

skillsmart retail®

Retail SVQ units

ACG approved 10th August 2011

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Qualifications to which these units relate

A separate qualification structures booklet is available for the qualifications these units appear in. These are:

SVQ 1 Retail Skills
SVQ 2 Retail Skills
SVQ 3 Retail (Sales Professional)
SVQ 3 Retail (Visual Merchandising)
SVQ 3 Retail (Management)

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Move goods and materials manually in a retail environment

SVQ Unit	SCQF level	SCQF credit
B.01	4	3

Summary

This unit is about following instructions for moving goods and materials and putting them in the right places. The unit does not involve using a lift truck, but you do need to use other types of lifting equipment and to use safe lifting techniques at all times.

1. Move goods and materials manually in a retail environment

You need to:

- P1.1 check where items are to be stored
- P1.2 check what time you need to complete the task by
- P1.3 check that the equipment you need is available and in working order
- P1.4 identify any faults with the equipment and report these to the right person
- P1.5 use safe and approved techniques for handling items
- P1.6 recognise when you need help in moving items and ask the right people promptly
- P1.7 put items in the correct places
- P1.8 place items so that they can be identified and reached easily
- P1.9 move and place items within the time allowed
- P1.10 ask the right person for advice if you are having trouble placing items correctly

You need to know and understand:

- K1.1 the types of goods and materials you are responsible for moving
- K1.2 the storage facilities you need to use, where they are and the differences between them
- K1.3 which goods and materials go where
- K1.4 the equipment that is available and what it is used for
- K1.5 how to use the equipment
- K1.6 what can go wrong with the equipment and what to do about it
- K1.7 how to handle and move goods safely
- K1.8 when to ask for help and who to ask
- K1.9 why it is important to place goods and materials correctly
- K1.10 how to place items so that they can easily be identified
- K1.11 why stock rotation is important
- K1.12 how to rotate stock
- K1.13 who to ask for advice about placing items correctly

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Keep stock at required levels in a retail environment

SVQ Unit	SCQF level	SCQF credit
B.02	4	3

Summary

This unit covers two areas of responsibility concerning keeping the shelves filled on the sales floor. Firstly, it involves following instructions for checking stock levels and updating stock records. Secondly, it is about positioning stock correctly on the sales floor.

1. Check stock levels in a retail environment

You need to:

- P1.1 check existing stock levels accurately and in line with instructions and company procedures
- P1.2 ask the right person for advice if instructions for checking stock are not clear
- P1.3 spot unsaleable stock and promptly tell the right person
- P1.4 check stock levels in ways that do not disturb other people any more than needed
- P1.5 update stock records accurately and in line with company procedures

You need to know and understand:

- K1.1 why accurate and up-to-date stock checks and records are important
- K1.2 company procedures for checking stock levels
- K1.3 why you should follow instructions and procedures for checking stock levels
- K1.4 how to check stock accurately
- K1.5 how to check stock levels so that you do not disturb other people any more than needed
- K1.6 reasons why the stock you are responsible for checking may be unsaleable
- K1.7 how to recognise unsaleable stock when you are checking stock levels
- K1.8 company procedures for updating stock records

2. Fill shelves in a retail environment

You need to:

- P2.1 follow instructions for positioning stock
- P2.2 promptly ask the right person for advice if instructions for positioning stock are not clear
- P2.3 handle stock in ways that protect your own and other people's safety
- P2.4 handle stock in ways that protect stock, equipment and premises from being damaged
- P2.5 fill shelves in ways that do not disturb other people any more than needed
- P2.6 promptly clean and tidy your work area when you have finished

You need to know and understand:

- K2.1 why stock needs positioning accurately
- K2.2 the safety risks of handling stock
- K2.3 how to handle stock without risking your own or other people's safety
- K2.4 how stock, premises and equipment can be damaged by poor stock handling
- K2.5 ways of handling stock so that stock, premises and equipment are not damaged
- K2.6 how to fill shelves so that you do not disturb other people any more than needed
- K2.7 why you should clean and tidy your work area promptly when you have finished
- K2.8 how to clean and tidy your work area, and the equipment and materials to use

Receive goods and materials into storage in a retail environment

SVQ Unit	SCQF level	SCQF credit
B.03	5	4

Summary

This unit is about two aspects of receiving deliveries. The first concerns preparing the receiving and storage areas and making sure the relevant paperwork is in order. The second is about checking deliveries, making sure that they are satisfactory and are off-loaded into the right areas, and updating the stock control records.

1. Prepare to receive deliveries in a retail environment

You need to:

- P1.1 identify accurately the quantity and nature of the items that are expected and the storage space needed
- P1.2 check accurately the storage space that is available and promptly report any shortage to the right person
- P1.3 check that the receiving area is clean, tidy and free from obstructions and dangers
- P1.4 check that the handling equipment you need is available and is in good working order
- P1.5 check that the relevant paperwork is complete, accurate and up-to-date

You need to know and understand:

- K1.1 why you need to prepare thoroughly to receive deliveries
- K1.2 the information you need about the quantity and nature of deliveries, and how to access and interpret this information
- K1.3 how to identify the quantity and type of storage space needed, and how to check if this is available
- K1.4 who to tell about any shortage of storage space, and why you should do so promptly
- K1.5 company procedures for receiving deliveries
- K1.6 why accurate, complete and up-to-date paperwork is needed, and the possible consequences of not having this
- K1.7 the paperwork you must check and how to identify problems with it
- K1.8 legal and company requirements for maintaining security and safety during deliveries, and how these relate to the preparations you are required to make

2. Receive deliveries into storage in a retail environment

You need to:

- P2.1 check that the type, quantity and quality of items deliveries are acceptable
- P2.2 follow company procedures and policies for refusing faulty deliveries
- P2.3 record any refusals accurately and tell the right person about them promptly
- P2.4 check deliveries using methods that are safe and hygienic and that protect the items from damage
- P2.5 allow deliveries to be off-loaded only into the right areas
- P2.6 update stock control systems promptly, fully and accurately
- P2.7 follow legal and company requirements for maintaining security and safety while receiving deliveries

You need to know and understand:

- K2.1 the handling equipment you need, where to find it and how to use it
- K2.2 how to recognise faulty equipment
- K2.3 who to tell about any faulty equipment that you are not responsible for fixing
- K2.4 why you must handle goods safely and hygienically, and how to do so
- K2.5 why you must handle goods without damaging them, and how to do so
- K2.6 where deliveries should be offloaded
- K2.7 legal and company requirements for maintaining security and safety while receiving deliveries

Put goods and materials into storage in a retail environment

SVQ Unit	SCQF level	SCQF credit
B.04	5	4

Summary

This unit is about two areas of responsibility concerning the storage of goods. Firstly, it involves checking that suitable storage space and handling equipment are available. Secondly, it is about putting goods into storage in ways that make the best use of the available space and allow people to reach the goods as needed.

1. Check storage arrangements for goods and materials in a retail environment

You need to:

- P1.1 identify the storage requirements and conditions for the goods and materials you are responsible for storing
- P1.2 check accurately that suitable storage places are available and in a fit state to use
- P1.3 tell the right person promptly when there aren't enough suitable storage locations
- P1.4 check accurately that suitable handling equipment is available for use

You need to know and understand:

- K1.1 possible causes of the goods and materials you work with deteriorating in storage
- K1.2 the types of storage facilities and conditions that stop the goods and materials you work with deteriorating
- K1.3 the storage facilities available in your workplace and their relevant features
- K1.4 how to check that suitable storage places are available and fit for use
- K1.5 who to tell if there aren't enough suitable storage places
- K1.6 the handling equipment used for storing goods and materials and how to check that it is available for use

2. Put goods and materials into storage in a retail environment

You need to:

- P2.1 put goods and materials in the right storage facilities within the time allowed
- P2.2 follow legal and company requirements for storing deliveries safely and securely
- P2.3 position items in storage so that they can be easily reached when needed
- P2.4 use the available storage space efficiently
- P2.5 identify any faulty equipment and fix it when this is your responsibility
- P2.6 report promptly and to the right person any faulty equipment that is not your responsibility to fix
- P2.7 fill in the relevant paperwork fully, accurately and promptly

You need to know and understand:

- K2.1 legal and company requirements for storing deliveries safely and securely
- K2.2 why stock needs to be rotated
- K2.3 how to position goods so that batches of stock can be reached easily and in the right order
- K2.4 the instructions you need for storing deliveries in the right places and in the right order
- K2.5 where to get instructions for storing deliveries
- K2.6 how to work safely, securely and efficiently when putting deliveries into storage

Keep stock on sale at required levels in a retail environment

SVQ Unit	SCQF level	SCQF credit
B.05	5	3

Summary

This unit is about two aspects of keeping the right levels of stock on sale. The first concerns using the stock control system to help you anticipate how much stock will be needed, while there is still enough time to order it. The second is about ordering stock on time, and making sure it reaches the sales floor as needed.

1. Check the level of stock on sale in a retail environment

You need to:

- P1.1 use the stock control system to identify current stock levels, the stock levels needed and any shortfalls in stock
- P1.2 work out how often to check stock so that there will be enough time to replace stocks before they run out
- P1.3 check stock levels at suitable intervals
- P1.4 tell the right person promptly when stock needs replacing
- P1.5 notice when stock has passed its expiry date and promptly remove it from sale and update the stock control system

You need to know and understand:

- K1.1 why the store needs to carry the right levels of stock
- K1.2 why the quality of stock needs checking regularly
- K1.3 the maximum and minimum levels of stock that need to be on display
- K1.4 the factors that can affect demand for stock, and how to work out how often to check stock levels
- K1.5 how to plan and organise your time so that you check stock at suitable intervals
- K1.6 how to use the stock control system to identify current stock levels, the stock levels needed and any shortfalls in stock
- K1.7 how to identify unsaleable stock
- K1.8 how to deal with unsaleable stock
- K1.9 how to update the stock control system to reflect changes in stock levels

2. Replenish stock on sale in a retail environment

You need to:

- P2.1 order enough stock to maintain the correct levels
- P2.2 prepare stock for sale within the time allowed
- P2.3 arrange for stock to be moved to the sales floor when it is needed
- P2.4 rotate stock correctly and with the least possible disturbance to other people
- P2.5 follow company procedures for recycling packaging waste
- P2.6 update the stock control system promptly, accurately and completely
- P2.7 notice changes in demand for stock and decide what stock levels are suitable
- P2.8 suggest realistic changes to the right person and give reasons for your recommendations

You need to know and understand:

- K2.1 how to use the stock control system to identify the types and quantities of stock to order
- K2.2 how to prepare and send orders for stock, and why you should do so accurately and at the right times
- K2.3 how to prepare different types of stock for sale
- K2.4 company procedures for recycling packaging waste
- K2.5 how to decide when to move stock to the sales floor and the arrangements to make for moving stock
- K2.6 why stock needs rotating
- K2.7 how to rotate stock correctly and without disturbing other people anymore than needed
- K2.8 why you should regularly check demand for stock
- K2.9 factors that can affect demand
- K2.10 who to approach with suggestions for changes to the levels of stock carried
- K2.11 how to present a clearly reasoned case for changing the levels of stock carried

Process customer orders for goods in a retail environment

SVQ Unit	SCQF level	SCQF credit
B.06	5	3

Summary

This unit covers two stages of processing customers' orders for goods. The first involves checking if the goods the customer wants are available and telling the customer the terms of supply. The second is about processing the order and keeping the customer informed of progress.

1. Check the availability of goods for retail orders

You need to:

- P1.1 identify customers' needs accurately by asking suitable questions
- P1.2 identify the goods that will meet customers' needs and check with customers that these are satisfactory
- P1.3 find out who can supply the goods needed and on what terms
- P1.4 keep customers informed of progress in finding the goods they need
- P1.5 give customers clear, accurate and complete information about the availability of goods and the terms of supply

You need to know and understand:

- K1.1 how to ask the right questions to find out exactly what customers want
- K1.2 which items are held in stock
- K1.3 how to check whether there is enough stock to meet the order
- K1.4 which items are available by order and which suppliers and manufacturers can provide them
- K1.5 how to check whether external suppliers and manufacturers can provide items, and on what terms
- K1.6 why you should keep customers informed of progress in finding the goods they need
- K1.7 why you should give customers clear, accurate and complete information about the terms of supply

2. Process orders for retail customers

You need to:

- P2.1 follow legal and company procedures for checking the customer's identity and credit status
- P2.2 follow company policy for offering to order goods the customer needs if they are not in stock
- P2.3 prepare accurate, clear and complete information about the order and pass this information promptly to the people responsible for fulfilling the order
- P2.4 provide accurate, clear, complete and timely information to those responsible for issuing the invoice
- P2.5 tell the right person promptly when you cannot process an order and explain the reasons clearly
- P2.6 let the customer know promptly and politely if their order cannot be fulfilled within the time agreed
- P2.7 store customers' details securely and show them only to people who have a right to see them

You need to know and understand:

- K2.1 legal and company procedures for checking the customer's identity and credit status, and why you must follow them
- K2.2 who is responsible for fulfilling customers orders, what information they need from you, and why they need it
- K2.3 who is responsible for invoicing customers for orders, what information they need from you, and why they need it
- K2.4 who to tell if you cannot process an order
- K2.5 why you should tell the customer promptly about any delays in fulfilling their order
- K2.6 legal and company requirements relating to customer confidentiality
- K2.7 what might happen if customer information is not kept confidential
- K2.8 company procedures for storing customer information securely
- K2.9 who is entitled to see customer information, and in what situations

Process returned goods and materials in a retail environment

SVQ Unit	SCQF level	SCQF credit
B.07	5	3

Summary

This unit is suitable for candidates who work on the shop floor and deal with customers face-to-face, as well as for candidates in behind-the-scenes roles dealing with customers by telephone or e-mail for example. The unit involves firstly telling the customer what you can do to help them return unwanted goods, and secondly taking suitable action such as requesting a refund or picking out replacement goods.

In stores where the POS system automatically updates the stock control system, criterion P2.3 can be achieved simply by scanning the returned goods at the POS. Knowing this procedure and its effects will count as knowing how to update the stock control system under K2.3

1. Help retail customers who need to return goods

You need to:

- P1.1 check clearly and politely with the customer what goods they want to return and their reasons
- P1.2 apologise promptly if your company appears to be at fault
- P1.3 follow legal and company requirements for offering replacements and refunds, and explain these to the customer clearly and politely
- P1.4 explain to the customer clearly and politely the action you are going to take, and any charges that apply
- P1.5 pick out accurately the replacement goods and follow company procedures for preparing them to be given or sent to the customer
- P1.6 explain to the customer accurately, clearly and politely the arrangements for returning the unwanted goods

You need to know and understand:

- K1.1 the main reasons customers might have for returning goods
- K1.2 the customer's legal rights to replacements and refunds
- K1.3 company policies and procedures for replacements and refunds, including proof of purchase
- K1.4 how much authority you have to agree to replacements and refunds, and who to ask for help when you need authorisation
- K1.5 any charges that apply when your company is not at fault
- K1.6 where to find replacement goods
- K1.7 company procedures for preparing replacement goods for giving or sending to the customer
- K1.8 how customers should return unwanted goods

2. Process returns of retail goods

You need to:

- P2.1 check accurately the type, quantity and condition of returned goods
- P2.2 give accurate and complete information to the person who can raise a credit note or refund the payment
- P2.3 update the stock control system promptly, accurately and fully
- P2.4 label clearly any goods that are to be returned to the supplier or manufacturer
- P2.5 move returned goods to the correct place and position
unsaleable goods separately from sales stock

You need to know and understand:

- K2.1 who can raise credit notes and refund payments, and the information they need
- K2.2 how to update the stock control system accurately and fully and why you should do so promptly
- K2.3 how to label goods for return to the supplier or manufacturer
- K2.4 where to place returned goods that cannot be re-sold
- K2.5 where to place returned goods that can be re-sold

Process donated goods for resale or recycling in a retail environment

SVQ Unit	SCQF level	SCQF credit
B.08	4	6

Summary

This unit is about processing donated goods in charity shops. It involves correctly identifying different types of goods, checking the condition of goods and preparing suitable goods for sale.

1. Process donated goods in a retail environment for selling or recycling

You need to:

- P1.1 clean and tidy the work area before you begin sorting
- P1.2 sort donated goods by their type and condition
- P1.3 follow procedures for getting rid of items and parts that are not suitable for either selling or recycling
- P1.4 ask the right person for help if you cannot identify or classify unusual items
- P1.5 put goods suitable for recycling in suitable containers
- P1.6 place containers in the correct place ready for collection and check that they are not in anyone's way
- P1.7 identify goods that need to be cleaned, tidied or repaired
- P1.8 follow legal and company requirements for protecting health and safety while processing donated goods
- P1.9 clean, tidy or repair goods to meet legal and company requirements for saleable goods

You need to know and understand:

- K1.1 the types of goods the store sells
- K1.2 the types of goods that can be sent for recycling
- K1.3 which types of goods are not suitable for selling or recycling and how to get rid of them
- K1.4 the legal and company safety requirements which apply to second-hand goods, including electrical equipment, furniture and toys
- K1.5 the legal age restrictions which apply to videos, DVDs and computer games
- K1.6 where to store donated goods until you are ready to sort them
- K1.7 where and when to sort donated goods
- K1.8 why you should tidy and clean the sorting area before starting to sort goods
- K1.9 where to put goods as you sort them
- K1.10 who to ask for help in identifying unusual items or deciding what to do with them

continued on next page

1. Process donated goods in a retail environment for selling or recycling

continued from previous page

You need to know and understand:

- K1.11 the procedures to follow to prepare goods for recycling
- K1.12 where to put goods for recycling so that they can be collected
- K1.13 how to identify goods that need to be cleaned, tidied or repaired
- K1.14 how to clean, tidy and repair different types of goods
- K1.15 how to use irons and steamers safely and effectively

Prepare products for sale to customers in a retail environment

SVQ Unit	SCQF level	SCQF credit
B.09	5	3

Summary

This unit is about preparing products for display by unpacking and assembling them. It also involves regularly checking the condition of goods on display and removing any that are damaged.

1. Prepare products for selling to retail customers

You need to:

- P1.1 check that all expected items and parts of the product are in the package
- P1.2 remove all unwanted packaging
- P1.3 follow legal and company procedures for preparing waste and unwanted packaging for recycling
- P1.4 gather the tools you need for putting products together
- P1.5 use safe work methods and follow manufacturers' instructions when putting products together
- P1.6 check that products have been assembled correctly and can be used safely
- P1.7 ask the right person for help when products are proving difficult to put together
- P1.8 check regularly that products on display are in a satisfactory condition
- P1.9 promptly remove damaged products from display and follow company procedures for dealing with them

You need to know and understand:

- K1.1 which products you are responsible for preparing for sale
- K1.2 company procedures for preparing waste and unwanted packaging for recycling
- K1.3 which tools to use to put products together
- K1.4 where to put products together and where to put them once they are assembled
- K1.5 how to work safely when putting products together for sale
- K1.6 how to check that products have been correctly put together and are safe to display
- K1.7 who to approach for help when products are proving difficult to put together
- K1.8 why you should regularly check the condition of products on display
- K1.9 company quality standards for products on display
- K1.10 how to check the condition of products on display and how often to carry out checks
- K1.11 company procedures for dealing with products that are damaged

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Process bake-off products for sale in a retail environment

SVQ Unit	SCQF level	SCQF credit
B.10	5	6

Summary

This unit is about processing ready-prepared goods such as bread, pastry, biscuits and scones, and covers two stages of the preparation process.

The first involves baking ready-prepared goods and checking their quality. The second is about following instructions for decorating ready-prepared goods.

1. Bake products for sale (bake-off) in a retail environment

You need to:

- P1.1 use approved methods to bake the correct quantity and quality of products
- P1.2 use approved procedures for checking that the quantity and quality of baked products is satisfactory
- P1.3 follow procedures for dealing with products that fail to meet the product specification
- P1.4 store products at the correct temperature for the next stage in the bakery process

You need to know and understand:

- K1.1 the factors that affect baking including temperature, time, humidity, density, weight and shape
- K1.2 the behaviour of ingredients during baking and their effect on baking
- K1.3 why baked products must be cooled in the correct conditions and what these conditions are
- K1.4 approved procedures for baking products
- K1.5 approved procedures for checking the quality of products
- K1.6 how to recognise products that are not fit for sale and what to do about them
- K1.7 the legal and company requirements you must follow when baking products for sale
- K1.8 procedures for reporting problems with baking processes

2. Glaze, coat and decorate bake-off products in a retail environment

You need to:

- P2.1 check that products are in the right condition for coating, glazing or decorating
- P2.2 make sure that finishing materials have the right texture, thickness, colour and temperature
- P2.3 check that coated, glazed and decorated products meet the specification and are correctly positioned for the next stage in the bakery process
- P2.4 follow procedures for dealing with finished products that fail to meet the product specification
- P2.5 make the amount of coated, glazed and decorated products needed
- P2.6 follow company procedures for re-using and recycling waste materials

You need to know and understand:

- K2.1 types of finishing materials for bake-off and how to use them
- K2.2 how to apply coatings, glazes and decorative materials
- K2.3 how to maintain the quality of coatings, glazes and decorative materials while applying them
- K2.4 how to recognise products that are not fit to sell and how to deal with them
- K2.5 the legal and company requirements you must follow in your working practices
- K2.6 procedures for reporting problems with finishing bake-off products

Process greengrocery products for sale in a retail environment

SVQ Unit	SCQF level	SCQF credit
B.12	5	9

Summary

This unit is about two aspects of putting greengrocery products on display in a store. Firstly, it is about unpacking products, checking their quality and preparing them for display. Secondly, it is about checking and rotating stock regularly so that it remains attractive to customers. You need to show you do all this with vegetables, fruit and salad.

1. Prepare greengrocery products in a retail environment for selling to customers

You need to:

- P1.1 remove unwanted packaging
- P1.2 follow legal and company procedures for recycling unwanted packaging and waste from greengrocery products
- P1.3 always handle greengrocery products hygienically and in a way that protects them from damage
- P1.4 choose only those greengrocery products that match the quality of the store sells
- P1.5 correctly deal with greengrocery products that do not match the requirements for quality
- P1.6 correctly weigh, classify and package greengrocery products
- P1.7 remove unwanted parts of greengrocery products to make them as attractive as possible to customers

You need to know and understand:

- K1.1 the greengrocery products that are sold in your store and how to handle them without damaging them
- K1.2 how to handle greengrocery products hygienically
- K1.3 legal and company procedures for recycling unwanted packaging and waste from greengrocery products
- K1.4 why you must handle greengrocery products hygienically and without damaging them
- K1.5 company quality standards for greengrocery products
- K1.6 how to recognise greengrocery products that must be rejected or reclassified
- K1.7 how to recognise parts of greengrocery products that must be removed to make the product more attractive to customers

2. Display greengrocery products to attract retail sales

You need to:

- P2.1 check that display areas are clean and in the correct condition for stock to be displayed
- P2.2 make displays attractive enough to interest customers
- P2.3 place specific greengrocery products in the correct display areas
- P2.4 regularly check the quality and shelf life of greengrocery products on display
- P2.5 follow legal and company procedures for recycling items that have little or no shelf life or that have deteriorated in quality
- P2.6 correctly rotate the stock of greengrocery items according to their shelf life
- P2.7 check that ticketing and coding is accurate and correct
- P2.8 regularly check the condition and cleanliness of displays and correct them if needed

You need to know and understand:

- K2.1 the greengrocery products that are sold in your store and how they should be displayed
- K2.2 why greengrocery products need displaying in the correct display areas
- K2.3 why you must regularly check the quality and shelf life of greengrocery products, and how to do so
- K2.4 why stock needs rotating
- K2.5 how to rotate stock
- K2.6 how to price and display greengrocery products with limited shelf life to encourage customers to buy them
- K2.7 legal and company procedures for recycling greengrocery products that cannot be sold because they have deteriorated or are past their shelf life
- K2.8 how to clean and maintain display areas, including chillers

Finish meat products by hand in a retail environment

SVQ Unit	SCQF level	SCQF credit
B.13	5	9

Summary

This unit is about three aspects of finishing meat products by hand. The first is about checking that meat products are suitable for processing. The second is about choosing suitable tools and preparing your work area so that you can process meat safely and hygienically. The third aspect of the unit is about processing meat by hand so that you get the required quantity and quality of finished products.

1. Check the suitability of meat products for finishing in a retail environment

You need to:

- P1.1 effectively carry out product quality checks against specifications for process, ingredients and products
- P1.2 identify and reject products that are unsuitable for finishing by hand, and put them in a suitable place away from other products
- P1.3 safely and hygienically deal with rejected products
- P1.4 keep products at the specified temperature during transfer and storage once they have been passed as suitable for finishing by hand
- P1.5 accurately record relevant information

You need to know and understand:

- K1.1 the sources of meat and other ingredients
- K1.2 how to carry out quality checks on products and recognise when meat and ingredients are fit for purpose
- K1.3 the reasons you should reject meat and other ingredients
- K1.4 the temperatures at which meat should be held during handling, transfer and storage, and the reasons for this
- K1.5 why you need to keep accurate records
- K1.6 the reasons for checking records and why you must identify and report problems
- K1.7 how to refer to and use the quality and safety management manuals

2. Prepare to finish meat products in a retail environment

You need to:

- P2.1 get the finishing instructions and organise your work in line with them
- P2.2 keep the work area free from dangers and organise it to meet safety and processing needs
- P2.3 choose hand tools and equipment in line with safety and processing requirements
- P2.4 prepare tools and equipment in line with safety and processing requirements
- P2.5 identify faulty tools and equipment and follow procedures for dealing with them
- P2.6 follow safe and hygienic working practices at all times

You need to know and understand:

- K2.1 the dangers associated with particular tools and equipment and the safety precautions to take
- K2.2 why it is important to use the correct tools and equipment
- K2.3 which tools and equipment are used for hand finishing
- K2.4 reasons for maintaining tools and equipment
- K2.5 how to keep tools and equipment clean, sharp and in good working order
- K2.6 what to do about faulty tools and equipment.

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

You need to:

- P3.1 achieve the finished product specification within the time allowed
- P3.2 achieve the product yield needed
- P3.3 identify and reject products that don't meet the specification, and put them in a suitable place away from other products
- P3.4 deal safely and hygienically with finished products which have been rejected
- P3.5 keep finished products at the specified temperature and store them safely, securely and hygienically
- P3.6 clean and store tools and equipment in line with safety and processing requirements
- P3.7 follow safe and hygienic working practices at all times

You need to know and understand:

- K3.1 the temperatures at which meat should be held during handling, transfer and storage, and the reasons for this
- K3.2 reasons for rejecting finished products
- K3.3 procedures to deal with finished products which have been rejected
- K3.4 how to clean tools and equipment
- K3.5 reasons for storing tools and equipment as instructed

Organise the receipt and storage of goods in a retail environment

SVQ Unit	SCQF level	SCQF credit
B.14	7	11

Summary

This unit is firstly about organising staff to receive goods, for example when preparing for seasonal intake of stock. Secondly, the unit involves organising storage facilities and training and supervising staff in the use of the storage system.

1. Organise staff to receive and check incoming deliveries in a retail environment

You need to:

- P1.1 gather enough competent staff and brief them well enough before deliveries are received
- P1.2 make sure that the area for receiving goods is prepared and that you have enough storage space for the delivery
- P1.3 check that deliveries are unloaded safely and securely
- P1.4 make sure that goods are promptly checked against requirements
- P1.5 make sure that delivery records are complete and accurate and processed promptly
- P1.6 use delivery records to check that each supplier has met your company's service needs
- P1.7 spot problems with deliveries and sort them out properly

You need to know and understand:

- K1.1 how to prepare to receive and handle different types of goods
- K1.2 procedures for receiving goods, including dealing with incorrect, damaged and late deliveries
- K1.3 which staff are involved in or are affected by a delivery schedule and the information they need to receive goods efficiently
- K1.4 the company's standards for acceptable goods
- K1.5 why incoming goods must be checked against requirements straight after unloading
- K1.6 recording and control system including procedures for checking goods received
- K1.7 safety and security procedures for receiving goods

2. Organise and maintain storage facilities in a retail environment

You need to:

- P2.1 organise storage facilities to take account of day-to-day work, safety requirements and the need to keep goods secure and in a saleable condition
- P2.2 give staff accurate, up-to-date information and suitable training so they can use the storage system securely, safely and in line with relevant legal requirements
- P2.3 give staff clear roles and responsibilities for storing and moving goods and check they understand these roles and responsibilities
- P2.4 develop and update plans to cope with unforeseen storage problems
- P2.5 check regularly that staff are storing and moving goods competently, safely, securely and in line with relevant legal requirements
- P2.6 keep complete, accurate and up-to-date stock records that can be found easily by everyone who needs them

You need to know and understand:

- K2.1 how effective storage systems contribute to reducing stock loss
- K2.2 how to work out what storage facilities are needed for goods on order
- K2.3 how to protect goods from various causes of deterioration and damage
- K2.4 how to work out suitable storage layouts and solve storage problems efficiently, safely and securely
- K2.5 how to run the stock recording and controlling systems efficiently and accurately, including using them to monitor and record stock loss
- K2.6 the legal requirements for storing stock, including health and safety requirements

3. Check the storage and care of stock in a retail environment

You need to:

- P3.1 keep up a routine for checking storage facilities and stock
- P3.2 carry out spot checks of storage facilities and stock at suitable intervals
- P3.3 make sure staff have the information and training they need to spot stock that is out of date or at risk of deteriorating, and to deal with it in line with legal and company requirements
- P3.4 check the storage and movement of stock to make sure that stock is reaching the shop floor as it is needed
- P3.5 evaluate the storage, care and movement of stock and find ways of running storage and movement systems more profitably

You need to know and understand:

- K3.1 when and how to check stock and storage, including both routine and spot checks
- K3.2 legal and company requirements for removing out-of-date stock
- K3.3 the company's requirements for storing and moving stock, and how to check that these requirements are being met
- K3.4 how to work out if ideas for improving the ways stock is stored and moved are likely to be profitable
- K3.5 the causes of stock deterioration and damage and how these affect products
- K3.6 the company's requirements and quality standards for storage
- K3.7 the information colleagues need to be able to use the storage system effectively
- K3.8 company policy and procedures for protecting goods that are at risk of damage or deterioration
- K3.9 the company's systems and procedures for moving and storing stock

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Audit stock levels and stock inventories in a retail environment

SVQ Unit	SCQF level	SCQF credit
B.15	7	6

Summary

This unit involves organising an audit, managing the audit team and preparing an audit report. The audit team may consist of people who don't normally work together, and you need not necessarily be a team leader in your day-to-day work.

1. Put an audit programme into practice in a retail environment

You need to:

- P1.1 find out and make sure you understand when to carry out an audit, why it is needed, what it should cover and who needs the audit report
- P1.2 find out how the report should be laid out and the level of detail needed
- P1.3 find out what resources are available to carry out the audit
- P1.4 spot any problems that are likely to prevent you from carrying out the audit effectively in the time available, and sort them out before your start the audit
- P1.5 choose staff to help with the audit, check their availability and give responsibilities to each of them
- P1.6 brief your audit team so that they know what their responsibilities are during the audit, and how to carry out those responsibilities

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You need to know and understand:

- K1.1 why it is important to audit levels of stock inventories
- K1.2 how often you need to carry out audits
- K1.3 the information held in the stock inventory and how to access it
- K1.4 how to interpret information and correct mistakes in the stock inventory
- K1.5 the types of situation that can make it difficult to carry out an effective audit in the time available, and how to prevent them
- K1.6 the resources you need to be able to carry out an audit
- K1.7 when and how to tell colleagues that an audit is to take place, and how it is likely to affect colleagues' work
- K1.8 how to choose people to help you with the audit and give them responsibilities

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1. Put an audit programme into practice in a retail environment

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You need to:

- P1.7** plan the work of the audit team so you make sure it is accurate and will cause as little disruption as possible to normal work
- P1.8** check on the audit team's progress at suitable intervals and help them to sort out any problems they may be having in completing the audit

You need to know and understand:

- K1.9** how to explain to your audit team what their responsibilities are during the audit and how you want these responsibilities to be carried out
- K1.10** how to check on the progress of the audit

2. Report the findings of a retail stock audit

You need to:

- P2.1** organise your findings so that you can easily spot any problems
- P2.2** spot problems and note them clearly for investigation
- P2.3** work out which problems are most important and should be investigated first
- P2.4** investigate problems methodically and sort them out as far as you can within the scope of the audit and with the resources available
- P2.5** prepare your final report in the layout needed and include comments on any problems which still exist
- P2.6** give or send your report to the people who need to see it, so that each person receives it on time

You need to know and understand:

- K2.1** how to organise audit findings so that problems can be easily identified
- K2.2** methods for spotting problems in audit findings
- K2.3** the types of problem that can happen and how to sort them out
- K2.4** the layout needed for the audit report
- K2.5** who needs to see the report
- K2.6** how to distribute the report so that each person receives it on time

Source required goods and services in a retail environment

SVQ Unit	SCQF level	SCQF credit
B.16	7	10

Summary

This unit is suitable for you if you order stock for a small, independent store and you are responsible for choosing the store's suppliers as well as ordering stock directly from them. The unit involves working out what needs replenishing and choosing which suppliers to use. It also involves ordering stock, checking that the right stock is delivered on time, and evaluating supplier's performance.

1. Choose suppliers and order stock for retail sale

You need to:

- P1.1 check the stock records at suitable intervals and spot which stock needs replenishing
- P1.2 follow a suitable routine for asking colleagues if they expect to have any special orders
- P1.3 compare purchase requisitions to spot items you can order together
- P1.4 use the purchasing records to find out who the regular suppliers have been, if any
- P1.5 choose suitable suppliers to use, taking account of stock availability, prices, delivery times and the extent to which the supplier's practices are compatible with your company's sustainability policy
- P1.6 order items accurately, promptly and from suitable suppliers
- P1.7 accurately work out the total cost of an order
- P1.8 keep complete, accurate and up-to-date purchasing records

You need to know and understand:

- K1.1 the types of goods the company normally needs
- K1.2 how to use the stock records to find out what needs to be ordered
- K1.3 the suppliers currently being used
- K1.4 the suppliers who have been used in the past and why they are no longer being used
- K1.5 how to find possible new suppliers and check whether they are suitable
- K1.6 company policy for choosing suppliers, including relevant aspects of your company's sustainability policy
- K1.7 what makes a legally binding contract
- K1.8 why you need to check suppliers' terms and conditions
- K1.9 company procedures for placing orders
- K1.10 company procedures for keeping records of orders

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1. Choose suppliers and order stock for retail sale

continued from previous page

You need to:

- P1.9 store purchasing records so that they can be easily found by the people who need them

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

You need to:

- P2.1 promptly match deliveries with orders so you can spot overdue items
- P2.2 spot items which are overdue and promptly contact the supplier about them
- P2.3 tell colleagues promptly if their orders will not be fulfilled on time and tell them what choices they have
- P2.4 follow procedures for returning goods and getting them replaced
- P2.5 check the quality, price and times of deliveries against the company's requirements
- P2.6 ask colleagues for comments about the quality and delivery times of items received from suppliers
- P2.7 provide accurate comments to suppliers on the level of service they provide

You need to know and understand:

- K2.1 company systems and procedures for returning goods
- K2.2 the company's legal rights as a buyer
- K2.3 company policy for paying creditors, and who to consult in the accounts department if a supplier suspends the account
- K2.4 the records your company keeps about suppliers' performance and how to find and use them
- K2.5 who in your company can comment on the quality and delivery time of goods or services received, and when and how to ask for their comments
- K2.6 how to complain to suppliers
- K2.7 how to respond positively when colleagues complain to you about the speed or quality of suppliers' performance

Contribute to food safety in a retail environment

SVQ Unit	SCQF level	SCQF credit
B.20	4	7

Summary

This unit is about your role in helping to maintain food safety. The unit applies to you if your job involves any of these activities:

- handling wrapped food
- handling unwrapped food not subject to temperature control requirements (for example, fresh produce or bakery items)
- going into an area where food is prepared even if you do not handle the food (for example, if you clean the food preparation area)

The unit is concerned with two aspects of food safety. The first is about keeping yourself clean as you work, and the second is about noticing and reporting obvious food safety hazards such as dirt, spillage or out-of-date stock.

1. Contribute to food safety in a retail environment

You need to:

- P1.1** keep yourself clean as you work, which means you:
- keep your hair, skin and nails in a suitable condition for working with food
 - remove any jewellery and other accessories that could cause food safety hazards
 - wear clean clothes including any protective clothing the company provides
 - wear the company's protective clothing correctly and change it when the company's rules say you must

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You need to know and understand:

- K1.1** how clean hair, skin, nails and clothing contribute to food safety and to giving the customer a positive impression of you and of the company
- K1.2** how jewellery and other accessories can put food safety at risk
- K1.3** the types of protective clothing you must wear at work
- K1.4** the right times to wash your hands, and how to wash your hands effectively
- K1.5** why you must avoid unsafe behaviour when you are working with or near food

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1. Contribute to food safety in a retail environment

continued from previous page

You need to:

P1.1, *continued*

- wash your hands at the right times and using effective methods
- avoid unsafe behaviour that could contaminate the food you are working with
- report any open wounds, skin infections and infectious illnesses promptly to the right person
- make sure any open wounds and skin infections are treated and covered with a suitable dressing

P1.2 notice and remove or report indicators of potential food safety hazards as you work, which means you:

- notice and correctly identify obvious indicators of potential food safety hazards in the workplace
- deal promptly and appropriately with indicators of potential food safety hazards when you have the authority to do so
- report promptly to the right person any indicators of potential food safety hazards you do not have the authority to deal with yourself

You need to know and understand:

K1.6 why you must report any open wounds, skin infections and infectious illnesses, and who is the right person to report them to

K1.7 the types of indicators of potential food safety hazards that you are expected to notice and identify in your workplace, and how to identify them

K1.8 which indicators of potential food safety hazards you have authority to deal with, and company procedures for dealing with them

K1.9 which indicators of potential food safety hazards you should report, and who to report them to

Maintain food safety while working with food in a retail environment

SVQ Unit	SCQF level	SCQF credit
B.21	5	8

Summary

This unit is about your responsibility for maintaining food safety. The unit applies to you if your main job role requires you to work in a food preparation area and involves any of these activities:

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

The unit is concerned with several aspects of food safety. Firstly, it is about keeping yourself clean as you work and cleaning your work area as you go. Secondly, it involves following the company's procedures for handling and processing food hygienically. Lastly, it is about making scheduled checks of food and food storage areas.

1. Maintain food safety while working with food in a retail environment

You need to:

- P1.1** keep yourself clean as you work, which means you:
- keep your hair, skin and nails in a suitable condition for working with food
 - remove any jewellery and other accessories that could cause food safety hazards
 - wear clean clothes including any protective clothing the company provides
 - wear the company's protective clothing correctly and change it when the company's rules say you must
 - wash your hands at the right times and using effective methods

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You need to know and understand:

- K1.1** how personal hygiene and behaviour affect food safety in the workplace
- K1.2** the types of illness the law requires you to report to your employer
- K1.3** why you must treat and cover open wounds and skin infections, and how to do so
- K1.4** how food handling practices affect food safety in the workplace
- K1.5** why you must keep your immediate work area clean and tidy
- K1.6** the company's schedules and procedures for cleaning the workplace and why you must follow these

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1. Maintain food safety while working with food in a retail environment

continued from previous page

You need to:

P1.1, *continued*

- avoid unsafe behaviour that could contaminate the food you are working with
- report any open wounds, skin infections and infectious illnesses promptly to the right person
- make sure any open wounds and skin infections are treated and covered with a suitable dressing

P1.2 keep your workspace in the right condition for working with food, which means you:

- keep your immediate work area clean and tidy as you work
- carry out any scheduled cleaning at the right times and in line with company procedures
- keep tools, utensils and equipment in good working order, in a hygienic condition and stored correctly

P1.3 work in a way that keeps food safe for customers, which means you:

- follow company procedures to dispose of food waste promptly and hygienically
- protect food from food safety hazards and cross-contamination as you work
- follow company procedures for dealing with contaminated food
- follow company procedures for items that may cause allergic reactions
- label products clearly with the correct use-by dates

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You need to know and understand:

K1.7 why you must keep certain foods at specified temperatures and how to do so

K1.8 your company's schedule and procedures for checking and reporting the condition of food and food storage areas, and why you must follow these

K1.9 the main types of infestation; how they can happen; how to prevent them; how to recognise them and what to do if you discover them

K1.10 the main types of food safety hazard and cross-contamination; how they can happen; how to prevent or reduce the risk of them happening; and what to do if you discover indicators of food safety hazards or cross-contamination

K1.11 the causes of food spoilage, how to recognise food spoilage and what to do if you discover it

1. Maintain food safety while working with food in a retail environment

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You need to:

- P1.4 check and record the condition of the food you are responsible for, which means you:
- check food and food storage areas in line with the company's schedules and procedures
 - follow company procedures for keeping accurate and complete records of the checks you make
 - follow company procedures for any indicators of potential food safety hazards you have authority to deal with
 - promptly report to the right person any indicators of potential food safety hazards you don't have authority to deal with yourself

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Monitor and help improve food safety in a retail environment

SVQ Unit	SCQF level	SCQF credit
B.22	6	12

Summary

This unit is for you if you supervise staff who handle or prepare wrapped or unwrapped food, including food subject to temperature control. The unit is firstly about monitoring food safety in line with your company's food safety procedures. Secondly, the unit is about making a contribution to continuously improving food safety in your work area.

Knowledge and understanding which relates to the whole of this unit

You need to know and understand:

- K1.1 what the relevant food safety management principles are and why it is important to follow them
- K1.2 what critical control points, control points, critical limits and relevant variance are
- K1.3 why it is important to monitor critical control points and control points, and how to do so
- K1.4 your responsibilities under your organisation's food safety procedures, including the critical control points relating to your work activity
- K1.5 how to communicate responsibilities for food safety procedures to staff and make sure they understand these
- K1.6 how to make sure staff receive appropriate training to meet their food safety responsibilities
- K1.7 the impact of variance at critical control points and control points on food safety, public health and your organisation
- K1.8 the type and frequency of checks that you should perform to control food safety within your work activities, and how to obtain verification of those checks
- K1.9 the reporting procedures when control measures fail
- K1.10 the records required for controlling food safety and how to maintain them
- K1.11 how traceability works and why it is important to food safety
- K1.12 types and methods of corrective action to reduce, control or eliminate food safety hazards
- K1.13 why it is important to have food safety procedures in place
- K1.14 what continuous improvement is and why it is important to contribute to the improvement process

1. Monitor food safety at critical control points

You need to:

P1.1 identify and monitor critical control points, which means you:

- identify relevant food safety control measures
- allocate and supervise food safety responsibilities
- identify and meet staff training needs
- complete all specified operational controls and checks at the set time frequency
- keep accurate and complete records of checks
- obtain verification for completed checks, following set procedures

P1.2 troubleshoot, which means you:

- take suitable corrective action with the appropriate degree of urgency when control measures fail
- report to the appropriate person any procedures that are out of line with critical limits
- seek expert advice and support for matters outside your own level of authority or expertise

2. Contribute to continuous improvement of food safety

You need to:

P2.1 highlight areas for improvement, which means you:

- identify and report any factors or issues that arise in your work activities which may affect the safety of food
- identify and report any factors or issues within the environment, supplies or product which may affect the safety of food

P2.2 contribute to improving food safety, which means you:

- contribute to team meetings with ideas and suggestions to improve procedures or processes
- contribute to introducing new procedures and/or reviewing existing ones in order to improve food safety

P2.3 interpret and use food safety management procedures, which means you:

- check that you understand and can use any new control measures that are introduced relating to food safety

Receive driver-controlled deliveries of fuel on a petrol forecourt

SVQ Unit	SCQF level	SCQF credit
B.23	5	7

Summary

This unit is for you if you work on a petrol forecourt where motor fuel deliveries are controlled by the tanker driver. The unit is about your role in ensuring that deliveries are completed safely and effectively. Firstly, you need to prepare to receive deliveries. Secondly, you need to check the completed delivery. Motor fuel poses serious risks to health and safety and it is vitally important that you follow recognised health and safety procedures at all stages of the delivery process.

1. Prepare to receive deliveries of motor fuel on a forecourt

You need to:

- P1.1 find out the expected delivery time and the type and amount of fuel expected and check these against the relevant documentation
- P1.2 check that there is enough space in the relevant storage tanks for the expected fuel
- P1.3 check that the equipment and materials needed to ensure safe and effective fuel delivery are available and in working order
- P1.4 identify potential hazards and follow legal and company requirements for removing them or making them safe
- P1.5 record and report potential hazards in line with legal and company requirements
- P1.6 give the tanker driver adequate information about the space in the storage tanks

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You need to know and understand:

- K1.1 what equipment and materials are needed for safe and effective delivery; what they are used for; where to find them; and how to check they are available and in working order
- K1.2 the documentation you need, and how to interpret it
- K1.3 typical problems that occur in relation to deliveries; which problems you are authorised to resolve, and how to do so; which problems you are not authorised to resolve, and who to refer them to
- K1.4 how to work out the amount of space available in the storage tanks on your forecourt
- K1.5 how motor fuel can be dangerous

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1. Prepare to receive deliveries of motor fuel on a forecourt

continued from previous page

You need to:

- P1.7 tell the tanker driver where to find the relevant health and safety equipment
- P1.8 follow legal and company requirements for setting up a hazardous zone around the fuel delivery area and coning off the area
- P1.9 spot problems relating to expected deliveries and resolve these problems promptly, in line with legal and company requirements and within the limits of your authority
- P1.10 where you are not authorised to resolve problems relating to expected deliveries, refer these problems promptly to the right person

You need to know and understand:

- K1.6 typical hazards on and around the forecourt and how to remove them, make them safe, record and report them
- K1.7 how to set up a hazardous zone around the delivery area and cone off the area

2. Check that driver-controlled deliveries of motor fuel have been completed safely

You need to:

- P2.1 follow company procedures for confirming with the driver that the necessary safety checks have been made
- P2.2 spot any safety hazards remaining after delivery, remove them or make them safe and record or report them
- P2.3 follow company procedures for confirming with the tanker driver that the expected type and amount of fuel has been delivered to each tank
- P2.4 follow company procedures for completing the relevant documentation

You need to know and understand:

- K2.1 the safety checks the tanker driver is responsible for making when fuel delivery is complete, and why these checks are needed
- K2.2 company procedures for confirming with the driver that the necessary safety checks have been made
- K2.3 typical safety hazards associated with driver-controlled deliveries and how to spot these, remove them or make them safe, record them and report them

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2. Check that driver-controlled deliveries of motor fuel have been completed safely

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You need to know and understand:

- K2.4 company procedures for confirming with the tanker driver that the expected type and amount of fuel has been delivered to each tank
- K2.5 the documentation you need to complete, and how to complete it

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Control deliveries of motor fuel on a forecourt

SVQ Unit	SCQF level	SCQF credit
B.24	5	7

Summary

This unit is for you if you work on a petrol forecourt and are responsible for controlling deliveries of motor fuel. Firstly, you need to prepare to receive deliveries. Secondly, you need to transfer fuel to the forecourt tanks safely, ensuring that the right type and quantity of fuel goes into each tank. Motor fuel poses serious risks to health and safety and it is vitally important that you follow recognised health and safety procedures at all stages of the delivery process.

1. Prepare to receive deliveries of motor fuel on a forecourt

You need to:

- P1.1 find out the expected delivery time and the type and amount of fuel expected and check these against the relevant documentation
- P1.2 check that there is enough space in the relevant storage tanks for the expected fuel
- P1.3 check that the equipment and materials needed to ensure safe and effective fuel delivery are available and in working order
- P1.4 identify potential hazards and follow legal and company requirements for removing them or making them safe
- P1.5 record and report potential hazards in line with legal and company requirements
- P1.6 give the tanker driver adequate information about the space in the storage tanks

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You need to know and understand:

- K1.1 what equipment and materials are needed for safe and effective delivery; what they are used for; where to find them; and how to check they are available and in working order
- K1.2 the documentation you need, and how to interpret it
- K1.3 typical problems that occur in relation to deliveries; which problems you are authorised to resolve, and how to do so; which problems you are not authorised to resolve, and who to refer them to
- K1.4 how to work out the amount of space available in the storage tanks on your forecourt
- K1.5 how motor fuel can be dangerous

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1. Prepare to receive deliveries of motor fuel on a forecourt

continued from previous page

You need to:

- P1.7 tell the tanker driver where to find the relevant health and safety equipment
- P1.8 follow legal and company requirements for setting up a hazardous zone around the fuel delivery area and coning off the area
- P1.9 spot problems relating to expected deliveries and resolve these problems promptly, in line with legal and company requirements and within the limits of your authority
- P1.10 where you are not authorised to resolve problems relating to expected deliveries, refer these problems promptly to the right person

You need to know and understand:

- K1.6 typical hazards on and around the forecourt and how to remove them, make them safe, record and report them
- K1.7 how to set up a hazardous zone around the delivery area and cone off the area

2. Control deliveries of motor fuel on a forecourt

You need to:

- P2.1 before taking delivery of fuel, check that the details in the delivery documents match the order, including details of the type and quantity of fuel ordered
- P2.2 spot any problems with the fuel delivery, take suitable action within the limits of your authority, and refer to the right person any problems you are not authorised to solve
- P2.3 throughout the delivery, remain alert for potential safety hazards and emergencies and deal with these promptly and in line with legal and company requirements

You need to know and understand:

- K2.1 the delivery details you need to check before fuel is transferred to the tanks
- K2.2 how to check that the details in the delivery documents match the order, including details of the type and quantity of fuel
- K2.3 typical problems with fuel deliveries and how to solve them
- K2.4 the paperwork you need to complete and how to complete it
- K2.5 typical safety hazards associated with fuel deliveries and the legal and company requirements for dealing with them
- K2.6 what to do in the event of an emergency, such as a fuel spill

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2. Control deliveries of motor fuel on a forecourt

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You need to:

- P2.4 complete all the necessary paperwork in line with company requirements
- P2.5 make the site ready for normal use when the delivery is complete
- P2.6 follow personal hygiene requirements after delivery

You need to know and understand:

- K2.7 how to make the site ready for normal use after delivery
- K2.8 the personal hygiene requirements associated with fuel delivery

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Pick products in a retail store to fulfil customer orders

SVQ Unit	SCQF level	SCQF credit
B.28	5	4

Summary

This unit is about providing a service to customers by picking orders from stock on display in a retail store in response to customer orders. You need to pick orders so they are ready in time for collection or despatch. Where the customer's preferred products are not in stock you need to take suitable action in line with the company's policy for providing alternatives.

1. Pick products in a retail store to fulfil customer orders

You need to:

- P1.1 plan a route around the store which is efficient and which enables you to pick orders within the time allowed
- P1.2 pick products in ways that minimise the inconvenience caused to other people in the store, whilst ensuring that orders are picked within the required time
- P1.3 ask the right person for advice if picking instructions are unclear
- P1.4 check that the products you pick are of saleable quality
- P1.5 protect picked products from damage and deterioration throughout the picking process
- P1.6 follow company procedures for recording picked products and prices
- P1.7 follow company policy and procedures for choosing alternatives when the products requested by the customer are not in stock

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You need to know and understand:

- K1.1 the layout of the store and how to work out the most efficient routes around the store for picking customer orders
- K1.2 why it is important to try not to inconvenience other people in the store as you pick products
- K1.3 how to pick products in ways that cause the least possible inconvenience to other people in the store whilst ensuring that orders are picked within the required time
- K1.4 how to interpret picking instructions and who to ask for advice if picking instructions are unclear
- K1.5 what counts as 'saleable quality' for the goods in your store and how to check the quality of the goods you pick
- K1.6 the common types of damage and deterioration which can affect products during picking, and how to prevent these

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1. Pick products in a retail store to fulfil customer orders

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You need to:

- P1.8 use effective methods for separating products for different orders when picking for more than one customer
- P1.9 pack orders so as to keep them in saleable condition without using excessive packaging
- P1.10 put packed orders in the right places ready for collection or despatch

You need to know and understand:

- K1.7 the company's procedures for recording picked products and prices
- K1.8 the company's policy and procedures for choosing alternatives when the products requested by the customer are not in stock
- K1.9 how to avoid mixing up orders when picking for more than one customer
- K1.10 the containers and packing methods to use to ensure that orders will remain in saleable condition during transit
- K1.11 how to pack goods so as to keep them in saleable condition without using excessive amounts of packaging

Load orders for despatch from a retail store to customers

SVQ Unit	SCQF level	SCQF credit
B.29	4	3

Summary

This unit is about your role in helping to ensure that customer orders are loaded safely, securely, and in an order which helps the delivery process to run smoothly and efficiently. This involves keeping the loading area clean and tidy, checking that orders are labelled and positioned correctly ready for loading, and using safe lifting techniques for loading orders into vehicles.

1. Load orders for despatch from a retail store to customers

You need to:

- P1.1 check the loading area regularly for obstacles, litter and spillages and clear these away safely and promptly
- P1.2 check that orders are clearly labelled with all the necessary information and placed in the right areas ready for loading
- P1.3 check regularly that loading equipment is fit for use
- P1.4 clean, repair or replace loading equipment promptly as needed
- P1.5 lift and move packed orders in ways which prevent damage and injury
- P1.6 follow instructions for positioning orders in the vehicle to ensure efficient delivery
- P1.7 follow company procedures for positioning orders so that they remain secure and protected from damage during transit

You need to know and understand:

- K1.1 why it is important to check the loading area regularly for obstacles, litter and spillages and how to do so
- K1.2 why it is important to clear away obstacles, litter and spillages promptly and how to do so safely
- K1.3 the information which must be shown on order labels
- K1.4 where orders need to be placed for loading
- K1.5 why it is important to check the condition of loading equipment regularly
- K1.6 how to clean and repair loading equipment and where to find replacements for faulty equipment which you are not responsible for fixing
- K1.7 how to lift and move packed orders without damaging them or injuring yourself or other people

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1. Load orders for despatch from a retail store to customers

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You need to know and understand:

- K1.8 how the positioning of orders in the vehicle can help the delivery process to run smoothly and efficiently
- K1.9 the company's procedures for positioning orders so that these remain secure and undamaged during transit

Check stock levels and sort out problems with stock levels in a retail store

SVQ Unit	SCQF level	SCQF credit
B.30	5	2

Summary

This unit is about your contribution to maintaining stock levels so that sales are not lost because stock was not available when customers wanted it. This involves knowing how to count stock, how to recognise problems with stock and stock levels and how to sort these out.

1. Check stock levels and sort out problems with stock levels

You need to:

- P1.1 follow instructions for counting stock in the right areas of the store and at the right times
- P1.2 follow company procedures for counting stock and recording stock levels
- P1.3 follow company procedures for noting problems with stock and stock levels
- P1.4 follow company procedures for safeguarding your own and others' health and safety whilst counting stock
- P1.5 when it is necessary to disturb others in order to count stock accurately and within the time allowed, minimise the disturbance and treat others with courtesy
- P1.6 where you are authorised to deal with problems with stock and stock levels, do so promptly and in line with company procedures

You need to know and understand:

- K1.1 how accurate stock counting contributes to maintaining stock levels and to customer satisfaction and sales
- K1.2 how to find out what stock you must count and when to count it
- K1.3 your company's procedures for counting stock and recording stock levels, including relevant health and safety procedures
- K1.4 your company's procedures for noting problems with stock levels
- K1.5 why it is important to minimise disturbance to others when counting stock, and how to do so
- K1.6 the problems with stock and stock levels you are authorised to deal with and the procedures for sorting such problems out
- K1.7 who to tell about problems with stock and stock levels which you aren't authorised to deal with yourself

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1. Check stock levels and sort out problems with stock levels

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You need to:

- P1.7 tell the right person promptly about any problems with stock and stock levels which you are not authorised to deal with yourself

Hand-process fish in a retail environment

SVQ Unit	SCQF level	SCQF credit
B.31	5	8

Summary

This unit is about preparing fish in a retail outlet, for sale to customers. This involves identifying and hand-processing common types of flat and round fish. Safe and hygienic work practices are an important aspect of this unit.

1. Hand-process fish in a retail environment

You need to:

- P1.1 organise your work area, equipment and tools so that you can hand-process fish safely, hygienically and efficiently
- P1.2 maintain hygienic working conditions when checking and hand-processing fish
- P1.3 check that the fish you have been asked to prepare are of saleable quality
- P1.4 hand process fish in ways that:
 - achieve specifications for yield and quality
 - minimise waste
 - keep fish in a saleable condition throughout processing
 - maintain your own and other people's health and safety
- P1.5 dispose of waste in ways that are safe and hygienic and that meet legal and company requirements for recycling

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You need to know and understand:

- K1.1 the importance of hygiene in relation to hand-processing fish
- K1.2 the company's hygiene policy relating to hand-processing fish
- K1.3 safe working practices relating to hand-processing fish
- K1.4 why it is important to follow safe working practices when hand-processing fish
- K1.5 the dangers and disadvantages of using unsafe and blunt tools to hand-process fish
- K1.6 the types of accident and injury associated with hand-processing fish
- K1.7 the procedures for dealing with accidents and injuries that occur when hand-processing fish
- K1.8 the company's cleaning schedule for your work area

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1. Hand-process fish in a retail environment

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You need to:

- P1.6 follow the company's schedule for cleaning and tidying your work area, tools and equipment
- P1.7 put processed products that meet specifications into containers that will keep the products in a saleable condition

You need to know and understand:

- K1.9 why it is important to follow the company's cleaning schedule for your work area
- K1.10 procedures for disposing safely and hygienically of waste resulting from hand-processing fish
- K1.11 legal and company requirements for recycling waste resulting from hand-processing fish
- K1.12 how to recognise the species of fish commonly sold in UK retail outlets
- K1.13 how the arrangement of body parts of a flat fish differs from that of a round fish
- K1.14 how the different arrangement of body parts affects the way that flat and round fish are hand-processed
- K1.15 hand-processing techniques that are safe and hygienic and that produce the yield and quality of fish required

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

SVQ Unit	SCQF level	SCQF credit
B.32	5	4

Summary

This unit is about two aspects of dough production within a retail store. First, it involves organising your own work to meet the dough production schedules you are given. Secondly, it is about the contribution you make to improving the efficiency and effectiveness of dough processing.

The type of dough you work with may be fermented or non-fermented. Common types of fermented dough include those used for bread, plain and fruited buns, Danish pastries and croissants. Common types of non-fermented dough include those used for sweet and savoury pastes, puff pastry, scones and biscuits.

1. Organise your own work to meet a dough production schedule in a retail store

You need to:

- P1.1 check you have all the instructions you need for your dough production schedule
- P1.2 within the limits of your authority and responsibility, organise your work within the dough production schedule to make best use of your time and other resources
- P1.3 tell the right person about any problems with the quantity or quality of resources available to you
- P1.4 tell the right person if your dough production schedule does not seem to be realistically achievable

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You need to know and understand:

- K1.1 how to organise your work efficiently within a dough production schedule, including re-organising your work to meet changing dough production needs
- K1.2 how to organise your work so as to avoid delays which result in dough no longer being in the required condition
- K1.3 how to get the instructions you need for your dough production schedule
- K1.4 the limits of your authority and responsibility for organising your work within the dough production schedule

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1. Organise your own work to meet a dough production schedule in a retail store

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You need to:

P1.5 work within the relevant requirements for health and safety and food safety

You need to know and understand:

K1.5 how to organise your work within the dough production schedule to make best use of your time and other resources

K1.6 where and when to get help and advice about problems with dough production schedules and resources

K1.7 the requirements for health and safety and food safety which apply to your work within the dough production schedule, and why you must follow them

2. Contribute to improving the efficiency and effectiveness of dough processing in a retail store

You need to:

P2.1 in relation to the efficiency and effectiveness of dough processing, make suggestions for improvement which are:

- realistic
- based on accurate information

P2.2 share your suggestions for improvement with the right person

P2.3 explain your suggestions positively and in enough detail for further action to be agreed

P2.4 react positively to feedback about your suggestions

You need to know and understand:

K2.1 why constant improvement to dough processing is necessary in both the short and long term

K2.2 company procedures for making constructive suggestions for improvements to dough processing

K2.3 how to spot ways in which dough processing could realistically be improved

K2.4 how to explain your suggestions positively and in enough detail for further action to be agreed

K2.5 how to react positively to feedback

Select, weigh and measure bakery ingredients (Improve)

SVQ Unit	SCQF level	SCQF credit
B.33	5	6

Summary

This unit is about identifying, selecting, weighing and measuring by hand a variety of bakery ingredients, important in the processing of bakery mixtures, in a non-automated bakery production environment.

You need to show that you can identify and select the correct ingredients, required by a product specification or recipe. You will need to check the condition of the ingredients, weigh or measure the correct quantities and store these in preparation for the mixing process or later use in production. Complying with health & safety, food safety and organisational requirements are essential features of this unit.

Knowledge and understanding which relates to the whole of this unit

You need to know and understand:

- K1.1 to what standards of health & safety and food safety you are required to work, why it is important that you do so and what might happen if they are not met
- K1.2 common factors affecting quality of ingredients, during handling, weighing, measuring and storage
- K1.3 the importance of handling and preparing ingredients at the optimum temperature and conditions for effective weighing, measuring and eventually mixing
- K1.4 how to avoid contamination of ingredients during handling, weighing, measuring and storage and what might happen if this is not done
- K1.5 how to recognise and report substandard ingredients, signs of contamination, infestation or damage to ingredients and packaging
- K1.6 what the lines and methods of effective communication are and why it is important to use them
- K1.7 what the documentation requirements are and why it is important to meet them.
- K1.8 personal protective clothing/equipment and working practices which are useful in combating potentially harmful effects of dust from ingredients and allergies from skin contact with ingredients

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Knowledge and understanding which relates to the whole of this unit

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You need to know and understand:

- K1.9 how to use work instructions and product specifications or recipes to calculate or adjust the ratio of ingredients required and ensure these meet production needs
- K1.10 the importance of working within time constraints required by production schedule
- K1.11 how to report non availability of ingredients and source alternative supplies of ingredients or alternative ingredients as permitted
- K1.12 the importance of using the correct type of weighing and measuring equipment according to the types and quantities of ingredients used
- K1.13 how to safely label and store ingredients ready for mixing or further processing

1. Identify ingredients

You need to:

- P1.1 identify the specified ingredients
- P1.2 check quantities according to your instructions and specifications
- P1.3 carry out any calculations necessary to establish quantities of ingredients required to meet production needs

2. Select ingredients

You need to:

- P2.1 select ingredients to meet production needs and check their condition for use
- P2.2 isolate and report ingredients of substandard quality, condition or quantity to the relevant personnel
- P2.3 take action where ingredients are not available to source alternative supplies or establish whether alternative ingredients can be utilised where permitted
- P2.4 store and position ingredients correctly ready for further processing
- P2.5 comply with health, safety, food safety and organisational requirements

3. Weigh and measure ingredients

You need to:

- P3.1 check selected ingredients against your instructions and specifications
- P3.2 select and check the accuracy of bakery weighing and measuring equipment
- P3.3 weigh and measure the required ingredients accurately, avoiding contamination
- P3.4 place the weighed and measured ingredients in the correct conditions and label storage containers or mixing bowls, where required, ready for further processing
- P3.5 comply with health, safety, food safety and organisational requirements
- P3.6 operate within the limits of your own authority and capabilities

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Hand divide, mould and shape fermented doughs (Improve)

SVQ Unit	SCQF level	SCQF credit
B.34	5	6

Summary

This unit is about dividing, moulding and shaping fermented dough by hand in a non automated bakery production environment. Fermented dough processed by hand typically may include bread, roll and stick dough, plain and fruited bun dough and doughnuts.

You need to show that you can hand divide dough using a knife and scales, and a manually operated dough portioning device. You will need to demonstrate hand moulding skills, and the shaping of dough by hand and using rolling pins. Complying with health & safety, food safety and organisational requirements are essential features of this unit.

Knowledge and understanding which relates to the whole of this unit

You need to know and understand:

- K1.1 to what standards of health & safety and food safety you are required to work, why it is important that you do so, and what might happen if they are not met
- K1.2 requirements of bread weight regulations and the importance of accurate dividing and check weighing of fermented dough to comply with these regulations
- K1.3 why it is important to follow work instructions and product specifications or recipes throughout dough processing to ensure successful dough processing
- K1.4 how to seek advice and make process adjustments to dough, to take into account minor changes in ingredient performance, production timing and environmental conditions, necessary to keep a dough within specification
- K1.5 common sources of dough contamination during processing
- K1.6 how to avoid contamination during dough processing and what might happen if this is not done
- K1.7 how to recognise and report dough that does not meet specification during processing
- K1.8 the procedure for rejecting and isolating failed dough and dough portions
- K1.9 what the lines and methods of effective communication during processing are and why it is important to use them correctly

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Knowledge and understanding which relates to the whole of this unit

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You need to know and understand:

- K.10 what the documentation requirements during processing are and why it is important to meet them
- K.11 personal protective clothing/equipment and working practices which are useful in combating the potentially harmful effects of dust and allergies resulting from breathing or skin contact with ingredients or dough
- K.12 how to maintain dough condition and deal with time constraints and variations to conditions throughout processing
- K.13 the correct method for loading and unloading trays in racks

1. Hand divide fermented dough

You need to:

- P1.1 check the available dough against your instructions and specifications and take prompt action on discovering any discrepancy
- P1.2 obtain and check the condition of dividing tools and the accuracy of equipment
- P1.3 hand divide dough accurately and reliably
- P1.4 work with practice which minimizes waste and correctly deal with scrap material
- P1.5 position and maintain divided dough portions correctly for further processing
- P1.6 comply with health, safety, food safety, bread weight regulations and organisational requirements throughout dividing operations

2. Hand mould and shape fermented dough

You need to:

- P2.1 check the available portioned dough against your instructions and specifications and take prompt action on discovering any discrepancy
- P2.2 prepare and maintain an appropriate table surface for moulding and shaping
- P2.3 hand mould and shape portioned dough accurately and reliably
- P2.4 wash and dress shaped dough surfaces as required to specification
- P2.5 work with practice which minimizes waste and correctly deal with scrap material
- P2.6 place dough in the correct condition and location, for further processing
- P2.7 comply with health, safety, food safety and organisational requirements throughout moulding and shaping operations
- P2.8 operate within the limits of your own authority and capabilities

Wrap and pack goods for customers in a retail environment

SVQ Unit	SCQF level	SCQF credit
C.01	4	3

Summary

This unit is about following instructions for packaging goods for customers. This can be to make the goods look more attractive, or to protect goods from damage.

1. Package goods for customers in a retail environment

You need to:

- P1.1 find out what items you must package
- P1.2 ask the right person for advice if instructions are not clear
- P1.3 choose packaging materials which meet legal requirements and company policy and which are suitable for the goods
- P1.4 gather the right quantities of packaging materials and the right tools for the job
- P1.5 use tools safely
- P1.6 cause as little wastage as possible
- P1.7 protect goods from damage while packaging them
- P1.8 close and seal packages neatly and in line with instructions
- P1.9 package goods within the time limits allowed
- P1.10 store materials and tools correctly and promptly after you have used them
- P1.11 get rid of waste correctly and promptly

You need to know and understand:

- K1.1 legal requirements and your company's policy relating to the types of packaging provided to customers
- K1.2 how goods can get damaged without the right packaging to protect them
- K1.3 types of packaging material and their uses
- K1.4 tools to use for packaging goods and how to use them effectively and safely
- K1.5 how to handle the goods you must wrap without damaging them
- K1.6 where packaging materials and tools are stored, and why you should put them away promptly after use
- K1.7 why you should ask for advice when instructions are not clear, and who to ask
- K1.8 why you should cause as little wastage as possible when packaging goods, and how to do this
- K1.9 where and how to get rid of waste, and why you should do so promptly

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Display stock to promote sales to customers in a retail environment

SVQ Unit	SCQF level	SCQF credit
C.02	5	6

Summary

This unit is about three aspects of displaying stock attractively. Firstly, it involves checking that the display area is suitable and preparing to set up the display. Secondly, it is about setting up and dismantling displays. Thirdly, it is concerned with labelling stock on display. This unit is suitable for sales assistants who are not visual merchandising specialists.

1. Prepare display areas and materials in a retail store

You need to:

- P1.1 identify what you need for the display in relation to stock, space, position of the display and dates
- P1.2 ask for clarification promptly when you are not sure what you need for the display
- P1.3 check that the display will not cause an obstruction, and report any problems promptly to the right person
- P1.4 check that the display area is the right size and report any problems promptly to the right person
- P1.5 gather the materials, equipment and stock you need for the display and check that they are clean, safe and in good working order
- P1.6 follow company procedures for clearing, cleaning and preparing the display area before use

You need to know and understand:

- K1.1 why you need to be clear about display requirements for stock, space, position of the display and dates, and where to get this information
- K1.2 who to ask for advice and help in solving problems with display plans
- K1.3 how to identify what you need for a display from plans and sketches
- K1.4 why you must check for possible dangers to health and safety before setting up displays
- K1.5 how to check whether displays will cause an obstruction

2. Set up and dismantle displays in a retail store

You need to:

- P2.1 set up and dismantle the display safely, in line with plans and within the time allowed
- P2.2 check that the display is clean, tidy and safe for use once you have set it up
- P2.3 check that the display has the levels of stock you need
- P2.4 clean and store equipment and excess materials and get rid of waste safely, correctly and promptly
- P2.5 disturb other people as little as possible while setting up and dismantling displays

You need to know and understand:

- K2.1 the value of displays and promoting new products
- K.2.2 how placing products in specific places attracts attention and promotes sales
- K2.3 how to use space effectively when displaying products
- K2.4 why you must check for possible dangers to health and safety when setting up and dismantling displays
- K2.5 how to check that the equipment you need to use is in working order
- K2.6 why you should clean and store the materials and equipment you use in displays and get rid of waste safely
- K2.7 how to identify and correct unsafe displays

3. Label displays of stock in a retail store

You need to:

- P3.1 check the requirements for labelling stock
- P3.2 check that the information on the label is clear, accurate and legal before starting to label stock
- P3.3 report promptly and to the right person any information on labels that may need changing
- P3.4 attach the right labels to the right products
- P3.5 position labels so that they are securely fastened and customers can see them clearly
- P3.6 complete labelling within the time allowed

You need to know and understand:

- K3.1 how proper labelling promotes sales
- K3.2 the legal requirements for labelling and what can happen if you do not meet these
- K3.3 the importance of checking that labels are clear and accurate
- K3.4 who to tell about information that may need changing on labels
- K3.5 how to use labelling materials and equipment efficiently and effectively

Help customers choose products in a retail environment

SVQ Unit	SCQF level	SCQF credit
C.03	5	8

Summary

This unit is about the sales role. It involves describing the features and benefits of products to customers in ways that encourage them to make a purchase. It also involves handling objections and spotting opportunities to sell additional or associated products.

1. Help customers choose products in a retail store

You need to:

- P1.1 find out which product features and benefits interest individual customers and focus on these when discussing products
- P1.2 describe and explain clearly and accurately relevant product features and benefits to customers
- P1.3 compare and contrast products in ways that help customers choose the product that best meets their needs
- P1.4 check customers' responses to your explanations, and confirm their interest in the product
- P1.5 encourage customers to ask you questions and respond to their questions and comments in ways that promote sales and goodwill
- P1.6 identify suitable opportunities to tell the customer about associated or additional products and do so in a way that promotes sales and goodwill
- P1.7 constantly check the store for security, safety and potential sales whilst helping customers

You need to know and understand:

- K1.1 why you need to promote sales and goodwill, and how helping customers to choose products contributes to this
- K1.2 the products you are responsible for selling and their features and benefits
- K1.3 why you need to explain product features and benefits to customers in ways that they understand and find interesting
- K1.4 how to check and interpret customers' responses to your explanations
- K1.5 how to adapt your explanations and respond to questions and comments in ways that promote sales and goodwill
- K1.6 how to encourage customers to ask you for clarification and more information
- K1.7 the risks of not paying attention to the store, in terms of security, safety and lost sales

2. Check the customer's preferences and buying decisions when making retail sales

You need to:

- P2.1 give customers enough time to evaluate products and ask questions
- P2.2 handle customers' questions in a way that promotes sales and keeps the customer's confidence
- P2.3 identify the need for additional and associated products and take the opportunity to increase sales
- P2.4 clearly acknowledge the customer's buying decisions
- P2.5 clearly explain any customer rights that apply
- P2.6 when necessary, clearly explain to the customer where to pay for their purchases

You need to know and understand:

- K2.1 how to recognise buying signals from customers
- K2.2 how to handle customers' questions confidently and effectively
- K2.3 techniques for closing the sale
- K2.4 why customer confidence and loyalty matter to the store and how you contribute towards these
- K2.5 legal rights and responsibilities of retailers and customers to do with returning of unsatisfactory goods

Maximise product sales in a retail environment

SVQ Unit	SCQF level	SCQF credit
C.04	5	5

Summary

This unit is about increasing the sales of a particular product using a definite campaign that you will plan beforehand and evaluate afterwards. It does not mean just promoting products as part of normal sales transactions.

<h3>1. Identify opportunities to increase retail sales of particular products</h3>	
<p>You need to:</p> <p>P1.1 identify promotional opportunities and estimate their potential to increase sales</p> <p>P1.2 identify promotional opportunities which offer the greatest potential to increase sales</p> <p>P1.3 report promotional opportunities to the right person</p> <p>P1.4 fill in the relevant records fully and accurately</p>	<p>You need to know and understand:</p> <p>K1.1 seasonal trends and how they affect opportunities for sales</p> <p>K1.2 the difference between the features and benefits of products</p> <p>K1.3 how you can promote the features and benefits of products to customers</p> <p>K1.4 how to estimate and compare the potential of promotional opportunities to increase sales</p> <p>K1.5 who to approach about promotional opportunities you have identified</p>
<h3>2. Promote particular retail products</h3>	
<p>You need to:</p> <p>P2.1 tell customers about promotions clearly and in a persuasive way</p> <p>P2.2 identify and take the most effective actions for converting promotional sales into regular future sales</p> <p>P2.3 gather relevant and accurate information about the effectiveness of promotions, and communicate this information clearly to the right person</p> <p>P2.4 record clearly and accurately the results of promotions</p>	<p>You need to know and understand:</p> <p>K2.1 techniques for encouraging customers to buy the product being promoted</p> <p>K2.2 techniques for building customers' interest in regularly buying in future the product you are promoting</p> <p>K2.3 the information that is relevant in evaluating the success of promotions, and who needs this information</p> <p>K2.4 how to evaluate and record the results of promotions</p>

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Provide information and advice to customers in a retail environment

SVQ Unit	SCQF level	SCQF credit
C.05	5	5

Summary

The first part of this unit is about listening to customers' needs and providing information and advice to meet those needs. It does not involve selling directly to customers, but does involve treating the customer in ways that promote goodwill.

The second part of the unit is about dealing with day-to-day complaints. These complaints are usually about the quality of products or, sometimes, service. This unit is not for you if you handle complaints as a major part of your job role, for example if you work in a customer contact centre.

Examples of giving information and advice to customers in the context of this unit could relate to:

- finding products in stock
- ordering products not in stock
- making informed buying decisions
- asking about products and services

1. Provide information and advice to meet the needs of retail customers

You need to:

- P1.1 acknowledge promptly and politely customers' requests for information and advice
- P1.2 identify the customer's needs for information and advice
- P1.3 communicate information and advice to customers in ways they can understand
- P1.4 provide information and advice to customers that is relevant, complete, accurate and up to date
- P1.5 check politely that the information and advice provided meets the customer's needs

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You need to know and understand:

- K1.1 how to identify the customer's needs for information and advice
- K1.2 how to give clear and accurate information and check the customer understands you
- K1.3 sources of information about the products and services that the company offers to customers, including information about where products are from, what they consist of and whether they can be recycled after use
- K1.4 who to approach for help if you cannot provide information and advice yourself
- K1.5 why it is important to keep customer loyalty and confidence

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1. Provide information and advice to meet the needs of retail customers

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You need to:

- P1.6 find other ways to help the customer when the information and advice given is not satisfactory
- P1.7 refer requests for information or advice to the right person when you cannot help the customer

You need to know and understand:

- K1.6 how to maintain customer loyalty and confidence while dealing with requests for information and advice
- K1.7 company policy on customer service and how this applies to giving information and advice to customers

2. Help retail customers sort out complaints

You need to:

- P2.1 identify the nature of the complaint from information obtained from customers
- P2.2 acknowledge the complaint clearly and accurately and apologise to the customer
- P2.3 follow legal requirements and company policies and procedures for dealing with complaints
- P2.4 when it is not your responsibility to sort out complaints, refer them promptly to the right person and explain the referral procedure clearly to the customer

You need to know and understand:

- K2.1 how to manage angry customers
- K2.2 what your responsibility is for sorting out complaints
- K2.3 who to refer complaints to when you do not have the authority to sort them out
- K2.4 how to assess complaints and decide what action to take
- K2.5 your company's policy concerning returns
- K2.6 why it is important to keep customer loyalty and confidence
- K2.7 how to keep customer loyalty and confidence when dealing with complaints
- K2.8 the legal rights and duties of the customer and the company
- K2.9 company policy on customer service and how this applies to dealing with complaints
- K2.10 company procedures for dealing with complaints

Demonstrate products to customers in a retail environment

SVQ Unit	SCQF level	SCQF credit
C.06	5	3

Summary

This unit is about demonstrating the features and benefits of products to customers and then closing the sale. For the purposes of this unit, demonstrations must involve actually operating the product and not just using gestures to explain how the product works.

1. Demonstrate products to customers in a retail environment

You need to:

- P1.1 take the necessary safety precautions before, during and immediately after demonstrating products
- P1.2 check that you have all the equipment and products you need before starting the demonstration
- P1.3 present the demonstration in a logical sequence of steps and stages
- P1.4 cover all the features and benefits you think are needed to gain the customer's interest
- P1.5 provide clear and accurate supporting commentary when needed
- P1.6 clear equipment and products away promptly and without keeping customers waiting unduly, after the demonstration is finished

You need to know and understand:

- K1.1 how demonstrations can help to promote and sell products
- K1.2 the safety precautions to take before, during and immediately after product demonstrations
- K1.3 how to obtain the equipment and products you need for demonstrations
- K1.4 the difference between 'features' and 'benefits' of products
- K1.5 the features and benefits of the products you are responsible for demonstrating
- K1.6 which product features and benefits can be demonstrated and which may need describing to the customer, in relation to the products you are responsible for demonstrating
- K1.7 why it is important to organise product demonstrations into logical steps and stages
- K1.8 how to organise product demonstrations into logical steps and stages

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1. Demonstrate products to customers in a retail environment

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You need to know and understand:

- K1.9 when and how to provide supporting commentary to help the customer understand the features and benefits of the product being demonstrated
- K1.10 why it is important to clear equipment and products away promptly and without keeping customers waiting unduly, after a demonstration is finished

2. Help customers choose products in a retail store

You need to:

- P2.1 find out which product features and benefits interest individual customers and focus on these when discussing products
- P2.2 describe and explain clearly and accurately relevant product features and benefits to customers
- P2.3 compare and contrast products in ways that help customers choose the product that best meets their needs
- P2.4 check customers' responses to your explanations, and confirm their interest in the product
- P2.5 encourage customers to ask you questions and respond to their questions and comments in ways that promote sales and goodwill
- P2.6 identify suitable opportunities to tell the customer about associated or additional products and do so in a way that promotes sales and goodwill
- P2.7 constantly check the store for security, safety and potential sales whilst helping customers

You need to know and understand:

- K2.1 why you need to promote sales and goodwill, and how helping customers to choose products contributes to this
- K2.2 the products you are responsible for selling and their features and benefits
- K2.3 why you need to explain product features and benefits to customers in ways that they understand and find interesting
- K2.4 how to check and interpret customers' responses to your explanations
- K2.5 how to adapt your explanations and respond to questions and comments in ways that promote sales and goodwill
- K2.6 how to encourage customers to ask you for clarification and more information
- K2.7 the risks of not paying attention to the store, in terms of security, safety and lost sales

Process part-exchange sales transactions in a retail environment

SVQ Unit	SCQF level	SCQF credit
C.07	6	12

Summary

This unit is about three aspects of part-exchange sales transactions. Firstly, it is about following company guidelines for valuing items offered in part exchange. Secondly, it involves negotiating part-exchange sales transactions and working out the balance the customer needs to pay. Thirdly, it is about taking payment and providing service at point of sale.

1. Decide on the value of items offered in part exchange by retail customers

You need to:

- P1.1 thoroughly inspect the item being offered
- P1.2 protect the item from damage while handling it
- P1.3 identify accurately any repairs and cleaning needed and the costs involved
- P1.4 work out the exchange value of the item accurately within company guidelines
- P1.5 explain to the customer clearly and accurately the part-exchange value of the item and the benefits of a part-exchange arrangement
- P1.6 tell the customer politely that the item is not acceptable for part exchange, when this applies
- P1.7 treat the customer politely throughout the valuation process

You need to know and understand:

- K1.1 the type and quality of items you can accept in part exchange
- K1.2 relevant aspects of the law relating to ownership and re-sale of goods
- K1.3 how to check that items are clean and operate normally, including different kinds of checks and when to use them
- K1.4 the potential for re-selling the item offered in part exchange
- K1.5 the company's pricing policy for part-exchange items
- K1.6 the benefits to the customer of part-exchange arrangements
- K1.7 how to treat the customer politely, including telling the customer the item cannot be accepted in part exchange

2. Negotiate part-exchange sales transactions with retail customers

You need to:

- P2.1 follow company policies and procedures for checking who owns the item
- P2.2 work out accurately the balance the customer should pay on the item they want to buy
- P2.3 accept or refuse the customer's offers according to company policies and the discretion you are allowed
- P2.4 end the transaction politely if the customer is not willing to go ahead
- P2.5 explain clearly and accurately the terms and conditions of the sale
- P2.6 fill in the paperwork for the transaction
- P2.7 treat the customer politely throughout negotiations

You need to know and understand:

- K2.1 company policies and procedures for checking who owns the item
- K2.2 what might happen if you do not check ownership properly
- K2.3 the terms and conditions of sale for items the store buys
- K2.4 how to deal with customer objections
- K2.5 how to treat the customer politely during negotiations
- K2.6 how to fill in the paperwork when buying part-exchange items

3. Provide service at point of sale in a retail store

You need to:

- P3.1 tell customers the correct amount to pay
- P3.2 check accurately the amount and means of payment offered by the customer
- P3.3 where the payment is acceptable, process the payment in line with company procedures
- P3.4 tell the customer tactfully when payment cannot be approved
- P3.5 offer additional services to the customer where these are available

You need to know and understand:

- K3.1 how to keep cash and other payments secure
- K3.2 the types of payment that you are authorised to receive
- K3.3 procedures for authorising non-cash transactions
- K3.4 how to check for and identify counterfeit payments
- K3.5 how to check for stolen cash equivalents
- K3.6 how to deal with customers offering suspect payments
- K3.7 relevant legal rights, duties and responsibilities

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3. Provide service at point of sale in a retail store

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You need to:

- P3.6** treat customers politely throughout the payment process
- P3.7** balance the need to give attention to individual customers with the need to acknowledge customers who are waiting for help

You need to know and understand:

- K3.8** company procedures for taking payments
- K3.9** company procedures for dealing with suspected fraud

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Process payments for purchases in a retail environment

SVQ Unit	SCQF level	SCQF credit
C.08	5	5

Summary

This unit is all about providing service to the customer at point of sale (POS). It involves sorting out pricing problems, spotting faulty goods, checking that payments are acceptable and storing payments securely.

1. Work out the price of customers' retail purchases

You need to:

- P1.1 accurately identify the price of purchases
- P1.2 promptly sort out any pricing problems by referring to pricing information
- P1.3 get advice promptly from the right person when you cannot sort out pricing problems yourself
- P1.4 work out accurately the amount the customer should pay

You need to know and understand:

- K1.1 how to identify and check prices in your own store
- K1.2 how to identify any current discounts and special offers
- K1.3 where to find information and advice on pricing
- K1.4 company procedures for working out payments
- K1.5 common methods of working out payments including point-of-sale technology, electronic calculators and longhand
- K1.6 the customer's rights and the company's duties and responsibilities in relation to the pricing of goods

2. Provide service at point of sale in a retail store

You need to:

- P2.1 tell customers the correct amount to pay
- P2.2 check accurately the amount and means of payment offered by the customer
- P2.3 where the payment is acceptable, process the payment in line with company procedures
- P2.4 tell the customer tactfully when payment cannot be approved
- P2.5 offer additional services to the customer where these are available
- P2.6 treat customers politely throughout the payment process
- P2.7 balance the need to give attention to individual customers with the need to acknowledge customers who are waiting for help

You need to know and understand:

- K2.1 how to keep cash and other payments secure
- K2.2 the types of payment that you are authorised to receive
- K2.3 procedures for authorising non-cash transactions
- K2.4 how to check for and identify counterfeit payments
- K2.5 how to check for stolen cash equivalents
- K2.6 how to deal with customers offering suspect payments
- K2.7 relevant legal rights, duties and responsibilities
- K2.8 company procedures for taking payments
- K2.9 company procedures for dealing with suspected fraud

Process payments and credit applications for purchases in a retail environment

SVQ Unit	SCQF level	SCQF credit
C.09	5	7

Summary

This unit is about two ways of helping customers pay for their purchases. The first is all about providing service to the customer at point of sale (POS). It involves sorting out pricing problems, spotting faulty goods, checking that payments are acceptable and storing payments securely. Secondly, the unit involves explaining the available credit facilities to customers and processing credit applications.

1. Work out the price of customers' retail purchases

You need to:

- P1.1 accurately identify the price of purchases
- P1.2 promptly sort out any pricing problems by referring to pricing information
- P1.3 get advice promptly from the right person when you cannot sort out pricing problems yourself
- P1.4 work out accurately the amount the customer should pay

You need to know and understand:

- K1.1 how to identify and check prices in your own store
- K1.2 how to identify any current discounts and special offers
- K1.3 where to find information and advice on pricing
- K1.4 company procedures for working out payments
- K1.5 common methods of working out payments including point-of-sale technology, electronic calculators and longhand
- K1.6 the customer's rights and the company's duties and responsibilities in relation to the pricing of goods

2. Provide service at point of sale in a retail store

You need to:

- P2.1 tell customers the correct amount to pay
- P2.2 check accurately the amount and means of payment offered by the customer
- P2.3 where the payment is acceptable, process the payment in line with company procedures
- P2.4 tell the customer tactfully when payment cannot be approved
- P2.5 offer additional services to the customer where these are available
- P2.6 treat customers politely throughout the payment process
- P2.7 balance the need to give attention to individual customers with the need to acknowledge customers who are waiting for help

You need to know and understand:

- K2.1 how to keep cash and other payments secure
- K2.2 the types of payment that you are authorised to receive
- K2.3 procedures for authorising non-cash transactions
- K2.4 how to check for and identify counterfeit payments
- K2.5 how to check for stolen cash equivalents
- K2.6 how to deal with customers offering suspect payments
- K2.7 relevant legal rights, duties and responsibilities
- K2.8 company procedures for taking payments
- K2.9 company procedures for dealing with suspected fraud

3. Process applications from retail customers for credit facilities

You need to:

- P3.1 identify the customer's needs for credit facilities
- P3.2 clearly explain to the customer the features and conditions of credit facilities
- P3.3 provide enough time and opportunities for the customer to ask for clarification or more information
- P3.4 accurately fill in the documents needed to allow the customer to get credit
- P3.5 successfully carry out the necessary credit checks and authorisation procedures
- P3.6 promptly refer difficulties in processing applications to the right person

You need to know and understand:

- K3.1 the features and conditions of the credit facilities offered by the company
- K3.2 legal and company requirements for giving information to customers when offering them credit facilities
- K3.3 legal and company procedures for carrying out credit checks and getting authorisation for credit facilities
- K3.4 who to approach for advice and help in sorting out difficulties in processing applications

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Process cash and credit transactions in a retail environment

SVQ Unit	SCQF level	SCQF credit
C.10	5	7

Summary

This unit is about three behind-the-scenes aspects of administering customers' credit accounts. Firstly, it is about monitoring credit accounts to ensure that customers are keeping up their payments and not exceeding their credit limits. Secondly, it concerns processing customer payments. Thirdly, the unit involves reconciling customer accounts and investigating problems.

1. Process retail customer credit

You need to:

- P1.1 follow company guidelines for setting customer credit limits
- P1.2 check customer accounts accurately and at suitable intervals to check that payments are up to date
- P1.3 promptly investigate reasons for missed payments and accurately record your findings
- P1.4 identify customers who go over their credit limits and report your findings promptly to the right person
- P1.5 act promptly and within company guidelines to deal with customers who go over their credit limits
- P1.6 report to the right person the results of the action you take to deal with customers who go over their credit limits

You need to know and understand:

- K1.1 the risks to the company of offering credit to customers
- K1.2 how to see if a customer is suitable for credit
- K1.3 company guidelines for setting customer credit limits
- K1.4 how to check customer accounts effectively, including how to identify overdue payments and customers who have gone over their credit limits
- K1.5 company guidelines for managing customers who go over their credit limits
- K1.6 the legal rights and obligations of customers and retailers in relation to credit
- K1.7 company policies for crediting the cost of returned goods to customer accounts
- K1.8 the procedures carried out by the automated billing system

2. Process payments made to retail customer accounts

You need to:

- P2.1 check that payments from customers are valid and accurate
- P2.2 record payments from customers promptly and accurately
- P2.3 record clearly and accurately the reasons why payments are overdue
- P2.4 identify problems accurately and sort them out promptly
- P2.5 tell the right person promptly about any problems that you cannot sort out
- P2.6 store collected payments securely and in line with company procedures

You need to know and understand:

- K2.1 the acceptable ways for customers to make payments
- K2.2 how to process cash and non-cash payments
- K2.3 what counts as legal tender in your country
- K2.4 how to spot counterfeit payments
- K2.5 company procedures for storing cash and cash equivalents securely

3. Reconcile retail customer accounts

You need to:

- P3.1 check that charges made to customer accounts are correct
- P3.2 check that credits made to customer accounts are correct
- P3.3 identify and sort out problems with customer accounts
- P3.4 tell the right person about problems with customer accounts that you cannot sort out or that are beyond your responsibility and control

You need to know and understand:

- K3.1 why accurate financial checks are needed
- K3.2 how to reconcile customer accounts accurately
- K3.3 the types of problem that you are responsible for sorting out, and how to identify and sort them out
- K3.4 who to approach for advice and help in sorting out problems that you cannot sort out or that are beyond your responsibility and control

Assemble retail products in customer's home/workplace

SVQ Unit	SCQF level	SCQF credit
C.11	5	4

Summary

This unit is about providing a service to customers at their home or other place of delivery. First, it involves loading and driving products to the customer's premises. This includes planning delivery schedules that make the best use of time and other resources. The second part of the unit is about putting products together and testing them at the customer's premises. It involves helping the customer understand how to install and use the product initially. This is not a selling role, but you should take opportunities to promote other products when they arise.

1. Deliver retail products to the customer's premises

You need to:

- P1.1 check that you have all the products you are due to deliver
- P1.2 check you have the equipment and paperwork needed for the delivery
- P1.3 check that you have all the delivery details you need and that you know how to get to the delivery address
- P1.4 plan a schedule of deliveries which makes the best use of time and other resources
- P1.5 check that you have enough fuel for your delivery schedule and follow company procedures for getting more fuel if needed
- P1.6 transport products and equipment safely and securely
- P1.7 deliver products at the times agreed with customers

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You need to know and understand:

- K1.1 how to check that you have all the products you are due to deliver
- K1.2 the equipment and paperwork you need to make deliveries and where to get these
- K1.3 what delivery details you need and where to get these
- K1.4 what sources of information to use for route planning, and how to use these
- K1.5 how an efficient delivery schedule benefits the business and the environment
- K1.6 how to plan a delivery schedule that makes the best use of time and other resources
- K1.7 how to check that you have enough fuel for your delivery schedule, and company procedures for getting more fuel if needed

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1. Deliver retail products to the customer's premises

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You need to:

- P1.8 take action in line with company procedures if you expect to arrive at the customer's premises early or late
- P1.9 follow company procedures for ensuring that deliveries are left only with individuals who may legally receive them
- P1.10 take action in line with company procedures if no one is available who can receive the delivery or if the customer rejects the delivery
- P1.11 unload orders safely and in ways which protect the orders from damage
- P1.12 treat the customer courteously throughout the delivery process
- P1.13 update records of delivery and non-delivery promptly and in line with company procedures

You need to know and understand:

- K1.8 how to transport products and equipment safely and securely
- K1.9 why it is important to deliver products at the times agreed with customers
- K1.10 the company procedures to follow if you expect to arrive at the customer's premises early or late
- K1.11 relevant legal restrictions on who can receive delivery
- K1.12 the company procedures to follow when no one is available who can receive the delivery and when the customer rejects the delivery
- K1.13 how to unload goods safely and in ways which protect goods from damage
- K1.14 why it is important to treat customers courteously, and how to do this
- K1.15 the records to keep of deliveries and non-deliveries and company procedures for completing these

2. Put retail products together at the customer's premises

You need to:

- P2.1 identify the exact place where the customer wants the product to be put together, from information they provide
- P2.2 agree a suitable place for putting the product together if the customer's chosen place is not suitable
- P2.3 check accurately that all the basic features of the product are working properly
- P2.4 explain and demonstrate to the customer clearly and accurately how to use the product and its basic features
- P2.5 provide clear explanations if the customer needs more help in understanding how to use the product
- P2.6 tell the customer about any sources of information they can consult concerning the product
- P2.7 promote additional or associated products to the customer where appropriate
- P2.8 behave appropriately in the customer's premises and represent the company positively

You need to know and understand:

- K2.1 how to set up and install the range of products you are responsible for at customers' premises
- K2.2 how to protect the health and safety of yourself and others while putting products together
- K2.3 the sources of information and advice that customers can consult about the product and how to use it
- K2.4 the associated or additional products that can be promoted to customers
- K2.5 how to judge when it is appropriate to promote associated or additional products to customers
- K2.6 how to behave appropriately in the customer's premises and represent the company positively
- K2.7 how to explain the features of the product in ways that customers can understand

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Promote loyalty schemes to customers in a retail environment

SVQ Unit	SCQF level	SCQF credit
C.12	5	5

Summary

This unit is about two aspects of promoting the store's loyalty scheme to customers. The first is about identifying customers who are not yet members of the company's loyalty scheme, explaining to them how the scheme works and how they would benefit from being members of the scheme. Secondly, the unit is about recognising when customers are interested in joining the loyalty scheme and helping them fill in the membership application.

For the purposes of this unit a loyalty scheme means a scheme offered by a retailer to its customers, subject to terms and conditions under which eligible transactions are recorded as accumulated points. These points can be exchanged by the customer in the future for rewards such as vouchers, discounts or air miles. The unit is not about promoting or helping the customer apply for any kind of payment card.

1. Explain to customers the features and benefits of the loyalty scheme

You need to:

- P1.1 take suitable opportunities to ask customers if they are members of the loyalty scheme and whether they are interested in joining
- P1.2 explain clearly and accurately to customers how joining the scheme would benefit them, including any current special offers relating to the scheme
- P1.3 respond positively to any questions or objections that the customer raises
- P1.4 provide relevant information to the customer to help them decide whether to join the scheme

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You need to know and understand:

- K1.1 the features and benefits of the company's loyalty scheme
- K1.2 the sources of information about the scheme that you can use or tell the customer about
- K1.3 why loyalty schemes are important in achieving the company's commercial aims
- K1.4 the specific offers currently available to scheme members
- K1.5 how to gain the customer's attention and interest
- K1.6 how to use suitable questions to gain information about the customer and their interest in joining the scheme

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1. Explain to customers the features and benefits of the loyalty scheme

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You need to:

P1.5 treat the customer politely at all times and in a way that promotes goodwill

You need to know and understand:

K1.7 how to tell the customer about the features and benefits of the scheme

K1.8 how to deal with frequently raised questions and objections in relation to the scheme

2. Gain customer commitment to the loyalty scheme

You need to:

P2.1 recognise accurately when customers are interested in joining the scheme

P2.2 take opportunities to ask customers who are showing signs of interest to sign up for the scheme

P2.3 fill in the membership application accurately with the customer, using the information they provide

P2.4 give the customer proof of their membership

P2.5 check with the customer that their details, as shown on the membership documentation, are correct

P2.6 give application forms to customers who show interest but are not willing to join the scheme there and then

You need to know and understand:

K2.1 how to recognise signals that customers are interested in joining the loyalty scheme

K2.2 how to ask customers to sign up for the scheme in a way that encourages them to co-operate willingly

K2.3 the layout of the membership application form, the questions it asks, and how to fill in the form accurately

K2.4 the proof of membership the company provides, and how to prepare this

K2.5 how to correct or replace incorrect proof of membership

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

SVQ Unit	SCQF level	SCQF credit
C.13	6	11

Summary

This unit is for team leaders responsible for organising and monitoring the display of goods. Firstly, the unit is about briefing colleagues about display requirements and supervising the assembly of displays. Secondly, the unit is about assessing the effectiveness of displays prepared by colleagues under your supervision. The third aspect of the unit is concerned with keeping stock replenished and accurately priced, and making suggestions for improving displays. You do not need specialist visual merchandising skills for this unit.

1. Organise staff to display goods for retail sale

You need to:

- P1.1 confirm the purpose of the display and any relevant requirements and standards and, where necessary, check them with the appropriate authority
- P1.2 clearly explain to staff the purpose of the display and any relevant requirements and standards
- P1.3 provide opportunities for staff to check they understand the requirements and standards of the display
- P1.4 check that staff prepare the display area and put the display together in a way that causes the least inconvenience to customers
- P1.5 provide constructive feedback to staff on their performance
- P1.6 check that the assembled display conforms to company requirements and standards

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You need to know and understand:

- K1.1 how different types of display help the store to reach its sales targets
- K1.2 how you can position information so that it helps to promote sales
- K1.3 how the layout of the selling area affects sales
- K1.4 the legal requirements for pricing goods for sales
- K1.5 the company's standards for putting displays together, including standards for cleaning and preparation
- K1.6 how to work out what type and quantity of resources you need to set up displays
- K1.7 how to brief staff in a way that encourages their involvement
- K1.8 how to check the work of staff preparing and putting displays together and how to give feedback to staff on their performance

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1. Organise staff to display goods for retail sale

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You need to:

- P1.7 obtain permission from the appropriate authority to modify or change the display
- P1.8 monitor that information has been placed accurately and legally, and is chosen and positioned to promote sales effectively
- P1.9 keep complete, accurate and up-to-date records of displays

You need to know and understand:

- K1.9 the security, health and safety requirements and procedures relating to displaying goods
- K1.10 the customer's legal rights and the company's legal duties and responsibilities in relation to the display of goods including descriptions of goods
- K1.11 how to check that the information in displays is accurate and legal
- K1.12 how to use different price marking methods and technologies

2. Assess how effective displays are in a retail environment

You need to:

- P2.1 identify what standards the display should meet
- P2.2 check displays against all the relevant standards to decide how effective they are
- P2.3 encourage staff to make helpful comments and identify changes that may make the display more appealing to customers
- P2.4 ask the right person for permission to make any changes that you cannot authorise yourself
- P2.5 give staff clear instructions and encouragement so that they can make any changes needed to the display
- P2.6 take prompt and suitable action to deal with any risks to security or health and safety that your assessment has revealed

You need to know and understand:

- K2.1 the standards you should apply when assessing how effective displays are
- K2.2 how to assess displays against the relevant standards
- K2.3 how to identify displays that are unsafe or not secure enough
- K2.4 how to correct displays that are unsafe or not secure enough
- K2.5 who can authorise changes in the display
- K2.6 how to involve staff in assessing and changing displays

3. Keep products available and maintain their quality in a retail environment

You need to:

- P3.1 collect and record accurate information on price changes
- P3.2 give accurate, up-to-date price information to the staff who need it
- P3.3 regularly check price marking and promptly sort out any pricing problems you spot
- P3.4 make sure that stock replenishment plans are up-to-date and realistic
- P3.5 deal with out-of-date or deteriorating stock in line with company policy and any relevant laws
- P3.6 involve staff in spotting potential improvements to the way stock is organised and presented
- P3.7 spot realistic and effective ways of improving how stock is organised and presented
- P3.8 get permission from the right person, where necessary, to improve the way stock is organised and presented
- P3.9 make sure that you maintain customer goodwill and staff morale while stock is being re-organised

You need to know and understand:

- K3.1 how to collect and record information about prices
- K3.2 how to check stock rotation and the quality of goods on display
- K3.3 what can happen to stock that is not stored correctly or renewed as needed
- K3.4 how to replenish and rotate stock and deal with sub-standard goods
- K3.5 how to check pricing and price marking, correct mistakes and change prices
- K3.6 why it is important to record price changes accurately

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Enable customers to apply for credit and hire purchase facilities

SVQ Unit	SCQF level	SCQF credit
C.15	6	12

Summary

This unit is about three aspects of enabling customers to apply for credit and hire purchase facilities. The first involves agreeing with the customer how much they will pay as a deposit and working out the remaining balance including any interest. Secondly, the unit is about explaining to customers how your store's borrowing facilities work. Lastly, the unit involves processing applications for credit or hire-purchase facilities, including making any credit checks needed.

1. Identify the retail customer's credit or hire-purchase requirements

You need to:

- P1.1 agree with the customer the deposit they need to pay to qualify for borrowing facilities
- P1.2 accurately work out the balance the customer needs to borrow so they can pay in full
- P1.3 accurately work out the interest the customer will have to pay on the amount they have borrowed
- P1.4 agree the customer's borrowing needs with them
- P1.5 identify the options you can offer to the customer in relation to their borrowing needs
- P1.6 strictly follow legal requirements in relation to borrowing in all aspects of the transaction

You need to know and understand:

- K1.1 the range of borrowing facilities your company offers
- K1.2 the legal requirements for all aspects of the borrowing transaction
- K1.3 the terms and conditions that apply to specific borrowing facilities
- K1.4 how to work out the annual percentage rate (APR) and the difference between the annual percentage rate and simple interest
- K1.5 how to carry out credit checks and authorise credit applications

2. Advise retail customers on the features of borrowing facilities

You need to:

- P2.1 explain to the customer clearly and accurately the terms and conditions of the borrowing facility
- P2.2 check with the customer that they understand their responsibilities in relation to the borrowing facility
- P2.3 give customers the chance to check they understand and to ask questions about the borrowing facility
- P2.4 give customers chance to compare the benefit and value of different borrowing options where they are available
- P2.5 give the customer accurate written quotations together with all the information your company and the law say you must provide
- P2.6 deal with the customer politely and in a way that promotes goodwill and confidence in you and the store

You need to know and understand:

- K2.1 the terms and conditions of the borrowing facilities you are authorised to offer customers
- K2.2 why you must help customers to understand their responsibilities in relation to the borrowing facility
- K2.3 how to explain the terms and conditions of borrowing facilities in ways that different customers can understand
- K2.4 how to give customers the chance to ask questions and check they understand
- K2.5 how to prepare accurate written quotations from the information the customer has given
- K2.6 the information that your company and the law need you to provide to customers in relation to borrowing facilities, and where you can get this
- K2.7 how to talk to customers about borrowing facilities in ways that promote goodwill and confidence in you and the store

3. Process credit or hire purchase applications on behalf of retail customers

You need to:

- P3.1 accurately fill in all the documents needed for the credit application
- P3.2 complete the necessary credit checks and authorisation procedures
- P3.3 tactfully and politely ask for more information from the customer where credit checks reveal problems in any information given
- P3.4 keep customer information strictly confidential
- P3.5 refer problems with applications to the right person when you are not authorised to sort out problems yourself
- P3.6 tell the customer politely and clearly the decision about their application to access credit or borrow funds
- P3.7 tactfully give reasons to the customer when credit has been refused and give contact details so that the customer can query or complain about the decision
- P3.8 offer additional or associated services to the customer where appropriate
- P3.9 keep a suitable level of confidentiality when processing information about customers

You need to know and understand:

- K3.1 the documents you need for credit or hire-purchase applications, and how to fill them in accurately
- K3.2 how to check for problems with information about customers, and how to question the customer tactfully about any problems
- K3.3 the credit checks you need to carry out and how to do this
- K3.4 company procedures for authorising credit applications
- K3.5 legal requirements that apply to credit or hire purchase including data protection
- K3.6 reasons why credit applications may be refused
- K3.7 how to explain tactfully to customers that credit applications have been refused
- K3.8 additional or associated services you are authorised to offer to customers, and how to spot suitable opportunities to offer these
- K3.9 the limits of your authority to make judgements about credit applications
- K3.10 who can help sort out problems with processing applications

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Evaluate the receipt of payments from customers

SVQ Unit	SCQF level	SCQF credit
C.16	6	9

Summary

This unit is about evaluating the way payments are processed by staff at point of sale. Firstly, it involves spotting any problems with the way payments are processed and sorting these out promptly. Secondly, the unit involves monitoring that staff are following the company's takings practices and procedures.

1. Evaluate takings practices and procedures in a retail environment

You need to:

- P1.1 check that staff carry out takings practices and procedures in line with company requirements
- P1.2 spot and promptly sort out any problems with takings practices and procedures
- P1.3 check payment processes and transaction procedures to make sure they maintain and promote customer goodwill
- P1.4 check at suitable times that review and control systems are providing up-to-date and accurate information
- P1.5 promptly sort out any identified problems, or refer them promptly to the right person when problems are beyond your responsibility to sort out

You need to know and understand:

- K1.1 the aims that takings practices and procedures are designed to achieve
- K1.2 how the way that payment transaction procedures are carried out can affect customer goodwill
- K1.3 the company's takings procedures, including safety and security arrangements
- K1.4 the control systems available and the information they provide
- K1.5 how to collect and interpret information about takings
- K1.6 how to check takings practices and procedures
- K1.7 types of problems with takings you need to look for
- K1.8 how to sort out problems with takings
- K1.9 the limits of your authority for resolving problems with takings
- K1.10 how to report your findings on takings practices and procedures

2. Monitor takings practices and processes at the cash point in a retail environment

You need to:

- P2.1 check at suitable times that staff are setting up and operating cash points correctly
- P2.2 look into and promptly sort out any problems with routine cash point operations and transactions
- P2.3 check that staff are handling cash and cash equivalents efficiently and in line with approved procedures
- P2.4 authorise refunds and payments promptly and in line with company procedures
- P2.5 correctly follow cash point security procedures
- P2.6 develop effective plans to cope with unexpected problems at the cash point

You need to know and understand:

- K2.1 methods of payment that are accepted in your store
- K2.2 how to check that cash points are being correctly set up and operated
- K2.3 the problems that can arise in routine cash point operations and transactions, and how to sort them out
- K2.4 the company's approved procedures for handling cash and cash equivalents, and how to follow these efficiently
- K2.5 the types of refund and payment which need your authorisation, and the procedures for authorising these
- K2.6 the company's cash point security procedures
- K2.7 how to plan to cope with unexpected problems at the cash point

Provide the lingerie fitting service in a retail environment

SVQ Unit	SCQF level	SCQF credit
C.17	5	8

Summary

This unit is about two aspects of the lingerie fitting service. Firstly, it is about explaining the lingerie fitting service and finding out what type of bra the customer needs, sometimes when the customer is unclear about their own needs. Secondly, the unit involves carrying out the bra-fitting service including measuring the customer and helping the customer to choose suitable products.

1. Identify the retail customer's needs for lingerie

You need to:

- P1.1 approach customers on the lingerie department and accurately find out what they are looking for from the information they give you
- P1.2 describe accurately to customers the process and benefits of the lingerie-fitting service
- P1.3 offer customers the lingerie-fitting service or, if the customer prefers, book a later appointment

You need to know and understand:

- K1.1 how to approach customers on the lingerie department
- K1.2 what is involved in the lingerie-fitting service and how long a fitting session is likely to take
- K1.3 questioning techniques used to clarify and agree customers' buying needs
- K1.4 how to build trust and relax customers you are working with
- K1.5 how to talk to different types of customers and help them to understand the information you provide

2. Measure and fit the retail customer for lingerie

You need to:

- P2.1 create a rapport with the customer while assessing their fitting needs
- P2.2 clearly and tactfully explain to the customer that you cannot guarantee an accurate fit if measurements are taken on top of the customer's clothing
- P2.3 position yourself and the customer correctly so you can:
- take accurate measurements
 - adjust the product to fit the customer
 - allow the customer to see the product when worn and correctly fitted
- P2.4 meet the customer's needs for privacy and help while they are trying products on
- P2.5 measure the chest accurately
- P2.6 accurately choose and offer a range of products in the customer's size and that meet the customer's needs
- P2.7 adjust and fit the product to provide customer comfort and prolong the life of the product
- P2.8 check the fit of the product and whether the customer is satisfied with the product
- P2.9 explain other possible courses of action if you cannot find a bra to fit the customer

You need to know and understand:

- K2.1 basic styles, shapes and sizes of bra
- K2.2 the different parts of bras and their technical names
- K2.3 brands, colours, fabrics, trims and price range of available products
- K2.4 the size range and fit of the bras in stock and where you can find different types of bra
- K2.5 the features, advantages and benefits of different bras
- K2.6 the ordering service using in-house systems or brand catalogues for lines either not in stock or not carried by the store
- K2.7 solution dressing – what to wear under different outfits
- K2.8 accessories such as enhancers and co-ordinating garments
- K2.9 manufacturers' guidance on washing and caring for products
- K2.10 scheduled delivery dates for new products
- K2.11 trends in design, technological solutions and fabrics
- K2.12 how to assess the customer's body size and age
- K2.13 the equipment and layout needed for the lingerie fitting room
- K2.14 how and where to measure for the customer's band size using a tape measure
- K2.15 how to estimate the cup size needed
- K2.16 how to choose the correct bras for the fitting
- K2.17 how to educate the customer on band sizes, cup sizes and correct fitting using the bras you have chosen
- K2.18 body shapes and breast sizes

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2. Measure and fit the retail customer for lingerie

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You need to know and understand:

- K2.19 how to adjust and fit the bra both inside and outside the fitting room
- K2.20 how to build trust and relax customers you are working with
- K2.21 how to talk to different types of customers and help them understand the information you provide
- K2.22 how to deal with challenging situations, including unusual body shape, body odour, disability, mastectomy and maternity
- K2.23 the importance of customer confidence and loyalty to the organisation and how you contribute to them

3. Check the customer's preferences and buying decisions when making retail sales

You need to:

- P3.1 give customers enough time to evaluate products and ask questions
- P3.2 handle customers' questions in a way that promotes sales and keeps the customer's confidence
- P3.3 identify the need for additional and associated products and take the opportunity to increase sales
- P3.4 clearly acknowledge the customer's buying decisions
- P3.5 clearly explain any customer rights that apply
- P3.6 when necessary, clearly explain to the customer where to pay for their purchases

You need to know and understand:

- K3.1 how to recognise buying signals from customers
- K3.2 how to handle customers' questions confidently and effectively
- K3.3 techniques for closing the sale
- K3.4 why customer confidence and loyalty matter to the store and how you contribute towards these
- K3.5 legal rights and responsibilities of retailers and customers to do with returning of unsatisfactory goods

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Follow guidelines for planning and preparing visual merchandising displays

SVQ Unit	SCQF level	SCQF credit
C.18	5	7

Summary

This unit is for visual merchandising specialists and is about planning and preparing visual merchandising displays within the guidelines provided by your manager. It involves interpreting design briefs and getting hold of the merchandise and props you will need for the display.

1. Interpret design briefs for retail display

You need to:

- P1.1 identify the purpose, content and style of the display
- P1.2 identify the equipment, materials, merchandise and props you need to create and install the display and the dates for completing it
- P1.3 evaluate whether the place you plan to put the display is likely to fulfil the design brief
- P1.4 create new and effective ways of improving the visual effect of displays, within the limits of the design brief, the company's visual design policies and the authority you have

You need to know and understand:

- K1.1 the role of displays in marketing, promotional and sales campaigns and activities
- K1.2 the importance and content of the design brief
- K1.3 how to use the design brief to identify what you need for the display
- K1.4 different approaches to designing displays for different types of merchandise, and why these are effective
- K1.5 how to evaluate the potential places to put the display so you meet the design brief
- K1.6 company policies for visual design

2. Get hold of merchandise and props to be featured in retail displays

You need to:

- P2.1 confirm that the features of merchandise and props shown in the design brief are those most likely to attract customers' attention
- P2.2 identify other merchandise and props when those originally specified are not available or not suitable, and agree your selections with the right person
- P2.3 agree arrangements for delivery of merchandise and props with the right people, allowing enough time for deliveries to arrive before the display must be installed
- P2.4 check the progress of deliveries and take suitable action if delays seem likely
- P2.5 update stock records to account for merchandise on display

You need to know and understand:

- K2.1 the role of displays in marketing, promotional and sales campaigns and activities
- K2.2 how to use the design brief to identify what you need for the display
- K2.3 different approaches to designing displays for different types of merchandise, and why these are effective
- K2.4 how light, colour, texture, shape and dimension combine to achieve the effects you need
- K2.5 how to assess the potential of places to put displays to meet the design brief
- K2.6 company policies for visual design
- K2.7 the merchandiser or buyer that you need to consult about merchandise and props
- K2.8 how to arrange delivery of merchandise and monitor the progress of deliveries
- K2.9 why you must update stock records to account for merchandise on display, and how to do this

Follow guidelines for dressing visual merchandising displays

SVQ Unit	SCQF level	SCQF credit
C.19	5	8

Summary

This unit is for visual merchandising specialists. It is about following guidelines for dressing in-store and window displays in ways that promote sales. It involves making judgements about how best to achieve the visual effect you need, while working within your company's policy for visual design. It is also about evaluating finished displays and sorting out any problems you identify.

1. Dress in-store displays to guidelines

You need to:

- P1.1 follow company procedures for using ladders, tools and equipment safely
- P1.2 place displays where they will attract the attention of target customers
- P1.3 use the design brief to identify the focal points of the display
- P1.4 choose shapes, colours and groupings that are suited to the purpose and style of the display
- P1.5 create displays that achieve the visual effect you need and are consistent with the company's visual design policy
- P1.6 position merchandise, graphics and signs in ways that promote sales
- P1.7 check that lighting is installed in line with the design brief
- P1.8 check that the finished display meets health and safety guidelines and legal requirements

You need to know and understand:

- K1.1 how to create and use focal points within a display
- K1.2 how to put together merchandising displays for use inside the store
- K1.3 how to choose and combine dimension, shape, colour, texture and lighting to create the visual effect you need from a display
- K1.4 how to dress mannequins, busts and other props
- K1.5 how to display different types of merchandise
- K1.6 how to choose a suitable type of grouping
- K1.7 how you can use different types, directions and levels of light to create atmosphere
- K1.8 how displays can achieve add-on sales and why this is important
- K1.9 why you are expected to install creative displays and to be aware of trends
- K1.10 different approaches to displaying merchandise and how to choose the best approach

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1. Dress in-store displays to guidelines

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You need to know and understand:

- K1.11 the different purposes of displays and how they are used in visual merchandising
- K1.12 how props, prototypes, dressings and fixtures create visual effects
- K1.13 health and safety guidelines for displays
- K1.14 how to identify the selling features of merchandise to be used in displays

2. Dress window displays to guidelines

You need to:

- P2.1 position merchandise, graphics and signs according to guidelines and in ways that attract the attention and interest of customers and give customers the information they need
- P2.2 group merchandise appropriately for the purpose and style of display, the selling features of the merchandise and the visual effect needed under the design brief
- P2.3 make sure that lighting is installed in line with lighting requirements
- P2.4 check that the finished display meets health and safety guidelines and legal requirements

You need to know and understand:

- K2.1 how to choose and combine dimension, shape, colour, texture and lighting to create the visual effect needed from a display
- K2.2 how to dress mannequins and other props
- K2.3 how to display different types of merchandise
- K2.4 how to choose a suitable way of grouping merchandise
- K2.5 how to light window displays and who in your store is responsible for installing lighting
- K2.6 how displays can achieve add-on sales and why this is important
- K2.7 why you are expected to install displays creatively and to be aware of trends
- K2.8 why different kinds of merchandise need different approaches to display, and what these approaches are
- K2.9 the different purposes of displays and how they are used in visual merchandising

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2. Dress window displays to guidelines

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You need to know and understand:

- K2.10 how props, prototypes, dressings and fixtures create visual effects
- K2.11 the dressing techniques to use for different types of merchandise
- K2.12 health and safety guidelines for displays
- K2.13 the legal requirements which apply to pricing and ticketing
- K2.14 how to identify the selling features of merchandise to be used in displays

3. Evaluate and improve retail displays

You need to:

- P3.1 check that all the parts of the display are suitable for the purpose of the display and meet requirements
- P3.2 check that the display meets requirements for easy access, safety and security
- P3.3 identify safety and security risks to the display and choose suitable ways of reducing risks
- P3.4 consider how the display looks from all the directions from which customers will approach it
- P3.5 encourage colleagues to provide constructive comments about the display
- P3.6 promptly make any adjustments that you are authorised to make and that are needed to achieve the visual effect and to make the display safe and secure
- P3.7 regularly check the display's visual effect
- P3.8 promptly report to the right person any problems and risks that you are not responsible for sorting out yourself

You need to know and understand:

- K3.1 how to decide if items are suitable for a display
- K3.2 how to identify risks to items and measures to protect them
- K3.3 how to evaluate the visual effect of displays
- K3.4 how to make adjustments and improvements to displays
- K3.5 how to use scale when creating visual effects
- K3.6 why you need to evaluate and improve displays
- K3.7 how light, colour, texture, shape and dimension combine to achieve the visual effects you need for a display
- K3.8 different approaches to using displays for different types of merchandise
- K3.9 the dressing techniques for different types of merchandise
- K3.10 how to identify the purpose of displays
- K3.11 the company's visual design and merchandising policies

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3. Evaluate and improve retail displays

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You need to know and understand:

K3.12 the types of risk displays face, why you must reduce these risks as far as possible and how to do so

K3.13 the reporting arrangements for sorting out problems and reducing risks

K3.14 how much authority you have to change displays

Order graphic materials for visual merchandising displays

SVQ Unit	SCQF level	SCQF credit
C.20	5	3

Summary

This unit is for visual merchandising specialists and is about ordering graphic materials and positioning them in displays. Firstly, it is about ordering the right quantity and quality of graphics, signs and tickets within the available budget and checking the progress of orders to ensure that requirements are met. Secondly, it is about positioning graphics, signs and tickets so that they support the purpose of the display and meet all relevant requirements.

1. Order graphic materials to meet retail display needs

You need to:

- P1.1 make clear to suppliers what graphic materials you need
- P1.2 check that suppliers can meet your needs
- P1.3 order supplies of graphic materials promptly and within the available budget
- P1.4 check the progress of orders
- P1.5 check the quality and quantity of graphic materials when they are delivered

You need to know and understand:

- K1.1 how graphic materials help to make displays more effective
- K1.2 different ways to use graphic materials for different types of merchandise
- K1.3 how to choose graphic materials that will achieve the desired effects
- K1.4 who can supply graphic materials
- K1.5 company procedures for ordering graphic materials
- K1.6 how to make clear to suppliers what graphic materials you need
- K1.7 how to check the quantity and quality of graphic materials when they are delivered
- K1.8 how to find out about cost limits and deadlines for buying graphic materials, and the importance of sticking to these

2. Position graphic materials to support retail displays

You need to:

- P2.1 position graphic materials according to the design brief, house style, company policy on signs, manufacturers' branding requirements and legal requirements
- P2.2 position graphic materials in ways that support the display's intended visual effect and message
- P2.3 check that graphic materials are positioned safely and securely and in line with legal requirements

You need to know and understand:

- K2.1 house style, company policy and legal requirements for using graphic materials
- K2.2 how to identify and interpret manufacturers' branding requirements
- K2.3 how to interpret the design brief
- K2.4 how to choose where to put graphic materials within the display
- K2.5 how to check that graphics and signs are safe and secure
- K2.6 how graphic materials help to attract and inform customers
- K2.7 different ways to use graphic materials for different types of merchandise

Dismantle and store visual merchandising displays

SVQ Unit	SCQF level	SCQF credit
C.21	5	13

Summary

This unit is for visual merchandising specialists. It is about dismantling displays and deciding what to do with the display parts. This involves returning borrowed merchandise, disposing of unwanted materials and cleaning the display sites and parts. It also involves storing equipment, props and graphics carefully so that they remain in good condition and can easily be found again when needed.

1. Dismantle retail displays

You need to:

- P1.1 dismantle displays safely
- P1.2 protect the parts of the display from being damaged during dismantling
- P1.3 return the parts of the display to the appropriate places promptly and, if needed, in a saleable condition
- P1.4 get rid of unwanted materials safely and keep accurate records of this if needed
- P1.5 clean display sites and parts using safe and approved cleaning materials and equipment

You need to know and understand:

- K1.1 how to dismantle displays safely
- K1.2 how to protect the parts of displays from being damaged during dismantling
- K1.3 how to identify unwanted materials and how to get rid of them safely
- K1.4 where to return the parts of display to
- K1.5 how to identify safe and approved cleaning materials and equipment to use
- K1.6 techniques for cleaning display sites and parts safely and thoroughly

2. Store equipment, props and graphics for retail displays

You need to:

- P2.1 work out accurately the storage space required
- P2.2 identify the protective packaging you need and the security measures that need to be in place
- P2.3 store items in suitable places and with clear and accurate labels
- P2.4 keep accurate and up-to-date records of items in storage
- P2.5 identify damaged items, missing items and dangers and risks to health and safety, and report these promptly to the right person
- P2.6 check that storage facilities and items in storage are clean, safe, secure and accessible only to those with a right to them

You need to know and understand:

- K2.1 how to work out the storage space needed
- K2.2 how to identify requirements for protective packaging and security measures
- K2.3 how to check the condition of items
- K2.4 how to deal with items that need repair
- K2.5 why you must label items accurately
- K2.6 why you must keep records of items and where to store them
- K2.7 why you must store items securely
- K2.8 suitable storage facilities available to you
- K2.9 which items need to be stored
- K2.10 possible dangers and risks to health, safety and security in relation to storage facilities and stored items
- K2.11 who to report dangers and risks to

Make props for visual merchandising displays

SVQ Unit	SCQF level	SCQF credit
C.22	5	10

Summary

This standard is for visual merchandising specialists and is all about making props for displays. Firstly, it is about using design information to identify the props and prototypes you need and working out how you will get hold of these items. It also covers making life-size replicas and scale models as well as decorating fixtures and panels for using in displays in stores.

1. Confirm the requirements for props and prototypes for retail displays

You need to:

- P1.1 use design information to identify the props and prototypes you need
- P1.2 produce specifications for props and prototypes that meet the design brief
- P1.3 specify clearly and accurately the type, size and function of the props and prototypes you need
- P1.4 identify which props and prototypes you can get ready-made and which need to be made to order
- P1.5 make realistic plans to get all the items you need

You need to know and understand:

- K1.1 where to get the design brief
- K1.2 how to use design information to identify the props and prototypes you need
- K1.3 how to decide whether different types of props and prototypes are relevant, including life size, large scale, small scale, standing items and moving items
- K1.4 how to specify your needs for props and prototypes clearly, and what formats to use
- K1.5 how to use scale in creating visual effects
- K1.6 how props, prototypes, dressings and fixtures create visual effects
- K1.7 the types and styles of props and prototypes your company uses

2. Make life-size copies of items for retail displays

You need to:

- P2.1 use the design brief to identify the features of original items that you need to copy
- P2.2 choose and use suitable and efficient techniques, materials, tools and equipment for making copies
- P2.3 complete the copies, including any alterations, by agreed deadlines and in line with the design brief
- P2.4 use valid and thorough tests to check that copies work as they should, look as they should, and are safe to use
- P2.5 evaluate test results accurately and make any adjustments needed to the copy
- P2.6 store copies securely and make them available to those who need them by the agreed deadlines

You need to know and understand:

- K2.1 how to make the copies needed
- K2.2 how to check whether the copies you make are suitable for display
- K2.3 how to test that copies work as they should, look as they should, and are safe to use
- K2.4 how to use scale to create visual effects
- K2.5 how props, prototypes, dressings and fixtures create visual effects
- K2.6 how to use the design brief to identify what items need to be copied
- K2.7 how to identify the cost limits and deadlines for making copies
- K2.8 how to arrange suitable storage for copies

3. Make scale models of items for retail displays

You need to:

- P3.1 choose new ideas, techniques and materials that are consistent with the design brief and the company's design policy
- P3.2 use shapes and colour styles that make models more effective within the limits of the design brief
- P3.3 choose and use suitable and efficient techniques, materials, tools and equipment for making scale models
- P3.4 complete scale models, including any alterations, by agreed deadlines and in line with the design brief
- P3.5 use valid and thorough tests to check that models work as they should, look as they should, and are safe to use
- P3.6 evaluate test results accurately and make any adjustments needed to the scale model
- P3.7 store scale models securely and make them available to those who need them by the agreed deadlines

You need to know and understand:

- K3.1 how to create scale models to use as props and prototypes
- K3.2 how to evaluate finished models against specifications
- K3.3 how to test that scale models work as they should, look as they should, and are safe to use
- K3.4 how to use scale to create visual effects
- K3.5 how models help to create visual effects
- K3.6 the mechanical principles of working models
- K3.7 how to use the design brief to identify what you need for scale models
- K3.8 how to identify the budget and deadlines for making scale models
- K3.9 how to make suitable storage arrangements for scale models

4. Decorate fixtures and panels for retail displays

You need to:

- P4.1 choose decorative techniques and materials which are suitable, new and within cost limits
- P4.2 choose materials that will have the visual effect you need when applied to the relevant fixtures
- P4.3 evaluate decorative work as its visual effect emerges and adjust it to give the effect you need
- P4.4 use tools, equipment and materials efficiently
- P4.5 produce decorative work that is free from faults, has the visual impact you need, is consistent with the design brief and is completed within agreed deadlines

You need to know and understand:

- K4.1 how to use scale to create visual effects
- K4.2 how to choose decorative materials and techniques
- K4.3 how to check and evaluate decorative work as it is being done
- K4.4 how to use materials efficiently
- K4.5 how to check the quality of finish of decorative panels and fixtures
- K4.6 how to judge the suitability of, and choose, new and creative decorative techniques
- K4.7 how to apply innovative decorative techniques
- K4.8 how to complete decorative work within cost limits and policy
- K4.9 how light, colour, texture, shape and dimension combine to achieve the visual effects you need for a display
- K4.10 why you are expected to decorate panels and fixtures in creative ways
- K4.11 why different kinds of merchandise need different approaches to decoration
- K4.12 how decorated panels and fixtures contribute to visual effects
- K4.13 how to identify the range of decorative techniques and materials you can choose from
- K4.14 how to identify the purpose of the display
- K4.15 the company's visual design policy

Put visual merchandising displays together

SVQ Unit	SCQF level	SCQF credit
C.23	5	8

Summary

This standard is for visual merchandising specialists and is all about assembling displays. Firstly, it involves interpreting diagrams of layouts for displays. As well as identifying the features of layouts, such as where to put them and what you need to create them, you need to be able to work out what you need to do to put layouts together. The second aspect of the unit is about putting layouts together accurately within the guidelines provided and introducing creative effects when appropriate.

1. Interpret retail display layout requirements from plans, elevations and drawings

You need to:

- P1.1 accurately identify the essential features and detailed requirements of layouts from plans, elevations and drawings
- P1.2 accurately identify health, safety and security arrangements from plans, elevations and drawings
- P1.3 work out what activities and resources you need to put layouts together as shown in plans, elevations and drawings
- P1.4 identify possible problems in putting layouts together and work out ways of sorting them out

You need to know and understand:

- K1.1 how to identify the layout needed and the essential features of layouts from plans, elevations and drawings
- K1.2 how to work out what activities and resources you need to put layouts together
- K1.3 how to identify the health, safety and security arrangements needed for layouts
- K1.4 what layout design is and its part in effective visual design practice
- K1.5 the techniques of layout design, including drawing conventions and standards
- K1.6 sources of information to use when working out what you need for layouts
- K1.7 who can make decisions when you have problems with layouts

2. Follow guidelines for putting retail display layouts together

You need to:

- P2.1 check that the parts you need are available and in working order
- P2.2 put the layout together within the guidelines, agreed deadlines, health and safety policies and legal requirements
- P2.3 identify opportunities for achieving creative effects and do so within the guidelines
- P2.4 identify possible problems which may arise and take prompt and suitable action within the guidelines

You need to know and understand:

- K2.1 how to interpret guidelines for putting layouts together
- K2.2 how to spot opportunities to achieve creative effects
- K2.3 how to work creatively within the visual merchandising policy
- K2.4 how to spot and sort out problems when putting layouts together
- K2.5 when creative effects are suitable
- K2.6 the parts you need to put layouts together
- K2.7 the relevant health, safety and legal requirements
- K2.8 where to find the parts you need for layouts

Choose merchandise to feature in visual merchandising displays

SVQ Unit	SCQF level	SCQF credit
C.24	6	6

Summary

This unit is for visual merchandising specialists and involves using design information to identify what you need for displays and choosing merchandise to feature in displays.

1. Interpret requirements for retail displays

You need to:

- P1.1 use design information to identify the purpose of the display, the merchandise you will use and how the merchandise will feature in the display
- P1.2 where there is scope for interpretation, interpret the requirements for the display in line with the company's design policy
- P1.3 check your interpretations with the right person before work starts on putting the display together

You need to know and understand:

- K1.1 how to identify the purpose of displays from design information
- K1.2 how to identify the merchandise you will use
- K1.3 how displays attract the interest of customers and persuade them to make buying decisions
- K1.4 the role of displays in marketing, promotional and sales campaigns and activities
- K1.5 good practice in creating displays that have the visual effect needed
- K1.6 company policy for merchandising and visual design
- K1.7 sources of information about the merchandise you will use
- K1.8 who to check your interpretations with

2. Choose and agree retail merchandise to be featured in displays

You need to:

- P2.1 evaluate the potential of merchandise to attract customers' attention and interest
- P2.2 choose merchandise that is the most likely to attract and interest customers, meets the requirements of the display and is consistent with the company's visual-display policy
- P2.3 check the suitability and availability of merchandise with the relevant decision-makers
- P2.4 reach agreement with decision-makers concerning realistic arrangements and timescales for supply
- P2.5 promptly make other arrangements to get hold of merchandise if it is not available within your timescales and cost limits

You need to know and understand:

- K2.1 how to compare selected merchandise with the display requirements
- K2.2 how to check whether merchandise is available
- K2.3 how to arrange for merchandise to be delivered
- K2.4 why displays are used to attract the interest of customers and persuade them to make buying decisions
- K2.5 how light, colour, texture, shape and dimension combine to achieve the visual effects you need
- K2.6 why you are expected to show creativity in selecting merchandise for displays and to be aware of trends
- K2.7 how displays can achieve add-on sales
- K2.8 different approaches to use for displaying different kinds of merchandise
- K2.9 the different purposes of displays and their use in visual merchandising
- K2.10 company policy for merchandising and visual design
- K2.11 the decision-makers who you need to agree your choices of merchandise with
- K2.12 the people who can supply the merchandise you need for the display

Plan, monitor and control how graphics are used in visual merchandising displays

SVQ Unit	SCQF level	SCQF credit
C.25	6	8

Summary

This unit is for visual merchandising specialists and is all about ensuring that graphics are used effectively in displays. There are three aspects to this unit. Firstly, it is about choosing graphics, signs and tickets to make displays more attractive and informative to customers. Secondly, it involves organising the distribution of graphics, signs and tickets and their use in displays. Thirdly, you need to check that graphics, signs and tickets are being used consistently with the purpose of the display and any relevant company and legal requirements.

1. Identify and get hold of graphic materials for retail displays

You need to:

- P1.1 use the design brief and information about the layout to identify the graphic materials you need
- P1.2 identify the types and quantities of graphic materials you need to order and the associated costs, delivery dates and delivery addresses
- P1.3 confirm what you need with the relevant decision-makers
- P1.4 choose graphic materials that are consistent with legal requirements and the company's visual-design policy
- P1.5 use the accepted ways of describing the type and quantity of graphic materials needed

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You need to know and understand:

- K1.1 how to identify the need for graphic materials, and the factors affecting their use and style
- K1.2 how to check your interpretations of the graphic materials you need
- K1.3 how to choose graphic materials and say how they should be used
- K1.4 how to check that proposals for graphic materials are consistent with the company's design policy and aims
- K1.5 how to brief suppliers about requirements
- K1.6 the part graphic materials play in displays
- K1.7 the part graphic materials have in attracting customers and giving them information

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1. Identify and get hold of graphic materials for retail displays

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You need to:

- P1.6 confirm that proposals for using graphic materials are consistent with design policy and aims and are acceptable to decision-makers
- P1.7 specify clearly to suppliers what graphic materials you need

You need to know and understand:

- K1.8 approaches to using graphic materials for different types of merchandise
- K1.9 the company's visual-design policy
- K1.10 legal requirements relating to graphic materials
- K1.11 the accepted ways of describing types and quantities of graphic materials so that suppliers understand what you need
- K1.12 company procedures and requirements for ordering graphic materials
- K1.13 who the relevant decision-makers are
- K1.14 who can supply graphic materials

2. Co-ordinate how graphic materials are used in retail displays

You need to:

- P2.1 check that graphic materials meet specifications, legal requirements and company policy
- P2.2 distribute graphic materials to the right places by the agreed deadlines
- P2.3 promptly give colleagues clear, accurate and up-to-date instructions for installing graphic materials
- P2.4 check that graphic materials are correctly installed and maintained

You need to know and understand:

- K2.1 how to confirm whether graphic materials are available
- K2.2 how to check that graphic materials are suitable
- K2.3 how to produce instructions for installing graphic materials
- K2.4 how to check that installations are satisfactory
- K2.5 the part graphic materials play in displays
- K2.6 the part graphic materials have in attracting and informing customers
- K2.7 different approaches to using graphic materials for different merchandise
- K2.8 company and legal requirements for graphic materials

3. Check how graphic materials are used in retail displays

You need to:

- P3.1 check displays yourself as far as possible and encourage colleagues to provide relevant information about using graphic materials
- P3.2 collect enough relevant information about the way graphic materials are being used
- P3.3 check whether graphic materials are being used suitably and effectively
- P3.4 take prompt and suitable action when graphic materials are not being used or maintained in line with company policy or the design brief
- P3.5 spot situations where the way graphic materials are used should change, promptly making any changes needed

You need to know and understand:

- K3.1 how to check how you should use graphic materials
- K3.2 how to ask for and collect comments from colleagues about using graphic materials
- K3.3 why it is important to check how graphic materials are used
- K3.4 the action to take when graphic materials are not being used correctly
- K3.5 the part graphic materials play in displays
- K3.6 the part graphic materials have in attracting customers and giving them information
- K3.7 different approaches to using graphic materials for different merchandise
- K3.8 company procedures for dealing with cases where graphic materials are not being used in line with policy

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Monitor the effect of visual merchandising displays and layouts

SVQ Unit	SCQF level	SCQF credit
C.26	6	10

Summary

This unit is for visual merchandising specialists and is all about finding out whether displays and layouts are having the desired effect on customers and encouraging them to purchase the items being promoted. This involves two activities. Firstly, you need to gather the right kinds of information about customers' responses to displays and layouts. Secondly, you need to assess the effect of displays and layouts on customer behaviour and business performance and report your findings to decision-makers.

1. Gather information about retail customers' responses to displays and layouts

You need to:

- P1.1 accurately recognise when you need information about customers' responses, why you need it, and what type of information would be most useful
- P1.2 gather information about customers' responses in ways that are suitable for your purposes, in line with the company's communications policy and likely to keep the goodwill and co-operation of those providing the information
- P1.3 gather enough information to allow you to make judgements about customers' responses to displays and layouts
- P1.4 accurately interpret information about customers' responses
- P1.5 assess information fairly when reviewing the effect of displays and layouts

You need to know and understand:

- K1.1 how to organise the collecting of information about customers' responses, such as sales figures, footfall and customer flow
- K1.2 how to bring together, compare and interpret information about customers' responses to displays
- K1.3 how to choose the information that is most useful for judging the effect of displays
- K1.4 why you need information about customers' responses to displays and how to use it to decide what needs improving
- K1.5 how constantly improving the design of displays helps to attract and interest customers
- K1.6 how to recognise what different designs are meant to achieve and the types of customer they should attract
- K1.7 what customer-focused trading is

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1. Gather information about retail customers' responses to displays and layouts

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You need to know and understand:

- K1.8 the meaning of 'validity' and 'reliability' in relation to customer responses
- K1.9 useful sources of information about customers' responses
- K1.10 company procedures and requirements for collecting information about customers' responses to displays

2. Assess and report the effect of retail displays and layouts

You need to:

- P2.1 agree suitable standards for assessing the effect of displays and layouts
- P2.2 judge fairly the evidence of the effect of displays and layouts against the agreed standards
- P2.3 draw conclusions that are reasonable in terms of the purpose of the display and customers' responses to it
- P2.4 clearly identify improvements you could make to the way visual merchandising is carried out in your store
- P2.5 report your findings and recommendations clearly to decision-makers

You need to know and understand:

- K2.1 how constantly improving the design of displays and layouts helps to attract and interest customers
- K2.2 the meaning of validity and reliability in relation to interpreting information about customers' responses to displays and layouts
- K2.3 the decisions that will be based on your findings and recommendations and the effect these decisions will have
- K2.4 how to judge fairly the evidence of customers' responses against the agreed standards for displays and layouts
- K2.5 how to draw reasonable conclusions about the effect of displays and layouts, bearing in mind the purpose of the display or layout and customers' responses to it
- K2.6 how to recognise improvements you could make to the way visual merchandising is carried out in your store
- K2.7 who can make decisions about the way visual merchandising is carried out in your store
- K2.8 how to present your findings and recommendations clearly to decision-makers

Allocate, monitor and control visual merchandising project resources against budgets

SVQ Unit	SCQF level	SCQF credit
C.27	6	10

Summary

This unit is for visual merchandising specialists and is all about your responsibility for putting together project budgets and making sure project costs stay within budget as the project progresses. Putting a budget together involves estimating the likely costs of the project, working out ways of achieving best value for money, and justifying your recommendations to decision-makers. Keeping within budget involves recording and monitoring project spending, identifying any unacceptable spending and taking prompt action to sort it out.

1. Negotiate and agree costs for visual merchandising projects

You need to:

- P1.1 check that your estimates of the costs of proposed projects are reasonable
- P1.2 prepare business cases for spending proposals that show clearly how you can achieve value for money
- P1.3 ask colleagues to suggest ways you could strengthen your business case
- P1.4 present proposals clearly and persuasively to decision-makers
- P1.5 work out accurate costs and agree budgets with decision-makers in a way that keeps them committed to the project's aims
- P1.6 explain clearly to colleagues the cost limits they must work within

You need to know and understand:

- K1.1 how to make reasonable estimates of the costs of proposed projects
- K1.2 how to use estimated costs to support the business case for proposed projects
- K1.3 who to ask for comments to help you strengthen your business case for the spending you are recommending
- K1.4 the approved layout for budget proposals
- K1.5 who can approve budget proposals
- K1.6 how to present budget proposals clearly and persuasively to decision-makers
- K1.7 where you can find information about the costs of activities and resources

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1. Negotiate and agree costs for visual merchandising projects

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You need to know and understand:

- K1.8 how to put together accurate budgets from agreed budget proposals
- K1.9 how to brief colleagues about the cost limits they must work within
- K1.10 how controlling spending and using resources efficiently help the company and the reputation of visual merchandising
- K1.11 the company's budgeting procedures and deadlines

2. Control costs for visual merchandising projects

You need to:

- P2.1 keep accurate, complete and up-to-date records of project spending
- P2.2 promptly identify unacceptable differences in project costs, sort them out promptly when you have the authority to do so, and report them promptly to the right person when you cannot sort them out yourself
- P2.3 recognise chances to improve value for money within budget limits and promptly act on these
- P2.4 keep the right people informed of project activities and costs

You need to know and understand:

- K2.1 what costs project budgets include and how these are set out
- K2.2 how to record project expenses
- K2.3 the financial information you need to refer to and when and how it is presented
- K2.4 how to interpret reports of actual spending against budgeted spending
- K2.5 how to recognise unacceptable differences between actual and budgeted spending
- K2.6 the company's procedures for reporting and acting on cost variations
- K2.7 what 'value for money' means, and why it does not simply mean paying the lowest prices
- K2.8 how to recognise and use chances to increase value for money within projects
- K2.9 how controlling spending and using resources efficiently help the company and the reputation of visual merchandising

Contribute to developing and putting into practice the company's visual merchandising policy

SVQ Unit	SCQF level	SCQF credit
C.28	6	10

Summary

This standard is for visual merchandising specialists and is about your contribution to developing the company's visual merchandising policy and making sure that staff follow it. The unit involves making suggestions for improving your company's visual-design policy, including gathering information and analysing it to arrive at your recommendations. It also involves explaining the policy to staff and motivating them to follow it, as well as making checks to make sure the policy is followed. Your company's visual merchandising policy could be a written policy, but need not be.

1. Contribute to developing the company's visual-design policy for its retail stores

You need to:

- P1.1 gather accurate and up-to-date information about what internal and external customers want and expect from the visual design in the store
- P1.2 accurately analyse information to identify internal and external customers' wishes and expectations
- P1.3 accurately and fairly decide if current and recent designs follow accepted good practice in visual design
- P1.4 use available information to spot opportunities for improving visual-design policy and for introducing new design ideas

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You need to know and understand:

- K1.1 the company's current visual-design policy
- K1.2 who your internal and external customers are
- K1.3 how to find out about and recognise what internal and external customers hope for and expect from the visual design in the store
- K1.4 accepted good practice in visual design
- K1.5 how to decide if current and recent designs follow accepted good practice in visual design
- K1.6 how to spot opportunities for new and better ways of using visual design
- K1.7 the format to use when making recommendations

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1. Contribute to developing the company's visual-design policy for its retail stores

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You need to:

- P1.5 reach reasonable conclusions as to whether your new ideas and suggestions for improvement are relevant to the needs of the company and developing the visual-design policy
- P1.6 recommend clearly to decision-makers those improvements and new ideas that you decide are relevant and present these in the format needed and by the agreed deadlines

You need to know and understand:

- K1.8 how to put together and present recommendations for developing the visual-design policy
- K1.9 how visual design helps to promote and sell goods and services
- K1.10 what customer-focused design is
- K1.11 how merchandising helps the company to achieve its aims

2. Support staff putting into practice the company's visual-design policy for its retail stores

You need to:

- P2.1 present accurate and up-to-date information about the company's visual-design policy
- P2.2 present information about the company's visual-design policy to staff in a way that is likely to encourage understanding and commitment
- P2.3 give staff the chance to ask questions about the visual-design policy
- P2.4 check that visual designs are consistent with the visual-design policy
- P2.5 promptly correct any designs that do not keep to the visual-design policy
- P2.6 give internal customers accurate information about the visual-design policy and how it affects visual merchandising in their areas

You need to know and understand:

- K2.1 what the company's visual-design policy is
- K2.2 the role of visual design in retail
- K2.3 good practice in creating visual effect by using displays
- K2.4 the different purposes of displays and their use in visual merchandising
- K2.5 why different kinds of merchandise need displaying in different ways
- K2.6 different approaches to using design for different types of merchandising
- K2.7 how designs achieve the visual effects required by displays
- K2.8 how to brief staff and internal customers about the visual-design policy
- K2.9 how to explain the visual-design policy so that staff and internal customers will understand it
- K2.10 how to motivate staff to follow the visual-design policy

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2. Support staff putting into practice the company's visual-design policy for its retail stores

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You need to:

- P2.7 check displays to make sure they conform to the visual-design policy, are used correctly and kept in the condition needed for as long as they are in use
- P2.8 promptly report to your manager any problems with keeping displays in the condition needed

You need to know and understand:

- K2.11 how to check that visual designs are consistent with the visual-design policy
- K2.12 how to check that displays keep to the visual-design policy

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Create plans, elevations and drawings to realise visual merchandising ideas

SVQ Unit	SCQF level	SCQF credit
C.29	6	10

Summary

This unit is for visual merchandising specialists and is all about designing layouts and producing diagrams and instructions that will enable staff to realise your designs. The unit is firstly about developing creative solutions for layout designs within the limits of time, budget and any guidelines you must follow. This involves testing that ideas are realistic, as well as asking for and using the suggestions of decision-makers. The second aspect of the unit is about producing guidance that will allow staff to put layouts together. This involves working out what is involved in putting layouts together and giving instructions using schematic drawings and detailed written specifications.

1. Develop and test solutions for retail display layouts

You need to:

- P1.1 work out what kind of layout is needed and check this with decision-makers
- P1.2 gather information from reliable sources about layout design and ideas for layout design
- P1.3 evaluate information and ideas about layout design to see how relevant they are for your needs
- P1.4 suggest a wide enough range of layout options so you can come up with a creative solution
- P1.5 evaluate layout options against the design requirements and choose those which offer the most creative solution possible within time and cost limits

You need to know and understand:

- K1.1 how to gather and evaluate ideas and information about layout design
- K1.2 how to develop, evaluate and modify design options
- K1.3 how to work up designs in detail and maintain a creative approach while doing so
- K1.4 how to choose and combine scale, shape, colour, texture and focal points to produce creative design solutions
- K1.5 how to apply techniques of layout design, including drawing conventions and standards
- K1.6 how to test and judge whether designs are practical
- K1.7 who the relevant decision-makers are
- K1.8 how to consult with decision-makers throughout the design process

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1. Develop and test solutions for retail display layouts

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You need to:

- P1.6 continue improving the preferred layouts until you have a detailed layout that meets the design requirements and which can be achieved within the agreed time and cost limits
- P1.7 check carefully that there is enough space for the preferred layout in the sales areas
- P1.8 when there is not enough space available for the preferred layout, adapt the layout so that it will fit the space and can still be used as intended and have the desired effect
- P1.9 consult decision-makers fully throughout the design development process, clearly acknowledge changes they suggest, and use these when they improve the usefulness and creativity of the design

You need to know and understand:

- K1.9 why you need to review layout designs and come up with solutions which are both creative and suitable
- K1.10 what layout design is and its part in effective visual merchandising
- K1.11 the nature and processes of creativity and layout design
- K1.12 the part played in creative design by dimension, shape, colour, texture and location
- K1.13 sources of information about the design requirements and possible layout solutions

2. Produce guidance for putting retail display layouts together

You need to:

- P2.1 draw layouts accurately
- P2.2 use accepted drawing techniques, graphic conventions and coding conventions to give information
- P2.3 specify accurately and clearly the dimensions and orientation of the layout and the standards of the finished work
- P2.4 estimate the quantities and costs of materials needed within cost limits and the design requirement
- P2.5 estimate costs of materials only if there are no existing stocks you can use
- P2.6 recognise when you need to use specialist services
- P2.7 identify the correct methods for putting layouts together and any risks to health and safety involved in putting layouts together and using them
- P2.8 provide enough information to allow people to put the layout together efficiently
- P2.9 tell people clearly and accurately what they must do to protect their own and others' health and safety while they are putting layouts together

You need to know and understand:

- K2.1 why specifications, drawings and supporting information are needed for putting layouts together
- K2.2 how to produce specifications and drawings to the technical standards needed
- K2.3 how to estimate quantities and costs
- K2.4 how to specify the standard of finished work
- K2.5 how to identify and specify the need for specialist services
- K2.6 how to describe methods for putting layouts together
- K2.7 how to recognise risks to health and safety arising from putting layouts together
- K2.8 how to draw the users' attention to health and safety risks and the preventive action they must take
- K2.9 how to identify and assess the conditions under which the layout will be put together
- K2.10 who puts together layouts in your company and who uses them
- K2.11 the drawing and coding conventions and standards to use
- K2.12 the supporting information needed by those who will put the layout together

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Develop individual retail service opportunities

SVQ Unit	SCQF level	SCQF credit
C.30	6	6

Summary

This unit is for personal shoppers and is about developing your client database. Firstly, you need to plan how to find new clients you can develop a business relationship with. You need to understand what type of clients you should be meeting, and how to go about meeting them in ways that use your time effectively and are likely to help you meet your sales targets. Secondly, you need to approach potential clients and get them interested in you and your service. You need to tailor your approach to different people so that you can quickly develop a rapport and gain their interest. You also need to gain their trust in you and your company by keeping your promises and keeping personal information strictly confidential.

1. Make plans for finding new retail clients

You need to:

- P1.1 identify the types of client who would benefit from your service and whose custom would help you achieve your sales targets
- P1.2 suggest ideas for building the client base that are suitable for the client profiles and achievable bearing in mind the budget and time available and company image and policy
- P1.3 follow company policies and procedures for building the client base
- P1.4 review your progress against your plans at suitable intervals
- P1.5 recognise whether you are achieving the results you need and adjusting your plans when necessary
- P1.6 give your manager clear and accurate reports of your progress at the agreed times

You need to know and understand:

- K1.1 your sales targets and when you should achieve them by
- K1.2 client profiles relevant to the brands and services you are personally responsible for selling
- K1.3 the number and types of clients you are likely to need in order to meet your sales targets
- K1.4 company policies and procedures for developing business relationships with clients
- K1.5 how best to balance your time between finding new clients and selling to existing clients
- K1.6 how often to review your progress in finding new clients
- K1.7 how to measure your progress in ways that help you decide if you need to change your approach
- K1.8 when and how you should report your progress to your manager

2. Market your service to potential retail clients

You need to:

- P2.1 spot suitable opportunities to approach potential clients
- P2.2 approach potential clients in a way that projects your company's image effectively and is likely to help create a business relationship
- P2.3 quickly create a rapport with potential clients
- P2.4 talk to potential clients in a persuasive way about your services
- P2.5 compare your service with competitors' services in ways that make clear the advantages of your service while being honest and fair
- P2.6 exchange relevant information with potential clients when appropriate
- P2.7 record client information promptly, accurately and in a way that allows you to use the information effectively
- P2.8 store and use client information in line with data protection laws and company policy
- P2.9 when it is not possible to keep promises to potential clients, tell them promptly and offer any other suitable information or help

You need to know and understand:

- K2.1 the type of business relationships you need to create with potential clients
- K2.2 the image your company wants to promote to customers
- K2.3 the difference between features and benefits
- K2.4 the features and benefits of the service you provide
- K2.5 how to talk to potential clients in a persuasive way about your service
- K2.6 how to find out about competitors' services
- K2.7 how to compare competitors' services with yours, so that potential clients can understand how using your service would benefit them
- K2.8 how to identify suitable opportunities for approaching potential clients
- K2.9 how to approach potential clients in a way that creates a positive impression of you and your company and is likely to help create a business relationship
- K2.10 how to create a rapport quickly with prospective clients
- K2.11 the information you need to exchange with potential clients
- K2.12 why you need to keep any promises you make to potential clients, for example sending them information they have asked for
- K2.13 how to record information about potential clients so that you can use it effectively
- K2.14 why client confidentiality is important to the business relationship
- K2.15 relevant aspects of the data protection laws and company policy to do with client confidentiality

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

SVQ Unit	SCQF level	SCQF credit
C.31	6	8

Summary

This unit is for personal shoppers and is all about providing the personal shopping experience and building clients' loyalty to you and to the store.

Firstly, it involves getting to know clients so that you can recommend and sell products according to clients' individual needs, preferences and budgets. Selling in this way is known as consultative selling or relationship selling, and involves developing a business relationship with clients so that they will trust you, take your advice and keep coming back to buy from you. To be able to provide a personalised service effectively you need an extensive knowledge of your store's products and services including seasonal trends and special promotions.

The second aspect of the unit is concerned with building clients' loyalty by following up client consultations. This involves keeping client records up-to-date and using them to keep in touch with clients so that they remain aware of your service and interested in doing business with you. It also involves providing a service and keeping clients' trust by doing the things you have promised clients you will do, such as placing orders or contacting them when new items are available.

1. Provide a personalised service to retail clients

You need to:

- P1.1 use available information in the client records to help you prepare for consultations
- P1.2 before starting a consultation, check that the work area is clean and tidy and that all the equipment you need is to hand
- P1.3 quickly create a rapport with the client at the start of the consultation
- P1.4 talk and behave towards the client in ways that project the company image effectively

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You need to know and understand:

- K1.1 what consultative selling is, and how this is different from other kinds of retail selling
- K1.2 your company's desired image and how to project this to clients
- K1.3 how to use information in client records to prepare for client visits
- K1.4 how to create and maintain a rapport with clients, both new and existing

continued on next page

1. Provide a personalised service to retail clients

continued from previous page

You need to:

- P1.5 ask questions that encourage the client to tell you about their buying needs, preferences and priorities
- P1.6 where appropriate, tactfully check how much the client wants to spend
- P1.7 explain clearly to the client the features and benefits of the products or services you are recommending and relate these to the client's individual needs
- P1.8 identify suitable opportunities to sell additional or related products or services that are suited to the client's needs
- P1.9 make recommendations to the client in a confident and polite way and without pressurising them
- P1.10 pace client consultations so you make good use of your selling time while maintaining good relations with the client
- P1.11 meet your company's customer service standards in your dealings with the client

You need to know and understand:

- K1.5 the types of question to ask clients to find out about their buying needs, preferences and priorities
- K1.6 when and how to ask clients tactfully how much they want to spend
- K1.7 how to keep yourself informed about the brands and services you are expected to sell, including:
 - seasonal trends
 - new brands or services
 - promotions
 - stock levels
 - competitor comparisons
 - additional services such as store cards, gift wrapping or delivery
- K1.8 how to relate the features and benefits of products or services to the client's needs
- K1.9 how to identify suitable opportunities to sell additional or related products
- K1.10 how to make recommendations to clients in a way that encourages them to take your advice, without pressurising them
- K1.11 why you need to balance the need to make immediate sales with the need to maintain good business relations with the client, and how to do so
- K1.12 the company's customer service standards and how to apply these when providing a personalised service to clients

2. Provide an after-sales service to retail clients

You need to:

- P2.1 follow the company's procedures for keeping client records up-to-date
- P2.2 record client information accurately and store it in the right places in your company's system
- P2.3 keep client information confidential and share it only with people who have a right to it
- P2.4 keep to clients' wishes as to how and when you may contact them
- P2.5 follow your company's policy and procedures for contacting clients
- P2.6 where you cannot keep promises to clients, tell them promptly and offer any other suitable products or services

You need to know and understand:

- K2.1 why you need to keep client records up-to-date and store them correctly
- K2.2 company procedures for updating client records
- K2.3 company systems and procedures for recording and storing client information
- K2.4 relevant aspects of the data protection laws and company policy for client confidentiality
- K2.5 why you should keep to clients' wishes as to how and when you may contact them
- K2.6 why you need to keep your promises to clients

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Promote beauty products to retail customers

SVQ Unit	SCQF level	SCQF credit
C.35	5	10

Summary

This unit is about two aspects of the retail sale of make-up and skincare products. Firstly, it is about demonstrating the features and benefits of make-up and skincare products to customers. This involves making the demonstration a pleasant experience for the customer, maintaining safety and hygiene during the demonstration, and gaining the customer's interest in making a purchase. The second aspect of the unit is about keeping accurate and up-to-date records of customers to help you provide a more effective service to them and so that promotional mail-outs will reach the right people and be more likely to increase sales.

1. Demonstrate beauty products to retail customers

You need to:

- P1.1 gather together all the tools, materials and products you need for an effective and hygienic demonstration
- P1.2 gain the customer's permission to carry out the demonstration
- P1.3 explain to the customer clearly and in enough detail which products you are going to apply and why
- P1.4 ask the customer whether they are allergic to any products or ingredients, and take care not to apply any of these products
- P1.5 follow the company grooming guidelines and maintain your own personal hygiene
- P1.6 protect the customer's hair and clothing from coming into contact with the products you are demonstrating
- P1.7 apply products in a logical sequence, using effective and hygienic techniques

continued on next page

You need to know and understand:

- K1.1 the purpose and value of demonstrations in promoting and selling make-up and skincare products
- K1.2 the tools, materials and products you need for demonstrating make-up and skincare products effectively and hygienically
- K1.3 how your own personal hygiene and grooming contribute to making the demonstration comfortable for the customer
- K1.4 why you must get the customer's permission for the demonstration
- K1.5 how to protect the customer's hair and clothing from contact with the products you are demonstrating
- K1.6 the feelings and concerns that customers typically have about demonstrations of make-up and skincare products, and how to tackle these

continued on next page

1. Demonstrate beauty products to retail customers

You need to:

- P1.8 explain clearly the features and benefits you think are needed to gain the customer's interest in making a purchase
- P1.9 complete the demonstration bearing in mind the customer's time pressures
- P1.10 check whether the customer wants you to make any adjustments to the products you have applied
- P1.11 promptly clear away the equipment and products at the end of the demonstration while not keeping customers waiting too long
- P1.12 give the customer the opportunity to look in a mirror at the end of the demonstration and make sure that the light and angle of mirror do justice to the products you have applied

You need to know and understand:

- K1.7 the difference between features and benefits of products
- K1.8 the features and benefits of the make-up and skincare products you are responsible for demonstrating
- K1.9 techniques for applying products effectively and hygienically
- K1.10 how to organise demonstrations into logical steps and stages, and the importance of doing so
- K1.11 how to communicate clear and accurate information before and during demonstrations
- K1.12 why you should clear equipment and products away promptly at the end of the demonstration without keeping customers waiting too long

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

You need to:

- P2.1 identify suitable opportunities to ask customers whether you may set up a record card for them
- P2.2 explain clearly to customers the benefits to them of being on file
- P2.3 record information clearly and accurately
- P2.4 update the record-card system often enough to keep it useful
- P2.5 keep information about customers confidential
- P2.6 follow company rules and procedures for setting up and updating customer record cards
- P2.7 ask customers whether they have any product or ingredient allergies, and record this information accurately
- P2.8 if a customer has an allergy, identify which products in your range contain this ingredient and note the products on the record card as unsuitable for the customer
- P2.9 identify your top customers from the record-card system and use this information to help you to boost sales
- P2.10 while setting up new record cards, offer customers opportunities to make appointments for return visits to your counter

You need to know and understand:

- K2.1 how using a customer record-card system can help you meet your sales targets
- K2.2 any company rules and procedures relating to the customer record-card system
- K2.3 the benefits to the customer of the record-card system
- K2.4 the importance of updating the record-card system regularly
- K2.5 how to find time in your working day to update the record-card system
- K2.6 the relevant aspects of current data protection laws and the importance of keeping to these laws
- K2.7 how to identify opportunities to make follow-up appointments
- K2.8 the importance of asking customers about any allergies to products and ingredients so that they can be noted on the record card
- K2.9 where to find information about product ingredients and how to interpret this information

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Follow point-of-sale procedures for age-restricted products in a retail environment

SVQ Unit	SCQF level	SCQF credit
C.36	5	8

Summary

This unit is about your responsibility for selling certain products only to customers who are old enough to buy them legally. You need to keep to the law and company policies and procedures. You also need to refuse sales when necessary, in ways that promote customer goodwill as far as possible in the circumstances. Under current law, age-restricted products include:

- air guns and pellets
- alcohol
- caps, cracker snaps, novelty matches, party poppers, serpents and throwdowns
- fireworks
- lighter refills containing butane
- liqueur chocolates
- lottery tickets and Instant Win cards
- offensive weapons, including knives
- tobacco products
- videos, DVDs and computer games classified 12, 15 and 18
- volatile substances and solvents

The unit also involves taking payment for age-restricted goods if the customer is old enough to buy them legally.

1. Follow procedures for retail sales of age-restricted products

You need to:

- P1.1** follow legal requirements and company policies and procedures for asking for proof of age
- P1.2** when you need proof of the customer's age, make the sale only if they provide it and it meets legal and company conditions
- P1.3** follow legal requirements and company policies and procedures for refusing sales

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You need to know and understand:

- K1.1** which age-restricted products you are authorised to sell
- K1.2** the age restrictions on the products you are authorised to sell, and what can happen to you and the company if you do not keep within these restrictions
- K1.3** company policies and procedures for asking for proof of age, including the types of proof you may accept

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1. Follow procedures for retail sales of age-restricted products

continued from previous page

You need to:

- P1.4 refuse politely and firmly to make sales that are against the law or any procedures and policies you must follow
- P1.5 explain clearly and accurately to customers what proof of age you can accept

You need to know and understand:

- K1.4 company policies and procedures for refusing sales of age-restricted products
- K1.5 why you should ask for proof of age and refuse sales in ways that are both firm and polite, and how to do so

2. Provide service at point of sale in a retail store

You need to:

- P2.1 tell customers the correct amount to pay
- P2.2 check accurately the amount and means of payment offered by the customer
- P2.3 where the payment is acceptable, process the payment in line with company procedures
- P2.4 tell the customer tactfully when payment cannot be approved
- P2.5 offer additional services to the customer where these are available
- P2.6 treat customers politely throughout the payment process
- P2.7 balance the need to give attention to individual customers with the need to acknowledge customers who are waiting for help

You need to know and understand:

- K2.1 how to keep cash and other payments secure
- K2.2 the types of payment that you are authorised to receive
- K2.3 procedures for authorising non-cash transactions
- K2.4 how to check for and identify counterfeit payments
- K2.5 how to check for stolen cash equivalents
- K2.6 how to deal with customers offering suspect payments
- K2.7 relevant legal rights, duties and responsibilities
- K2.8 company procedures for taking payments
- K2.9 company procedures for dealing with suspected fraud

Help customers to buy National Lottery products in a retail environment

SVQ Unit	SCQF level	SCQF credit
C.37	5	8

Summary

Playing the National Lottery is a form of gambling and so is carefully regulated. Retailers who don't keep to the relevant laws and regulations may no longer be allowed to sell National Lottery products. This unit is about your role in making sure the store keeps this source of income by selling National Lottery products in line with the law and the operator's requirements. This involves knowing and following the relevant requirements, including following the law and your store's policy with regard to under-age and vulnerable players. The unit is also about providing a service to customers by explaining the features of National Lottery products including the rules of play and odds of winning. Finally, the unit also involves taking payment and paying out prize money.

1. Sell National Lottery products to retail customers

You need to:

- P1.1 use and maintain the service terminal in line with the operator's policies and procedures
- P1.2 keep to all relevant laws, regulations and organisational policies and procedures for selling National Lottery products to vulnerable players
- P1.3 explain the rules of the game clearly and accurately to customers, when they ask
- P1.4 explain clearly and accurately to customers how to play the game, when they ask
- P1.5 explain to customers clearly and accurately the differences between National Lottery products in terms of price, method of play and odds of winning

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You need to know and understand:

- K1.1 the role of the operator in promoting the National Lottery
- K1.2 the role of the National Lottery Commission in monitoring how the National Lottery works
- K1.3 why there is concern about vulnerable players
- K1.4 your organisation's policies and procedures for selling, and refusing to sell, National Lottery products to vulnerable players
- K1.5 the main legal requirements relating to the National Lottery and gambling in general, and how these affect selling National Lottery products
- K1.6 the features of the National Lottery products currently available, including price, rules of play, methods of play and odds of winning

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1. Sell National Lottery products to retail customers

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You need to:

- P1.6 process prize payouts in line with the operator's requirements and your company's procedures
- P1.7 promptly ask the appropriate person for help when the service terminal is not working properly

You need to know and understand:

- K1.7 how to explain clearly to customers the features of National Lottery products
- K1.8 how to compare different National Lottery products for customers
- K1.9 the operator's policies and procedures for selling National Lottery products
- K1.10 the operator's requirements and your company's procedures for processing prize payouts
- K1.11 the purpose of the service terminal
- K1.12 how to use and maintain the service terminal
- K1.13 who to ask for help if the service terminal is not working properly

2. Follow procedures for retail sales of age-restricted products

You need to:

- P2.1 follow legal requirements and company policies and procedures for asking for proof of age
- P2.2 when you need proof of the customer's age, make the sale only if they provide it and it meets legal and company conditions
- P2.3 follow legal requirements and company policies and procedures for refusing sales
- P2.4 refuse politely and firmly to make sales that are against the law or any procedures and policies you must follow
- P2.5 explain clearly and accurately to customers what proof of age you can accept

You need to know and understand:

- K2.1 which age-restricted products you are authorised to sell
- K2.2 the age restrictions on the products you are authorised to sell, and what can happen to you and the company if you do not keep within these restrictions
- K2.3 company policies and procedures for asking for proof of age, including the types of proof you may accept
- K2.4 company policies and procedures for refusing sales of age-restricted products
- K2.5 why you should ask for proof of age and refuse sales in ways that are both firm and polite, and how to do so

3. Provide service at point of sale in a retail store

You need to:

- P3.1 tell customers the correct amount to pay
- P3.2 check accurately the amount and means of payment offered by the customer
- P3.3 where the payment is acceptable, process the payment in line with company procedures
- P3.4 tell the customer tactfully when payment cannot be approved
- P3.5 offer additional services to the customer where these are available
- P3.6 treat customers politely throughout the payment process
- P3.7 balance the need to give attention to individual customers with the need to acknowledge customers who are waiting for help

You need to know and understand:

- K3.1 how to keep cash and other payments secure
- K3.2 the types of payment that you are authorised to receive
- K3.3 procedures for authorising non-cash transactions
- K3.4 how to check for and identify counterfeit payments
- K3.5 how to check for stolen cash equivalents
- K3.6 how to deal with customers offering suspect payments
- K3.7 relevant legal rights, duties and responsibilities
- K3.8 company procedures for taking payments
- K3.9 company procedures for dealing with suspected fraud

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Assist customers to obtain appropriate insurance (Financial Services Skills Council)

SVQ Unit	SCQF level	SCQF credit
C.38	6	12

Summary

This unit is for you if you sell extended warranties on domestic electrical goods. The provision of insurance products by retailers is regulated by the Financial Services Authority (FSA) and therefore a key aspect of this unit is to understand and comply with FSA requirements relating to the sale of insurance. You also need to understand the relevant principles and concepts of insurance.

The unit is also about four aspects of selling and administering extended warranties. Firstly, it involves identifying suitable products for individual customers and giving them accurate information on products you are authorised to deal with. Secondly, it is about calculating the costs of extended warranties and explaining these costs to customers. The third aspect involves helping customers complete their applications for extended warranties and providing customers with the necessary documentation. Finally, the unit involves helping customers to make claims under extended warranties they bought through your store.

Knowledge and understanding which relates to the whole of this unit

You need to know and understand:

K1.1 the principles and practice of insurance (an introductory knowledge only) including:

- utmost good faith
- insurable interest
- indemnity
- subrogation
- contribution
- risk as it relates to insurance
- contract and agency
- proximate cause
- compulsory insurance

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Knowledge and understanding which relates to the whole of this unit

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You need to know and understand:

- K1.2** the legal and regulatory requirements relating to securing insurance products and arrangements, including:
- an awareness of FSA rules and powers (for example Insurance Conduct of Business Rules)
 - your own and the company's responsibility for complying with all legislation including FSA rules, and the consequences of failing to comply
 - money laundering rules and cash limits
 - Data Protection Act (DPA)
 - consumer protection
 - financial promotions
 - crime prevention measures relating to insurance:
 - ABI data sharing project
 - guidelines on the exchange of information between the police, insurers and loss adjusters
 - acceptance criteria and guidelines for the reporting of suspected fraudulent insurance claims to the police
- K1.3** the limits of your own responsibility for dealing with insurance arrangements, complaints and claims

2. Identify the customer's insurance needs

You need to:

- P2.1** advise the customer of your status and your company's status in relation to the products you offer
- P2.2** accurately find out what the customer requires to meet his/her insurance needs
- P2.3** recognise any requests for product information that you are not authorised to deal with and promptly pass them to an appropriate authority
- P2.4** accurately complete and store all initial documentation in accordance with procedures
- P2.5** comply at all times with relevant legal and regulatory requirements

You need to know and understand:

- K2.1** the procedure for advising customers of your status and your company's status in relation to the products you offer
- K2.2** how to assist different types of customer:
- retail/consumer/commercial
 - on the telephone, face-to-face
 - advised/non-advised basis
- K2.3** policies and procedures for obtaining and supplying information to customers, and keeping records of requests
- K2.4** when and how to pass requests for product information to a higher authority

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2. Identify the customer's insurance needs

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You need to know and understand:

- K2.5 the documentation that needs to be issued, and/or completed and stored, in durable medium, that may included:
- status disclosure
 - demands and needs statements
 - key fact statement
- K2.6 legal and regulatory requirements relating to insurance products and their sale

3. Agree insurance policies with the customer to enable them to be appropriately insured

You need to:

- P3.1 identify the types of insurance products that can be offered to the customer that meet their needs
- P3.2 clearly and accurately describe the details of the product offered and provide a policy summary
- P3.3 provide details of exclusions and cancellation rights and complaints and claims procedures
- P3.4 where necessary, supply accurate written quotations for insurance cover in the required format
- P3.5 accurately calculate and confirm with the customer the premium due and arrange payment in accordance with procedures
- P3.6 where necessary, refer issues that arise during the arrangement of insurance to an appropriate authority
- P3.7 issue legible and accurate confirmation of cover where this is appropriate
- P3.8 accurately complete and store all necessary documentation in accordance with procedures

continued on next page

You need to know and understand:

- K3.1 how to identify the type of customer (retail/consumer or commercial)
- K3.2 how to identify the insurance products which best suit the customer
- K3.3 how to select different insurance products for different types of insurance needs and customer preferences, including:
- types of insurance
 - types of cover
 - features and benefits of different types of insurance
 - terms and conditions of policies
 - exclusions and limitations on insurance cover
 - cancellation rights
 - duration of insurance cover
 - premiums and fees
 - complaints procedures
 - compensation schemes
- K3.4 how to prepare, present and record written and verbal quotes for insurance agreements
- K3.5 different methods of payment and their effect on total cost

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3. Agree insurance policies with the customer to enable them to be appropriately insured

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You need to:

- P3.9 identify additional insurance services where appropriate and relevant to the needs of the customer
- P3.10 comply at all times with relevant legal and regulatory requirements

You need to know and understand:

- K3.6 cancellation of cover costs
- K3.7 when you must disclose commission
- K3.8 how to calculate the premium and any other associated fees if appropriate
- K3.9 your company's procedures for the handling of client money

4. Process insurance applications

You need to:

- P4.1 gather all necessary information to enable applications for insurance to proceed
- P4.2 send documentation and other necessary information to the insurers, or others, within the time agreed
- P4.3 where necessary, obtain further information from the customer where checks reveal inconsistencies or discrepancies in details supplied by the customer
- P4.4 where problems occur with insurance applications, seek advice and assistance from an appropriate authority
- P4.5 deal promptly with any complaints, refer issues to an appropriate authority and keep accurate records
- P4.6 keep the customer informed of progress at all stages
- P4.7 check and issue all documents to the customer within the time required
- P4.8 make accurate and complete records at all stages and store them correctly in the customer file
- P4.9 comply at all times with relevant legal and regulatory requirements

You need to know and understand:

- K4.1 how and when to carry out credit checks
- K4.2 how to recognise inconsistencies and discrepancies in information and the correct action to take
- K4.3 common problems that occur with insurance applications and when you need to seek advice on how to deal with them or refer them
- K4.4 policies and procedures for dealing with and recording complaints
- K4.5 how to inform customers of decisions about insurance arrangements
- K4.6 the information and documentation that is needed, in the required format and in durable medium, in order to progress insurance applications, which may include:
- statement of price
 - demands and needs statements
 - key fact statement
 - proposal form
 - certificate of insurance
 - policy summary
 - policy booklet
 - policy schedule

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4. Process insurance applications

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You need to know and understand:

- K4.7 where and how to store completed documentation
- K4.8 legal and regulatory requirements relating to processing insurance applications

5. Assist customers with claims

You need to:

- P5.1 where appropriate, disclose whether you are acting on behalf of an insurer in relation to a claim
- P5.2 give customers appropriate guidance, according to procedures, to help them to make a claim
- P5.3 gather all necessary information to allow a valid claim, or to direct the claim to the appropriate people
- P5.4 where necessary, complete accurately the required documentation to process the claim
- P5.5 where appropriate, inform the customer of the progress of the claim and any outcome
- P5.6 deal with complaints or pass them to the appropriate authority
- P5.7 if necessary, refer issues to an appropriate authority
- P5.8 make accurate and complete records at all stages and store them correctly
- P5.9 comply at all times with relevant legal and regulatory requirements

You need to know and understand:

- K5.1 when to disclose conflicts of interest and how to manage them
- K5.2 policies and procedures for giving guidance to customers on claims, and keeping appropriate records
- K5.3 policies and procedures for directing claims to the appropriate people
- K5.4 documentation that needs to be completed in order to process a claim
- K5.5 your company's complaints procedure
- K5.6 the role of the Financial Ombudsman Service
- K5.7 when and how to pass issues to a higher authority
- K5.8 policies and procedures for keeping and storing accurate records about claims
- K5.9 legal and regulatory requirements relating to claims

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Process the self-service dispensing and purchase of motor fuel on a forecourt

SVQ Unit	SCQF level	SCQF credit
C.39	5	7

Summary

This unit is for sales assistants working in petrol forecourt shops on self-service forecourts. It involves checking that it is safe for customers to dispense fuel, activating the pumps, transferring transactions to point-of-sale and taking payment. Health and safety and security are important aspects of this unit, including noticing and dealing with drive-offs.

1. Authorise and monitor the self-service dispensing of motor fuel on a forecourt

You need to:

- P1.1 authorise customers to dispense fuel in line with the safety requirements laid down by the law and by your company
- P1.2 follow legal and company requirements for checking that customers are legally old enough to dispense fuel and that any fuel containers the customer is using comply with legal requirements
- P1.3 when you can safely and legally do so, activate pumps promptly and in line with the manufacturer's instructions
- P1.4 remain alert for safety hazards while fuel is being dispensed, and take prompt and suitable action to deal with any hazards which arise
- P1.5 notice when dispensing equipment is not working properly and take prompt and suitable action

continued on next page

You need to know and understand:

- K1.1 the safety requirements laid down by the law and by your company for the safe dispensing of fuel by customers
- K1.2 the layout of your forecourt including the positions of the pumps
- K1.3 the age over which customers may legally dispense fuel, and legal and company requirements for checking that the customer is over the legal age
- K1.4 legal requirements concerning customers filling containers with fuel
- K1.5 the importance of remaining alert for safety hazards while customers are dispensing fuel; what hazards can arise; and how to deal with them
- K1.6 reasons why dispensing equipment might not work properly, and what action to take when this happens

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1. Authorise and monitor the self-service dispensing of motor fuel on a forecourt

continued from previous page

You need to:

- P1.6 when the customer has finished dispensing fuel, transfer the transaction to point-of-sale promptly and in line with manufacturer's instructions
- P1.7 remain alert for security risks while customers are dispensing fuel
- P1.8 notice when customers have driven away without paying, and follow company procedures for recording and reporting drive-offs

You need to know and understand:

- K1.7 the types of security risk which can arise when customers are dispensing fuel and how to remain alert for these
- K1.8 how to tell when a drive-off has occurred, and the company's procedures for recording and reporting drive-offs

2. Provide service at point of sale in a retail store

You need to:

- P2.1 tell customers the correct amount to pay
- P2.2 check accurately the amount and means of payment offered by the customer
- P2.3 where the payment is acceptable, process the payment in line with company procedures
- P2.4 tell the customer tactfully when payment cannot be approved
- P2.5 offer additional services to the customer where these are available
- P2.6 treat customers politely throughout the payment process
- P2.7 balance the need to give attention to individual customers with the need to acknowledge customers who are waiting for help

You need to know and understand:

- K2.1 how to keep cash and other payments secure
- K2.2 the types of payment that you are authorised to receive
- K2.3 procedures for authorising non-cash transactions
- K2.4 how to check for and identify counterfeit payments
- K2.5 how to check for stolen cash equivalents
- K2.6 how to deal with customers offering suspect payments
- K2.7 relevant legal rights, duties and responsibilities
- K2.8 company procedures for taking payments
- K2.9 company procedures for dealing with suspected fraud

Establish customer needs and provide advice regarding tiling products

SVQ Unit	SCQF level	SCQF credit
C.40	5	6

Summary

This unit is about finding out how customers intend to use tiles for specific tiling projects. It involves establishing the customer's needs and advising them on tiling solutions which are suitable for the intended use and which will achieve the visual effect required by the customer.

1. Establish customer needs and provide advice regarding tiling products

You need to:

- P1.1 establish correctly where the customer intends to use the tiles, and why tiles are being considered
- P1.2 determine the customer's budget and delivery timescale for the tiles
- P1.3 establish the nature of the surface to be tiled, and determine correctly any consequent considerations regarding the suitability of particular tiles and how they might be fixed
- P1.4 identify whether the customer requires any fixtures or fittings and advise the customer accordingly
- P1.5 establish how the tiled surfaces are to be used, and advise the customer correctly upon the available types of tile suited to the intended use
- P1.6 explore and determine the customer's preferred colours, styles, design and layout of tiles

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You need to know and understand:

- K1.1 the different locations where tiles are used, and the factors to consider when determining which tiles are suitable
- K1.2 the relative advantages and disadvantages of a tiled floor compared with the principal other types of flooring
- K1.3 the constituent materials and general manufacturing process of the tiles which you are involved in selling
- K1.4 the delivery times for the tiles which you are involved in selling
- K1.5 the implications of building regulations and sustainability for the tiles which your organisation offers
- K1.6 the principal types of adhesives and grouts and for what these are used
- K1.7 the principal types of integral fittings and accessories available and which can be installed during or after tiling

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1. Establish customer needs and provide advice regarding tiling products

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You need to:

- P1.7 provide customers with samples of appropriate tiles and displays
- P1.8 advise, with sensitivity, why certain styles may be better suited to particular types of homes
- P1.9 advise the customer correctly regarding the relevant tiling finishes available, including appropriate trims and beadings
- P1.10 determine correctly whether the customer is seeking other requirements such as underfloor heating
- P1.11 create a rapport with the customer and demonstrate an interest in the customer's needs
- P1.12 listen actively and promote understanding by using words that are clear, concise and suited to the customer's needs

You need to know and understand:

- K1.8 procedures for cutting and drilling through tiles
- K1.9 the reasons for possible differences in sizes and shading of tiles, and the purpose of batch numbers
- K1.10 current trends in tiling design and fashion
- K1.11 the types of tile fixing, trim and beading and those most appropriate for different applications
- K1.12 the circumstances when it is important to use silicone sealants
- K1.13 where to seek information appropriate to customers' needs, particularly non-standard requirements
- K1.14 the principal forms of underfloor heating, and those floor finishes which are suitable

Advise customers upon measuring and planning for the fixing of tiles

SVQ Unit	SCQF level	SCQF credit
C.41	5	6

Summary

This unit is about helping customers to buy the products they need for specific tiling projects. This involves advising customers on how to measure the area to be tiled; working out the quantity of tiles the customer needs to buy; telling the customer about any additional products they will need; and working out the total price of the products you are recommending.

1. Advise customers upon measuring and planning for the fixing of tiles

You need to:

- P1.1 determine correctly the nature of the location being tiled, and the subsequent use to which the tiled surfaces are to be put
- P1.2 identify correctly the nature of the materials suited for the intended location
- P1.3 check and confirm, where possible, the accuracy of measurements provided by the customer, using tact and sensitivity
- P1.4 calculate correctly the area of the surface to be tiled
- P1.5 calculate correctly the number of tiles required, taking into account the intended design and any use of motif and border tiles
- P1.6 determine correctly the amount of trim, edging material and sealants required
- P1.7 calculate correctly the amount and type of adhesive needed
- P1.8 identify correctly the number and size of spacers required

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You need to know and understand:

- K1.1 why measuring, setting out and planning for tiling is important, and the general procedures for doing this
- K1.2 the principal types of tools and materials required for measuring, planning and setting out, and their respective purposes
- K1.3 the information to be sought from customers when advising upon tiling different locations
- K1.4 the importance of ensuring that tiles are from the same batch, and the potential difficulties that might arise where this does not occur
- K1.5 how to measure the surfaces to be tiled, and the factors to be determined in identifying the number of tiles required
- K1.6 how to convert between metric and imperial measures
- K1.7 methods for planning for incorporating motif and border tiles

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1. Advise customers upon measuring and planning for the fixing of tiles

continued from previous page

You need to:

- P1.9 determine correctly the type, colour and amount of grout required
- P1.10 calculate correctly how any other requirements, such as underfloor heating, will affect the measuring and planning process
- P1.11 provide an accurate estimate for the customer, explaining clearly and correctly its component parts
- P1.12 listen actively and encourage questions from the customer towards promoting the customer's understanding

You need to know and understand:

- K1.8 the types of tile fixing trim, and those most appropriate for different applications
- K1.9 the types and methods of applying adhesive
- K1.10 the types of grout available
- K1.11 methods for calculating the size of the electrical underfloor heating system required
- K1.12 where to seek help or information for customers' non-standard or particular requirements

Advise customers upon the fixing of tiles

SVQ Unit	SCQF level	SCQF credit
C.42	5	6

Summary

This unit is about promoting sales and increasing customer confidence and satisfaction by explaining to customers how to fix tiles and helping them to choose suitable products for this.

1. Advise customers upon the fixing of tiles

You need to:

- P1.1 determine required details about the surfaces upon which the tiles are to be fixed, establishing the nature of the surface being tiled
- P1.2 advise the customer correctly regarding any required preparation of the surface
- P1.3 establish how the finished tiled surfaces are to be used
- P1.4 identify and select appropriate adhesives and grout to meet the customer's needs
- P1.5 ensure that customers are fully informed about the products that will be used, including the order of application and how products are to be applied
- P1.6 identify whether there are any existing or planned fixtures, fittings, pipework and cabling, and establish correctly their potential impact for the fixing of the proposed tiles
- P1.7 agree with the customer how best to accommodate any existing or planned fixtures, fittings, pipework or cabling

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You need to know and understand:

- K1.1 the general principles of preparing surfaces on which tiles are to be fixed including fixing and using battens, and the circumstances when it is important to waterproof walls before tiling, and how to do this
- K1.2 those surfaces which are not suited for tiling, including flaking paint and wallpaper, the reasons why and what can be done to make them suitable
- K1.3 the types of flooring most commonly found in domestic and office buildings, and the conditions that must be satisfied for tiling to be appropriate
- K1.4 the purpose of movement joints and how these are sited
- K1.5 what a tanking system is, and the circumstances when it is required
- K1.6 the principal types of adhesives, grouts and admixes, the relative advantages of these and the suitability of the different types for different applications and locations when tiling, including suitability for wet areas

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1. Advise customers upon the fixing of tiles

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You need to:

- P1.8 ensure that customers are briefed on safe working and best practice techniques
- P1.9 determine whether there is, or will be, underfloor heating and determine correctly the impact for the fixing of the proposed tiles
- P1.10 explore with the customer and gain agreement on how the tiled surfaces are to be finished off
- P1.11 explain correctly how to take care of the tiled surfaces
- P1.12 offer the appropriate cleaning and maintenance products to the customer, where relevant
- P1.13 provide confidence to the customer that the decisions taken throughout the process will meet the customer's expectations and tiling requirements

You need to know and understand:

- K1.7 the principal methods for applying adhesives and grout and the importance of following manufacturers' instructions
- K1.8 the terms "slip, open time, drying/curing time" and their relevance to the use of adhesives and grouts
- K1.9 the principal types of tools used in the fixing, grouting and finishing of tiles
- K1.10 the principal types of tools and materials required for tile cutting and drilling, the respective purposes of these and how to use tools and materials safely including the use of tile cutters and tile nippers
- K1.11 how to cut and drill tiles safely and effectively and which tiles cannot be cut or drilled and why
- K1.12 methods and materials for fitting, fixing and sealing electrical underfloor heating systems
- K1.13 how to finish tiled surfaces off upon completion of tiling
- K1.14 the principal methods for undertaking routine cleaning and maintenance of all tiled surfaces including tiles and grouting, and how to recognise and deal with problems such as mildew, discolouration of tiles and grouting
- K1.15 the various cleaning and maintenance products available, the applications of these and how to use them safely

Maintain a display of cut flowers in a retail store

SVQ Unit	SCQF level	SCQF credit
C.43	5	3

Summary

This unit is for sales assistants who maintain displays of cut flowers in retail stores which don't specialise in floristry; for example, supermarkets or petrol forecourt shops.

Cut flowers in non-specialist stores are usually bought on impulse, so it is essential that the display always looks fresh and attractive. This involves noticing and getting rid of flowers which make the display unattractive. It also involves answering basic customer queries about the flowers on display.

1. Maintain a display of cut flowers in a retail store

You need to:

- P1.1 check, tidy and replenish the cut-flower display at suitable times
- P1.2 handle flowers in ways which keep them in a saleable condition
- P1.3 add water to the flowers on display at suitable times
- P1.4 balance the need to maintain the display with the need to allow customers to view and choose flowers
- P1.5 spot flowers which don't meet your store's standards for freshness, and remove them promptly
- P1.6 safely and effectively clean up water spillages on and around the cut-flower display

You need to know and understand:

- K1.1 the names of the cut flowers your store sells, and how to identify these flowers
- K1.2 the main reasons why customers buy cut flowers from your store, what they expect in terms of freshness and long life, and how the quality of the display affects sales
- K1.3 how to judge whether cut flowers are fresh enough for display, including how to recognise when flowers are in bud, blooming, overblown and decaying
- K1.4 why you need to remove flowers which are not fresh enough, including how they affect the condition of nearby flowers
- K1.5 when and how to check, tidy, and replenish the cut flower display and add water to the flowers as needed

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1. Maintain a display of cut flowers in a retail store

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You need to:

- P1.7 respond to customer's queries about the flowers on display politely and in ways that are likely to encourage customers to buy flowers from your store
- P1.8 when customers ask, identify the flowers on display for them; help them find the flowers they want, if these are available; and advise on the likely life of the flowers and how to prolong the life of the flowers

You need to know and understand:

- K1.6 how to handle cut flowers without damaging them
- K1.7 how to balance the need to tidy and replenish the display with the need to allow customers to view and choose flowers
- K1.8 how to safely and effectively clean up water spillages on or near the flower display
- K1.9 how to get rid of unsaleable flowers safely
- K1.10 how to respond to customer queries about cut flowers in ways that are polite and encourage sales
- K1.11 the likely life of cut flowers once the customer has bought them, and how customers can prolong the life of the cut flowers they buy in your store

Help customers to choose alcoholic beverages in a retail store

SVQ Unit	SCQF level	SCQF credit
C.45	6	6

Summary

This unit is about knowing how to help customers to choose the alcoholic beverages that best match their requirements. This involves knowing how to find out what customers are looking for, how to match products to requirements and how to support your recommendations with relevant product information. You also need to know how to establish a rapport with customers and how to recognise opportunities to increase sales by recommending associated or additional products where appropriate. Strict laws apply to the sale of alcohol in stores in the UK and you need to comply at all times with these and your store's policies.

1. Help customers to choose alcoholic beverages in a retail store

You need to:

- P1.1 follow all relevant laws and your store's policies relating to the sale of alcoholic beverages
- P1.2 when necessary, explain clearly and politely to customers the law and your store's policies relating to the sale of alcoholic beverages
- P1.3 use effective questioning techniques to establish a rapport with customers and find out what they are looking for
- P1.4 match products as closely as possible to customers' stated requirements, from the products available
- P1.5 support your product recommendations with factually correct information which is likely to give customers confidence in your recommendations

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You need to know and understand:

- K1.1 the laws and the store's policies relating to the sale of alcoholic beverages
- K1.2 why you must follow the law and your store's policies for selling alcohol and what can happen to you and to the company if these are not followed
- K1.3 when and how to explain to customers the law and your store's policies for selling alcohol
- K1.4 how to establish a rapport with customers
- K1.5 the kinds of questions you need to ask customers in order to find out their requirements
- K1.6 where to find reliable information about the alcoholic content of the alcoholic beverages the store carries

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1. Help customers to choose alcoholic beverages in a retail store

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You need to:

- P1.6 compare and contrast products in ways that help customers choose the products that best meet their requirements
- P1.7 encourage customers to ask you questions and respond to their questions, comments and objections in ways that promote sales and goodwill
- P1.8 recognise and act on suitable opportunities to recommend to customers associated or additional products
- P1.9 constantly check the store for security and potential sales whilst helping customers

You need to know and understand:

- K1.7 the characteristics of different alcoholic beverages and how to match these to customers' requirements
- K1.8 how product information can give customers confidence in your product recommendations
- K1.9 how to decide which product features are relevant and how much detail the customer needs to help them choose products
- K1.10 effective ways of comparing and contrasting products for customers
- K1.11 why it is important to encourage customers to ask questions about products
- K1.12 how to respond to customers' questions in ways which promote sales and goodwill
- K1.13 how to recognise opportunities to recommend associated or additional products
- K1.14 why it is important to check the store for security and potential sales whilst helping customers

Cash up in a retail store

SVQ Unit	SCQF level	SCQF credit
C.46	5	2

Summary

This unit is about your responsibility for cashing up one or more tills. This includes identifying and dealing with overages and shortages. It is very important that you keep cash and cash equivalents secure when cashing up.

1. Cash up in a retail store

You need to:

- P1.1 cash up in line with company routines and procedures
- P1.2 identify till overages and shortages and deal with these in line with company procedures and within the limits of your authority
- P1.3 where you are not authorised to resolve problems with overages and shortages yourself, report these promptly to the right person
- P1.4 follow company procedures for keeping cash, cash equivalents and yourself secure throughout the cashing-up process
- P1.5 use cashing-up equipment safely, effectively and efficiently

You need to know and understand:

- K1.1 company routines and procedures for cashing up
- K1.2 how to check for any overages and shortages
- K1.3 the reasons why overages and shortages occur
- K1.4 the level of your authority to deal with overages and shortages
- K1.5 who to contact regarding those discrepancies you cannot deal with yourself
- K1.6 company procedures for keeping cash, cash equivalents and yourself secure throughout the cashing-up process
- K1.7 what equipment to use for cashing-up and how to use it safely, effectively and efficiently

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Promote the store's credit card to customers

SVQ Unit	SCQF level	SCQF credit
C.47	5	3

Summary

This unit is about knowing how to encourage customers to apply for your store's credit card.

Credit cards are financial products and are subject to strict laws which you must comply with at all times. You also need to understand the features and benefits of your store's card and explain these to customers persuasively and within the limits of the law.

A credit card is not simply a card which offers rewards such as points or discounts, although it may have these additional features. The difference between a credit card and a card which is purely a loyalty card is that the customer incurs a financial debt when using a credit card to pay for purchases. This debt must eventually be paid, and can cost the customer extra money in the form of interest if payment is not made in full on the due date. If the store's card cannot be used in this way then this unit is not suitable for you.

1. Promote the store's credit card to customers

You need to:

- P1.1 take suitable opportunities and use effective questioning techniques to find out if customers have credit cards with your store
- P1.2 where customers aren't already card holders, tell them in a persuasive manner about the benefits to them of having the card
- P1.3 where customers are already card holders, acknowledge this and remind them in a friendly and persuasive manner of the benefits of using the card

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You need to know and understand:

- K1.1 the benefits to your store of having card holders
- K1.2 the opportunities you can take to ask customers if they are already card holders
- K1.3 friendly and engaging questioning techniques you can use to find out if customers are card holders
- K1.4 the benefits to the customer of having your store's credit card
- K1.5 how to explain to customers in a persuasive manner the benefits to them of being card holders

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1. Promote the store's credit card to customers

continued from previous page

You need to:

- P1.4 where customers express an interest in having the card, give them clear and factually accurate information about the features of the card including:
- the costs involved
 - the repayment terms
 - the customer's right to cancel the card
- P1.5 where customers express concern about the card, address their concerns honestly whilst continuing to stress the benefits of the card

You need to know and understand:

- K1.6 who is eligible to apply for the card
- K1.7 the features of your store's credit card including:
- the costs involved
 - the repayment terms
 - the customer's right to cancel the card
- K1.8 typical concerns which customers might have about the card
- K1.9 how to respond to customers' concerns honestly whilst continuing to stress the benefits of the card
- K1.10 why it is important to the business to make existing card holders feel special and to continue to promote to them the benefits of the card

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

SVQ Unit	SCQF level	SCQF credit
C.48	5	1

Summary

This unit is about your responsibility for the dressing room area. By providing a pleasant and welcoming environment for the customer you will enhance their shopping experience and encourage them to buy.

You are responsible for preparing the dressing room for use and monitoring it whilst in use. You create sales opportunities by offering assistance and telling customers about in-store promotions and offers. Using your customer service skills you:

- make customers feel valued
- help customers find the products they need.

Whilst enhancing the whole shopping experience for the customer you are also monitoring security and minimising stock loss.

1. Use the dressing room facilities to create sales opportunities

You need to:

- P1.1 monitor the sales floor for customers who may be interested in trying clothes on
- P1.2 welcome customers in a friendly manner when they approach the dressing room
- P1.3 check how many items are being taken into the cubicle, and follow company policy for restricting the number of items when necessary
- P1.4 politely but firmly advise the customer of the store policy regarding how many items of clothing are allowed in a cubicle at any one time and deal with any disputes
- P1.5 let the customer know how to get further help if needed

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You need to know and understand:

- K1.1 how many cubicles there are and what other facilities are available
- K1.2 when a dressing room is likely to be busy and needs to be open and when it is not so it can be closed
- K1.3 how to greet customers in a welcoming manner
- K1.4 store policy on checking how many items are being taken into the dressing room area and how to deal with customers who dispute the policy
- K1.5 how to keep yourself informed about in-store offers and promotions and how to advise the customer about them
- K1.6 how to engage the customer in conversation in order to suggest additional purchases

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1. Use the dressing room facilities to create sales opportunities

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You need to:

- P1.6 take suitable opportunities to tell customers about special offers and promotions
- P1.7 take suitable opportunities to suggest matching items and accessories
- P1.8 keep track of the number of cubicles that are in use whilst carrying out your other duties
- P1.9 politely check that the customer has brought all the items of clothing out of the cubicle which they took into it in case of any discrepancies
- P1.10 if there is a discrepancy promptly follow the store procedures on how to deal with possible stock loss
- P1.11 acknowledge customers who are waiting to use the dressing room and direct them to alternative facilities if these are available

You need to know and understand:

- K1.7 how to monitor customers entering and leaving the cubicles so none remain empty whilst customers are waiting
- K1.8 company procedures for dealing with suspected stock loss
- K1.9 the right person to contact if you suspect stock loss has occurred
- K1.10 how to check whether alternative dressing room areas are available at busy times

2. Keep dressing room facilities ready for customer use

You need to:

- P2.1 before opening a dressing room area check it is in a fit state for customers to use, in line with the company's standards for cleanliness, tidiness and hygiene
- P2.2 clean and tidy cubicles as needed, using suitable equipment and materials and safe and effective procedures
- P2.3 report to the right person any problems with the dressing room area which you cannot sort out yourself

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You need to know and understand:

- K2.1 why it is important to keep the dressing room area clean, tidy, and in good working order
- K2.2 the company's standards for the cleanliness, tidiness and hygiene of the dressing room area
- K2.3 who can help to resolve problems with the dressing room area which you are unable to deal with yourself
- K2.4 where cleaning materials are kept and how to clean the dressing room area safely and effectively

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2. Keep dressing room facilities ready for customer use

continued from previous page

You need to:

- P2.4 whilst the dressing room is open, regularly and discreetly check that the cubicles and dressing room area are clean, tidy and free from obstructions in line with company safety and security policies
- P2.5 when merchandise needs returning to the shop floor and this cannot be done immediately, place it in the designated area
- P2.6 prepare unsold merchandise for prompt return to the shop floor
- P2.7 follow company procedures for dealing with merchandise that is no longer of saleable quality

You need to know and understand:

- K2.5 how to routinely check in a discreet manner that the dressing room and cubicles are clean and tidy, whilst customers are using the area
- K2.6 where to store unsold merchandise before preparing it for return to the shop floor
- K2.7 how to prepare merchandise for return to the shop floor
- K2.8 how to recognise merchandise that is no longer of saleable quality
- K2.9 company procedures for dealing with merchandise that is no longer of saleable quality

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

SVQ Unit	SCQF level	SCQF credit
C.49	5	2

Summary

This unit is about offering customers samples of food or drink products to consume immediately, as a way of promoting sales. You need to select suitable products and prepare and display them so they look appealing. You also need to actively encourage customers to sample and buy products. You need to comply with food safety requirements when preparing, displaying and disposing of product samples.

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

You need to:

- P1.1 spot suitable opportunities to promote sales by making samples available to customers
- P1.2 select suitable products for sampling
- P1.3 prepare product samples in line with company procedures and standards for preparation and presentation
- P1.4 follow company procedures for giving customers information about potentially allergenic ingredients
- P1.5 spot suitable opportunities to encourage individual customers to sample products
- P1.6 use persuasive words and body language to encourage customers to sample and buy products
- P1.7 explain clearly to customers, when necessary, where they can buy the products sampled

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You need to know and understand:

- K1.1 how the opportunity to sample products helps to promote sales
- K1.2 the criteria for selecting products for sampling, including product type and sell-by date
- K1.3 the company's procedures and standards for preparing and displaying samples
- K1.4 the required temperatures for safely storing and serving samples
- K1.5 the information you must give customers about potentially allergenic ingredients, and the company's procedures for giving this information
- K1.6 how to spot opportunities to encourage customers to sample products
- K1.7 how to use words and body language to encourage customers to sample and buy products

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

continued from previous page

You need to:

- P1.8 monitor the freshness of samples on display and remove samples which no longer meet requirements for freshness
- P1.9 dispose of waste products in line with company and legal food safety requirements
- P1.10 follow company procedures and legal requirements for recording food disposals

You need to know and understand:

- K1.8 where customers can buy the products sampled and how to explain this clearly to customers
- K1.9 why it is important to monitor the freshness of samples on display, and how to do so
- K1.10 legal requirements and the company's procedures for disposing of waste products and recording food disposals

Deliver retail products to the customer's premises

SVQ Unit	SCQF level	SCQF credit
C.50	5	3

Summary

This unit is about delivering products to the customer's home or other place of delivery. It includes planning delivery schedules that make the best use of time and other resources. You need to deal with the customer in ways which give a positive impression of your company and encourage the customer to buy from your company again in future.

1. Deliver retail products to the customer's premises

You need to:

- P1.1 check that you have all the products you are due to deliver
- P1.2 check you have the equipment and paperwork needed for the delivery
- P1.3 check that you have all the delivery details you need and that you know how to get to the delivery address
- P1.4 plan a schedule of deliveries which makes the best use of time and other resources
- P1.5 check that you have enough fuel for your delivery schedule and follow company procedures for getting more fuel if needed
- P1.6 transport products and equipment safely and securely
- P1.7 deliver products at the times agreed with customers
- P1.8 take action in line with company procedures if you expect to arrive at the customer's premises early or late

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You need to know and understand:

- K1.1 how to check that you have all the products you are due to deliver
- K1.2 the equipment and paperwork you need to make deliveries and where to get these
- K1.3 what delivery details you need and where to get these
- K1.4 what sources of information to use for route planning, and how to use these
- K1.5 how an efficient delivery schedule benefits the business and the environment
- K1.6 how to plan a delivery schedule that makes the best use of time and other resources
- K1.7 how to check that you have enough fuel for your delivery schedule, and company procedures for getting more fuel if needed
- K1.8 how to transport products and equipment safely and securely
- K1.9 why it is important to deliver products at the times agreed with customers

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1. Deliver retail products to the customer's premises

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You need to:

- P1.9 follow company procedures for ensuring that deliveries are left only with individuals who may legally receive them
- P1.10 take action in line with company procedures if no one is available who can receive the delivery or if the customer rejects the delivery
- P1.11 unload orders safely and in ways which protect the orders from damage
- P1.12 treat the customer courteously throughout the delivery process
- P1.13 update records of delivery and non-delivery promptly and in line with company procedures

You need to know and understand:

- K1.10 the company procedures to follow if you expect to arrive at the customer's premises early or late
- K1.11 relevant legal restrictions on who can receive delivery
- K1.12 the company procedures to follow when no one is available who can receive the delivery and when the customer rejects the delivery
- K1.13 how to unload goods safely and in ways which protect goods from damage
- K1.14 why it is important to treat customers courteously, and how to do this
- K1.15 the records to keep of deliveries and non-deliveries and company procedures for completing these

Contribute to monitoring and maintaining ease of shopping in a retail sales area

SVQ Unit	SCQF level	SCQF credit
C.51	4	2

Summary

This unit is about making the sales area clean and tidy and then monitoring the area and maintaining it to ensure it remains that way. It is also about making it as easy as possible for customers to move freely around the sales area and make purchases. You need to maintain the overall impression of a clean, tidy and un-cluttered sales floor, and to do this without hindering customers whilst they shop.

1. Contribute to monitoring and maintaining ease of shopping in a retail sales area

You need to:

- P1.1** check your area of the sales floor at suitable times to ensure:
- the area is clean, tidy and free from hazards and obstructions
 - merchandise is in a saleable condition and meets company standards for positioning and presentation
 - information concerning prices, products and promotions is clearly visible to customers
- P1.2** maintain your area of the sales floor to the store standard without hindering customers from shopping

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You need to know and understand:

- K1.1** how the layout and appearance of the sales floor influences sales
- K1.2** company standards for the condition of the sales floor in relation to:
- cleanliness
 - tidiness
 - health and safety
 - positioning, condition and presentation of merchandise
 - positioning of information concerning products, prices and promotions
- K1.3** when and how to check the sales floor meets company standards
- K1.4** how to balance checking the sales floor during trading hours with your other duties

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1. Contribute to monitoring and maintaining ease of shopping in a retail sales area

continued from previous page

You need to:

- P1.3 promptly report problems that could have a negative effect on the customer experience
- P1.4 tell the right person promptly about any customer feedback you receive

You need to know and understand:

- K1.5 how to recognise when the condition of the sales floor is not satisfactory and how to correct it
- K1.6 the right person to contact if you are unable to restore the condition of the sales floor to the required standard
- K1.7 how to identify realistic ways to improve the condition of the sales floor so as to encourage sales
- K1.8 how to spot and report problems that could have a negative effect on the customer's shopping experience
- K1.9 who you need to tell about any customer feedback you receive

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

SVQ Unit	SCQF level	SCQF credit
C.52	5	4

Summary

This unit is about helping customers with the process of applying for your store's credit card and any associated insurance products you are authorised to offer the customer.

Credit cards and insurance are financial products and are subject to strict laws which you must comply with at all times.

A credit card is not simply a card which offers rewards such as points or discounts, although it may have these additional features. The difference between a credit card and a card which is purely a loyalty card is that the customer incurs a financial debt when using a credit card to pay for purchases. This debt must eventually be paid, and can cost the customer extra money in the form of interest if payment is not made in full on the due date. If the store's card cannot be used in this way then this unit is not suitable for you.

1. Offer customers insurance products associated with the store's credit card

You need to:

- P1.1** use compliant wording to give credit card applicants consistent, clear, unbiased and factually correct information about the associated insurance products available, including:
- whether or not the insurance is optional
 - the cost of the insurance
 - the cover available
 - significant and unusual exclusions
 - the customer's right to cancel the insurance

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You need to know and understand:

- K1.1** the difference between informing and advising customers about insurance products, and why you must give information and not advice
- K1.2** which insurance products you are authorised to offer, and to whom

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1. Offer customers insurance products associated with the store's credit card

continued from previous page

You need to:

- P1.2 offer customers the policy summary and explain clearly the benefits of reading it
- P1.3 allow customers enough time to read the policy summary if they wish
- P1.4 politely check that customers are eligible for the insurance products you are offering
- P1.5 in response to customers' requests for advice or recommendations, clearly and politely explain that you cannot answer these yourself and tell the customer who they can contact for further help
- P1.6 check that the customer understands the product information by listening carefully to what they say and observing their body language

You need to know and understand:

- K1.3 product features which you must tell the customer about, including:
 - whether or not the insurance is optional
 - the cost of the insurance
 - the cover available
 - significant and unusual exclusions
 - the customer's right to cancel the insurance
- K1.4 how to give customers information about insurance products which is:
 - consistent
 - clear
 - unbiased
 - factually correct
 - compliant with relevant legislation, regulations and guidelines
- K1.5 the benefits to the customer of reading the policy summary
- K1.6 legal requirements for offering the customer the opportunity to read the policy summary
- K1.7 who is eligible for the insurance products you offer and how to check eligibility
- K1.8 how to deal with customers' requests for advice and recommendations concerning insurance products
- K1.9 who the customer can contact for help with queries which you are not authorised to deal with yourself

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1. Offer customers insurance products associated with the store's credit card

continued from previous page

You need to know and understand:

K1.10 why it is important to check that the customer understands the product information you give, and the verbal and non-verbal indications to listen and look for

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

You need to:

- P2.1** meet legal and company requirements for giving customers information about the application process
- P2.2** if customers wish to take the application form away to consider, make it clear that they are welcome to do so and follow procedures for voiding the blank form
- P2.3** ask customers politely for proof of identity and check that suitable proof is provided
- P2.4** keep the customer's personal data secure throughout the application process
- P2.5** process applications in line with the procedures agreed between the store and the insurer
- P2.6** where an application is accepted, confirm clearly to the customer:
- the decision
 - the customer's credit limit
 - the Annual Percentage Rate which applies
- P2.7** follow procedures to enable accounts to be set up for customers whose applications have been accepted

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You need to know and understand:

- K2.1** the legal and company requirements for giving customers information about the application process
- K2.2** why customers may wish to take application forms away to study in detail and why this is to be welcomed
- K2.3** why you must void blank application forms and how to do so
- K2.4** why customers must prove their identity and what proofs you can accept
- K2.5** why you must keep customers' personal data secure during the application process and how to do this
- K2.6** the procedures agreed between the store and the insurer for processing applications
- K2.7** the procedures to follow when an application is accepted
- K2.8** how to treat customers with courtesy and tact when their applications have been declined
- K2.9** why you must not try to guess with customers about the possible reasons why their applications have been declined

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

continued from previous page

You need to:

- P2.8 where an application is declined, tell the customer tactfully and explain how they can enquire about the reasons
- P2.9 where technical problems occur with the application system or equipment, deal with these in line with procedures and report promptly to the right person any problems you can't resolve yourself

You need to know and understand:

- K2.10 the contact details you can give to customers who want to enquire further about declined applications
- K2.11 how to use the application system and equipment and how to deal with technical problems that may occur with these

Help customers to choose delicatessen products in a retail outlet

SVQ Unit	SCQF level	SCQF credit
C.54	5	6

Summary

This unit is about helping customers to choose delicatessen products in a specialist retail outlet or on a specialist counter within a more general retail outlet such as a supermarket or department store.

For the purposes of this unit, delicatessen products are ready-to-serve products such as cheese, cold cooked meats and salads.

The unit involves providing information about products to help customers to make choices, as well as spotting opportunities to recommend additional products. Where products cannot be portioned in the way the customer requests, alternatives need to be tactfully suggested.

1. Help customers to choose delicatessen products in a retail outlet

You need to:

- P1.1 use effective questioning techniques to establish a rapport with customers and find out what they are looking for
- P1.2 match products as closely as possible to customers' stated requirements, from the products available
- P1.3 support your product recommendations with factually correct information which is likely to give customers confidence in your recommendations
- P1.4 compare and contrast products in ways that help customers choose the products that best meet their requirements

continued on next page

You need to know and understand:

- K1.1 how to establish a rapport with customers
- K1.2 the kinds of questions you need to ask customers in order to find out their requirements
- K1.3 where to find reliable information about the products you are responsible for selling
- K1.4 effective ways of comparing and contrasting products for customers
- K1.5 how to recognise opportunities to recommend associated or additional products

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1. Help customers to choose delicatessen products in a retail outlet

continued from previous page

You need to:

- P1.5 recognise and act on suitable opportunities to recommend to customers associated or additional products
- P1.6 tactfully suggest alternative portion sizes or products when customers' requests are impractical

You need to know and understand:

- K1.6 practical limits on portion weight, size or shape
- K1.7 how to explain tactfully to customers when portion requirements cannot be met, and what alternatives can be offered

Portion delicatessen products in a retail outlet to meet individual customers' requirements

SVQ Unit	SCQF level	SCQF credit
C.55	5	6

Summary

This unit is about portioning delicatessen products in a specialist retail outlet or on a specialist counter within a more general retail outlet such as a supermarket or department store.

For the purposes of this unit, delicatessen products are ready-to-serve products such as cheese, cold cooked meats and salads.

The customer specifies the portion size or weight and expects the resulting portions to be very close to the specified size or weight and to be in a presentable condition.

1. Portion delicatessen products in a retail outlet to meet individual customers' requirements

You need to:

- P1.1 handle and portion products in ways which comply with all relevant food safety requirements
- P1.2 use tools and utensils suited to the product
- P1.3 cut products so as to:
 - produce conventionally acceptable portion shapes
 - maintain the attractiveness of the product
 - minimise waste
 - comply with all relevant health and safety requirements
- P1.4 when weighing portions, take into account the weight of any additional items on the scales such as containers

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You need to know and understand:

- K1.1 the food safety and general health and safety requirements to be complied with when handling, portioning and disposing of products
- K1.2 which tools and utensils to use with which products and why
- K1.3 how to cut products safely and in ways which achieve the required portion whilst minimising waste
- K1.4 the conventionally accepted portion shapes for the products you are responsible for portioning
- K1.5 how to use weighing scales, including how to allow for the weight of additional items such as containers

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1. Portion delicatessen products in a retail outlet to meet individual customers' requirements

continued from previous page

You need to:

- P1.5 check that the customer is satisfied with the portioned product before it is wrapped
- P1.6 place portioned products in suitable packaging
- P1.7 check that the product from which portions have been taken is still in saleable condition, and adjust, remove or replace it as needed
- P1.8 dispose of any unsaleable products in line with all relevant health and safety requirements, including food safety requirements

You need to know and understand:

- K1.6 how to choose packaging to suit the product type and portion size
- K1.7 accepted standards of presentation for products from which portions have been taken
- K1.8 when and how to adjust or dispose of remaining products

Help customers to choose specialist products in a retail environment

SVQ Unit	SCQF level	SCQF credit
C.56	6	7

Summary

This unit is for you if you are a sales assistant working in retail and you give expert advice to customers on specialist products. Specialist products are ones for which many customers will welcome in-depth advice to help them to choose the products that best meet their needs.

1. Help customers to choose specialist products in a retail environment

You need to:

- P1.1 judge from customers' body language and immediate circumstances whether they are likely to respond positively to an attempt to engage them in conversation
- P1.2 adapt your speech and body language so as to establish and maintain a rapport with individual customers
- P1.3 interact with customers in ways that support the company's brand values
- P1.4 explore customers' requirements with them to establish what the customer is looking for
- P1.5 provide customers with product information that is clear, factually correct, legally compliant and selected for its relevance to the customer's needs

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You need to know and understand:

- K1.1 your company's brand values in relation to its product offer, pricing and service
- K1.2 how your company compares with its competitors on product offer, pricing and service
- K1.3 the customer profiles for your store
- K1.4 the elements of a positive customer experience in relation both to your company and to the products you sell
- K1.5 how customers' circumstances, such as who they are with or the time of day, affect their willingness to engage in conversation with a salesperson
- K1.6 how to recognise from customers' body language whether they are likely to respond positively to an approach from a salesperson

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1. Help customers to choose specialist products in a retail environment

continued from previous page

You need to:

- P1.6 match the features and benefits of available products as closely as possible to customers' needs
- P1.7 compare and contrast products in ways that help customers to choose the products that best meet their needs
- P1.8 respond to customers' questions in a confident manner and in ways that are likely to promote sales and goodwill
- P1.9 recommend to customers related products that are likely to enhance their experience of the product they are purchasing
- P1.10 keep abreast of new products and product trends in your area of expertise
- P1.11 actively seek ways of maintaining your own enthusiasm for the products in your area of expertise

You need to know and understand:

- K1.7 how to establish and maintain a rapport with individual customers
- K1.8 the meaning of specialist terminology that knowledgeable customers are likely to use in relation to the products you sell
- K1.9 how the products you sell are produced or obtained, and how these methods affect the nature and quality of the products
- K1.10 any legal restrictions relating to the products you sell, such as where the products come from or who can buy or use the products, and how to explain these to customers
- K1.11 any health and safety considerations that customers must be warned about, or are likely to ask about, in relation to the products you sell
- K1.12 any ethical and environmental concerns that customers are likely to have about the products you sell, and how to address these
- K1.13 what related products are available from your organisation that would enhance customers' experience of the products you sell
- K1.14 sources of up-to-date production information and how to access and use these
- K1.15 the sources of after-sales advice and support that are available to customers
- K1.16 the customer's legal rights and the organisation's policy concerning returns

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1. Help customers to choose specialist products in a retail environment

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You need to know and understand:

K1.17 the importance of maintaining your own enthusiasm for the products you sell

K1.18 how to search for and evaluate opportunities to maintain your enthusiasm for the products you sell

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Demonstrate specialist products to customers in a retail environment

SVQ Unit	SCQF level	SCQF credit
C.57	6	5

Summary

This unit is about creating and making the most of opportunities to demonstrate specialist products to customers. Specialist products are ones for which many customers will welcome in-depth advice to help them to choose the products that best meet their needs.

1. Demonstrate specialist products to customers in a retail environment

You need to:

- P1.1 judge from customers' body language and immediate circumstances whether they are likely to respond positively to an invitation to watch or take part in a product demonstration
- P1.2 organise product demonstrations in ways that ensure a smoothly-run, efficient demonstration that meets health and safety requirements
- P1.3 give demonstrations that clearly show the customer the use and value of the product
- P1.4 offer customers the opportunity to use the product themselves, when it is safe, legal and cost-effective to do so
- P1.5 encourage customers to ask questions about the products being demonstrated

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You need to know and understand:

- K1.1 how demonstrations can help to promote and sell specialist products
- K1.2 the elements of a positive customer experience in relation both to your company and to the specialist products you demonstrate to customers
- K1.3 how customers' circumstances, such as who they are with or the time of day, affect their willingness to watch or take part in a product demonstration
- K1.4 how to recognise from customers' body language whether they are likely to respond positively to an invitation to watch or take part in a product demonstration
- K1.5 how to establish a rapport with individual customers and maintain this throughout a product demonstration

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1. Demonstrate specialist products to customers in a retail environment

continued from previous page

You need to:

- P1.6 respond to customers' comments and questions during demonstrations in ways that promote sales and goodwill
- P1.7 take the necessary steps, within the limits of your own authority, to minimise any security risks associated with the demonstrations you carry out

You need to know and understand:

- K1.6 the health and safety requirements that apply to the demonstrations you give
- K1.7 what constitutes a smoothly-run and efficient product demonstration
- K1.8 how to keep customers interested during product demonstrations
- K1.9 how to respond to customers' comments and questions during demonstrations in ways that promote sales and goodwill
- K1.10 the steps you are authorised to take to minimise the security risks associated with product demonstrations

Provide a counter/takeaway service (People 1st)

SVQ Unit	SCQF level	SCQF credit
C.58	4	3

Summary

This unit is about taking customers' orders and serving food and drink on a counter or takeaway basis. It also covers maintaining the counter and service areas, with items such as trays and utensils, and displaying food and drink items in the correct manner.

1. Serve customers at the counter

You need to:

- P1.1 give your customers information that meets their needs, and promotes your organisation's products and services
- P1.2 find out what your customers require, and if necessary tell them about any waiting time
- P1.3 process the order promptly
- P1.4 serve food and drink items at the recommended temperature, using clean, hygienic and undamaged service equipment of the appropriate type
- P1.5 make sure there are appropriate condiments and accompaniments available for your customers

You need to know and understand:

- K1.1 safe and hygienic working practices for serving customers at the counter and why these are important
- K1.2 why it is important to use separate serving equipment for each food item
- K1.3 why food and drink items must be served at the correct temperature
- K1.4 why portions must be controlled when serving customers
- K1.5 why information given to customers must be accurate
- K1.6 the types of unexpected situations that may occur when serving customers and how to deal with these

2. Maintain counter and service areas

You need to:

- P2.1 keep your work area tidy, hygienic and free from rubbish and food debris during service
- P2.2 maintain enough stocks of clean service items
- P2.3 restock with food and drink items when necessary
- P2.4 display and store food and drink items in line as required
- P2.5 clear the work area of used and un-required service items at the appropriate times
- P2.6 dispose of rubbish, used disposable items and food waste as required

You need to know and understand:

- K2.1 safe and hygienic practices for clearing and why these are important
- K2.2 why food which is prepared first, should be served first
- K2.3 why maintaining food at the correct temperature is important and how you can ensure this
- K2.4 why counter service preparation areas and dining areas must be kept tidy and free from rubbish and food debris throughout service
- K2.5 why waste must be handled and disposed of correctly
- K2.6 why a constant stock of service items should be maintained
- K2.7 the types of unexpected situations that may occur when clearing away and how to deal with these

Give customers a positive impression of yourself and your organisation (CfA Business Skills @ Work)

SVQ Unit	SCQF level	SCQF credit
D.10	5	5

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.

Knowledge and understanding which relates to the whole of this unit

You need to know and understand:

- K1.1 your organisation's standards for appearance and behaviour
- K1.2 your organisation's guidelines for how to recognise what your customer wants and respond appropriately
- K1.3 your organisation's rules and procedures regarding the methods of communication you use
- K1.4 how to recognise when a customer is angry or confused
- K1.5 your organisation's standards for timeliness in responding to customer questions and requests for information

1. Establish rapport with customers

You need to:

- P1.1 meet your organisation's standards of appearance and behaviour
- P1.2 greet your customer respectfully and in a friendly manner
- P1.3 communicate with your customer in a way that makes them feel valued and respected
- P1.4 identify and confirm your customer's expectations
- P1.5 treat your customer courteously and helpfully at all times
- P1.6 keep your customer informed and reassured
- P1.7 adapt your behaviour to respond to different customer behaviour

2. Respond appropriately to customers

You need to:

- P2.1 respond promptly to a customer seeking help
- P2.2 choose the most appropriate way to communicate with your customer
- P2.3 check with your customer that you have fully understood their expectations
- P2.4 respond promptly and positively to your customer's questions and comments
- P2.5 allow your customer time to consider your response and give further explanation when appropriate

3. Communicate information to customers

You need to:

- P3.1 quickly find information that will help your customer
- P3.2 give your customer information they need about the services or products offered by your organisation
- P3.3 recognise information that your customer might find complicated and check whether they fully understand
- P3.4 explain clearly to your customers any reasons why their expectations cannot be met

Support customer service improvements (CfA Business Skills @ Work)

SVQ Unit	SCQF level	SCQF credit
D.11	5	5

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.

Knowledge and understanding which relates to the whole of this unit

You need to know and understand:

- K1.1 how customer experience is influenced by the way service is delivered
- K1.2 how customer feedback is obtained
- K1.3 how to work with others to identify and support change in the way service is delivered
- K1.4 why it is important to give a positive impression to your customer about the changes made by your organisation even if you disagree with them

1. Use feedback to identify potential customer service improvements

You need to:

- P1.1 gather informal feedback from your customers
- P1.2 use your organisation's procedures to collect feedback from your customers
- P1.3 use the information from your customers to develop a better understanding of their customer service experience
- P1.4 identify ways the service you give could be improved based on information you have gathered
- P1.5 share your ideas for improving customer service with colleagues

2. Implement changes in customer service

You need to:

- P2.1 identify a possible change that could be made to improve customer service
- P2.2 present your idea for improving customer service to a colleague with the appropriate authority to approve the change
- P2.3 carry out changes to customer service procedures based on your own idea or proposed by your organisation
- P2.4 keep your customers informed of changes to customer service
- P2.5 give customers a positive impression of changes that have been made
- P2.6 work positively with others to support customer service changes

3. Assist with the evaluation of changes in customer service

You need to:

- P3.1 discuss with others how changes to customer service are working
- P3.2 work with others to identify any negative effects of changes and how these can be avoided

Resolve customer service problems (CfA Business Skills @ Work)

SVQ Unit	SCQF level	SCQF credit
D.12	5	6

Summary

This unit is about what to do when it is difficult to meet customer expectations. Even if the service you give is excellent, some customers experience problems. Part of your job is to help to resolve those problems. There is likely to be a problem if customer expectations are not met. This may be because your customer's expectations involve more than you can offer or because your service procedures have not been followed. Some problems are reported by customers and sometimes you spot the problem first and resolve it before your customer has even noticed. As soon as you are aware of a problem, you need to consider the options and then choose a way to put it right. This unit is particularly important in customer service because many customers judge how good the customer service of your organisation is by the way problems are handled.

Knowledge and understanding which relates to the whole of this unit

You need to know and understand:

- K1.1 organisational procedures and systems for dealing with customer service problems
- K1.2 how to defuse potentially stressful situations
- K1.3 how to negotiate
- K1.4 the limitations of what you can offer your customer
- K1.5 types of action that may make a customer problem worse and should be avoided

1. Spot customer service problems

You need to:

- P1.1 listen carefully to your customers about any problem they have raised
- P1.2 ask your customers about the problem to check your understanding
- P1.3 recognise repeated problems and alert the appropriate authority
- P1.4 share customer feedback with others to identify potential problems before they happen
- P1.5 identify problems with systems and procedures before they begin to affect your customers

2. Pick the best solution to resolve customer service problems

You need to:

- P2.1 identify the options for resolving a customer service problem
- P2.2 work with others to identify and confirm the options to resolve a customer service problem
- P2.3 work out the advantages and disadvantages of each option for your customer and your organisation
- P2.4 pick the best option for your customer and your organisation
- P2.5 identify for your customer other ways that problems may be resolved if you are unable to help

3. Take action to resolve customer service problems

You need to:

- P3.1 discuss and agree the options for solving the problem with your customer
- P3.2 take action to implement the option agreed with your customer
- P3.3 work with others and your customer to make sure that any promises related to solving the problem are kept
- P3.4 keep your customer fully informed about what is happening to resolve the problem
- P3.5 check with your customer to make sure the problem has been resolved to their satisfaction
- P3.6 give clear reasons to your customer when the problem has not been resolved to their satisfaction

Organise the delivery of reliable customer service (CfA Business Skills @ Work)

SVQ Unit	SCQF level	SCQF credit
D.13	6	6

Summary

This unit is about how you deliver and maintain excellent and reliable customer service. Your role may or may not involve supervisory or management responsibilities but you are expected to take some responsibility for the resources and systems you use which support the service that you give. In your job you must be alert to customer reactions and know how they can be used to improve the service that you give. In addition, customer service information must be recorded to support reliable service.

Knowledge and understanding which relates to the whole of this unit

You need to know and understand:

- K1.1 organisational procedures for unexpected situations and your role within them
- K1.2 resource implications in times of staff sickness and holiday periods and your responsibility at these times
- K1.3 the importance of having reliable and fast information for your customers and your organisation
- K1.4 organisational procedures and systems for delivering customer service
- K1.5 how to identify useful customer feedback and how to decide which feedback should be acted on
- K1.6 how to communicate feedback from customers to others
- K1.7 organisational procedures and systems for recording, storing, retrieving and supplying customer service information
- K1.8 legal and regulatory requirements regarding the storage of data

1. Plan and organise the delivery of reliable customer service

You need to:

- P1.1 plan, prepare and organise everything you need to deliver services or products to different types of customers
- P1.2 organise what you do to ensure that you are consistently able to give prompt attention to your customers
- P1.3 reorganise your work to respond to unexpected additional workloads

2. Review and maintain customer service delivery

You need to:

- P2.1 maintain service delivery during very busy periods and unusually quiet periods
- P2.2 maintain service delivery when systems, people or resources have let you down
- P2.3 consistently meet your customers' expectations
- P2.4 balance the time you take with your customers with the demands of other customers seeking your attention
- P2.5 respond appropriately to your customers when they make comments about the products or services you are offering
- P2.6 alert others to repeated comments made by your customers
- P2.7 take action to improve the reliability of your service based on customer comments
- P2.8 monitor the action you have taken to identify improvements in the service you give to your customers

3. Use recording systems to maintain reliable customer service

You need to:

- P3.1 record and store customer service information accurately following organisational guidelines
- P3.2 select and retrieve customer service information that is relevant, sufficient and in an appropriate format
- P3.3 quickly locate information that will help solve a customer's query
- P3.4 supply accurate customer service information to others using the most appropriate method of communication

Improve the customer relationship (CfA Business Skills @ Work)

SVQ Unit	SCQF level	SCQF credit
D.14	6	7

Summary

To improve relationships with your customers you need to deliver consistent and reliable customer service. In addition, customers need to feel that you genuinely want to give them high levels of service and that you make every possible effort to meet or exceed their expectations. This encourages loyalty from external customers or longer-term service partnerships with internal customers. You need to be proactive in your dealings with your customers and to respond professionally in all situations. You need to negotiate between your customers and your organisation or department in order to find some way of meeting your customers' expectations. In addition you need to make extra efforts to delight your customers by exceeding their customer service expectations.

Knowledge and understanding which relates to the whole of this unit

You need to know and understand:

- K1.1 how to make best use of the method of communication chosen for dealing with your customers
- K1.2 how to negotiate effectively with your customers
- K1.3 how to assess the costs and benefits to your customer and your organisation of any unusual agreement you make
- K1.4 the importance of customer loyalty and/or improved internal customer relationships to your organisation

1. Improve communication with your customers

You need to:

- P1.1 select and use the best method of communication to meet your customers' expectations
- P1.2 take the initiative to contact your customers to update them when things are not going to plan or when you require further information
- P1.3 adapt your communication to respond to individual customers' feelings

2. Balance the needs of your customer and your organisation

You need to:

- P2.1 meet your customers' expectations within your organisation's service offer
- P2.2 explain the reasons to your customers sensitively and positively when their expectations cannot be met
- P2.3 identify alternative solutions for your customers either within or outside the organisation
- P2.4 identify the costs and benefits of these solutions to your organisation and to your customers
- P2.5 negotiate and agree solutions with your customers which satisfy them and are acceptable to your organisation
- P2.6 take action to satisfy your customers with the agreed solution when balancing their needs with those of your organisation

3. Exceed customer expectations to develop the relationship

You need to:

- P3.1 make extra efforts to improve your relationship with your customers
- P3.2 recognise opportunities to exceed your customers' expectations
- P3.3 take action to exceed your customers' expectations within the limits of your own authority
- P3.4 gain the help and support of others to exceed your customers' expectations

Work with others to improve customer service (CfA Business Skills @ Work)

SVQ Unit	SCQF level	SCQF credit
D.15	6	8

Summary

Teamwork is a key component of delivering and improving excellent customer service. The people you work with to improve customer service may include one or more of the following: team members; colleagues; suppliers; service partners; supervisors; managers; team leaders. The delivery of excellent customer service depends on your skills and those of others. It involves communicating with each other and agreeing how you can work together to give a more effective service. You need to work together positively. You must also monitor your own and the team's performance and change the way you do things if that improves customer service. This unit is about how you develop a relationship with others to improve your customer service performance.

Knowledge and understanding which relates to the whole of this unit

You need to know and understand:

- K1.1 who else is involved either directly or indirectly in the delivery of customer service
- K1.2 the roles and responsibilities of others in your organisation
- K1.3 the roles of others outside your organisation who have an impact on your services or products
- K1.4 what the goals or targets of your organisation are in relation to customer service and how these are set
- K1.5 how your organisation identifies improvements in customer service

1. Improve customer service by working with others

You need to:

- P1.1 contribute constructive ideas for improving customer service
- P1.2 identify what you have to do to improve customer service and confirm this with others
- P1.3 agree with others what they have to do to improve customer service
- P1.4 co-operate with others to improve customer service
- P1.5 keep your commitments made to others
- P1.6 make others aware of anything that may affect plans to improve customer service

2. Monitor your own performance when improving customer service

You need to:

- P2.1 discuss with others how what you do affects customer service performance
- P2.2 identify how the way you work with others contributes towards improving customer service

3. Monitor team performance when improving customer service

You need to:

- P3.1 discuss with others how teamwork affects customer service performance
- P3.2 work with others to collect information on team customer service performance
- P3.3 identify with others how customer service teamwork could be improved
- P3.4 take action with others to improve customer service performance

Monitor and solve customer service problems (CfA Business Skills @ Work)

SVQ Unit	SCQF level	SCQF credit
D.16	6	6

Summary

Your job involves delivering and organising excellent customer service. However good the service provided, some of your customers will experience problems and you will spot and solve other problems before your customers even know about them. This unit is about the part of your job that involves solving immediate customer service problems. It is also about changing systems to avoid repeated customer service problems. Remember that some customers judge the quality of your customer service by the way that you solve customer service problems. You can impress customers and build customer loyalty by sorting out those problems efficiently and effectively. Sometimes a customer service problem presents an opportunity to impress a customer in a way that would not have been possible if everything had gone smoothly.

Knowledge and understanding which relates to the whole of this unit

You need to know and understand:

- K1.1 organisational procedures and systems for dealing with customer service problems
- K1.2 organisational procedures and systems for identifying repeated customer service problems
- K1.3 how the successful resolution of customer service problems contributes to customer loyalty with the external customer and improved working relationships with service partners or internal customers
- K1.4 how to negotiate with and reassure customers while their problems are being solved

1. Solve immediate customer service problems

You need to:

- P1.1 respond positively to customer service problems following organisational guidelines
- P1.2 solve customer service problems when you have sufficient authority
- P1.3 work with others to solve customer service problems
- P1.4 keep customers informed of the actions being taken
- P1.5 check with customers that they are comfortable with the actions being taken
- P1.6 solve problems with service systems and procedures that might affect customers before they become aware of them
- P1.7 inform managers and colleagues of the steps taken to solve specific problems

2. Identify repeated customer service problems and options for solving them

You need to:

- P2.1 identify repeated customer service problems
- P2.2 identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option
- P2.3 work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of your organisation

3. Take action to avoid the repetition of customer service problems

You need to:

- P3.1 obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated
- P3.2 action your agreed solution
- P3.3 keep your customers informed in a positive and clear manner of steps being taken to solve any service problems
- P3.4 monitor the changes you have made and adjust them if appropriate

Promote continuous improvement (CfA Business Skills @ Work)

SVQ Unit	SCQF level	SCQF credit
D.17	7	7

Summary

This unit covers the key competence of the customer service professional. You must be dedicated to the continuous improvement of customer service and this involves organising changes in the way customer service is delivered over and over again. You need to identify potential changes, think through their consequences and make them work. Above all, this unit covers the competence of organising and seeing through change that is sustainable and is in the spirit of continuous improvement in customer service.

Knowledge and understanding which relates to the whole of this unit

You need to know and understand:

- K1.1 how service improvements in your area affect the balance between overall customer satisfaction, the costs of providing service and regulatory requirements
- K1.2 how customer experience is influenced by the way service is delivered
- K1.3 how to collect, analyse and present customer feedback
- K1.4 how to make a business case to others to bring about change in the products or services you offer

1. Plan improvements in customer service based on customer feedback

You need to:

- P1.1 gather feedback from customers that will help to identify opportunities for customer service improvement
- P1.2 analyse and interpret feedback to identify opportunities for customer service improvements and propose changes
- P1.3 discuss with others the potential effects of any proposed changes for your customers and your organisation
- P1.4 negotiate changes in customer service systems and improvements with somebody with sufficient authority to approve trial or full implementation of the change

2. Implement changes in customer service

You need to:

- P2.1 organise the implementation of authorised changes
- P2.2 implement the changes following organisational guidelines
- P2.3 inform people inside and outside your organisation who need to know of the changes being made and the reasons for them
- P2.4 monitor early reactions to changes and make appropriate fine-tuning adjustments

3. Review changes to promote continuous improvement

You need to:

- P3.1 collect and record feedback on the effects of changes
- P3.2 analyse and interpret feedback and share your findings on the effects of changes with others
- P3.3 summarise the advantages and disadvantages of the changes
- P3.4 use your analysis and interpretation of changes to identify opportunities for further improvement
- P3.5 present these opportunities to somebody with sufficient authority to make them happen

Help to keep the retail unit secure

SVQ Unit	SCQF level	SCQF credit
E.01	4	4

Summary

This unit is about helping to protect people, property and premises by noticing and reporting security risks in the store as you go about your day-to-day work. Security risks are situations where people, property or premises are at risk of theft, damage or abuse. You are also expected to do your work in ways that contribute to keeping the store secure, for example by not leaving goods or cash unattended.

1. Identify and report security risks in a retail environment

You need to:

- P1.1 notice and correctly identify security risks
- P1.2 follow company procedures for reporting security risks
- P1.3 report security risks to the right people promptly and accurately
- P1.4 follow company procedures for preventing security risks while you work
- P1.5 notice where stock may have been stolen and tell the right person about it

You need to know and understand:

- K1.1 why workplace security matters
- K1.2 what can happen, to you and to the company, if the store is not kept secure
- K1.3 your responsibility for helping to keep the workplace secure by noticing and reporting security risks
- K1.4 the types of security risk you need to be alert for, including:
 - shoplifting
 - theft by staff
 - aggressive customers
 - vandalism
 - terrorist activity
- K1.5 how to identify security risks
- K1.6 situations that can make you less alert for security risks, and how to deal with these situations
- K1.7 why you must report security risks promptly and accurately
- K1.8 who to report security risks to and how to communicate these risks

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1. Identify and report security risks in a retail environment

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You need to know and understand:

K1.9 the reasons why you should not take on more responsibility than you are authorised to do when faced with security risks, including:

- personal safety
- legal considerations
- company policy

Help to maintain health and safety in a retail environment

SVQ Unit	SCQF level	SCQF credit
E.02	4	5

Summary

This unit is about your contribution to keeping your workplace a safe place for colleagues, customers and other visitors. You need to be able to recognise the types of accident and emergency that can happen in the workplace and know how to get help in these situations. You also need to follow procedures for working ways that do not put anyone's health or safety in danger. In particular, working in a store involves lifting and handling goods and you need to use safe lifting techniques so that you don't injure yourself or other people.

1. Identify and report accidents and emergencies in a retail environment

You need to:

- P1.1 notice and correctly identify accidents and emergencies
- P1.2 get help promptly and in the most suitable way
- P1.3 follow company policy and procedures for preventing further injury while waiting for help to arrive
- P1.4 act within the limits of your responsibility and authority when accidents and emergencies arise
- P1.5 promptly follow instructions given by senior staff and the emergency services

You need to know and understand:

- K1.1 the types of accident and emergency that tend to happen in stores and why they happen
- K1.2 how to get help in the event of an accident or emergency
- K1.3 the action you can safely and usefully take while waiting for help to arrive
- K1.4 why you must not take on more responsibility than you are authorised to do when accidents and emergencies happen, including:
 - personal safety
 - legal considerations
 - company policy

2. Protect health and safety as you work in a retail environment

You need to:

- P2.1** follow company procedures and legal requirements for reducing health and safety risks as far as possible while you work
- P2.2** use safety equipment correctly and in the right situations
- P2.3** get advice and help from the right people when you are concerned about your ability to work safely

You need to know and understand:

- K2.1** the types of health and safety risk that can arise in a store environment
- K2.2** company procedures and legal requirements for reducing health and safety risks as far as possible while you work
- K2.3** what can happen to you and to the company if you do not follow health and safety procedures
- K2.4** the safety equipment you need to use and why you need to use it
- K2.5** approved procedures for using safety equipment
- K2.6** who can provide advice and help if you are concerned about your ability to work safely

3. Lift and handle goods safely in a retail environment

You need to:

- P3.1 take suitable safety measures before lifting to protect yourself and other people
- P3.2 use approved lifting and handling techniques
- P3.3 check that any equipment you need to use is fit for use
- P3.4 use lifting and handling equipment in line with company guidelines and manufacturers' instructions
- P3.5 plan a safe and efficient route for moving goods
- P3.6 make sure that you understand your responsibilities when you ask others to help in lifting and handling operations

You need to know and understand:

- K3.1 how to find out what you can lift safely
- K3.2 how to find out the weight of the loads you are asked to lift
- K3.3 company guidelines for not lifting more than is safe
- K3.4 why you should plan your route when moving goods
- K3.5 how to plan your route when moving goods, including the types of obstacles to look for and how to remove or avoid them
- K3.6 approved techniques for safe handling and lifting
- K3.7 company guidelines and manufacturers' instructions for using lifting and handling equipment
- K3.8 how using unsafe techniques for lifting and handling can affect you, the people lifting with you, and others close by

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Work effectively in your retail team

SVQ Unit	SCQF level	SCQF credit
E.03	4	7

Summary

For the purposes of this unit, the 'team' could be just you and your manager. This unit is about two aspects of being effective at work. The first is about working with colleagues to achieve results together. It is about following instructions, asking for help when you need it and helping your team mates willingly when your own workload allows. Secondly, the unit is about your responsibility for learning new information and tasks at work, with the help and guidance of your manager or trainer. You need to know what you are expected to learn, follow your training programme and ask for help if you are having difficulty.

1. Work well as part of a retail team

You need to:

- P1.1 ask colleagues promptly and politely for the help and information you need to do your work
- P1.2 respond willingly and promptly to colleagues' requests for help and information when your workload allows and without taking on more responsibility than you are authorised to do
- P1.3 ask a suitable person for advice about any problems that you cannot solve yourself in working with colleagues
- P1.4 follow instructions for safeguarding health and safety as you work

You need to know and understand:

- K1.1 how to keep track of how much work you have to do and how long it is likely to take
- K1.2 why you should ask for help and information from colleagues when you need it
- K1.3 why you should offer help to colleagues and respond positively to requests for help, whenever possible
- K1.4 how the law and your organisation define discrimination, bullying and harassment
- K1.5 company procedures for dealing with discrimination, bullying and harassment
- K1.6 why you must always follow instructions for safeguarding health and safety as you work

2. Follow plans and procedures for learning in a retail environment

You need to:

- P2.1 check that you are clear about what you need to learn and when you need to learn it by
- P2.2 check that you are clear about how you will learn, including the specific action points in your training programme
- P2.3 promptly ask the right people for help when you are having problems following your training programme

You need to know and understand:

- K2.1 why you need to be an effective learner at work
- K2.2 which people are responsible for setting your targets and helping you learn
- K2.3 why you need to plan your learning and why you need action points and deadlines in your training programme
- K2.4 company procedures for following training programmes
- K2.5 why you should ask for help with any problems you have with your training, and who to ask

Keep the retail environment clean and hygienic (non-food)

SVQ Unit	SCQF level	SCQF credit
E.04	4	3

Summary

This unit is about keeping work areas and work surfaces clean and tidy, as well as keeping yourself and your clothing clean enough for the work that you do. This unit is for you if no food is stored, handled or processed in the areas you are responsible for cleaning.

1. Keep work surfaces clean in a retail environment

You need to:

- P1.1 get the equipment and materials that are suitable for the surfaces that need cleaning
- P1.2 safely position the cleaning equipment and materials and any items you must move
- P1.3 keep the risk of spillages to a minimum and clean up any spillages promptly and thoroughly
- P1.4 get rid of rubbish and waste promptly and safely
- P1.5 disturb other people as little as possible while cleaning
- P1.6 check that surfaces are thoroughly clean
- P1.7 store cleaning equipment and materials correctly and promptly when you have finished cleaning

You need to know and understand:

- K1.1 company procedures for cleaning work surfaces
- K1.2 the equipment and materials for cleaning work surfaces and their uses
- K1.3 where cleaning equipment and materials are stored, and why you should put them away promptly after use
- K1.4 why you must position cleaning equipment and materials and other items safely, and how to do so
- K1.5 the health and safety risks posed by spillages and why you must clean up spillages promptly
- K1.6 how to follow the Control of Substances Hazardous to Health Regulations (COSHH) when carrying out routine cleaning and when dealing with spillages
- K1.7 techniques for reducing as far as possible the risk of spillages and how to clean up spillages thoroughly
- K1.8 why you should get rid of rubbish and waste promptly and safely, and how to do so

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1. Keep work surfaces clean in a retail environment

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You need to know and understand:

- K1.9 why you should disturb other people as little as possible while cleaning, and how to do so
- K1.10 company standards for clean work surfaces, and how to check you have achieved them

2. Get rid of waste and litter in a retail environment

You need to:

- P2.1 use suitable equipment to tidy work areas
- P2.2 check that equipment is safe to use before starting to use it
- P2.3 get rid of waste and litter safely and in line with company procedures
- P2.4 disturb other people as little as possible while getting rid of waste and litter
- P2.5 store equipment correctly and promptly after use

You need to know and understand:

- K2.1 why work areas should be kept free of waste and litter, including health and safety reasons
- K2.2 the safe methods for getting rid of waste and litter
- K2.3 the equipment to use and how to check it is safe to use
- K2.4 company procedures for getting rid of waste and litter
- K2.5 where equipment is stored and why you should put it away promptly after use
- K2.6 how to cause the least disturbance to other people when getting rid of waste and litter

3. Maintain personal hygiene in a retail environment

You need to:

- P3.1 wear protective clothing that is clean and suitable for the work you need to do
- P3.2 dispose correctly of used clothing and products
- P3.3 use effective practices and techniques for keeping your hair, skin and nails clean enough for the work you do

You need to know and understand:

- K3.1 why hygiene is important in your workplace, and how keeping yourself clean contributes to this
- K3.2 how a clean and tidy appearance helps to give customers a positive impression of you and the organisation
- K3.3 effective cleaning practices and techniques for keeping your hair, skin and nails clean enough for the work you do

Help to maintain health and safety in a retail environment

SVQ Unit	SCQF level	SCQF credit
E.06	5	4

Summary

This unit is about two aspects of your contribution to health and safety. Firstly, you need to be able to recognise and report accidents and emergencies and deal with them within the limits of your authority. Secondly, you need to know and follow the health and safety requirements laid down by your company and the law. This includes dealing with risks within the limits of your authority and reporting any risks you do not have the authority to deal with.

1. Deal with accidents and emergencies in a retail environment

You need to:

- P1.1 follow company procedures and legal requirements for dealing with accidents and emergencies
- P1.2 speak and behave in a calm way while dealing with accidents and emergencies
- P1.3 report accidents and emergencies promptly, accurately and to the right person
- P1.4 recognise when evacuation procedures have been started and following company procedures for evacuation

You need to know and understand:

- K1.1 company procedures and legal requirements for dealing with accidents and emergencies
- K1.2 how speaking and behaving in a calm way helps to promote safety during emergency situations
- K1.3 techniques for speaking and behaving in a calm way while dealing with accidents and emergencies
- K1.4 how reporting accidents and emergencies promotes health and safety
- K1.5 legal and company requirements for reporting accidents and emergencies
- K1.6 company procedures for evacuation, including how the alarm is raised and where emergency exits and assembly points are

2. Help to reduce risks to health and safety in a retail environment

You need to:

- P2.1 follow the health and safety requirements laid down by your company and by law, and encourage colleagues to do the same
- P2.2 promptly take the approved action to deal with risks if you are authorised to do so
- P2.3 if you do not have authority to deal with risks, report them promptly to the right person
- P2.4 use equipment and materials in line with the manufacturer's instructions

You need to know and understand:

- K2.1 the health and safety requirements laid down by your company and by law
- K2.2 how setting a good example can contribute to health and safety in the workplace
- K2.3 the limits of your authority and responsibility for dealing with health and safety risks, and the importance of not taking on more responsibility than you are authorised to
- K2.4 approved procedures for dealing with health and safety risks
- K2.5 who to report health and safety risks to
- K2.6 what can happen to you and to others if you do not use equipment and materials in line with the manufacturer's instructions
- K2.7 where to find instructions for using equipment and materials

Help to keep the retail unit secure

SVQ Unit	SCQF level	SCQF credit
E.07	5	6

Summary

This unit is about your role in protecting the security of premises, stock, cash, colleagues and customers. You need to deal with security risks within the limits of your authority, and report those you do not have authority to deal with. You also need to follow company policies and procedures for maintaining security while you work, for example by noticing what customers are doing.

1. Help to keep the retail environment secure

You need to:

- P1.1 take prompt and suitable action to reduce security risks as far as possible, where it is within the limits of your responsibility and authority to do so
- P1.2 follow company policy and legal requirements when dealing with security risks
- P1.3 recognise when security risks are beyond your authority and responsibility to sort out, and report these risks promptly to the right person
- P1.4 use approved procedures and techniques for protecting your personal safety when security risks arise
- P1.5 follow company policies and procedures for maintaining security while you work
- P1.6 follow company policies and procedures for making sure that security will be maintained when you go on your breaks and when you finish work

You need to know and understand:

- K1.1 the types of security risk that can arise in your workplace
- K1.2 how much authority and responsibility you have to deal with security risks, including your legal rights and duties
- K1.3 company policy and procedures for dealing with security risks in your workplace
- K1.4 who to report security risks to, and how to contact them
- K1.5 the approved procedures and techniques for protecting your personal safety when security risks arise
- K1.6 company policies and procedures for maintaining security while you work
- K1.7 company policies and procedures for making sure that security will be maintained when you go on your breaks and when you finish work

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Work effectively in your retail organisation

SVQ Unit	SCQF level	SCQF credit
E.08	6	9

Summary

This unit is about being an effective member of your team, including taking some responsibility for helping colleagues to learn. The unit involves supporting your team's efforts by sharing the workload fairly, making realistic commitments and doing your best to keep them, and contributing to team morale and good working relations. The unit is also about being an effective learner in the workplace. It assumes that you receive some help and support in planning and carrying out your learning plans. Your responsibilities are to contribute to the planning process, carry out your plan and report on your progress.

Finally, the unit is about helping colleagues to gain the information and skills they need to do their jobs. It involves passing on to colleagues your own knowledge and skills as you go about your day-to-day work. This standard is not about being a professional trainer and you are not expected to assess your colleagues' performance formally.

1. Support effective team working in a retail environment

You need to:

- P1.1 share work fairly with colleagues, taking account of your own and others' preferences, skills and time available
- P1.2 make realistic commitments to colleagues and do what you have promised you will do
- P1.3 let colleagues know promptly if you will not be able to do what you have promised and suggest suitable alternatives
- P1.4 encourage and support colleagues when working conditions are difficult
- P1.5 encourage colleagues who are finding it difficult to work together to treat each other fairly, politely and with respect

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You need to know and understand:

- K1.1 your team's purpose, aims and targets
- K1.2 your responsibility for contributing to the team's success
- K1.3 your colleagues' roles and main responsibilities
- K1.4 the importance of sharing work fairly with colleagues
- K1.5 the factors that can affect your own and colleagues' willingness to carry out work, including skills and existing workload
- K1.6 the importance of being a reliable team member

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1. Support effective team working in a retail environment

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You need to:

P1.6 follow the company's health and safety procedures as you work

You need to know and understand:

K1.7 the factors to take account of when making commitments, including your existing workload and the degree to which interruptions and changes of plan are within your control

K1.8 the importance of maintaining team morale, the circumstances when morale is likely to flag, and the kinds of encouragement and support that are likely to be valued by colleagues

K1.9 the importance of good working relations, and techniques for removing tension between colleagues

K1.10 the importance of following the company's policies and procedures for health and safety, including setting a good example to colleagues

2. Help to plan and organise your own learning in a retail environment

You need to:

P2.1 discuss and agree with the right people goals that are relevant, realistic and clear

P2.2 identify the knowledge and skills you will need to achieve your goals

P2.3 agree action points and deadlines that are realistic, taking account of your past learning experiences and the time and resources available for learning

P2.4 regularly check your progress and, when necessary, change the way you work

P2.5 ask for feedback on your progress from those in a position to give it, and use their feedback to improve your performance

You need to know and understand:

K2.1 who can help you set goals, help you plan your learning, and give you feedback about your progress

K2.2 how to identify the knowledge and skills you will need to achieve your goals

K2.3 how reflecting on your past learning experiences can help you to plan your future learning, and techniques for doing so

K2.4 how to work out how much time you need to devote to learning and how much time you can make available for learning

K2.5 how often to check your progress and how to do this

K2.6 how to adjust your plans as needed to help you meet your goals

K2.7 why you should ask for feedback on your progress, how to do so, and how to respond positively

3. Help others to learn in a retail environment

You need to:

- P3.1 encourage colleagues to ask you for work-related information or advice that you are likely to be able to provide
- P3.2 notice when colleagues are having difficulty performing tasks at which you are competent, and tactfully offer advice
- P3.3 give clear, accurate and relevant information and advice relating to tasks and procedures
- P3.4 explain and demonstrate procedures clearly, accurately and in a logical sequence
- P3.5 encourage colleagues to ask questions if they don't understand the information and advice you give them
- P3.6 give colleagues opportunities to practise new skills, and give constructive feedback
- P3.7 check that health, safety and security are not compromised when you are helping others to learn
- P3.8 recognise when you are not the most appropriate person to advise colleagues in their learning and guide them to suitable sources of help

You need to know and understand:

- K3.1 your role in helping others to learn in the workplace
- K3.2 how to work out what skills and knowledge you can usefully share with others
- K3.3 how and when to offer help and advice to colleagues who are learning
- K3.4 methods of helping others to learn on the job, and how to choose suitable methods for different learning situations
- K3.5 health, safety and security risks that are likely to arise when people are learning on the job, and how to reduce these risks
- K3.6 sources of help within your organisation for people who are learning, and how to access them

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Help to manage a retail team

SVQ Unit	SCQF level	SCQF credit
E.09	6	11

Summary

This unit is about managing a team when you are not a full-time team leader. For example, you might lead a team responsible for a special event, sales preparation, stock-taking or emergency situations. You are expected to manage the smooth running of the team's work. You need to understand and act within the limits of your responsibility when acting as team leader, and to ask your manager for advice whenever you need it. The unit does not require you to take responsibility for formally developing or disciplining team members.

1. Help to manage a retail team

You need to:

- P1.1 set an example for the team by following company procedures and policies at all times
- P1.2 check that team members are following company procedures and policies
- P1.3 take prompt and suitable action when team members are not following company procedures and policies
- P1.4 give clear information and instructions to your team
- P1.5 use methods suited to individual team members' levels of motivation and expertise, when encouraging them to complete tasks
- P1.6 recognise when team members need support
- P1.7 choose and apply suitable methods for supporting team members
- P1.8 praise good performance promptly and tell your manager about it

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You need to know and understand:

- K1.1 company procedures and policies relating to the work of your team and the way your team's daily activities are managed, including:
 - health and safety
 - security
 - staffing levels
 - absence reporting
 - timekeeping
 - personal appearance
 - handling customer complaints
- K1.2 laws and regulations relating to the products your team sells
- K1.3 why you should set an example to team members by following the company's procedures and policies at all times
- K1.4 how to check that team members follow the company's procedures and policies
- K1.5 what you must do when team members are not following the company's procedures and policies
- K1.6 how clear communication helps teams to work effectively

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1. Help to manage a retail team

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You need to:

- P1.9 manage your own time so that you carry out both your management duties and your other duties
- P1.10 recognise when you should treat information as confidential and release it only to those who have a right to it
- P1.11 share work and privileges fairly between team members
- P1.12 act within the limits of your responsibility and authority
- P1.13 promptly ask the right person for advice when problems are beyond your responsibility, authority or expertise to resolve

You need to know and understand:

- K1.7 how to give instructions so that team members will readily understand them and feel motivated to follow them
- K1.8 why you need to be approachable as a team leader
- K1.9 different ways of motivating and encouraging staff, and how to choose which method to use
- K1.10 the kinds of support team members are likely to need, what kinds of support you can provide and how to do so
- K1.11 how to plan, prioritise and delegate so that you can fulfil your management duties as well as your other duties
- K1.12 the types of confidential information to which team leaders have access, and the importance of respecting confidentiality
- K1.13 why you must treat all team members fairly
- K1.14 the challenges involved in managing people who also know you as a friend or fellow team member, and techniques for resisting pressure from team members to abuse your responsibilities
- K1.15 the limits of your responsibility and authority when managing the team
- K1.16 who can help to sort out problems that are beyond your responsibility, authority or expertise
- K1.17 the kinds of information your manager needs from you, when it is needed and in what format

Contribute to the continuous improvement of retail operations

SVQ Unit	SCQF level	SCQF credit
E.10	6	10

Summary

This unit is about helping your store to improve the way it operates, so that you or they can achieve or improve on sales targets and standards of service. You will need to have a thorough knowledge of day-to-day operations in your area of responsibility and be able spot things that could be improved and suggest practical and cost-effective ways of improving them.

The unit is also about presenting your recommendations persuasively to management. Finally, you need to put improvements into practice. This involves working with other people and sometimes experiencing their resistance to new ways of doing things. As a result, you need to communicate your plans persuasively, support staff through the change and demonstrate your own commitment to the change.

1. Identify opportunities for solving problems and improving retail operations

You need to:

- P1.1 get accurate, up-to-date information from relevant sources about operations you are responsible for
- P1.2 accurately identify the causes of problems where operations are not meeting quality standards or sales targets
- P1.3 clearly and accurately identify the scope for further development where operations are achieving quality standards and sales targets
- P1.4 accurately assess possible improvements to see if they are practical, consistent with company policy and style, and easy to put into practice
- P1.5 identify the ideas that offer the greatest benefits for the organisation and its customers

You need to know and understand:

- K1.1 the company's standards for customer service
- K1.2 the sales targets your unit is expected to reach
- K1.3 company policies, procedures and computerised systems affecting your work
- K1.4 the main characteristics of the company's customer base and products or services
- K1.5 different sources of facts and opinions about operational performance and how useful each one is
- K1.6 common causes of failure to achieve quality standards and sales targets
- K1.7 how to identify aspects of customer service and sales that could be improved

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1. Identify opportunities for solving problems and improving retail operations

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You need to know and understand:

- K1.8 how to generate ideas for improving customer service and sales
- K1.9 how to evaluate the benefits of potential improvements and how urgent they are
- K1.10 how to work out what resources you would need to put improvements into practice
- K1.11 how to weigh the costs of your improvements against the benefits

2. Recommend ways of improving retail operations

You need to:

- P2.1 offer recommendations to management that are clear, concise, in a suitable format and supported by relevant information
- P2.2 clearly and honestly acknowledge recommendations that are based on suggestions from other people
- P2.3 clearly explain the benefits the recommended improvements could bring and the resources needed to put them into practice
- P2.4 discuss recommendations with the relevant decision makers

You need to know and understand:

- K2.1 how to present your recommendations to management clearly, concisely and in a suitable format
- K2.2 the types of questions and concerns management are likely to have when considering your recommendations, and how to handle these
- K2.3 why it is important to encourage staff and colleagues to suggest ideas for improvement, and why it is important to make sure they get the credit if their ideas are put into practice

3. Contribute to putting improvements in retail operations into practice

You need to:

- P3.1 explain plans to staff in a way which encourages understanding and involvement
- P3.2 give appropriate support, encouragement, advice and training to members of staff for as long as they need it
- P3.3 promptly ask for appropriate advice and support when you have problems putting improvements into practice
- P3.4 consistently show staff by your behaviour that you are committed to achieving the benefits of the improvement

You need to know and understand:

- K3.1 why it is important for staff to understand the purpose and intended benefits of improvements
- K3.2 different ways of explaining plans to staff, and how to decide which one to use
- K3.3 how your manner and behaviour while explaining improvements can affect your staff's response to plans
- K3.4 why it is important to show enthusiasm and lead by example when putting improvements into practice
- K3.5 how and why different people will need different levels of support, encouragement, advice and training to put improvements into practice
- K3.6 how to identify problems with putting improvements into practice and who to ask for advice and support

Help to monitor and maintain the security of the retail unit

SVQ Unit	SCQF level	SCQF credit
E.11	6	11

Summary

This unit is about two aspects of your responsibility for keeping the store secure. Firstly, it is about monitoring and maintaining the security of people, property, premises and cash as part of your daily routine. As well as personally checking the security of the work area and sorting out any problems you identify, you need to make sure that staff are clear about their own responsibilities for maintaining security and that they understand the security procedures they must follow.

The second part of the unit is about your responsibility for monitoring levels of stock, equipment, cash and cash equivalents and identifying and investigating any losses. It also involves drawing conclusions about how wastage and losses can be prevented in future, taking preventive measures and training staff to help reduce wastage and losses as far as possible.

1. Put procedures into practice to maintain security in a retail environment

You need to:

- P1.1 monitor the work area often enough to identify possible problems with security
- P1.2 identify problems with security and deal with them promptly, legally and in line with company requirements
- P1.3 brief and update staff clearly and often enough about security procedures and their responsibilities for maintaining security

You need to know and understand:

- K1.1 the security procedures to put into practice when opening, operating and closing your retail unit
- K1.2 the security threats most likely to happen in a retail unit
- K1.3 the company's policies for responsibility for security
- K1.4 different methods of briefing staff about security arrangements, and when it is appropriate to use each method
- K1.5 who has authority to stop and search staff and customers and how to contact the relevant authorities

2. Monitor and investigate losses in a retail environment

You need to:

- P2.1 monitor levels of stock, equipment, cash and cash equivalents thoroughly and often enough, using methods that are consistent with security policy and procedures
- P2.2 identify losses, record them accurately and investigate their causes promptly
- P2.3 identify and investigate ways of preventing wastage and loss and put them into practice
- P2.4 evaluate loss control thoroughly and accurately, using valid and reliable information
- P2.5 explain clearly to staff the nature and extent of wastage and losses, the problems caused by wastage and losses and how staff can help to reduce wastage and losses

You need to know and understand:

- K2.1 the company's security policy and procedures
- K2.2 procedures for identifying and recording losses
- K2.3 the company's investigation procedures and its definition of unacceptable losses
- K2.4 how unacceptable losses are likely to happen in a retail unit
- K2.5 items most likely to be at risk in the retail unit
- K2.6 the purpose of loss-control and stock-taking systems
- K2.7 different strategies for preventing wastage and loss and when to use each one
- K2.8 how to check loss evaluations

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

SVQ Unit	SCQF level	SCQF credit
E.12	7	11

Summary

This unit is about working out how many staff need to be on duty in the store to maintain the levels of customer service and profitability needed. You need to produce plans and schedules that take account of all the relevant factors and that are easy to understand and use. You also need to collect, analyse and evaluate information about progress towards work targets, and make justifiable recommendations for changes in staffing.

1. Plan staffing levels and prepare work schedules for a retail team

You need to:

- P1.1 produce staffing plans and schedules that cover all operational needs and take account of operational limits
- P1.2 produce staffing plans and schedules that include accurate numbers and realistic levels of skill, work allocation, places where people will work and start and finish times
- P1.3 schedule hours of work that keep to relevant laws, company policy and contracts of employment
- P1.4 produce plans that are easy for the relevant people to understand and use
- P1.5 include realistic emergency plans to cope with abnormal situations

You need to know and understand:

- K1.1 why staffing plans are needed
- K1.2 relevant laws, company policy and contract terms and conditions which affect the hours that staff must work
- K1.3 the relationship between staffing plans and work targets
- K1.4 how to work out staffing requirements
- K1.5 how to produce and present staffing plans in a form suitable for the needs of the relevant people
- K1.6 how to schedule work so that you meet operational needs and take account of operational limits

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

You need to:

- P2.1 collect and organise enough information about the staff available and the work they are doing
- P2.2 assess realistically whether you have enough staff for the targets you need to achieve
- P2.3 find out what progress is being made towards achieving your work targets
- P2.4 use the information about staffing and progress towards targets to make realistic and justifiable assessments of how effective staff are
- P2.5 adjust staffing levels and schedules so that you can meet targets
- P2.6 clearly and promptly recommend changes in staffing to your manager
- P2.7 promptly pass on the results of assessments to the people who need them
- P2.8 use the results of assessments to encourage staff to reach their targets

You need to know and understand:

- K2.1 how staffing levels and the way in which staff are used can affect the work that can be done
- K2.2 how to collect and evaluate information on staffing
- K2.3 how to adjust staffing levels and schedules
- K2.4 the factors, other than staffing, that may affect progress towards work targets, and the effect these are likely to have
- K2.5 how to justify assessments of effectiveness
- K2.6 how your manner and behaviour when presenting the results of assessments is likely to influence staff's response to them

Recruit, select and keep colleagues (CfA - Business skills @ work)

SVQ Unit	SCQF level	SCQF credit
E.13	9	12

Summary

This unit is mainly about recruiting and selecting people to undertake identified activities or work roles within your area of responsibility. It involves taking a fair and objective approach to recruitment and selection to ensure that individuals with the required skills, knowledge and understanding, and who are likely to perform effectively, are appointed.

As recruitment and selection can be expensive and time-consuming activities, the unit also involves taking action to understand why colleagues are leaving and taking action to keep colleagues.

Whilst you would be expected to draw on the expertise of personnel specialists, you are not expected to be a personnel specialist yourself.

For the purposes of this unit, 'colleagues' means those people for whom you have line management responsibility.

The NOS in this unit are from the Management and Leadership suite of NOS, overseen by CfA Business Skills @ Work.

1. Recruit, select and keep colleagues

You need to:

- P1.1 talk with colleagues who are leaving your area of responsibility to identify and discuss their reasons for leaving
- P1.2 identify ways of addressing staff turnover problems, implementing those which clearly fall within your authority and communicating others to the relevant people for consideration

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You need to know and understand:

General knowledge and understanding

- K1.1 why it is important to identify and understand why colleagues are leaving and how to do so constructively and sensitively
- K1.2 the types of reasons colleagues might give for leaving
- K1.3 how to measure staff turnover
- K1.4 the causes and effects of high **and** low staff turnover

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1. Recruit, select and keep colleagues

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You need to:

- P1.3 review, on a regular basis, the work required in your area of responsibility, identifying any shortfall in the number of colleagues and/or the pool of skills, knowledge, understanding and experience
- P1.4 identify and review the options for addressing any identified shortfalls and decide on the best option(s) to follow
- P1.5 consult with others to produce or update job descriptions and person specifications where there is a clear need to recruit
- P1.6 consult with others to discuss and agree stages in the recruitment and selection process for identified vacancies, the methods that will be used, the associated timings and who is going to be involved
- P1.7 ensure that any information on vacancies is fair, clear and accurate before it goes to potential applicants
- P1.8 seek and make use of specialist expertise in relation to recruiting, selecting and keeping colleagues
- P1.9 ensure that the skills needed by applicants to succeed in the recruitment process are no more than are required to perform the job
- P1.10 participate in the recruitment and selection process, as agreed, making sure that the process is fair, consistent and effective

You need to know and understand:

- K1.5 measures which can be undertaken to address staff turnover problems
- K1.6 how to review the workload in your area in order to identify shortfalls in the number of colleagues and/or the pool of skills, knowledge, understanding and experience
- K1.7 how to identify actual skills and avoid stereotyping with regard to skills levels and work ethics
- K1.8 different options for addressing identified shortfalls and their associated advantages and disadvantages
- K1.9 what job descriptions and person specifications should cover and why it is important to consult with others in producing or updating them
- K1.10 different stages in the recruitment and selection process and why it is important to consult with others on the stages, recruitment and selection methods to be used, associated timings and who is going to be involved
- K1.11 different recruitment and selection methods and their associated advantages and disadvantages
- K1.12 why it is important to give fair, clear and accurate information on vacancies to potential applicants
- K1.13 how cultural differences in language, body language, tone of voice and dress can differ from expectations
- K1.14 how to judge whether applicants meet the stated requirements of the vacancy

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1. Recruit, select and keep colleagues

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You need to:

- P1.11 make sure that applicants who are offered positions are likely to be able to perform effectively and work with their new colleagues
- P1.12 judge whether the recruitment and selection process has been successful in relation to recent appointments in your area and identify any areas for improvements

You need to know and understand:

- K1.15 sources of specialist expertise in relation to recruitment, selection and retention
- K1.16 how to take account of equality, diversity and inclusion issues, including legislation and any relevant codes of practice, when recruiting and selecting people and keeping colleagues
- K1.17 how to review the effectiveness of recruitment and selection in your area

Industry/sector specific knowledge and understanding

- K1.18 turnover rates within similar organisations in the industry/sector
- K1.19 recruitment, selection and retention issues and specific initiatives and arrangements within the industry/sector
- K1.20 working culture and practices of the industry/sector

Context specific knowledge and understanding

- K1.21 current people resources available to your area, including skills, knowledge, understanding and experience of colleagues
- K1.22 work requirements in your area
- K1.23 agreed operational plans and changes in your area
- K1.24 the staff turnover rate in your area
- K1.25 job descriptions and person specifications for confirmed vacancies
- K1.26 local employment market conditions
- K1.27 the organisation's structure, values and culture

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1. Recruit, select and keep colleagues

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You need to know and understand:

K1.28 employment policies and practices within the organisation - including recruitment, selection, induction, development, promotion, retention, redundancy, dismissal, pay and other terms and conditions

K1.29 sources of specialist expertise in relation to recruitment, selection and retention used by your organisation

2. Behaviours which underpin effective performance

You need to:

- P2.1** recognise the opportunities presented by the diversity of people
- P2.2** work to turn unexpected events into opportunities rather than threats
- P2.3** try out new ways of working
- P2.4** identify people's information needs
- P2.5** seek to understand people's needs and motivations
- P2.6** comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
- P2.7** take and implement difficult and/or unpopular decisions, if necessary
- P2.8** act within the limits of your authority
- P2.9** show integrity, fairness and consistency in decision making

Provide learning opportunities for colleagues (CfA - Business skills @ work)

SVQ Unit	SCQF level	SCQF credit
E.14	8	11

Summary

This unit is about supporting colleagues in identifying their learning needs and helping to provide opportunities to address these needs.

Encouraging colleagues to take responsibility for their own learning is an aspect of this unit as is your role in providing an 'environment', for example, in your team or area of responsibility, in which learning is valued.

For the purposes of this unit, 'colleagues' means those people for whom you have line management responsibility.

The NOS in this unit are from the Management and Leadership suite of NOS, overseen by CfA Business Skills @ Work

1. Provide learning opportunities for colleagues

You need to:

- P1.1 promote the benefits of learning to colleagues and make sure that their willingness and efforts to learn are recognised
- P1.2 give colleagues fair, regular and useful feedback on their work performance, discussing and agreeing how they can improve
- P1.3 work with colleagues to identify and prioritise learning needs based on any gaps between the requirements of their work roles and their current knowledge, understanding and skills

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You need to know and understand:

General knowledge and understanding

- K1.1 the benefits of learning for individuals and organisations and how to promote these to colleagues
- K1.2 ways in which you can develop an 'environment' in which learning is valued and willingness and efforts to learn are recognised
- K1.3 why it is important to encourage colleagues to take responsibility for their own learning
- K1.4 how to provide fair, regular and useful feedback to colleagues on their work performance

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1. Provide learning opportunities for colleagues

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You need to:

- P1.4 help colleagues to identify the learning style(s) or combination of styles which works best for them and ensure that these are taken into account in identifying and undertaking learning activities
- P1.5 work with colleagues to identify and obtain information on a range of possible learning activities to address identified learning need
- P1.6 recognise and seek to find out about differences in expectations and working methods of any team members from a different country or culture and promote ways of working that take account of their expectations and maximise productivity
- P1.7 discuss and agree, with each colleague, a development plan which includes learning activities to be undertaken, the learning objectives to be achieved, the required resources and timescales
- P1.8 work with colleagues to recognise and make use of unplanned learning opportunities
- P1.9 seek and make use of specialist expertise in relation to identifying and providing learning for colleagues
- P1.10 support colleagues in undertaking learning activities, making sure any required resources are made available and making efforts to remove any obstacles to learning

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You need to know and understand:

- K1.5 how to identify learning needs based on identified gaps between the requirements of colleagues' work roles and their current knowledge, understanding and skills
- K1.6 how the values, ethics, beliefs, faith, cultural conventions, perceptions and expectations of any people from other countries or cultures may impact on their personal development and learning
- K1.7 how to prioritise learning needs of colleagues, including taking account of organisational needs and priorities and the personal and career development needs of colleagues
- K1.8 the range of different learning styles and how to support colleagues in identifying the particular learning style(s) or combination of learning styles which works best for them
- K1.9 different types of learning activities, their advantages and disadvantages and the required resources (for example, time, fees, substitute staff)
- K1.10 how/where to identify and obtain information on different learning activities
- K1.11 why it is important for colleagues to have a written development plan and what it should contain (for example, identified learning needs, learning activities to be undertaken and the learning objectives to be achieved, timescales and required resources)
- K1.12 how to set learning objectives which are SMART (Specific, Measurable, Achievable, Realistic and Time-Bound)
- K1.13 sources of specialist expertise in relation to identifying and providing learning for colleagues

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1. Provide learning opportunities for colleagues

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You need to:

- P1.11 evaluate, in discussion with each colleague, whether the learning activities they have undertaken have achieved the desired outcomes and provide positive feedback on the learning experience
- P1.12 work with colleagues to update their development plan in the light of performance, any learning activities undertaken and any wider changes
- P1.12 encourage colleagues to take responsibility for their own learning, including practising and reflecting on what they have learned

You need to know and understand:

- K1.14 what type of support colleagues might need to undertake learning activities, the resources needed and the types of obstacles they may face and how they can be resolved
- K1.15 how to evaluate whether a learning activity has achieved the desired learning objectives
- K1.16 the importance of regularly reviewing and updating written development plans in the light of performance, any learning activities undertaken and any wider changes
- K1.17 how to take account of equality legislation, any relevant codes of practice and general diversity and inclusion issues in providing learning opportunities for colleagues

Industry/sector specific knowledge and understanding

- K1.18 industry/sector requirements for the development or maintenance of knowledge, skills and understanding and professional development
- K1.19 learning issues and specific initiatives and arrangements that apply within the industry/sector
- K1.20 working culture and practices of the industry/sector

Context specific knowledge and understanding

- K1.21 relevant information on the purpose, objectives and plans of your team or area of responsibility or the wider organisation
- K1.22 the work roles of colleagues, including the limits of their responsibilities and their personal work objectives

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1. Provide learning opportunities for colleagues

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You need to know and understand:

- K1.23 the current knowledge, understanding and skills of colleagues
- K1.24 identified gaps in the knowledge, understanding and skills of colleagues
- K1.25 identified learning needs of colleagues
- K1.26 learning style(s) or combinations of styles preferred by colleagues
- K1.27 the written development plans of colleagues
- K1.28 sources of specialist expertise available in/to your organisation in relation to identifying and providing learning for colleagues
- K1.29 learning activities and resources available in/to your organisation
- K1.30 your organisation's policies in relation to equality and diversity
- K1.31 your organisation's policies and procedures in relation to learning
- K1.32 your organisation's performance appraisal systems

2. Behaviours which underpin effective performance

You need to:

- P2.1 recognise the opportunities presented by the diversity of people
- P2.2 find practical ways to overcome barriers
- P2.3 make time available to support others
- P2.4 seek to understand individuals' needs, feelings and motivations and take an active interest in their concerns
- P2.5 encourage and support others to make the best use of their abilities
- P2.6 recognise the achievements and the success of others
- P2.7 inspire others with the excitement of learning
- P2.8 confront performance issues and sort them out directly with the people involved
- P2.9 say 'no' to unreasonable requests
- P2.10 show integrity, fairness and consistency in decision making

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Develop productive working relationships with colleagues (CfA - Business skills @ work)

SVQ Unit	SCQF level	SCQF credit
E.15	6	9

Summary

This unit is about developing working relationships with colleagues, within your own organisation and within other organisations, that are productive in terms of supporting and delivering your work and that of the overall organisation.

'Colleagues' are any people you are expected to work with, whether they are at a similar position or in other positions, including your manager.

The NOS in this unit are from the Management and Leadership suite of NOS, overseen by CfA Business Skills @ Work.

1. Develop productive working relationships with colleagues

You need to:

- P1.1 establish working relationships with all colleagues who are relevant to the work being carried out
- P1.2 recognise, agree and respect the roles and responsibilities of colleagues and, particularly in situations of matrix management, their managers' requirements
- P1.3 understand and take account of the priorities, expectations, and authority of colleagues in decisions and actions
- P1.4 create an environment of trust and mutual respect where you have no authority, or shared authority, over those you are working with

You need to know and understand:

General knowledge and understanding

- K1.1 the benefits of developing productive working relationships with colleagues
- K1.2 the importance of creating an environment of trust and mutual respect where you have no authority, or shared authority, over those you are working with
- K1.3 the importance of understanding difficult situations and issues from your colleague's perspective and providing support, where necessary, to move things forward
- K1.4 principles of effective communication and how to apply them in order to communicate effectively with colleagues

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1. Develop productive working relationships with colleagues

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You need to:

- P1.5 understand difficult situations and issues from your colleague's perspective and provide support, where necessary, to move things forward
- P1.6 fulfil agreements made with colleagues and let them know
- P1.7 advise colleagues promptly of any difficulties or where it will be impossible to fulfil agreements
- P1.8 identify and sort out conflicts of interest and disagreements with colleagues in ways that minimise damage to work being carried out
- P1.9 exchange information and resources with colleagues to make sure that all parties can work effectively
- P1.10 provide feedback to colleagues on their performance and seek feedback from colleagues on your own performance in order to identify areas for improvement

You need to know and understand:

- K1.5 how to identify disagreements with colleagues and the techniques for sorting them out
- K1.6 how to identify conflicts of interest with colleagues and the measures that can be used to manage or remove them
- K1.7 how to take account of diversity and inclusion issues when developing working relationships with colleagues
- K1.8 the importance of exchanging information and resources with colleagues
- K1.9 how to get and make use of feedback on your performance from colleagues
- K1.10 how to provide colleagues with useful feedback on their performance

Industry/sector specific knowledge and understanding

- K1.11 regulations and codes of practice that apply in the industry or sector
- K1.12 standards of behaviour and performance in the industry or sector
- K1.13 working culture of the industry or sector

Context specific knowledge and understanding

- K1.14 current and future work being carried out
- K1.15 colleagues who are relevant to the work being carried out, their work roles and responsibilities
- K1.16 processes within the organisation for making decisions

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1. Develop productive working relationships with colleagues

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You need to know and understand:

- K1.17 line management responsibilities and relationships within the organisation
- K1.18 the organisation's values and culture
- K1.19 power, influence and politics within the organisation
- K1.20 standards of behaviour and performance expected in the organisation
- K1.21 information and resources that different colleagues might need
- K1.22 agreements with colleagues

2. Behaviours which underpin effective performance

You need to:

- P2.1 present information clearly, concisely, accurately and in ways that promote understanding
- P2.2 seek to understand people's needs and motivations
- P2.3 make time available to support others
- P2.4 clearly agree what is expected of others and hold them to account
- P2.5 work to develop an atmosphere of professionalism and mutual support
- P2.6 model behaviour that shows respect, helpfulness and co-operation
- P2.7 keep promises and honour commitments
- P2.8 consider the impact of your own actions on others
- P2.9 say 'no' to unreasonable requests
- P2.10 show respect for the views and actions of others

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Allocate and check work in your team (CfA - Business skills @ work)

SVO Unit	SCQF level	SCQF credit
E.16	5	12

Summary

This unit is about ensuring that the work required of your team is effectively and fairly allocated amongst team members. It also involves checking on the progress and quality of the work of team members to ensure that the required level or standard of performance is being met.

The NOS in this unit are from the Management and Leadership suite of NOS, overseen by CfA Business Skills @ Work.

1. Allocate and check work in your team

You need to:

- P1.1 confirm the work required of the team with your manager and seek clarification, where necessary, on any outstanding points and issues
- P1.2 plan how the team will undertake its work, identifying any priorities or critical activities and making best use of the available resources
- P1.3 allocate work to team members on a fair basis taking account of their skills, knowledge and understanding, experience and workloads and the opportunity for development
- P1.4 brief team members on the work they have been allocated and the standard or level of expected performance

You need to know and understand:

General knowledge and understanding

- K1.1 different ways of communicating effectively with members of a team
- K1.2 the importance of confirming/clarifying the work required of the team with your manager and how to do this effectively
- K1.3 how to plan the work of a team, including how to identify any priorities or critical activities and the available resources
- K1.4 how to identify sustainable resources and ensure their effective use when planning the work of a team
- K1.5 how to identify and take due account of health and safety issues in the planning, allocation and checking of work
- K1.6 why it is important to allocate work across the team on a fair basis and how to do so

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1. Allocate and check work in your team

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You need to:

- P1.5 recognise and seek to find out about differences in expectations and working methods of any team members from a different country or culture and promote ways of working that take account of their expectations and maximise productivity
- P1.6 encourage team members to ask questions, make suggestions and seek clarification in relation to the work they have been allocated
- P1.7 check the progress and quality of the work of team members on a regular and fair basis against the standard or level of expected performance and provide prompt and constructive feedback
- P1.8 support team members in identifying and dealing with problems and unforeseen events
- P1.9 motivate team members to complete the work they have been allocated and provide, where requested and where possible, any additional support and/or resources to help completion
- P1.10 monitor the team for conflict, identifying the cause(s) when it occurs and dealing with it promptly and effectively
- P1.11 identify unacceptable or poor performance, discuss the cause(s) and agree ways of improving performance
- P1.12 recognise successful completion of significant pieces of work or work activities by team members and the overall team and advise your manager

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You need to know and understand:

- K1.7 why it is important to brief team members on the work they have been allocated and the standard or level of expected performance and how to do so
- K1.8 the values, ethics, beliefs, faith, cultural conventions, perceptions and expectations of any team members from a different country or culture and how your own values, ethics, beliefs, faith, cultural conventions, perceptions, expectations, use of language, tone of voice and body language may appear to them
- K1.9 ways of encouraging team members to ask questions and/or seek clarification and make suggestions in relation to the work which they have been allocated
- K1.10 effective ways of regularly and fairly checking the progress and quality of the work of team members
- K1.11 how to provide prompt and constructive feedback to team members
- K1.12 how to select and apply a limited range of different methods for motivating, supporting and encouraging team members to complete the work they have been allocated and improve their performance, and for recognising their achievements
- K1.13 the additional support and/or resources which team members might require to help them complete their work and how to assist in providing this
- K1.14 why it is important to monitor the team for conflict and how to identify the cause(s) of conflict when it occurs and deal with it promptly and effectively

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1. Allocate and check work in your team

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You need to:

P1.13 use information collected on the performance of team members in any formal appraisal of performance

You need to know and understand:

K1.15 how to take account of diversity and inclusion issues when supporting and encouraging team members to complete the work they have been allocated

K1.16 why it is important to identify unacceptable or poor performance by members of the team and how to discuss the cause(s) and agree ways of improving performance with team members

K1.17 the type of problems and unforeseen events that may occur and how to support team members in dealing with them

K1.18 how to log information on the ongoing performance of team members and use this information for performance appraisal purposes

Industry/sector specific knowledge and understanding

K1.19 industry/sector specific legislation, regulations, guidelines, codes of practice relating to carrying out work

K1.20 industry/sector requirements for the development or maintenance of knowledge, understanding and skills

Context-specific knowledge and understanding

K1.21 the members, purpose and objectives of your team

K1.22 the work required of your team

K1.23 the available resources for undertaking the required work

K1.24 the organisation's written health and safety policy statement and associated information and requirements

K1.25 your team's plan for undertaking the required work

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1. Allocate and check work in your team

continued from previous page

You need to know and understand:

- K1.26 the skills, knowledge and understanding, experience and workloads of team members
- K1.27 your organisation's policy and procedures in terms of personal development
- K1.28 reporting lines in the organisation and the limits of your authority
- K1.29 organisational standards or levels of expected performance
- K1.30 organisational policies and procedures for deal with poor performance
- K1.31 organisational grievance and disciplinary policies and procedures
- K1.32 organisational performance appraisal systems

2. Behaviours which underpin effective performance

You need to:

- P2.1 make time available to support others
- P2.2 clearly agree what is expected of others and hold them to account
- P2.3 prioritise objectives and plan work to make best use of time and resources
- P2.4 state your own position and views clearly and confidently in conflict situations
- P2.5 show integrity, fairness and consistency in decision-making
- P2.6 seek to understand people's needs and motivations
- P2.7 take pride in delivering high quality work
- P2.8 take personal responsibility for making things happen

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2. Behaviours which underpin effective performance

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You need to:

P2.9 encourage and support others to make the best use of their abilities

P2.10 be vigilant for possible risks and hazards

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

SVQ Unit	SCQF level	SCQF credit
E.17	6	9

Summary

This unit involves monitoring the service provided by external suppliers your store places customer orders with. This involves checking the progress of orders, keeping customers informed and getting customer feedback about the service provided. The unit is also about using customer feedback to decide how the service provided by external suppliers could be improved, and encouraging suppliers to make improvements.

1. Monitor the quality of customer service provided by external suppliers to your retail customers

You need to:

- P1.1 keep accurate and up-to-date records of the customer orders sent from your store to external suppliers
- P1.2 regularly check the progress of orders to identify any difficulties or delays in dealing with them
- P1.3 when service is delayed, get an explanation and tell your customer promptly and accurately what is happening
- P1.4 accurately identify whether your customer is satisfied with the ordering service provided
- P1.5 identify and accurately note any customer dissatisfaction with the ordering service and the causes of this
- P1.6 tactfully explain when the problem is your customer's responsibility
- P1.7 clearly and accurately explain your customer's rights when the cause of the problem lies with the external supplier

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You need to know and understand:

- K1.1 which services external suppliers are giving your customers
- K1.2 the records you need to keep, including those the company needs
- K1.3 how to get feedback from customers
- K1.4 how to find out what is making customers dissatisfied
- K1.5 how to deal with dissatisfied customers in ways that promote goodwill and future sales

1. Monitor the quality of customer service provided by external suppliers to your retail customers

continued from previous page

You need to:

- P1.8 regularly collect and accurately report, to those who need to know, feedback on the quality of suppliers' service

2. Evaluate and improve external suppliers' service to your retail customers

You need to:

- P2.1 assess information fairly to identify external suppliers' overall quality of service to customers
- P2.2 make evaluations which are consistent with the weight of evidence you have
- P2.3 use evaluations to develop realistic and cost-effective improvements to customer service
- P2.4 present the results of evaluations and suggestions for improvement clearly to external suppliers
- P2.5 invite external suppliers to suggest improvements they can make
- P2.6 accurately note, and report to your manager, agreements to improve customer service
- P2.7 make an accurate report to your manager, together with your recommendations for action, if suppliers do not improve service

You need to know and understand:

- K2.1 what the level of customer satisfaction is with individual suppliers
- K2.2 how to evaluate the quality of service given to customers
- K2.3 typical problems with services provided by external suppliers
- K2.4 how to present evaluations and suggestions to suppliers
- K2.5 what you can do when suppliers refuse to improve the quality of service

Monitor and maintain health and safety in a retail environment

SVQ Unit	SCQF level	SCQF credit
E.18	6	13

Summary

This unit is about your responsibility for helping to monitor and safeguard health and safety in your store. Firstly, it involves carrying out day-to-day monitoring, specific regular checks and planned assessments. You need to keep written records of the health and safety assessments you carry out. You also need to train staff to help protect health and safety.

Secondly, the unit is about taking charge of accidents and emergencies. 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.

1. Assess and control risks to health and safety in a retail environment

You need to:

- P1.1 monitor the working area continually to make sure it is clean and free from dangers
- P1.2 when you cannot control a danger, get advice immediately from the appropriate authority
- P1.3 give staff training, instructions and information to allow them to do their work safely
- P1.4 check accurately and often enough that staff are using protective equipment according to the instructions they have been given
- P1.5 regularly and accurately carry out health, safety and maintenance checks in line with legal and company requirements
- P1.6 carry out assessments which clearly and accurately identify significant dangers

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You need to know and understand:

- K1.1 your rights, duties and responsibilities under current legislation relating to:
 - health and safety at work
 - managing health and safety at work
 - reporting injuries, diseases and dangerous occurrences
 - substances that can endanger health
 - first aid
 - fire precautions
- K1.2 the company's procedures for managing health and safety incidents, including the type and frequency of safety checks to be carried out
- K1.3 where to get information and advice about health and safety laws, policy and procedures
- K1.4 who to report assessment results and risks to

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1. Assess and control risks to health and safety in a retail environment

continued from previous page

You need to:

- P1.7 where assessments identify risks, prioritise these in the order in which they should be dealt with
- P1.8 review and update assessment procedures to take account of changes in factors affecting health and safety
- P1.9 record assessments accurately and make the records available to those who need them

You need to know and understand:

- K1.5 what safety equipment and protective clothing is available and the instructions for using this
- K1.6 how to identify and control different dangers
- K1.7 why you need to assess risks and how to do this
- K1.8 how to communicate effectively to control risks

2. Put accident and emergency procedures into practice in a retail environment

You need to:

- P2.1 act promptly and in line with company procedures to prevent injury and damage and to contain potential unsafe situations in the work area
- P2.2 immediately contact the people and services responsible for managing accidents and emergencies
- P2.3 use safety equipment in line with the manufacturer's guidelines
- P2.4 when you evacuate the building make sure that staff and customers leave immediately using approved escape routes, and that officials responding to requests for help are given access
- P2.5 identify threatening and violent behaviour, and act promptly to protect staff and customers and to isolate anyone acting violently or making threats

You need to know and understand:

- K2.1 how you are likely to react when accidents and emergencies happen, and how to stay calm in these situations
- K2.2 different methods of containing and controlling threatening and violent behaviour and how to decide which method to use
- K2.3 who is responsible for protecting your retail unit, controlling dangers and managing incidents, and how to contact them
- K2.4 how to set the alarm systems off
- K2.5 your responsibilities when the workplace needs to be evacuated
- K2.6 the escape routes from your retail unit and how to access them safely

Work effectively in your retail team

SVQ Unit	SCQF level	SCQF credit
E.19	5	8

Summary

For the purposes of this unit, the 'team' could be just you and your manager. This unit is about two aspects of being an effective team member. The first is about working with colleagues to achieve results together. It is about managing your time effectively and getting along with colleagues in the workplace. Secondly, the unit is about your responsibility for learning new information and tasks at work, with the help and guidance of your manager or trainer. You need to follow your training programme and work out by trial and error which ways of learning and remembering tend to work best for you.

1. Work effectively in your retail team

You need to:

- P1.1 ask colleagues promptly and politely for the help and information you need to do your work
- P1.2 respond willingly and promptly to colleagues' requests for help and information when your workload allows and without taking on more responsibility than you are authorised to do
- P1.3 offer help to colleagues when your workload allows and without taking on more responsibility than you are authorised to do
- P1.4 discuss and sort out difficulties in working together in a polite and constructive way
- P1.5 ask a suitable person for advice about any problems in working with colleagues that you can't resolve yourself
- P1.6 follow instructions for safeguarding health and safety as you work

You need to know and understand:

- K1.1 how to keep track of how much work you have to do and how long it is likely to take
- K1.2 why you should ask for help and information from colleagues when you need it
- K1.3 how to ask for help in ways that make your needs clear while respecting the other person's needs and priorities
- K1.4 why you should offer help to colleagues and respond positively to requests for help, whenever possible
- K1.5 why you need to balance being helpful to colleagues with completing your own work
- K1.6 how to refuse requests for help, when necessary, in ways that show respect for the other person and maintain good working relationships
- K1.7 how to let colleagues know when their behaviour is bothering you, in ways that encourage constructive discussion

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1. Work effectively in your retail team

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You need to know and understand:

- K1.8 how to encourage constructive discussion when colleagues are upset with you
- K1.9 who to approach for advice and help if you are experiencing difficulties working with colleagues
- K1.10 how the law and your organisation define discrimination, bullying and harassment
- K1.11 company procedures for dealing with discrimination, bullying and harassment
- K1.12 why you must always follow instructions for safeguarding health and safety as you work

2. Improve the way you learn in a retail environment

You need to:

- P2.1 check that you are clear about what you need to learn and when you need to learn it by
- P2.2 check that you are clear about how you will learn, including the specific action points in your learning plan
- P2.3 ask the right person for advice if you are not clear about anything in your training programme
- P2.4 use suitable methods to help you understand and remember the information, tasks and procedures you need to learn
- P2.5 promptly ask the right people for help when you are having problems following your training programme
- P2.6 ask at suitable times for feedback about your progress and make sure you clearly understand what is going well and what needs improving

You need to know and understand:

- K2.1 why you need to be an effective learner at work
- K2.2 which people are responsible for setting your targets and helping you learn
- K2.3 why you need to plan your learning and why you need action points and deadlines in your training programme
- K2.4 company procedures for following training programmes
- K2.5 ways of learning and remembering information, tasks and procedures
- K2.6 which ways of learning and remembering tend to work best for you
- K2.7 why you should ask for help with any problems you have with your training, and who to ask
- K2.8 why you should ask for feedback on your progress

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2. Improve the way you learn in a retail environment

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You need to know and understand:

K2.9 the most useful times to ask for feedback on your progress, and how to ask for it

K2.10 how to respond positively to feedback and use it to help you improve

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Prepare newspapers and magazines for return to the merchandiser

SVQ Unit	SCQF level	SCQF credit
E.20	5	2

Summary

This unit is about your role in ensuring that unsold newspapers and magazines are returned to the merchandiser so that your store can receive the credit owed for unsold items. You need to pick out returns using the information you are given, and follow procedures for preparing returns and putting them in the right place ready for collection at the agreed time. You also need to complete the necessary paperwork, and deal with missed returns and returns which aren't collected.

1. Prepare newspapers and magazines for return to the merchandiser

You need to:

- P1.1 allow enough time to prepare returns by the agreed collection time
- P1.2 use the information you are given to pick out those items which need returning
- P1.3 stack returns in the required order
- P1.4 wrap returns using methods which protect items adequately and minimise wastage of wrapping materials
- P1.5 label returns clearly with all the required information
- P1.6 lift and move returns safely
- P1.7 put returns in the agreed place ready for collection
- P1.8 complete returns paperwork legibly and with all the required information
- P1.9 file returns paperwork in the right place

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You need to know and understand:

- K1.1 why it is important to return unsold newspapers and magazines promptly and in line with procedures
- K1.2 the agreed collection times for returns
- K1.3 how to organise your work so that you prepare returns for collection by the agreed times
- K1.4 what information you need to enable you to prepare returns, where to get this information and how to interpret it
- K1.5 the required order for stacking returns
- K1.6 the materials and methods to use for wrapping returns securely and with minimum waste
- K1.7 the information which needs to appear on labels for returns
- K1.8 how to lift and move returns safely

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1. Prepare newspapers and magazines for return to the merchandiser

continued from previous page

You need to:

P1.10 follow company procedures for dealing with missed returns and returns which aren't collected

You need to know and understand:

- K1.9** where to put returns ready for collection
- K1.10** the returns paperwork you need to complete and how to complete it
- K1.11** where to file returns paperwork
- K1.12** company procedures for dealing with missed returns and returns which aren't collected

Monitor and support secure till use during trading hours

SVQ Unit	SCQF level	SCQF credit
E.21	6	3

Summary

This unit is about your responsibility for maintaining the secure use of the till during trading hours.

The unit refers to a single till and service area, but you should take this to mean all the tills and service areas you are responsible for at any one time.

You contribute to keeping cash, staff and data secure, both by monitoring the service area and carrying out transactions and adjustments within the limits of your authority. You do this during trading hours, so you need to ensure that customers are not kept waiting any longer than necessary and that you project a positive image of your company at all times.

1. Monitor and support secure till use during trading hours

You need to:

- P1.1 during trading hours, check the till and service area often enough to ensure that personal data is kept confidential
- P1.2 authorise till transactions and adjustments within the limits of your authority and in line with company procedures for:
 - customer service
 - security
 - stock control
- P1.3 refer till transactions and adjustments promptly to the right person when you cannot authorise these yourself
- P1.4 top up the change in the till in a timely fashion and in line with company security procedures

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You need to know and understand:

- K1.1 the till and service area for which you are responsible
- K1.2 why it is important to keep personal data confidential
- K1.3 the data security risks which can arise at the till and how to minimise these
- K1.4 the types of till transactions and adjustments you are authorised to carry out
- K1.5 how to carry out the till transactions and adjustments for which you are responsible
- K1.6 who can authorise a transaction that is outside your level of authority, and how to contact that person

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1. Monitor and support secure till use during trading hours

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You need to:

- P1.5 check the authorisation of anyone who draws cash or cash equivalents from the till during trading hours
- P1.6 prioritise your tasks so as to minimise customer waiting times and queue size

You need to know and understand:

- K1.7 how to top up the change in the till, including company procedures for keeping cash and yourself secure in the process
- K1.8 how to monitor the till and service area whilst completing your other tasks
- K1.9 who is authorised to draw cash and cash equivalents from the till during trading hours

Check the accuracy of records of hours worked in a retail store

SVQ Unit	SCQF level	SCQF credit
E.22	5	3

Summary

This unit is about your responsibility for checking the accuracy of records of hours worked by colleagues in your store. Colleagues must receive the pay that is due to them, and your role is to help to ensure that this happens. You do this firstly by checking the records of hours worked and noticing and querying anything unusual or which seems to be incorrect. You then process the data, check it carefully in case mistakes have been made during processing, and then pass the data on to those who need it. You also need to respond to colleagues' queries, remembering always to treat colleagues as internal 'customers', and to respect confidentiality.

1. Check the accuracy of records of hours worked in a retail store

You need to:

- P1.1 use efficient and effective methods of checking that data and calculations are complete and accurate
- P1.2 spot discrepancies and unusual features of data and query these promptly with the right people
- P1.3 spot recurring data inaccuracies and report these promptly to the right people
- P1.4 give information and reports to the right people at the required times and in suitable formats
- P1.5 provide information and advice promptly, courteously and accurately in response to colleagues' queries about records of hours worked
- P1.6 where you cannot resolve colleagues' queries, refer these promptly to the right person

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You need to know and understand:

- K1.1 why you need to check records of hours worked
- K1.2 the records the company keeps of hours worked, and where to find these
- K1.3 efficient and effective methods for checking data and calculations
- K1.4 the discrepancies and unusual features you need to check for, and how to recognise these
- K1.5 why it is important to spot recurring data inaccuracies, how to do this and who needs to know about such problems
- K1.6 what information and reports you need to produce, when and how to produce them and who needs to see them
- K1.7 what it means to treat colleagues as internal 'customers' and why it is important to do this

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1. Check the accuracy of records of hours worked in a retail store

continued from previous page

You need to:

- P1.7 follow company procedures for keeping personal data confidential
- P1.8 use data processing equipment and materials safely, effectively and efficiently

You need to know and understand:

- K1.8 the types of query you are responsible for resolving and how to resolve these
- K1.9 who to refer queries to when you cannot resolve these yourself
- K1.10 why it is important to keep personal data confidential, and the company procedures for doing this
- K1.11 what data processing equipment and materials to use and how to do so safely, effectively and efficiently