	PPL.E305	Monitor, Identify and Investigate Loss and Wastage in a Retail Organisation
J09E 04	8	7	PPL.E306	Assess, Monitor and Control Risks to Health and Safety and Provide Training in a Retail Organisation
J0CF 04	5	4	PPL.E307	Take a Safe and Active Role When Accidents and Emergencies Occur in a Retail Organisation
J0AF 04	6	6	PPL.E308	Plan Staffing Levels and Prepare Work Schedules for a Retail Organisation

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J0BY 04	6	5	PPL.E309	Monitor Work Targets to Make Changes in Staffing Levels in a Retail Organisation
J0AG 04	6	5	PPL.E337	Help Colleagues to Learn in a Retail Organisation

Options Group 2 (Group A)

Candidates must complete a minimum one/maximum four units in Group A

SQA ref	SQA level	SCQF credit points	SSC ref	Title
Stock Management				
J0AH 04	6	12	PPL.B301	Organise Staff to Receive, Check and Record Incoming Deliveries in a Retail Organisation
J09P 04	7	12	PPL.B302	Manage Staff and Maintain Stock Records in a Storage Facility in a Retail Organisation
J0AK 04	6	5	PPL.B303	Check the Storage and Care of Stock in a Retail Organisation
J0C0 04	6	8	PPL.B304	Organise an Audit Programme and Put it into Practice with a Team in a Retail Organisation
J0AL 04	6	5	PPL.B305	Investigate Problems and Report the Findings of Stock Audits in a Retail Organisation
J0AM 04	6	7	PPL.B306	Choose and Contract with Suppliers and Order Stock in a Retail Organisation
J0AN 04	6	7	PPL.B307	Check and Evaluate the Performance of Suppliers of Stock
Merchandising				
J0C5 04	6	4	PPL.C301	Organise Staff to Display Goods for Retail Sale
J0C1 04	6	4	PPL.C302	Assess How Effective Displays are in a Retail Organisation
Finance				
J09R 04	7	7	PPL.C270	Promote a Retail Organisation's Own Credit Card to Customer
J0AP 04	6	6	PPL.C271	Offer Customers Information on Insurance Products Associated with a Retail Organisation's Credit Card

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J0AS 04	6	8	PPL.C272	Help Customers to Apply for a Retail Organisation's Credit Card and Associated Insurance Products
J0AT 04	6	6	PPL.C306	Identify the Retail Customer's Credit or Hire-Purchase Requirements
J09S 04	7	6	PPL.C307	Advise Retail Customers on the Features of Borrowing Facilities
J0AV 04	6	5	PPL.C308	Process Credit or Hire-Purchase Applications on Behalf of Retail Customers
J09T 04	7	5	PPL.C309	Evaluate Takings Practices and Procedures in a Retail Organisation
J09V 04	7	5	PPL.C310	Monitor Practices and Procedures at the Payment Point in a Retail Organisation
Customer Service				
J09W 04	7	8	PPL.E315	Evaluate and Improve External Suppliers Service to Customers' of a Retail Organisation
H5BN 04	6	7	CFACSB11	Improve the Customer Relationship
J0AA 04			CFACSD11	Lead a Team to Improve Customer Service
J09F 04	8	8	PPL.C412	Monitor and Improve Customers' Experience of a Retail Organisation
J09G 04	8	7	PPL.D002	Develop Effective Relationships with Customers within a Retail Organisation
J09H 04	8	6	PPL.D004	Monitor and Resolve Customer Complaints within a Retail Organisation
Multi-channel Retail				
J0C3 04	6	8	PPL.MCR01	Work Productively with Colleagues in a Multi-Channel Retail Organisation
J0C4 04	6	6	PPL.MCR02	Work with Colleagues to Encourage Innovation in a Multi-Channel Retail Organisation
J0C6 04	6	3	PPL.MCR03	Update Product Information on a Trading Website
J0CD 04	6	5	PPL.MCR05	Provide Support to Individual Retail Customers of a Trading Website
J0CC 04	6	4	PPL.MCR06	Analyse Feedback from Retail Customers of a Multi-Channel Retail Organisation When Goods Are Returned

SQA ref	SQA level	SCQF Credit Points	SSC ref	Title
J0AW 04	6	4	PPL.MCR07	Manage a Social Network on a Trading Website
J0C8 04	6	7	PPL.MCR16	Advise and Support Customers in a Retail Organisation on the Use of Online Retail Facilities
J0C9 04	6	7	PPL.MCR17	Motivate Colleagues to Promote Online Retail Facilities to Retail Customers
Product Expertise				
J0B0 04	6	8	PPL.B308	Monitor and Contribute to Improving Food Safety in a Retail Organisation

Options Group 2 (Group B)

Candidates may complete a maximum of 3 units in Group B

SQA ref	SQA level	SCQF Credit Points	SSC ref	Title
J0CG 04	5	3	PPL.C303	Keep Stock Available, Correctly Priced and Maintain Quality of Stock in a Retail Organisation
J0CG 04	5	4	PPL.C269	Cash Up One or More Payment Registers
J0CH 04	5	3	PPL.E211	Monitor and Support Secure Use of the Payment Register and Service Area in a Retail Organisation
J0F3 04	5	4	PPL.E314	Monitor the Service Provided to Customers by External Suppliers of a Retail Organisation
J0CJ 04	5	9	PPL.MCR15	Use In-Store Online Facilities to Achieve Retail Sales
J0F6 04	5	5	PPL.MCR18	Maintain the Confidentiality and Security of Online Data Regarding Retail Customers

SVQ Retail (Sales Professional) at SCQF level 6 (GP1C 23)

Mandatory units

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J0AB 04	6	4	PPL.E335	Support Effective Team Working in a Retail Organisation

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J0AC 04	6	5	PPL.E336	Contribute to the Planning, Organisation and Evaluation of your Own Learning in a Retail Organisation
FY7H 04	6	6	CFACSB10	Organise the Delivery of Reliable Customer Service

Options Group A

Candidates must complete a total of 3 units

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J0D9 04	5	4	PPL.C223	Check the Customer's Preferences and Buying Decisions When Making Retail Sales
J0B4 04	6	7	PPL.C311	Make and Review Plans for Finding New Retail Clients
J0B5 04	6	7	PPL.C312	Market a Retail Organisation's Services to Potential Clients
J0B6 04	6	6	PPL.C313	Provide a Consultative Selling Service to Retail Clients
J0A9 04	7	6	PPL.C314	Provide an After-Sales Service To Retail Clients as a Result of Retail Client Consultations
J0B1 04	6	7	PPL.C355	Help Customers to Choose Specialist Products in a Retail Organisation
J0BA 04	6	6	PPL.C356	Demonstrate Specialist Products to Customers in a Retail Organisation
J0BW 04	6	5	PPL.E338	Manage a Team on a Temporary Basis in a Retail Organisation
J0CJ 04	5	4	PPL.E314	Monitor the Service Provided to Customers by External Suppliers of a Retail Organisation
J09G 04	8	7	PPL.D002	Develop Effective Relationships with Customers within a Retail Organisation
H5BN 04	6	7	CFACSB11	Improve the Customer Relationship

Options Group B (Group 1)

Candidates must take a minimum of 2 credits from Group 1

SQA ref	SQA level	SCQF credit points	SSC ref	Title
Stock Management				
J0AH 04	6	12	PPL.B301	Organise Staff to Receive, Check and Record Incoming Deliveries in a Retail Organisation
J09P 04	7	12	PPL.B302	Manage Staff and Maintain Stock Records in a Storage Facility in a Retail Organisation
J0AK 04	6	5	PPL.B303	Check the Storage and Care of Stock in a Retail Organisation
J0C0 04	6	8	PPL.B304	Organise an Audit Programme and Put it into Practice with a Team in a Retail Organisation
J0AL 04	6	5	PPL.B305	Investigate Problems and Report the Findings of Stock Audits in a Retail Organisation
J0AM 04	6	7	PPL.B306	Choose and Contract with Suppliers and Order Stock in a Retail Organisation
J0AN 04	6	7	PPL.B307	Check and Evaluate the Performance of Suppliers of Stock
Customer Service				
J0B7 04	6	5	PPL.C315	Decide on the Value of Items Offered in Part-Exchange by Retail Customers
J0B8 04	6	5	PPL.C316	Negotiate Part-Exchange Sales Transactions with Retail Customers
J09W 04	7	8	PPL.E315	Evaluate and Improve External Suppliers Service to Customers' of a Retail Organisation
J0AA 04	7	7	CFACSD11	Lead a Team to Improve Customer Service
J09F 04	8	8	PPL.C412	Monitor and Improve Customers' Experience of a Retail Organisation
J09H 04	8	6	PPL.D004	Monitor and Resolve Customer Complaints within a Retail Organisation
Management and Leadership				
J0BX 04	6	6	PPL.E003	Plan and Allocate Work to Staff in a Retail Organisation
J09D 04	8	10	PPL.E301	Identify and Analyse Opportunities for Solving Problems And Improving Retail Operations

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J0AE 04	6	7	PPL.E302	Recommend, Agree and Contribute to Implementing Improvements to Retail Operations
J09N 04	8	6	PPL.E305	Monitor, Identify and Investigate Loss and Wastage in a Retail Organisation
J09E 04	8	7	PPL.E306	Assess, Monitor and Control Risks to Health and Safety and Provide Training in a Retail Organisation
J0AG 04	6	5	PPL.E337	Help Colleagues to Learn in a Retail Organisation
Merchandising				
J0C5 04	6	4	PPL.C301	Organise Staff to Display Goods for Retail Sale
J0C1 04	6	4	PPL.C302	Assess How Effective Displays Are in a Retail Organisation
Finance				
J09R 04	7	7	PPL.C270	Promote a Retail Organisation's Own Credit Card to Customer
J0AP 04	6	6	PPL.C271	Offer Customers Information on Insurance Products Associated with a Retail Organisation's Credit Card
J0AS 04	6	8	PPL.C272	Help Customers to Apply for a Retail Organisation's Credit Card and Associated Insurance Products
J0AT 04	6	6	PPL.C306	Identify the Retail Customer's Credit or Hire-Purchase Requirements
J09S 04	7	6	PPL.C307	Advise Retail Customers on the Features of Borrowing Facilities
J0AV 04	6	5	PPL.C308	Process Credit or Hire-Purchase Applications on Behalf of Retail Customers
Multi-channel Retail				
J0C3 04	6	8	PPL.MCR01	Work Productively with Colleagues in a Multi-Channel Retail Organisation
J0C4 04	6	6	PPL.MCR02	Work with Colleagues to Encourage Innovation in a Multi-Channel Retail Organisation
J0C6 04	6	3	PPL.MCR03	Update Product Information on a Trading Website
J0CD 04	6	5	PPL.MCR05	Provide Support to Individual Retail Customers of a Trading Website

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J0CC 04	6	4	PPL.MCR06	Analyse Feedback from Retail Customers of a Multi-Channel Retail Organisation When Goods Are Returned
J0AW 04	6	4	PPL.MCR07	Manage a Social Network on a Trading Website
J0C8 04	6	7	PPL.MCR16	Advise and Support Customers in a Retail Organisation on the Use of Online Retail Facilities
J0C9 04	6	7	PPL.MCR17	Motivate Colleagues to Promote Online Retail Facilities to Retail Customers
Product Expertise				
J0B0 04	6	8	PPL.B308	Monitor and Contribute to Improving Food Safety in a Retail Organisation
J0BM 04	6	6	PPL.C253	Demonstrate Beauty Products to Retail Customers
J0C7 04	6	8	PPL.C263	Advise Customers Upon Measuring and Planning for the Fixing of Tiles
J0BJ 04	6	8	PPL.C264	Advise Customers Upon the Fixing of Their Own Tiles
J0BH 04	6	8	PPL.C268	Help Customers to Choose Alcoholic Beverages in a Retail Organisation by Advising on and Recommending Relevant Products
J0BG 04	6	2	PPL.C273	Use the Dressing Room Facilities to Create Sales Opportunities

Options Group B (Group 2)

Candidates must complete a maximum of 2 units from Group 2

SQA ref	SQA level	SCQF credit points	SSC ref	Title
Management and Leadership				
J0CE 04	5	5	PPL.E304	Monitor and Maintain Security in a Retail Organisation
J0CF 04	5	4	PPL.E307	Take a Safe and Active Role When Accidents and Emergencies Occur in a Retail Organisation
Merchandising				
J0CG 04	5	3	PPL.C303	Keep Stock Available, Correctly Priced and Maintain Quality of Stock in a Retail Organisation

SQA ref	SQA level	SCQF credit points	SSC ref	Title
Finance				
J0D1 04	5	4	PPL.C214	Provide a Payment Service at Point of Sale in a Retail Organisation
Multi-channel Retail				
J0F6 04	5	9	PPL.MCR15	Use In-Store Online Facilities to Achieve Retail Sales
J0F7 04	5	5	PPL.MCR18	Maintain the Confidentiality and Security of Online Data Regarding Retail Customers
Product Expertise				
J0DL 04	5	6	PPL.B220	Bake (Bake-Off) Products for Sale in a Retail Organisation
J0DM 04	5	6	PPL.B221	Finish Bake-Off Products in a Retail Organisation
J0DN 04	5	3	PPL.B224	Prepare Greengrocery Products for Sale in a Retail Organisation
J0DC 04	5	5	PPL.B225	Display and Maintain Greengrocery Products to Attract Sales in a Retail Organisation
J0DT 04	5	6	PPL.B226	Quality Check the Suitability of Meat Products for Finishing in a Retail Organisation
J0DV 04	5	5	PPL.B227	Prepare to Finish Meat Products in a Retail Organisation
J0DW 04	5	5	PPL.B228	Achieve Meat Product Yield and Finish in a Retail Organisation
J0DY 04	5	4	PPL.B243	Organise Your Work to Meet a Dough Production Schedule in a Retail Organisation
J0E0 04	5	5	IMPCB101	Select Weigh and Measure Ingredients in Bakery Operations
J0E1 04	5	6	IMPCB105	Divide, Mould and Shape Fermented Dough in Bakery Operations
J0E2 04	5	6	PPL.B248	Hand-Process Fish in a Retail Organisation
J0DJ 04	5	2	PPL.C250	Identify the Retail Customer's Requirements for Lingerie
J0DK 04	5	8	PPL.C251	Measure and Fit Retail Customers for Lingerie
J0F2 04	5	2	PPL.C254	Maintain the Customer Record-Card System in a Retail Organisation
J0E5 04	5	6	PPL.C262	Establish Retail Customers' Requirements and Provide Advice Regarding Tiling Products

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J0E3 04	5	7	PPL.C278	Help Customers to Choose Delicatessen Products in a Specialist Retail Organisation
J0E4 04	5	6	PPL.C279	Portion Delicatessen Products to Meet Individual Customers' Requirements in a Specialised Retail Organisation or Specialist Counter within a General Retail Organisation

SVQ Retail (Visual Merchandising) at SCQF level 6 (GP1F 23)

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J0AB 04	6	4	PPL.E335	Support Effective Team Working in a Retail Organisation
J0AC 04	6	5	PPL.E336	Contribute to the Planning, Organisation and Evaluation of Your Own Learning in a Retail Organisation
FY7H 04	6	6	CFACSB10	Organise the Delivery of Reliable Customer Service

Group A Options

Candidates must take a minimum of three units from Group A

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J0BN 04	6	6	PPL.C234	Evaluate and Improve Retail Displays
J0BP 04	6	5	PPL.C235	Order Graphic Materials to Meet Retail Display Requirements
J09L 04	8	8	PPL.C239	Confirm the Requirements for Props and Prototypes for Retail Displays
J09X 04	7	8	PPL.C240	Make Life-Size Copies of Items for Retail Displays
J09Y 04	7	8	PPL.C241	Make Scale Models of Items for Retail Displays
J0A1 04	7	5	PPL.C242	Decorate Fixtures and Panels for Retail Displays
J0A2 04	7	5	PPL.C243	Interpret Retail Display Layout Requirements from Plans, Elevations and Drawings

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J0C5 04	6	4	PPL.C301	Organise Staff to Display Goods for Retail Sale
J0C1 04	6	4	PPL.C302	Assess How Effective Displays Are in a Retail Organisation
J0BR 04	6	4	PPL.C332	Identify and Obtain Graphic Materials for Retail Displays
J0BS 04	6	4	PPL.C333	Co-ordinate How Graphic Materials Are Used in Retail Displays
J0BT 04	6	5	PPL.C335	Gather Information About Retail Customers' Responses to Displays and Layouts
J0A3 04	7	4	PPL.C336	Assess and Report the Effect of Retail Displays and Layouts
J0A4 04	7	7	PPL.C337	Negotiate and Agree Costs for Visual Merchandising Projects
J0A5 04	7	6	PPL.C338	Record and Monitor Costs for Visual Merchandising Projects
J0A6 04	7	6	PPL.C339	Contribute to Developing a Retail Organisations Visual-Design Policy
J0A7 04	7	6	PPL.C340	Support Staff Putting into Practice a Retail Organisation's Visual-Design Policy
J0A8 04	7	7	PPL.C341	Develop and Test Solutions for Retail Display Layouts
J09M 04	8	7	PPL.C342	Produce Guidance for Putting Retail Display Layouts Together

Group B Options

Candidates must take a maximum of four units from Group B

SQA ref	SQA level	SCQF credit points	SSC ref	Title
Merchandising and Visual Merchandising				
J0EM 04	5	3	PPL.C230	Interpret Design Briefs for Retail Displays
J0EP 04	5	5	PPL.C231	Source Merchandise and Props to Be Featured in Retail Displays
J0ER 04	5	7	PPL.C232	Dress In-Store Displays to Guidelines
J0ET 04	5	6	PPL.C233	Dress Window Displays Following a Retail Organisation's Guidelines
J0EV 04	5	3	PPL.C236	Position Graphic Materials to Support Retail Displays

SQA ref	SQA level	SCQF credit points	SSC ref	Title
J0EJ 04	5	3	PPL.C238	Store Equipment, Props and Graphics for Retail Displays
J0EW 04	5	4	PPL.C244	Follow Guidelines for Putting Retail Display Layouts Together
J0CG 04	5	3	PPL.C303	Keep Stock Available, Correctly Priced and Maintain Quality of Stock in a Retail Organisation
J0EX 04	5	2	PPL.C330	Interpret Requirements for Retail Displays
J0EY 04	5	3	PPL.C331	Choose and Agree Retail Merchandise to Be Featured in Retail Displays
J0F0 04	5	2	PPL.C334	Check How Graphic Materials Are Used in Retail Displays
Stock Management				
J0AH 04	6	12	PPL.B301	Organise Staff to Receive, Check and Record Incoming Deliveries in a Retail Organisation
J09H 04	7	12	PPL.B302	Manage Staff and Maintain Stock Records in a Storage Facility in a Retail Organisation
J0AK 04	6	5	PPL.B303	Check the Storage and Care of Stock in a Retail Organisation
Management and Leadership				
J0CF 04	5	4	PPL.E307	Take a Safe and Active Role When Accidents and Emergencies Occur in a Retail Organisation
J0AG 04	6	5	PPL.E337	Help Colleagues to Learn in a Retail Organisation
J0BW 04	6	5	PPL.E338	Manage a Team on a Temporary Basis in a Retail Organisation
J09D 04	8	10	PPL.E301	Identify and Analyse Opportunities for Solving Problems and Improving Retail Operations
J0AE 04	6	7	PPL.E302	Recommend, Agree and Contribute to Implementing Improvements to Retail Operations
J0CE 04	5	5	PPL.E304	Monitor and Maintain Security in a Retail Organisation
J09N 04	8	6	PPL.E305	Monitor, Identify and Investigate Loss and Wastage in a Retail Organisation

An assessment strategy for the SVQ?

As part of the review of the SVQ(s), the standards-setting body has developed an assessment strategy which defines a range of requirements:

- ◆ the occupational expertise of assessors and verifiers
- ◆ a definition of simulation
- ◆ definition of the workplace
- ◆ information on a model of independent assessment or external quality control

The assessment strategy are published on SQA's website (www.sqa.org.uk), on the relevant subject page and both SQA and centres must comply with these requirements.

Why would people be interested in the SVQ?

People will take SVQs for a variety of reasons: to gain promotion, to prove their job competence, or for personal development. There will be other reasons too. One of the first things to do is to find out why your candidates want to do the SVQ, and to advise them of the appropriateness of the qualification. If anyone is acting as a coach or mentor to your candidates, they might help you to do this.

How do candidates begin?

Choosing the SVQ

You should make sure that candidates get guidance before starting out on an SVQ — they need advice to ensure that their existing job remit, skills, experience, and their plans for progression, are matched to the SVQ selected. It does not have to be you as the assessor, who carried out the matching process, but whoever has responsibility for this should ensure that the assessment opportunities available to the candidate are also considered.

Example

Alison has been working for three years as a sales assistant in the fashion department of Lifestyle Stores, a family run department store. Internal promotion has created a vacancy for an assistant department manager and the store manager has recommended Alison for the role. Alison was selected for interview and was given the job.

During the interview, it was identified that Alison needed to further develop a number of skills to assist her in her new role. These skills included:

- ◆ stock control
- ◆ stock taking procedures
- ◆ team building
- ◆ dealing with difficult customers

Part of Lifestyle Store's development programme for staff includes the SVQs in Retail which are delivered by an external training organisation. All members of staff are encouraged to be part of the programme and SVQs are offered at SCQF levels 4, 5, and 6.

Alison's store manager arranged a meeting between the training organisation, Alison, and her department manager to discuss the most appropriate route for Alison's development. It was agreed that Alison should work towards an SVQ Retail (Sales Professional) at SCQF level 6. She would be supported at work by a mentor — her department manager, and be assessed in the workplace by an occupationally competent assessor from the external training organisation.

Alison, her mentor, and the assessor met to discuss and agree the most appropriate units for Alison's development and job role. The SVQ Retail (Sales Professional) at SCQF level 6 consists of three mandatory units and seven optional units.

It was recognised that the mandatory units *J0AB 04 Support Effective Team Working in a Retail Organisation*, *J0AC 04 Contribute to the Planning, Organisation and Evaluation of Your Own Learning in a Retail Organisation* and *FY7H 04 Organise the Delivery of Reliable Customer Service* would allow Alison to demonstrate a number of the skills and knowledge required in her new role. However, as it was a new role, focus on the optional units would provide Alison the opportunity to demonstrate the skills deemed necessary at the interview process to allow her to operate effectively at assistant department manager level.

These units were identified as:

- ◆ J0BW 04 *Manage a Team on a Temporary Basis in a Retail Organisation*
- ◆ J09G 04 *Develop Effective Relationships with Customers in a Retail Organisation*
- ◆ H5BN 04 *Improve the Customer Relationship*
- ◆ J0AK 04 *Check the Storage and Care of Stock in a Retail Organisation*
- ◆ J0AA 04 *Lead a Team to Improve Customer Service*
- ◆ J09H 04 *Monitor and Resolve Customer Complaints within the Retail Organisation*
- ◆ J09P 04 *Manage Staff and Maintain Stock Records in a Storage Facility in a Retail Organisation*

Completion of these units would allow Alison to demonstrate competence in a variety of areas, but would provide a focus on the relevant skills identified in the interview process.

It was agreed that in-house training would provide Alison with the knowledge required for stock control and stock taking, and that Alison would shadow her department manager during the next stock take. The training company also runs team building courses, and a date was confirmed for Alison to attend an external training event.

Evidence for the units would come from examples of work completed by Alison, for example, stock taking records and results, staffing schedules, observations/ testimonies from expert witnesses to confirm Alison's performance, and a combination of written and audio records from Alison herself.

It was also agreed that Alison's customer care and selling skills were already up to the SVQ SCQF level 6 standard, and that much of the evidence for these units would come from a combination of evidence from an expert witness, Alison's manager, and audio recordings of professional discussions between Alison and her assessor.

A nine month assessment plan which avoided peak trading times, for example Christmas and sale periods, was agreed. As a result, Alison took up her new post with the knowledge that she had the support of a sound learning and development programme with a nationally recognised outcome — SVQ Retail (Sales Professional) at SCQF level 6 — to assist her in the future.

2 Preparing to assess the SVQ

This section offers practical advice on how to begin to go about assessing your candidates for the SVQ. This advice is offered as examples of good practice — you may develop your own approaches to assessing your candidates which also work well.

Your role and your candidate's role

Assessing the SVQ will involve several stages. Both you and the candidate should be clear on your roles in the assessment process before you begin.

Your role

- ◆ ensure candidates understand what is to be assessed and how it is to be assessed
- ◆ ensure the conditions and resources required for assessment are available
- ◆ help candidates to identify and gather evidence
- ◆ observe and record candidates carrying out the activities described in the standards — records should say what has been observed, how it was carried out, and what it demonstrates
- ◆ assess products of the candidate's own work
- ◆ question candidates and record results
- ◆ help candidates to present evidence
- ◆ authenticate the evidence candidates provide
- ◆ judge evidence and make assessment decisions
- ◆ identify gaps or shortfalls in candidates' competence
- ◆ provide feedback to candidates throughout the assessment process
- ◆ record achievement

Candidate's role

- ◆ prepare for assessment — become familiar with the standards, what is to be assessed and how it is to be assessed
- ◆ help to identify sources of evidence and how these could be assessed
- ◆ carry out activities, and/or produce products of own work, and/or answer questions
- ◆ gather and present evidence
- ◆ receive and act on feedback from the assessor

Planning

In planning for assessment, you will find it helpful to meet with your candidate and plan what is to be assessed, in what way, and when and where the assessment is to take place. This discussion can be confirmed in the form of an agreed assessment plan between you and your candidate.

You should treat assessment plans as working documents — they can be updated and changed as you review progress with your candidate.

As you are planning assessment, don't forget to make the most of opportunities to *integrate* assessment. This means planning to assess an activity which draws on the contents of different units or elements. It can be a practical and cost-effective way of assessing your candidate's competence.

If you are a new assessor working towards your *Learning and Development* units (the national standards in assessment and verification) you will need copies of completed assessment plans as part of your evidence.

To help you plan for assessment, we have produced an assessment plan which covers unit J0AA 04 *Lead a Team to Improve Customer Service* which is part of the SVQ Retail (Sales Professional) SCQF level 6.

You will notice that we have included spaces to enter dates when the assessment plan has been reviewed. Any gaps identified during these reviews should be discussed with your candidates and noted for action in the assessment plan.

Assessment plan

Units	J0AA 04 Lead a Team to Improve Customer Service				
Activities	Statements Key outcomes	Method of assessment/ sources of evidence	Date of assessment	Evidence already available	Links to other units (PC and range)
Organise a team meeting to discuss existing customer service and ways in which it can be improved individually, as a team and as an organisation	P1, P2, P3, P4, P5, P6 K1, K2, K3, K4, K5, K6	Observation	1 October	N/A	Link to mandatory units J0AB 04 <i>Support Effective Team Working in a Retail Organisation</i> , FY7H 04 <i>Organise the Delivery of Reliable Customer Service</i> . Also likely to link to H5BN 04 <i>Improve the Customer Relationship</i> .
Work the the team in a customer facing environment to encourage implementation of customer service improvements	P7, P8, P9 K7	Observation	14 October		
Review performance of team members	P10, P11, P12 K8	Observation	14 October		
Questioning for knowledge and understanding not apparent from performance to be identified from 2nd review		Assessor devised questions	14 October		

Assessor's signature	<u>Heather Morrison</u>	1st review due	<u>1 October</u>
Candidate's signature	<u>Alison Fraser</u>	2nd review due	<u>14 October</u>
Date of agreement	<u>1 October</u>	Date of completion	<u>14 October</u>

Selecting methods of assessment

The methods of assessment you use should be valid, reliable and practicable.

- ◆ By valid we mean that the assessment method should be appropriate to the standards
- ◆ By reliable we mean that the assessment method should ensure consistent results when used with different candidates, different assessors and on different occasions
- ◆ By practicable we mean that the method ensures that the assessment makes best use of available resources, equipment and time

Before you assess a candidate, you must make sure that the methods of assessment you have chosen to use, along with any assessment materials (such as questions and sample answers) have been agreed within your centre through its system of internal quality assurance. This system is often called *internal verification* — its purpose is to help to ensure that assessment methods are valid, reliable and practicable.

There are both benefits and challenges when you are assessing SVQs in the workplace, or in conditions of the workplace. When you select methods of assessment, you should try to offer the candidate the benefits of workplace assessment and minimise any potential difficulties.

The benefits might be:

- ◆ cost effectiveness to the candidate's organisation ie, no need to be 'off the floor' for unproductive periods of time
- ◆ observation by the assessor in the workplace removes the need for further authenticity of evidence
- ◆ opportunity for the candidate to perform in a familiar environment
- ◆ development of a positive and constructive relationship between the assessor, the candidate, and the candidate's organisation

The challenges might be:

- ◆ changing assessment plans to meet the needs of the business eg, candidate may not have time to be assessed due to shortage of staff
- ◆ conditions might not lend themselves to valid, reliable, and practicable assessment methods eg, conditions could be too busy or too quiet to allow performance to be demonstrated to the SVQ standard
- ◆ there may be issues of confidentiality, particularly at level 3
- ◆ shift work may mean that assessors have to be available at different times of the day and night

Example

You might agree to use observation to assess a candidate who works in a retail outlet and has to demonstrate how they give customers a positive impression of themselves and their organisation. The observations could be supported by testimony from an expert witness and, where appropriate, any gaps in evidence could be covered by professional discussion.

Methods of assessment

Assessment may involve a range of assessment methods. For SVQs, some of the most commonly used methods are observation, product evidence, and questioning.

Observation

Observation by an assessor is considered to be the most valid and reliable method of assessment. It can be organised in a variety of ways:

- ◆ working alongside the candidate
- ◆ arranging to visit when naturally-occurring activities are carried out by the candidate
- ◆ arranging for activities to take place

Observation by the assessor can often be supplemented by other types of assessment methods such as questioning. For example, it may be appropriate to ask oral questions of candidates as they carry out naturally-occurring activities.

Observation of naturally-occurring evidence would be an ideal assessment method for unit J0BA 04 *Demonstrate Specialist Products to Customers in a Retail Organisation*, and for other units where candidates perform tasks as part of their job role, for example, carry out spot checks of storage facilities and stock at suitable intervals.

Observation of unit J0BW 04 *Manage a Team on a Temporary Basis in a Retail Organisation* could be arranged in the assessment plan to allow the assessor to observe at first hand that correct procedures are being used.

Product evidence

As candidates work towards achieving the SVQ, they will produce evidence in the form of products of their work. The nature of this evidence can vary widely depending on what the candidate's job entails, but examples of product evidence include:

- ◆ Product evidence for unit J0AK 04 *Check the Storage and Care of Stock in a Retail Organisation*, might include a delivery note which has been signed by the candidate
- ◆ A 'live' staffing schedule which has been completed by the candidate would be relevant product evidence for unit *Manage a Team on a Temporary Basis in a Retail Organisation* J0BW 04

NB — Further explanation or annotation of any product evidence greatly increases its value. For example, encourage candidates to explain how their product evidence relates to the evidence requirements.

Questioning

Candidates have to show that they can meet the knowledge specifications for the SVQs. For these SVQs, knowledge and understanding is specified for each unit. Much of a candidate's knowledge and understanding will be apparent from what they do or produce as part of their work, but this will not always be the case, and questioning can be a useful way of confirming what candidates know and understand.

Questions can be asked in a variety of forms, such as oral questions, short answer written questions, and multiple-choice.

You should be careful that the method of questioning does not go beyond the competence required for the SVQ and become a barrier to fair assessment. For example, some candidates will feel more comfortable with oral questions than written.

Example

In the assessment for *J0BW 04 Manage a Team on a Temporary Basis in a Retail Organisation*, it may not always be possible to access confidential information (PC 10)

A suitable question to confirm competence in this scenario might be:

Why is it important to identify recognise what is confidential information and how this should be managed?

It is fair to assume that the majority of the knowledge requirements from a given unit would be covered by observation of the candidates performance, however, this might not always be the case. For example in the same unit as above, knowledge requirements K7 and K12 may still need to be covered. Oral questions in this scenario may be:

K7 What are the benefits to both your team and yourself in ensuring you are approachable as a team leader?

K12 Why is it important to ensure that all members of your team are treated equally?

Other methods of assessment

These methods, like questioning, are often used for authentication. See Section 3 for more about authenticating candidates' evidence.

Personal statements

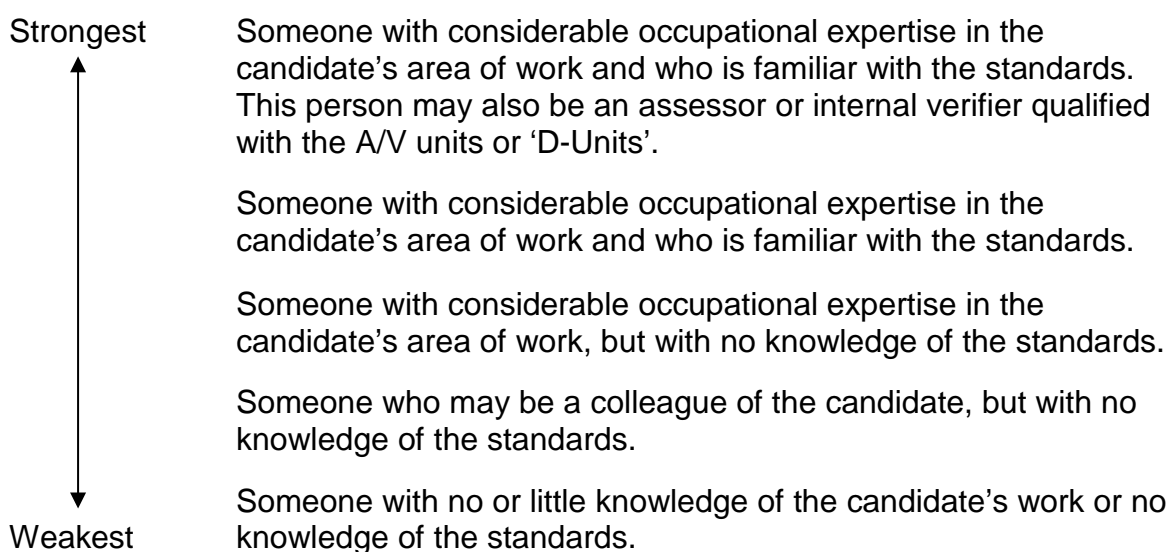
You might sometimes find it helpful to ask a candidate to give an account of why they did an activity in a certain way or how they produced a product of their work. This is often referred to as a *personal statement*. You should take care to ensure that by asking candidates to produce such statements, you are not asking them to demonstrate competence beyond what is required by the standards. You should also be selective in the use of personal statements, and make sure they have not been produced as a substitute to a more valid, reliable and practical method of assessment.

Unit J0BA 04 *Demonstrate Specialist Products to Customers in a Retail Organisation*, is an activity that is not easy to plan for. It is likely that your candidate will have to deal with these types of situations when you are not present to observe. Therefore, a personal statement by your candidate which describes how they helped a customer through demonstrating the benefits of a particular product. The personal statement should be confirmed by a reliable witness and/or further questioning by the assessor for authentication purposes.

Witness testimony

For practical reasons, you may not be able to observe all the activities carried out by your candidates, but might feel that other people may be able to provide a statement on what your candidates have been doing or producing as part of their work. Statements of this kind are called *witness testimony*, and are often used to support other evidence produced by candidates. If witness testimony is used, you should, ideally, identify witnesses and opportunities for using their testimony as part of assessment planning.

You should bear in mind that the weight of the evidence will vary, depending on the knowledge and expertise of the person providing the witness testimony. You will have to take these factors into account as you make your judgement.



Witness testimony is unlikely to be sufficient in itself for a decision about the candidate's competence, and would normally be supplemented by questioning candidates.

Most units require that performance be demonstrated on more than one occasion, and over a period of time, to establish competence. Sources of evidence such as observation and/or product evidence might not always cover all of the evidence requirements. This is particularly the case at level 3 where candidate input in the form of reports and professional discussions are required, or where candidate personal statements are used. It is useful to include a witness statement in which another person can confirm your candidate's performance. The value and reliability of the witness statement will depend very much on the knowledge and expertise of the witness (see above), and you must bear this in mind when making your assessment decision.

In situations where specialist skills and knowledge are being assessed, testimony from an expert witness will be necessary.

Simulation

Simulation is any structured assessment exercise involving a specific task which reproduces real-life situations.

On some occasions, it may not be practical to assess a candidate in real work. Examples might be where the standards require candidates to carry out emergency or contingency procedures, or where client confidentiality is an issue, or where a candidate's job role does not cover all aspects of the qualification.

For more details on simulation and what constitutes performance in the workplace, look at the assessment strategy on SQA's website: www.sqa.org.uk.

Other sources of evidence

Other sources of evidence can be previous experience or learning, case studies or assignments.

SQA's *Guide to Assessment* has more advice on methods of assessment and how to ensure that your assessment is valid, reliable and practicable.

3 Generating evidence

The methods of assessment you use should generate sufficient evidence to demonstrate the candidate's competence.

We described earlier the circumstances in which you might choose to use different methods of assessment. Starting on the next page, this section gives you examples of forms which you can use to record and present evidence of:

- ◆ observation (by the assessor)
- ◆ questions and candidate responses
- ◆ personal statement (produced by the candidate)
- ◆ witness testimony

There are blank forms which you can copy and use in assessment in Appendix 1.

Observation

For observation, note that the form asks you to record the skills and activities observed. This helps you to make a judgement on how the activity was carried out and what it demonstrates.

Observation record

Unit/element(s)	<i>JOBA 04 Demonstrate Specialist Products to Customers in a Retail Organisation</i>
Candidate	<i>Alison Fraser</i>
Evidence index number	<i>5</i>
Date of observation	<i>1 October</i>

Skills/activities observed	Performance criteria covered
I observed Alison dealing with customers wishing to buy a vacuum cleaner. She established the customer needs by asking questions, and selected a number of vacuum cleaners which matched their requirements — pets at home, hand-held options. Alison explained the features and benefits of the products and checked that the customer understood by asking further questions. Alison allowed the customer time to consider, and responded to objections about price of their favourite model by saying that the product had the longest guarantee of all the models on offer. The customer agreed to purchase, and the candidate suggested a specialist car cleaning attachment which was on offer at half price. Customer purchased both products. Alison highlighted the warranty on both products, and accompanied the customer to the checkout.	P1, P2, P3, P4, P5, P6, P7

Knowledge and understanding apparent from this observation

K1, K2, K4, K5, K6, K7, K8, K9

Other units/elements to which this evidence may contribute

Unit: *Improve the Customer Relationship*

Elements: P1.1, P1.3, P2.1 P2.2, P2.3, P2.4, P2.5, P2.6, P3.1, P3.2, P3.3

Assessor's comments and feedback to candidate

Excellent evidence of helping customers to choose products was demonstrated during this observation. Expert witness testimony will be requested to confirm performance over time and evidence from observation on 12 September will be included.

Oral questions will be asked on 14 October to supplement knowledge and understanding for elements K3 and K10. Successful completion of these will complete unit. Well done.

I can confirm the candidate's performance was satisfactory.

Assessor's signature *Heather Morrison* **Date** *1 October*

Candidate's signature *Alison Fraser* **Date** *1 October*

Observation record

Unit/element(s)	<i>J0BW 04 Manage a Team on a Temporary Basis in a Retail Organisation</i>
Candidate	<i>Alison Fraser</i>
Evidence index number	<i>6</i>
Date of observation	<i>1 October</i>

Skills/activities observed	Performance criteria covered
I observed Alison during the morning staff meeting. Alison told me that there was a shortage of staff and she wanted to boost morale. She explained to the team that staffing levels were low today and that as a result, cover on the shop floor would be thin during breaks so everyone would be required to ensure stock levels were replenished, and payment points were fully operational before taking breaks. Alison thanked her team for an excellent previous day's trade, and assured them that she had reported this to the store manager. Alison then informed the team of all current promotions, and gave advice on add-on selling to maximise sales. Alison informed the team that she would be involved in a meeting from 10am to 11am and that in her absence the team leader in the next department would be available to assist if required. Alison informed the team that she would be carrying out performance reviews starting the following week, and that all team members should consider any questions they might have. The meeting was brought to a close at this point.	P1, P2, P3, P7, P8, P9, P12

Knowledge and understanding apparent from this observation K1, K2, K7, K8, K10, K15

Other units/elements to which this evidence may contribute <i>J0AB 04 Support Effective Team Working in a Retail Organisation</i> Elements: P2, P4, K1, K7, K9

Assessor's comments and feedback to candidate Confident and enthusiastic presentation given to team. Professional discussion — next assessment — will confirm all knowledge requirements and store manager will provide a witness statement. Well done.

I can confirm the candidate's performance was satisfactory.

Assessor's signature *Heather Morrison* **Date** *1 October*

Candidate's signature *Alison Fraser* **Date** *1 October*

Questions and candidate responses

This form can be used to record any questions you might ask the candidate to establish what they know and understand. You should note the candidate's responses on this form too.

Note that there is a space near the top of the form for you to record when, where, how and why you asked the questions.

Where you want to give the candidate written questions, this form could also be used.

Record of questions and candidate's answers

Unit	J0BA 04 <i>Demonstrate specialist products to customers in a retail organisation</i>
Outcomes/element(s)	P1 (K3)
Evidence index number	16
Circumstances of assessment	
Evidence not generated during observation on 1 October	
List of questions and candidate's responses	
Q	Why is it important to be aware of customer body language and immediate circumstances when you are showing a product and extend an invite to watch or take part in a specialist product demonstration?
A	It is always positive to provide a customer with a demonstration on how a particular product works. However, you must be aware of the customers body language and immediate circumstances when providing this offer. If the customer is fidgety or short in their responses, this could be a sign they are in a hurry to be somewhere else, and this means they do not have time for a demonstration. Likewise if the customer has a young child who is getting restless you must be aware of this in the interaction you are having. In these circumstances it would be good to recognise the circumstance of the particular customer, offering to make arrangements for another time if necessary. This allows the customer the freedom to make a choice and increases the chance of them being satisfied with the service provided and coming back.
Q	What steps should be taken to minimise the security risks associated with specialist product demonstrations?
A	When demonstrating a product to a customer, it is important to always be aware of where the product is. Allow the customer the freedom to have a proper demonstration but do not be so lax as to let the customer walk away with the product. Pay attention throughout the demonstration and keep distractions to a minimum, this will reduce the likelihood of the product being stolen.

Assessor's signature Heather Morrision **Date** 1 October

Candidate's signature Alison Fraser **Date** 1 October

Candidate's personal statement

If a personal statement is being used as evidence, it should be completed by the candidate. The statement should record what they did, how and why they chose to carry out an activity or produce work in a certain way. Where other people may have been present during an activity and they may be able to provide witness testimony, the candidate should record how the statement links to other evidence in the column provided.

Personal statement

Date	Evidence index number	Details of statement	Links to other evidence (enter numbers)	Unit, elements, performance criteria, performance statements, scope covered
25/5	11	<p>I was working on the shop floor on Tuesday 23 May when a customer approached me and asked to see the manager. I explained that my manager was in a meeting and asked if I could help. The customer stated that she had bought a vacuum cleaner on Saturday and when she got home and unpacked discovered there was a crack on it.</p> <p>I examined the vacuum cleaner and it was clear that there was a crack. I agreed with the customer and explained that the vacuum cleaner could have been damaged in transit. I apologised for the inconvenience and offered to exchange the goods. The customer was happy with this and I selected a new vacuum cleaner from the stockroom.</p>		<p>Unit H5BN 04 <i>Improve the Customer Relationship</i></p> <p>P1, P3, P4, P5, P7, P10, P13</p> <p>K1, K3, K4</p>

Date	Evidence index number	Details of statement	Links to other evidence (enter numbers)	Unit, elements, performance criteria, performance statements, scope covered
		<p>I examined the new product carefully and showed the customer that it was in perfect condition. I explained to the customer that the guarantee was exactly the same as before and advised her to keep her receipt as proof of purchase.</p> <p>The customer thanked me for my help and left the store.</p> <p>I am allowed to process exchange of goods, but have to refer any refunds to my manager. If I have any doubt about the exchange of goods, I would also refer to my manager.</p> <p>The above statement has been confirmed by my colleague Manjit Saggu, who witnessed the event.</p> <p>Manjit Saggu 23/10</p> <p>I confirm that I was present during the above event and witnessed Alison dealing with the customer as described.</p>		

Candidate's signature Alison Fraser Date 23 October

Witness testimony

Remember when you begin to use witness testimony that it must be capable of being authenticated — even if the testimony itself is being used to authenticate a candidate's claim to competence.

To make sure the witness testimony is genuine, you must ensure that you have a record of who is acting as a witness, their relationship to the candidate (eg, supervisor, client) address, telephone number and the date. There are spaces for this information in the form.

Witness testimony

SVQ title and level	SVQ 3 Retail (Sales Professional) SCQF level 6
Candidate's name	Alison Fraser
Evidence index no	Page 9
Index no of other evidence which this testimony relates to (if any)	Page 30 Unit <i>Manage a Team on a Temporary Basis in a Retail Organisation</i>
Outcomes/element(s)	1, 2, 3
Date of evidence	1 May
Name of witness	Andrew Morrison
Designation/relationship to candidate	Manager
<p>Details of testimony</p> <p>I can confirm that Alison managed a team of sales assistants which set up and delivered a recent fashion promotion within Lifestyle Stores. The event was to promote a new range of jeans and ran for two weeks.</p> <p>Alison was responsible for informing all team members of the promotion and held several team meetings to ensure that everyone was aware of the promotion and their role in it. Alison delegated responsibilities to individuals. These responsibilities included:</p> <ul style="list-style-type: none"> ◆ preparation of the promotion area ◆ assembling fixtures and fittings ◆ stocking and pricing the promotion ◆ positioning point of sale material for the promotion <p>Alison provided clear instructions to all her team and gave some one-to-one coaching on pricing and positioning point of sale material.</p> <p>Alison monitored the promotion throughout and made some changes to the layout. This resulted in an increase in sales.</p> <p>Throughout the promotion, Alison planned each stage and kept team members informed of all developments. Alison treated her team with respect, and ensured that each member of the team was prepared for their tasks. Alison kept her team motivated, praised performance where appropriate, and provided guidance when needed. Alison also sought advice from me in relation to the most effective positioning of point of sale material.</p> <p>Alison has proved herself to be a most thorough and effective team leader during this promotion.</p>	

I can confirm the candidate's performance was satisfactory.

Witness's signature Andrew Morrison **Date** 1 October

Witness (please select the appropriate box):

- Holds A1/A2 or D32/D33 qualifications
- Is familiar with the SVQ standards to which the candidate is working

Filling the gaps

There may come a time when your candidate has provided evidence for most of the unit (or SVQ), but there are some gaps. For example, you may find that certain situations, such as handling contingencies, have not arisen during assessment. Often these will relate to dealing with health and safety issues, or unexpected problems with workflow like delays in receiving information from another part of the organisation.

In this SVQ, such gaps are likely to occur in generating evidence for:

- ◆ health and safety units, for example evacuation procedures, dealing with emergencies
- ◆ security units, for example security risks beyond your candidate's authority, procedures for personal safety
- ◆ supply of goods and services units, for example reporting shortages in storage space to the right person, reporting faulty equipment when it is not your candidate's responsibility to fix it
- ◆ customer service units, for example referring a customer complaint to the right person when it is not your candidate's responsibility to sort out, dealing with difficult customers

NB — wherever possible, evidence should be generated in realistic working environments which reflect your candidate's ability to perform to the national standard.

You may be able to overcome these by:

- ◆ questioning to confirm your candidate's knowledge of performance
- ◆ witness testimony to confirm your candidate's performance
- ◆ photographic evidence which shows your candidate's progress towards completing an activity, for example building a display, positioning point of sale
- ◆ opportunity to work in other departments/parts of the business to enable evidence to be generated
- ◆ online learning materials
- ◆ online test
- ◆ contributions to online forums
- ◆ simulation to cover some aspects of health and safety and security

Guidance and support to candidates

At all times during the assessment process — from planning through to making your assessment decision — feedback should be on-going, clear and constructive. Feedback should be given against the national standards by relating it to the evidence provided, including the knowledge specifications.

Where there are any shortfalls in a candidate's competence, you should discuss these with your candidate and make plans for re-assessment.

Judging candidate evidence and making an assessment decision

In judging candidate evidence, you must be satisfied that your candidates can work consistently to the required standard, and that the evidence they have produced is their own. You must consider whether your candidate understands and applies the knowledge evidence and how this links to performance evidence.

Evidence must:

- ◆ be relevant to the SVQ
- ◆ be authentic
- ◆ show current competence
- ◆ be sufficient to help you form a decision about the candidate's competence

Insufficient evidence

You have to judge whether the candidate has produced enough evidence required by the standards for you to reach a decision about their evidence.

Where there is insufficient evidence, you should say this to your candidate. You should tell them that it is not that they are not yet competent — there is simply not enough evidence on which to make a decision.

In this situation, your feedback to your candidates must help them produce more evidence and/or plan for further assessment.

Authenticating candidates' evidence

Authentication is required where you have not observed candidates' performance at first hand.

You can check whether a candidate has produced evidence which they claim shows their competence by questioning them or, if this is appropriate, asking them to produce a personal statement, using witness testimony, or seeking peer reports from other colleagues of the candidate.

Example

- ◆ If your candidate is submitting evidence obtained via the internet, you should consider asking them to e-mail the evidence to their manager/supervisor who can confirm that the work is indeed that of your candidate.
- ◆ If your candidate is submitting written questions, authentication can be proved by asking some additional questions and/or checking that hand writing is consistent with other pieces of evidence.
- ◆ Sources of peer reports and witness statements should be checked to confirm the status and reliability of the witness — see section on witness testimonies.

4 Recording achievement

You should retain all evidence — clearly referenced — for internal and external verification.

The candidate's evidence is normally kept in a file, often called a *portfolio*. These documents help you and your candidates to collect, present and cross-reference the evidence to the national standards. They are also a means of recording your assessment decisions, and they tell an external verifier what stage a candidate has reached in achieving the SVQ.

Recording documents do not need to be paper-based — it is possible to use an electronic format for collecting and structuring the evidence. Whatever format you and your candidates choose to use, the documents must show what evidence was generated, the assessment decisions you made, how the evidence meets the standards, and where the evidence can be located. You should avoid photocopying items simply to put them in a portfolio — a clear explanation of where the evidence can be found (for example, in a filing cabinet) may be sufficient for the external verifier to follow it up and include it in the visit.

There are various reasons why record-keeping is so important:

- ◆ it provides a way of tracking a candidate's progress in achieving an SVQ
- ◆ it helps candidates to make claims for certification of their competence
- ◆ internal verifiers and external verifiers use the records to sample assessment decisions
- ◆ it helps us to monitor the quality assurance of our qualifications

If your candidates' evidence is incomplete, or cannot be located, or if there is inaccurate cross-referencing to the standards, there is a risk that an internal verifier or external verifier will be unable to confirm your assessment decisions.

To help you and your candidate present evidence and record your assessment decision, we have provided examples of the forms which you and your candidate might use to compile the portfolio.

- ◆ Completing the unit progress record
- ◆ Using the evidence index
- ◆ Completing the element achievement record

These forms are also used in SQA's portfolio.

Completing the unit progress record

You should complete this form each time your candidate achieves a unit from the SVQ by adding your signature and the date next to the relevant unit.

At this stage, candidates should make sure they have completed the recording documents correctly and that their evidence can be easily located. Only then should they circle the relevant unit number at the top of the form. This enables both of you to see at a glance what stage the candidate is at in their SVQ.

Unit progress record

Qualification and level SVQ in Retail (Sales Professional) (GP1C 23)

Candidate Alison Fraser

To achieve the whole qualification, you must prove competence in three **mandatory** unit and seven **optional** units.

Unit checklist

Mandatory	J0AB 04	J0AC 04	FY7H 04				
Optional	J0BW 04	J09G 04	H5BN 04	J0AK 04	J0AA 04	J09H 04	J09P 04

Mandatory units achieved

Unit number	Title	Assessor's signature	Date
J0AB 04	Support Effective Teamwork in a Retail Organisation	<i>Heather Morrison</i>	<i>30 Jan</i>

Optional units achieved

Unit number	Title	Assessor's signature	Date
J0BW 04	Manage a Team on a Temporary Basis in a Retail Organisation	<i>Heather Morrison</i>	<i>31 Oct</i>
J09G 04	Develop Effective Relationships with Customers in a Retail Organisation	<i>Heather Morrison</i>	<i>23 Oct</i>
H5BN 04	Improve the Customer Relationship	<i>Heather Morrison</i>	<i>30 Nov</i>

Using the index of evidence

The purpose of the index of evidence is to help you locate and work through the candidate's evidence. It should give you a summary of what evidence the candidate has collected, and where (eg in a portfolio) it can be found.

The index of evidence should be completed by entering:

- ◆ the index number for each piece of evidence
- ◆ a description of each piece of evidence
- ◆ the place or location where it can be found
- ◆ the initials of the internal verifier and the date (if they have sampled the candidate's evidence)

Ideally, it should be candidates themselves (with your support and encouragement) who complete the index.

You must make sure that the information in the evidence index is accurate when your candidates' portfolios are presented for assessment and verification — particularly the information about where the evidence can be located. This is important because we suggest that anything which has been produced as day-to-day work is kept in its normal location, but anything which has been produced through assessment for the SVQ eg, observation checklists, is filed in the candidate's portfolio. In this way, your candidate can avoid having to photocopy work products just for the sake of including them in a portfolio. It also means that evidence produced as a result of assessment is kept safely in a central file.

If the index of evidence is not completed with an accurate description and location of the evidence, there is a risk that an internal verifier or external verifier might be unable to confirm your assessment decisions.

Index of evidence

SVQ title and level	SVQ 3 Retail (Sales Professional) at SCQF level 6
----------------------------	---------------------------------------------------

Evidence number	Description of evidence	Included in portfolio (Yes/No) If no, state location	Sampled by the IV (initials and date)
1	CV	Yes	
2	Personal Development Plan	No — located in personal development folder in store	
3	Performance review 2010	Located in my file in the HR Department	
4	Performance review 2011	Located in my file in the HR Department	
5	Observation report	Yes	
6	Observation report	Yes	
7	Expert witness testimony	Yes	
8	Copies of e-mails from me to suppliers	No — located in my folder on C drive	
9	Lay out plans for store promotion	Yes	
10	Observation report	Yes	
11	Personal statement	Yes	
12	Answers to oral questions	Yes	
13	Witness statement	Yes	
14	Observation report	Yes	
15	Results of online test	No — located in my folder on C drive	
16	Questions from my assessor	Yes	

Completing the element achievement record

To help you and your candidates cross-reference the evidence to the standards of the SVQs, we have provided records similar to those produced in the SQA portfolio. Use one record for each element. The grids should be completed by:

- ◆ entering the evidence index number in the first column
- ◆ giving a brief description of the evidence in the second
- ◆ marking the relevant boxes for the performance criteria (or statements of competence as they are sometimes known)
- ◆ entering the areas of knowledge and understanding the piece of evidence covers

If integrated assessment is used (linking PCs or elements across different units) the evidence should be cross-referenced back to the relevant units.

We have provided a completed example to show how to use the record.

Element achievement record

Unit Check the Storage and Care of Stock in a Retail Organisation

Outcome 1

Evidence index no	Description of evidence	PC/performance statements							Areas of knowledge and understanding/scope															
		1	2	3	4	5	6	7	1	2	3	4	5	6	7	8								
5	Observation	X	X	X		X	X		X		X		X		X									
16	Questions from my assessor				X			X		X		X		X		X								

Unit Check the Storage and Care of Stock in a Retail Organisation

Outcome 1

Notes/comments

Observation reports confirm your performance over a period of time. All performance criteria were met on both occasions and knowledge requirements covered have been identified. Further questions to cover aspects of performance and knowledge which are not easily demonstrable were asked and answered fully.

Evidence is sufficient and completes Outcome 1. Well done.

The candidate has satisfied the assessor and internal verifier that the performance evidence has been met.

Candidate's signature Alison Fraser **Date** 31 October

Assessor's signature Heather Morrison **Date** 31 October

Internal verifier's signature Helen Martin **Date** 31 October

5 Further information

What else should I read?

The publications listed here provide additional information on how to implement SVQs. Details of these and other SQA publications are available on our website at **www.sqa.org.uk** on the 'Publications, Sales and Downloads' section. They can be ordered from SQA's Business Development and Customer Support Team — telephone 0303 333 0330. Please note that there may be a charge for some of these publications.

- ◆ *Assessor/Verifier Units: Assessment guidance*
- ◆ *External Verification: A Guide for Centres*
- ◆ *Guide to Assessment*
- ◆ *Introduction to Assessment Arrangements for Schools and Colleges*
- ◆ *SQA's Quality Framework: a guide for centres*
- ◆ *Operational Help Centre*

The Operational Guide for Centres has been replaced by the online Operational Help Centre on **www.sqa.org.uk**

6 The units with additional assessment guidance

You will find below a list of units which have additional assessment guidance for this particular SVQ. Not all units have additional guidance within this SVQ, so only those which do are listed below.

Index of units

Unit no: PPL.B201

Unit title: Prepare to Receive Deliveries in a Retail Organization

Unit summary: This unit is about preparing to receive deliveries of goods and materials in your retail organisation. This involves checking the receiving and storage areas, the handling equipment and the relevant paperwork.

Unit assessment: General unit — Awarding body own phraseology.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

Glossary: *The glossary contains definitions of the terms used in unit PPL.B201. These definitions do not constitute range.*

Goods and materials — Retail goods for sale and your retail organisation's materials such as consumables and equipment, etc.

Unit No: PPL.B226

Unit title: Quality Check the Suitability of Meat Products for Finishing in a Retail Organisation

Unit summary: This unit is about quality checks made on meat products for their suitability for finishing in a retail organisation. It covers isolating those products that are not suitable for finishing. It involves maintaining the quality and storage temperatures when handling all meat-products.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

Finishing is to include both meat and poultry.

Glossary: The glossary contains definitions of the terms used in unit PPL.B226. These definitions do not constitute range.

Products:

- ◆ Meat
- ◆ Poultry
- ◆ Ingredients

Product quality and suitability checks:

- ◆ Temperature
 - ◆ Visual
 - ◆ Touch
 - ◆ Smell
-

Unit no: PPL.B227

Unit title: Prepare to Finish Meat Products in a Retail Organisation

Unit summary: This unit is about preparing to finish meat products in a retail organisation. It involves following your retail organisation's instructions and using safe and hygienic working practices. It is also about preparing and maintaining tools and equipment.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

Finishing is to include both meat and poultry.

Glossary: The glossary contains definitions of the terms used in unit PPL.B227. These definitions do not constitute range.

Processing (needs/requirements):

- ◆ organisation policies for storing and preparing ingredients and products
- ◆ procedures for processing meat products
- ◆ instructions for carrying out specifications
- ◆ organisation policies for storing tools and equipment

Safe and hygienic working practices:

- ◆ using checking procedures
- ◆ maintaining personal hygiene
- ◆ using personal protective clothing and equipment

Safety (needs/requirements):

- ◆ UK and NI laws
 - ◆ codes of practice and guidance notes
-

Unit no: PPL.B228

Unit title: Achieve Meat Product Yield and Finish in a Retail Organisation

Unit summary: This unit is about finishing meat products to achieve the yield and finish required.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

Finishing is to include both meat and poultry.

Glossary: The glossary contains definitions of the terms used in unit PPL.B228. These definitions do not constitute range.

Products:

- ◆ meat
- ◆ poultry
- ◆ ingredients

Product specification:

- ◆ yield
- ◆ finish

Safe and hygienic working practices:

- ◆ working on your own
 - ◆ working in a team
 - ◆ using checking procedures
 - ◆ maintaining personal hygiene
-

Unit no: PPL.B235

Unit title: Maintain Food Safety While Working with Food in a Retail Organisation

Unit summary: This unit is about maintaining food safety in a retail organisation. This unit applies to personnel whose main job role requires working in a food preparation area and involves any of these activities:

- ◆ handling wrapped or unwrapped food including food subject to temperature control requirements (for example, in storage, display, in the bakery or on the deli counter)
- ◆ preparing unwrapped food, including food subject to temperature control requirements

This unit is for all personnel involved in food preparation in a retail organisation.

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.

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.

Glossary: *The glossary contains definitions of the terms used in unit PPL.B235. These definitions do not constitute range.*

Accessories:

- ◆ Additional items apart from clothing and jewellery, for example, false nails

Correct person (to report to):

- ◆ This could be a supervisor or manager

Cross-contamination — In your retail organisation there are two kinds of cross-contamination to guard against:

- 1 the transfer of harmful bacteria between foods by direct contact (eg, the juices of raw meat dripping onto cooked meat stored on a lower shelf), or indirect contact (eg, via the hands, clothing, cloths, equipment or other surfaces)
- 2 the cross-contamination of foods containing specific allergens (eg, nuts, milk, eggs) with other food (eg, by use of common utensils on cold meat counters and salad bars, slicers on deli counters, etc, by the mixing of foods due to damaged packaging or spillages, or via hands, clothing, cloths or other surfaces)

Food handling practices — Depending on the type of food and the activities being carried out, food handling practices may include:

- ◆ keeping finished products separate from other materials
- ◆ keeping raw and cooked meat products separate
- ◆ getting rid of waste, and contaminated or damaged products

Food spoilage:

- ◆ When food goes bad and has a noticeable change in its taste, smell or appearance

Indicators of potential food safety hazards — Things that could make food unsatisfactory for consumers, for example:

- ◆ damaged packaging
- ◆ spillage into another food
- ◆ out of date stock
- ◆ food not stored where it should be (for example, if customers have moved food)
- ◆ chiller cabinets or freezers that are not operating at the right temperature
- ◆ ovens or hot hold cabinets that are not operating at the right temperature
- ◆ use of the same utensils to handle different foods
- ◆ food waste that needs disposing of dirt
- ◆ pests such as rodents or insects

Infestation:

- ◆ The presence of pests such as insects or rodents in the workplace which puts food safety at risk

Procedures:

- ◆ A series of clear steps or instructions on how to do things; rules — some organisations document their procedures formally in writing, and others simply have procedures that all staff understand and follow, but that are not written down

Protective clothing — Clothing your retail organisation provides for food safety reasons, which could include:

- ◆ trousers
- ◆ tops such as jackets or tabards
- ◆ coats
- ◆ disposable gloves
- ◆ headgear such as caps or hairnets
- ◆ aprons
- ◆ shoe protectors

Right times (to wash hands) — Appropriate times to wash hands would include:

- ◆ after going to the toilet
- ◆ before going into food production areas, including after any work breaks
- ◆ after getting rid of waste
- ◆ after cleaning
- ◆ before and after changing a dressing or touching an open wound

Specified temperatures:

- ◆ Temperatures specified by relevant legislation or in your retail organisation's procedures

Unsafe behaviour — Behaviour that can make food unsafe for customers, including:

- ◆ touching the face, nose or mouth
 - ◆ smoking
 - ◆ chewing gum
 - ◆ eating
 - ◆ scratching
 - ◆ coughing or sneezing
-

Unit no: PPL.B238

Unit title: Prepare to Receive Deliveries of Fuel (for Driver-Controlled Transfers) on a Forecourt

Unit summary: This unit is about preparing to receive deliveries of fuel on a forecourt for driver-controlled transfers to fuel tanks. Fuel poses serious risks to health and safety and it is vitally important that all the necessary precautions are maintained, and that relevant regulations are followed in all geographical locations of the United Kingdom (UK).

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.

Specific evidence requirement: It is expected that simulation will be used to gather evidence for taking action to deal with or contain health and safety risks.

Glossary: *The glossary contains definitions of the terms used in unit PPL.B238. These definitions do not constitute range.*

Driver-controlled transfer:

- ◆ when fuel is transferred to the storage tanks on the forecourt by the driver

Fuel:

- ◆ all types of motor fuel stored in your retail organisation's forecourt
-

Unit no: PPL.B239

Unit title: Check that Driver-Controlled Fuel Transfers Have Been Completed

Unit summary: This unit is about making the necessary checks after a driver-controlled transfer of fuel is complete. Fuel poses serious risks to health and safety and it is vitally important that these checks are completed and that relevant regulations are followed in all geographical locations of the United Kingdom (UK).

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.

Specific evidence requirement: It is expected that simulation will be used to gather evidence for taking action to deal with or contain health and safety risks.

Glossary: *The glossary contains definitions of the terms used in unit PPL.B239. These definitions do not constitute range.*

Driver-controlled transfer:

- ◆ when fuel is transferred to the storage tanks on the forecourt by the driver

Fuel:

- ◆ all types of motor fuel stored in your retail organisation's forecourt
-

Unit no: PPL.B240

Unit title: Receive Deliveries and Transfer Fuel on a Forecourt

Unit summary: This unit is about receiving deliveries of fuel and transferring fuel to tanks. This is where authorised forecourt personnel other than the driver transfers the fuel to the tanks. Fuel poses serious risks to health and safety and it is vitally important that all the necessary precautions are taken, and that you follow relevant legal regulations relating to the UK geographical location of your retail organisation.

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.

Specific evidence requirement: It is expected that simulation will be used to gather evidence for taking action to deal with or contain health and safety risks.

Glossary: *The glossary contains definitions of the terms used in unit PPL.B240. These definitions do not constitute range.*

Driver-controlled transfer:

- ◆ when fuel is transferred to the storage tanks on the forecourt by the driver

Fuel:

- ◆ all types of motor fuel stored in your retail organisation's forecourt
-

Unit no: PPL.B243

Unit title: Organise Your Work to Meet a Dough Production Schedule in a Retail Organisation

Unit summary: This unit is about helping to ensure that dough production in a retail organisation runs to schedule and without wasting time, ingredients or other resources. This involves organising your own work to meet the dough production schedules allocated. It is also about making suggestions to improve dough production schedules to become more effective.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

Glossary: *The glossary contains definitions of the terms used in unit PPL.B243. These definitions do not constitute range.*

Dough

Common types of fermented dough include those used for:

- ◆ bread
- ◆ plain and fruited buns
- ◆ danish pastries
- ◆ croissants

Common types of non-fermented dough include those used for:

- ◆ puff pastry
 - ◆ scones
 - ◆ biscuits
-

Unit no: PPL.B248

Unit title: Hand-Process Fish in a Retail Organisation

Unit summary: This unit is about hand-processing fish in a retail organisation 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.

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.

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 'hand-processing' we mean filleting, skinning, heading, scaling, gutting, boning, portioning and steaking **either** flat **or** round fish.*

Unit no: PPL.B308

Unit title: Monitor and Contribute to Improving Food Safety in a Retail Organisation

Unit summary: This unit is for personnel who supervise staff that handle or prepare wrapped or unwrapped food, including food subject to temperature control. The unit is firstly about monitoring food safety in line with a retail organisation's food safety procedures. Secondly, the unit is about making a contribution to continuously improving food safety.

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.

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.

Glossary: The glossary contains definitions of the terms used in unit PPL.B308. These definitions do not constitute range.

Control measures:

- ◆ Actions required to prevent or remove a food safety hazard, or reduce it to an acceptable level

Control points:

- ◆ Steps in the food preparation process that can be controlled, but would not result in an unacceptable health risk if control was not exercised

Corrective actions:

- ◆ The actions to be taken when a critical limit is breached

Critical control points:

- ◆ Steps in the food control or preparation process to deal with a food safety hazard by preventing it, removing it or reducing it to an acceptable level

Critical limits:

- ◆ The minimum and maximum limits allowed in order to control a particular task or process

Food safety hazards — Something that may cause harm to the consumer and can be:

- ◆ microbiological (eg, bacteria, moulds, viruses)
- ◆ chemical (eg, pesticides used on fruit and vegetables, chemicals used in cleaning or for pest control)
- ◆ physical (eg, insects, parasites, glass, nails)
- ◆ allergenic (eg, 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 organisations document their procedures formally in writing, and others simply have procedures that all staff understand and follow, but that are not written down

- ◆ Training:
- ◆ Bringing an individual up to a desired level or standard of proficiency — this can be done by means of informal 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
-

Unit no: PPL.C101

Unit title: Package Goods for Customers in a Retail Organisation

Unit summary: This unit is about packaging goods for customers in a retail organisation. This can be to make the goods look more attractive, or to protect goods from damage. The packaging could take place at the counter or a stock area or both. This unit is for owners, managers, department managers, team leaders and sales assistants.

Unit assessment: General unit — Awarding body own phraseology.

Specific evidence requirement: Simulation is allowed for the performance evidence within this unit only if no opportunities exist to gather workplace evidence.

Glossary: The glossary contains definitions of the terms used in unit PPL.C101. These definitions do not constitute range.

Packaging goods:

- ◆ Wrapping or packing goods to make them more attractive or to protect them from damage
-

Unit no: PPL.C206

Unit title: Identify Opportunities to Increase Sales of Particular Products

Unit summary: This unit is about identifying opportunities to increase the sales of a particular product using a definite campaign based on research and estimating the

increase in sales. This could be based on new or current products. It does not mean just identifying opportunities to promote products as part of normal sales transactions.

Unit assessment: General unit — Awarding body own phraseology.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

Glossary: *The glossary contains definitions of the terms used in unit PPL.C206. These definitions do not constitute range.*

Promotional opportunities:

- ◆ Opportunities to increase sales of a particular product by using a definite campaign. Promotional opportunities are not just opportunities to promote products as part of normal sales transactions.

Unit no: PPL.C207

Unit title: Promote Particular Retail Products

Unit summary: This unit is about identifying opportunities to increase the sales of a particular product using a definite campaign based on research and estimating the increase in sales. This could be based on new or current products. It does not mean just identifying opportunities to promote products as part of normal sales transactions.

Unit assessment: General unit — Awarding body own phraseology

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

Glossary: *The glossary contains definitions of the terms used in unit PPL.C207. These definitions do not constitute range.*

Promotional opportunities:

- ◆ Opportunities to increase sales of a particular product by using a definite campaign. Promotional opportunities are not just opportunities to promote products as part of normal sales transactions.
-

Unit no: PPL.C208

Unit title: Provide Information and Advice to Meet the Requirements of Retail Customers

Unit summary: This unit is about listening to retail customers' requirements and providing information and advice to meet those requirements. It does not involve selling directly to retail customers, but does involve treating the retail customer in ways that follow the retail organisation's customer service standards. This unit is for owners, managers, department managers, team leaders and sales/customer assistants.

Unit assessment: General unit — Awarding body own phraseology.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

Glossary: The glossary contains definitions of the terms used in unit PPL.C208. These definitions do not constitute range.

Information and advice — Examples of information and advice provided to customers might include:

- ◆ finding products in stock
 - ◆ ordering products not in stock
 - ◆ helping customers to make informed buying decisions
 - ◆ helping customers to return goods
-

Unit no: PPL.C217

Unit title: Process Payments Made to Retail Customer Accounts

Unit summary: This unit is about processing various forms of payment from retail customers and crediting them to retail customers' accounts.

This standard is for owners, managers, department managers, team leaders and sales assistants.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

Glossary: The glossary contains definitions of the terms used in unit PPL.C217. These definitions do not constitute range.

Legal tender:

- ◆ Coins and notes that your retail organisation must accept in payment

Your country:

- ◆ England, Wales, Scotland or Northern Ireland
-

Unit no: PPL.C231

Unit title: Source Merchandise and Props to be Featured in Retail Displays

Unit summary: This unit is about sourcing the merchandise and props shown in the design brief that will be featured in retail displays.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

The candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

Unit no: PPL.C232

Unit title: Dress In-Store Retail Displays to Guidelines

Unit summary: This unit is about following guidelines for dressing in-store retail displays in ways that promote sales. It involves making judgements about how best to achieve the visual effect required, while working within your retail organisation's policy for visual design.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

The candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

Glossary: *The glossary contains definitions of the terms used in unit PPL.C232. These definitions do not constitute range.*

Policy — Your retail organisation's policy may include a set of principles, or procedures, or both. If there is a written policy, it should work in line with this and any further instructions your manager has given. If your retail organisation has no written policy then advice should be sought on the broad guidelines to be followed if this is not already clear. If there is no written policy, it should be assumed 'policy' means those broad guidelines your retail organisation or manager have given.

Unit no: PPL.C233

Unit title: Dress Window Displays Following a Retail Organisation's Guidelines

Unit summary: This unit is about following guidelines for dressing window displays in ways that promote sales and follow the retail organisation's guidelines. It involves deciding how to achieve the best visual effect, whilst working within your retail organisation's policy for visual design.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

The candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

Unit no: PPL.C235

Unit title: Order Graphic Materials to Meet Retail Display Requirements

Unit summary: This unit is about ordering the right quantity and quality of graphic materials, including signs and tickets, within the available budget and checking the progress of orders to ensure that retail display requirements are met.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

The candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

Unit no: PPL.C236

Unit title: Position Graphic Materials to Support Retail Displays

Unit summary: This unit is about positioning graphic materials, including signs and tickets, so that they support the purpose of retail displays and meet all relevant requirements. This standard is for staff who are visual merchandising specialists and personnel responsibilities for visual displays.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

The candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

Glossary: *The glossary contains definitions of the terms used in unit PPL.C236. These definitions do not constitute range.*

Policy — Your retail organisation's policy may include a set of principles, or procedures, or both. If there is a written policy, it should work in line with this and any further instructions your manager has given. If your retail organisation has no written policy then advice should be sought on the broad guidelines to be followed if this is not already clear. If there is no written policy, it should be assumed 'policy' means those broad guidelines your retail organisation or manager have given.

Unit no: PPL.C237

Unit title: Dismantle Retail Displays

Unit summary: This unit is about dismantling retail displays and deciding what to do with the display parts, following safe practices.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

The candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

Unit no: PPL.C238

Unit title: Store Equipment, Props and Graphics for Retail Displays

Unit summary: This unit is about storing retail display equipment, props and graphics and regularly checking the condition of storage facilities and stored items.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

The candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

Unit no: PPL.C239

Unit title: Confirm the Requirements for Props and Prototypes for Retail Displays

Unit summary: This unit is about using design information to confirm the props and prototypes required for retail displays and working out how to obtain these items.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

The candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

Unit no: PPL.C240

Unit title: Make Life-Size Copies of Items for Retail Displays

Unit summary: This unit is about making life-size copies of items to use as props in visual retail displays in stores. This unit is for staff who are visual merchandising specialists with the authority and capabilities to make life sized items.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

The candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

Unit no: PPL.C241

Unit title: Make Scale Models of Items for Retail Displays

Unit summary: This unit is about making scale models of items to be included in visual retail displays in stores.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

The candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

Glossary: *The glossary contains definitions of the terms used in unit PPL.C241. These definitions do not constitute range.*

Policy — Your retail organisation's policy may include a set of principles, or procedures, or both. If there is a written policy, it should work in line with this and any further instructions your manager has given. If your retail organisation has no written policy then advice should be sought on the broad guidelines to be followed if this is not already clear. If there is no written policy, it should be assumed 'policy' means those broad guidelines your retail organisation or manager have given.

Unit no: PPL.C242

Unit title: Decorate Fixtures and Panels for Retail Displays

Unit summary: This unit is about decorating fixtures and panels for use in retail displays in store.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

The candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

Glossary: *The glossary contains definitions of the terms used in unit PPL.C242. These definitions do not constitute range.*

Policy — Your retail organisation's policy may include a set of principles, or procedures, or both. If there is a written policy, it should work in line with this and any further instructions your manager has given. If your retail organisation has no written policy then advice should be sought on the broad guidelines to be followed if this is not already clear. If there is no written policy, it should be assumed 'policy' means those broad guidelines your retail organisation or manager have given.

Unit no: PPL.C243

Unit title: Interpret Retail Display Layout Requirements From Plans, Elevations and Drawings

Unit summary: This unit is about interpreting plans, elevations and drawings of layouts for visual merchandising retail displays. As well as identifying the features of layouts, such as where to put them and what is required to create them, this unit covers working out what is required to assemble layouts. For the purposes of this standard 'elevation' means scale models or drawings of retail display requirements.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

The candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

Unit no: PPL.C244

Unit title: Follow Guidelines for Putting Retail Display Layouts Together

Unit summary: This unit is about putting retail display layouts together accurately following the guidelines provided and introducing creative effects when appropriate.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

The candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

Glossary: *The glossary contains definitions of the terms used in unit PPL.C244. These definitions do not constitute range.*

Policy — Your retail organisation's policy may include a set of principles, or procedures, or both. If there is a written policy, it should work in line with this and any further instructions your manager has given. If your retail organisation has no written policy then advice should be sought on the broad guidelines to be followed if this is not already clear. If there is no written policy, it should be assumed 'policy' means those broad guidelines your retail organisation or manager have given.

Unit no: PPL.C251

Unit title: Measure and Fit Retail Customers for Lingerie

Unit summary: This unit is about carrying out the lingerie-fitting service including measuring and fitting retail customers and helping them to choose suitable lingerie products. It can include specialist support for retail customers who have special requirements including:

- ◆ Disability
- ◆ Mastectomy
- ◆ Minors or customers with limited mental capacity
- ◆ Gender realignment

It also covers the relevant legislation related to equality and diversity as well as dealing with minors. This unit is for staff who conduct lingerie fitting as part of their role.

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.

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 no: PPL.C253

Unit title: Demonstrate Beauty Products to Retail Customers

Unit summary: This unit is about demonstrating the features and benefits of beauty products to retail customers.

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.

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 no: PPL.C254

Unit title: Maintain the Retail Customer Record-Card System in a Retail Organisation

Unit summary: This unit is about maintaining accurate and up-to-date record-cards of retail customers to help to provide a more effective service to them. It is also about making sure that your retail organisation database is active and relevant for the purposes of promotional activities. This is a service your retail organisation may use instead of a customer database using technology.

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.

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 no: PPL.C262

Unit title: Establish Retail Customers' Requirements and Provide Advice Regarding Tiling Products

Unit summary: This unit is about establishing retail customers' requirements and providing the correct advice upon tiling products that are best suited for the intended application.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

Glossary: *The glossary contains definitions of the terms used in unit PPL.C262. These definitions do not constitute range.*

Sustainability — Any environmental considerations that apply, such as:

- 1 the impact of the manufacturing process upon the environment
 - 2 the scarcity of the natural materials used in the manufacturing process
 - 3 any effects the finished product may have on the environment
-

Unit No: PPL.C271

Unit Title: Offer Customers Information on Insurance Products Associated with a Retail Organisation's Credit Card

Unit summary: This unit is about offering associated insurance products to customers who apply for your retail organisation's credit card, and giving customers information to help them decide whether to take out insurance. The sale of insurance products is carefully regulated so as to protect customers from being pressured or misled. Your retail organisation needs to ensure that you fulfil your legal responsibilities and act within the limits of your legal authority. This unit is for owners, managers, department managers, team leaders and sales/customer service assistants.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

Glossary: *The glossary contains definitions of the terms used in unit PPL.C271.*

These definitions do not constitute range.

Compliant wording — Wording that complies with the relevant legislation, regulations and guidelines relating to the insurance products your retail organisation offers.

Unit no: PPL.C311

Unit title: Make and Review Plans for Finding New Retail Clients

Unit summary: This unit is about making and reviewing plans for finding new retail clients where a business relationship can be developed. It involves understanding what type of clients you should be meeting, and how to go about meeting them in ways that uses time effectively and is likely to help to meet sales targets. This unit is for owners, managers, department managers and team leaders.

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.

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 no: PPL.C312

Unit title: Market a Retail Organisation's Services to Potential Clients

Unit summary: This unit is about marketing your retail organisation's services to potential clients. It involves approaching potential clients and getting them interested in your retail organisation and its services. The approach needs to be tailored to different people so that a rapport can be quickly developed and their interest gained. Their trust also needs to be gained by your retail organisation keeping its promises and keeping personal information strictly confidential.

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.

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 no: PPL.C313

Unit title: Provide a Consultative Selling Service to Retail Clients

Unit summary: This unit is about getting to know retail clients so that your retail organisation can provide a personalised service to them. Products can be recommended and sold according to the clients' individual requirements, preferences and budget. Selling in this way is known as consultative selling or relationship selling.

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.

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 no: PPL.C314

Unit title: Provide an After-Sales Service to Retail Clients as a Result of Retail Client Consultations

Unit summary: This unit is about following up retail client consultations by providing an after-sales service. It involves keeping retail client records up-to-date and using them to keep in touch with retail clients so that they remain aware of the service and interested in doing business. It also involves providing a service and keeping retail clients' trust by carrying out the things that have been promised to them, such as placing orders or contacting them when new items are available.

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.

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 no: PPL.C338

Unit title: Record and Monitor Costs for Visual Merchandising Projects

Unit summary: This unit is about recording and monitoring visual merchandising project costs, identifying any unacceptable spending and taking prompt action to resolve it.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

The candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

Unit no: PPL.C339

Unit title: Contribute to Developing a Retail Organisation's Visual-Design Policy

Unit summary: This unit is about contributing suggestions for developing your retail organisation's visual-design policy, including gathering information and analysing it to then present recommendations. This standard applies if your retail organisation has a formal written policy for visual-design that must be improved or if your retail organisation is going to have a formal written policy for the first time that needs to be written and developed.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

The candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

Unit no: PPL.C340

Unit title: Support Staff Putting into Practice a Retail Organisation's Visual-Design Policy

Unit summary: This unit is about supporting staff putting into practice your retail organisation's visual-design policy. It involves being able to explain the policy to staff, motivating them to follow it, and making checks to make sure the policy is followed. This standard applies if your retail organisation has a formal written policy for visual design that must be put into practice.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

The candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

Unit no: PPL.C341

Unit title: Develop and Test Solutions for Retail Display Layouts

Unit summary: This unit is about developing creative solutions for retail display layout designs within the limits of time, budget and any guidelines that must be followed. It involves testing that ideas are realistic, as well as asking for and using the suggestions of decision makers.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

The candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

Unit no: PPL.C342

Unit title: Produce Guidance for Putting Retail Display Layouts Together

Unit summary: This unit is about producing guidance that will allow staff to put retail display layouts together. It involves working out what is involved in putting retail display layouts together and giving instructions using schematic drawings and detailed written specifications.

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.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

The candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

Glossary: *The glossary contains definitions of the terms used in unit PPL.C342. These definitions do not constitute range.*

Formats — This refers to the type of document eg, PDF, printed leaflet

Platforms — This refers to where the guidance can be found digitally eg, intranet

Unit no: PPL.C412

Unit title: Monitor and Improve Retail Customers' Experience of a Retail Organisation

Unit summary: The quality of the retail customer experience can help keep retail customers loyal or lose them to your competitors. This unit is relevant if you are a retail manager, area manager or regional manager and have some responsibility for the quality of the retail customer experience.

You need to be able to monitor and improve all aspects of retail customers' experience. The unit includes being in the retail sales area regularly, training staff and gathering feedback from retail customers.

For simplicity we have referred throughout the unit to a single retail organisation, but if you are a regional or area manager you should understand this to mean all the locations you manage.

Unit assessment: General unit — Awarding body own phraseology.

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.

Glossary: *The glossary contains definitions of the terms used in unit PPL.C412. These definitions do not constitute range.*

Walk the store — 'Walking the store' is a standard expression used in retail and is not intended to be discriminatory. You need not necessarily inspect your retail organisation by moving around on foot. The essential point is that you should be physically present in your retail organisation, moving through it in such a way that you can check the features that affect how customers experience your retail organisation.

Unit no: PPL.D002

Unit title: Develop Effective Relationships with Customers within a Retail Organisation

Unit summary: Developing effective relationships with customers goes beyond just meeting the customer service policies and standards that have been set for a retail organisation. It involves doing that bit extra for customers thereby increasing retail customer loyalty and enhancing the reputation of your retail organisation. This is likely to involve negotiating, making an extra effort and potentially costs.

Unit assessment: General unit — Awarding body own phraseology.

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 no: CFACSA4 Imported (Instructus)

Unit title: Give Customers a Positive Impression of Yourself and Your Organisation

Unit summary: Excellent customer service is provided by people who are good with people. Your behaviour affects the impression that customers have of the service they are receiving. This unit is about communicating with your customers and giving a positive impression whenever you deal with a customer. By doing this you create a positive impression of your organisation and the customer service it provides. All of us enjoy the experience of good customer service if we feel that the person serving us really wants to create the right impression, responds to us and gives us good information. Every detail of your behaviour counts when dealing with a customer.

Unit assessment: General unit — Awarding body own phraseology.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

Evidence based on a realistic working environment or a work placement is permissible.

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.

Communication with customers may be face to face, in writing, by telephone, text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role.

Evidence must be provided of creating a positive impression with customers:

- ◆ during routine delivery of customer service
- ◆ during a busy time in your job
- ◆ during a quiet time in your job
- ◆ when people, systems or resources have let you down

You must provide evidence that you communicate effectively by:

- ◆ using appropriate spoken or written language
 - ◆ applying the conventions and rules appropriate to the methods of communication you have chosen
-

Unit no: CFACSD2 Imported (Instructus)

Unit title: Support Customer Service Improvements

Unit summary: Organisations change the way they deliver service to their customers because customer expectations rise and because other organisations improve the services they offer. Often the most important ideas about how to improve customer service come from people dealing directly with customers. Your job involves delivering customer service. If your organisation has decided to make changes, it is your job to support them and to present them positively to your customers. Also, by listening to customer comments you may have your own ideas about how the service you deliver could be improved. This unit is about how you provide support for changes that your organisation has introduced. In addition, it covers how you present your own ideas for improvements to someone in your organisation who can authorise trying out the change.

Unit assessment: General unit — Awarding body own phraseology

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

Evidence based on a realistic working environment or a work placement is permissible.

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 provide evidence that you have:

- ◆ contributed to improving customer service through your own efforts
- ◆ contributed to improving customer service by working with others

Your evidence must cover **two** changes with which you have been actively involved. In each case you must be able to identify the part you played in:

- ◆ linking customer feedback with the reasons for the change
- ◆ implementing the change
- ◆ gathering customer reactions to the change

Your evidence for each change must show how:

- ◆ the change has improved customer service
- ◆ your customers have reacted to the change

Each change that is part of your evidence must be significant enough for a regular customer to notice that the services or products you are delivering are different or that the way you and your colleagues deliver the services or products is different.

Unit no: CFACSB10 Imported (Instructus)

Unit title: Organise the Delivery of Reliable Customer Service

Unit 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.

Unit assessment: General unit — Awarding body own phraseology

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

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.

Unit no: CFACSB11 Imported (Instructus)

Unit title: Improve the Customer Relationship

Unit 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.

Unit assessment: General unit — Awarding body own phraseology.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

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 no: CFACSD8 Imported (Instructus)

Unit title: Work with Others to Improve Customer Service

Unit 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.

Unit assessment: General unit — Awarding body own phraseology.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

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
-

Unit no: PPL.E101

Unit title: Identify and Report Security Risks in a Retail Organisation

Unit summary: This unit is about helping to protect people, property and premises by identifying and reporting security risks. Security risks are situations where people, property or premises are at risk of theft, damage or abuse in your retail organisation.

Unit assessment: General unit — Awarding body own phraseology.

Specific evidence requirement: It is expected that simulation will be used to gather evidence for the demonstration of emergency procedures. Simulation is also allowed for the remaining performance evidence within this unit, but only if no opportunities exist to gather workplace evidence.

This unit can be achieved in isolation of other unit. However, evidence for this unit will be generated holistically whilst the candidate is working towards competence in their selected units for the qualification.

Glossary: *The glossary contains definitions of the terms used in unit PPL.E101. These definitions do not constitute range.*

Security risks — Situations where people, property or premises are at risk of theft, damage or abuse.

Unit no: PPL.E102

Unit title: Identify and Seek Assistance When Accidents and Emergencies Occur in a Retail Organisation

Unit summary: This unit is about identifying the types of accident and emergency that can happen, seeking assistance and acting within the limits of responsibility given to you by your retail organisation.

Unit assessment: General unit — Awarding body own phraseology.

Specific evidence requirement: It is expected that simulation will be used to gather evidence for the demonstration of emergency procedures. Simulation is also allowed for the remaining performance evidence within this unit, but only if no opportunities exist to gather workplace evidence.

This unit can be achieved in isolation of other unit. However, evidence for this unit will be generated holistically whilst the candidate is working towards competence in their selected units for the qualification.

Glossary: *The glossary contains definitions of the terms used in unit PPL.E102. These definitions do not constitute range.*

Accidents — Incidents where people have been injured

Emergencies — Incidents where there is an immediate risk of people being seriously injured, or where serious injury or sudden illness has already happened

Unit no: PPL.E103

Unit title: Maintain Health and Safety Procedures in a Retail Organisation

Unit summary: This unit is about following your retail organisation's procedures for maintaining health and safety whilst working in ways that protects other people. It also covers rest times whilst you are still on your retail organisation's premises.

Unit assessment: General unit — Awarding body own phraseology.

Specific evidence requirement: It is expected that simulation will be used to gather evidence for the demonstration of emergency procedures. Simulation is also allowed for the remaining performance evidence within this unit, but only if no opportunities exist to gather workplace evidence.

This unit can be achieved in isolation of other unit. However, evidence for this unit will be generated holistically whilst the candidate is working towards competence in their selected units for the qualification.

Unit no: PPL.E104

Unit title: Manually Lift and Handle Goods and Materials Safely in a Retail Organisation

Unit summary: This unit is about manually lifting and handling goods and materials safely in your retail organisation without injuring yourself or other people.

Unit assessment: General unit — Awarding body own phraseology.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

This unit can be achieved in isolation of other unit. However, evidence for this unit will be generated holistically whilst the candidate is working towards competence in their selected units for the qualification.

Glossary: *The glossary contains definitions of the terms used in unit PPL.E104. These definitions do not constitute range.*

Goods and materials — Retail goods for sale and your retail organisation's materials such as consumables and equipment, etc.

Unit no: PPL.E105

Unit title: Work Effectively as Part of a Team in a Retail Organisation

Unit summary: This unit is about working effectively with your colleagues in your retail organisation to achieve results together. It is about coordinating efforts, participating in a team, as well as getting along with colleagues from day to day.

Unit assessment: General unit — Awarding body own phraseology.

Specific evidence requirement: Simulation is allowed for the performance evidence within this unit only if no opportunities exist to gather workplace evidence.

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.

Unit no: PPL.E206

Unit title: Deal with Accidents and Emergencies within the Limits of your Authority in a Retail Organisation

Unit summary: This unit is about dealing with accidents and emergencies within the limits of your own responsibility in your retail organisation. This unit is for team leaders, sales and storage personnel.

Unit assessment: General unit — Awarding body own phraseology.

Specific evidence requirement: It is expected that simulation will be used to gather evidence for the demonstration of emergency procedures.

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.

Unit no: PPL.E207

Unit title: Contribute to Reducing Risks to Health and Safety in a Retail Organisation

Unit summary: This unit is about contributing to making your retail organisation safe for everyone who works in it or visits it. It is also about ensuring the behaviour of colleagues, customers and visitors is safe within your retail organisation's requirements.

Unit assessment: General unit — Awarding body own phraseology

Specific evidence requirement: It is expected that simulation will be used to gather evidence for the demonstration of emergency procedures.

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

Unit no: PPL.E208

Unit title: Work Effectively in a Team to Meet Targets in a Retail Organisation

Unit summary: This unit is about working within a team in your retail organisation to achieve results and team targets together. It is about managing time effectively and getting along with team members.

Unit assessment: General unit — Awarding body own phraseology.

Specific evidence requirement: Simulation is allowed for the performance evidence within this unit only if no opportunities exist to gather workplace evidence.

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.

Glossary: *The glossary contains definitions of the terms used in unit PPL.E208. These definitions do not constitute range.*

Difficulties in working together/with colleagues — Difficulties can arise for various reasons, including:

- 1 disagreements on work-related issues
- 2 personality clashes
- 3 unfair, insulting or threatening behaviour

Unit no: PPL.E209

Unit title: Improve the Way You Learn in a Retail Organisation

Unit summary: This unit is about taking responsibility for learning new information and tasks in your retail organisation, with the help and guidance of a manager or trainer. This involves following a training programme and working out your preferred 'learning style' so you can improve the way you learn.

Unit assessment: General unit — Awarding body own phraseology.

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.

Glossary: *The glossary contains definitions of the terms used in unit PPL.E209. These definitions do not constitute range.*

Learning styles — Learning and development technique to find out an individual's learning style. This can be carried out by using published questions and exercises. Trainers and candidates may need to seek appropriate authority and copyright to use some questions and exercises however, there are free 'learning styles' exercises available to use.

Unit no: PPL.E210

Unit title: Prepare Newspapers and Magazines for Return to the Merchandiser

Unit summary: This unit is about preparing unsold newspapers and magazines for return to the merchandiser so your retail organisation can receive the credit owed for unsold items.

Unit assessment: General unit — Awarding body own phraseology.

Specific evidence requirement: Simulation is not allowed for any performance evidence within this unit.

Glossary: *The glossary contains definitions of the terms used in unit PPL.E210. These definitions do not constitute range.*

Documentation — ‘Documentation’ can mean either paper records or computer records.

File (documentation) — ‘File documentation’ can mean either filing paper records or storing records on a computer.

Unit no: PPL.E301

Unit title: Identify and Analyse Opportunities for Solving Problems and Improving Retail Operations

Unit summary: This unit is about helping to improve the way your retail organisation operates, so that it can achieve or improve on sales targets and standards of service. Working within your area of responsibility, a thorough knowledge of day-to-day operations is required. It is also about being able to identify and analyse problems and suggest ways to improve operations that are practical and cost-effective.

Unit assessment: General unit — Awarding body own phraseology.

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 oral reports of real achievements and testimony from an expert witness to confirm the candidate’s competence.

Unit no: PPL.E302

Unit title: Recommend, Agree and Contribute to Implementing Improvements to Retail Operations

Unit summary: This unit is about being able to present recommendations for improvements to retail operations to decision makers, clearly and persuasively, and respond positively to their questions and comments. It is about getting the agreement to go ahead with the improvement to retail operations. It is also about contributing to implementing improvements to retail operations and evaluating their impact to your retail organisation.

Unit assessment: General unit — Awarding body own phraseology.

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 oral reports of real achievements and testimony from an expert witness to confirm the candidate's competence.

Unit no: PPL.E304

Unit title: Monitor and Maintain Security in a Retail Organisation

Unit summary: This unit is about monitoring and maintaining the security of people, stock, premises (inside and out) and cash as part of a daily routine in your retail organisation. As well as personally checking the security of the work area and resolving any problems identified, it involves making sure that staff are clear about their responsibilities for maintaining security and that they understand the security procedures they must follow.

Unit assessment: General unit — Awarding body own phraseology.

Specific evidence requirement: It is expected that simulation will be used to gather evidence for taking action to deal with or contain security risks, threats and breaches and incidents of theft.

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.

Unit no: PPL.E305

Unit title: Monitor, Identify and Investigate Loss and Wastage in a Retail Organisation

Unit summary: This unit is about monitoring levels of stock, equipment, cash and cash equivalents and identifying and investigating any loss and wastage in your retail organisation. It also involves drawing conclusions about how wastage and loss can be prevented in future, taking preventive measures and training staff to help reduce wastage and loss as far as possible.

Unit assessment: General unit — Awarding body own phraseology.

Specific evidence requirement: Simulation is allowed for the performance evidence within this unit only if no opportunities exist to gather workplace evidence.

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.

Unit no: PPL.E306

Unit title: Assess, Monitor and Control Risks to Health and Safety and Provide Training in a Retail Organisation

Unit summary: This unit is about checking that your retail organisation is a healthy and safe place, by using day-to-day monitoring, specific regular checks and planned assessments. It is about keeping accurate records and training staff to protect health and safety. It includes checking premises, stock, and equipment including Personal Protective Equipment (PPE). Control of Substances Hazardous to Health (CoSHH) must also be monitored.

Unit assessment: General unit — Awarding body own phraseology.

Specific evidence requirement: Simulation is allowed for the performance evidence within this unit only if no opportunities exist to gather workplace evidence.

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.

Unit no: PPL.E307

Unit title: Take a Safe and Active Role When Accidents and Emergencies Occur in a Retail Organisation

Unit summary: This unit is about taking a safe and active role when accident and emergencies occur in your retail organisation. This includes contacting the emergency services, setting off alarms, beginning and supervising evacuation, and reducing further injury or damage as far as possible until specialist help arrives.

Unit assessment: General unit — Awarding body own phraseology.

Specific evidence requirement: It is expected that simulation will be used to gather evidence for the demonstration of emergency procedures.

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.

Unit no: PPL.E314

Unit title: Monitor the Service Provided to Customers by External Suppliers of a Retail Organisation

Unit summary: This unit is about monitoring the service provided by external suppliers to customers of your retail organisation. This involves checking the progress of orders, keeping customers informed and getting customer feedback about the service provided.

Unit assessment: General unit — Awarding body own phraseology.

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.

Glossary: *The glossary contains definitions of the terms used in unit PPL.E314. These definitions do not constitute range.*

External suppliers — These are the range of suppliers of products or services to a retail organisation's customers. This can mean supply of products directly from the external supplier's premises or from your retail organisation, delivery of products, or assembly/fitting of products on the customer premises.

Unit no: PPL.E315

Unit title: Evaluate and Improve External Suppliers' Service to Customers of a Retail Organisation
Unit summary: This unit is about evaluating feedback from customers of your retail organisation to decide how the service provided by external suppliers could be improved, and encouraging suppliers to make improvements.

Unit assessment: General unit — Awarding body own phraseology.

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.

Glossary: *The glossary contains definitions of the terms used in unit PPL.E315. These definitions do not constitute range.*

External suppliers — These are the range of suppliers of products or services to a retail organisation's customers. This can mean supply of products directly from the external supplier's premises or from your retail organisation, delivery of products, or assembly/fitting of products on the customer premises.

Unit no: PPL.E335

Unit title: Support Effective Team Working in a Retail Organisation

Unit summary: This unit is about working with colleagues in your retail organisation to achieve results and targets together. It is about supporting the team's efforts using leadership skills, by sharing the workload equally (to individual strengths), making realistic commitments and working hard to support them effectively, and contributing to team morale and good working relations.

Unit assessment: General unit — Awarding body own phraseology.

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.

Glossary: *The glossary contains definitions of the terms used in unit PPL.E355. These definitions do not constitute range.*

Difficulties in working together/with colleagues — Difficulties can arise for various reasons, including:

- 1 disagreements on work-related issues
 - 2 personality clashes
 - 3 unfair, insulting or threatening behaviour
-

Unit no: PPL.E336

Unit title: Contribute to the Planning Organisation and Evaluation of Your Own Learning in a Retail Organisation

Unit summary: This standard is about being an effective candidate in your retail organisation. It assumes help and support in planning and carrying out your learning plans is available. Your responsibilities are to contribute to the planning process, carry out your plan and evaluate its effectiveness.

Specific, Measurable, Achievable, Realistic and Time-bound (SMART) planning is a requirement of this standard to plan your goals, and your learning aims and objectives.

Unit assessment: General unit — Awarding body own phraseology.

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.

Glossary: *The glossary contains definitions of the terms used in unit PPL.E336. These definitions do not constitute range.*

SMART — Specific, Measurable, Achievable, Realistic, Time-bound.

Appendix 1: Blank recording forms

Unit progress record

Qualification and level _____

Candidate _____

To achieve the whole qualification, you must prove competence in xx **mandatory** units and xx **optional** units.

Unit checklist

Mandatory									
Optional									

Mandatory units achieved

Unit number	Title	Assessor's signature	Date

Optional units achieved

Unit number	Title	Assessor's signature	Date

Index of evidence

SVQ title and level	
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Evidence number	Description of evidence	Included in portfolio (Yes/No) If no, state location	Sampled by the IV (initials and date)

Element achievement record

Unit

Element

Evidence index no	Description of evidence	PC/performance statements						Areas of knowledge and understanding/scope																				

Unit

Element

Notes/comments

The candidate has satisfied the assessor and internal verifier that the performance evidence has been met.

Candidate's signature _____ **Date** _____

Assessor's signature _____ **Date** _____

Internal verifier's signature _____ **Date** _____

Assessment plan

Units					
Elements					
Activities	Performance Criteria (PC)	Method of assessment/ sources of evidence	Date of assessment	Evidence already available	Links to other units (performance criteria and range)
Questioning for knowledge and understanding not apparent from performance to be identified from 2nd review					

Assessor's signature _____ 1st review due _____

Candidate's signature _____ 2nd review due _____

Date of agreement _____ Date of completion _____

Personal statement

Date	Evidence index number	Details of statement	Links to other evidence (enter numbers)	Unit, elements, performance criteria, performance statements, scope covered

Candidate's signature _____ **Date** _____

Observation record

Unit/element(s) _____
Candidate _____
Evidence index number _____
Date of observation _____

Skills/activities observed	Performance criteria covered

Knowledge and understanding apparent from this observation

Other units/elements to which this evidence may contribute

Assessor's comments and feedback to candidate

I can confirm the candidate's performance was satisfactory.

Assessor's signature _____ **Date** _____

Candidate's signature _____ **Date** _____

Witness testimony

SVQ title and level	
Candidate's name	
Evidence index no	
Index no of other evidence which this testimony relates to (if any)	
Element(s)	
Date of evidence	
Name of witness	
Designation/relationship to candidate	
Details of testimony	

I can confirm the candidate's performance was satisfactory.

Witness's signature _____ **Date** _____

Witness (please select the appropriate box):

- Holds A1/A2 or D32/D33 qualifications
- Is familiar with the SVQ standards to which the candidate is working

Record of questions and candidate's answers

Unit	
Element(s)	
Evidence index number	
Circumstances of assessment	
List of questions and candidate's responses	
Q	
A	
Q	
A	
Q	
A	
Q	
A	
Q	
A	

Assessor's signature _____ **Date** _____

Candidate's signature _____ **Date** _____