

CFACSB10 - SQA Unit Code FY7H 04

Organise the delivery of reliable customer service



Overview

This Standard is part of the Customer Service Theme of Delivery. This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

This Standard is about how you organise the delivery and maintenance of 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.

CFACSB10 - SQA Unit Code FY7H 04

Organise the delivery of reliable customer service

Performance criteria

Plan and organise the delivery of reliable customer service

- You must be able to:*
- P1 plan, prepare and organise everything you need to deliver services or products to different types of customers
 - P2 organise what you do to ensure that you are consistently able to give prompt attention to your customers
 - P3 reorganise your work to respond to unexpected additional workloads

Review and maintain customer service delivery

- You must be able to:*
- P4 maintain service delivery during very busy periods and unusually quiet periods
 - P5 maintain service delivery when systems, people or resources have let you down
 - P6 consistently meet your customers' expectations
 - P7 balance the time you take with your customers with the demands of other customers seeking your attention
 - P8 respond appropriately to your customers when they make comments about the services or products you are offering
 - P9 alert others to repeated comments made by your customers
 - P10 take action to improve the reliability of your service based on customer comments
 - P11 monitor the action you have taken to identify improvements in the service you give to your customers

Use recording systems to maintain reliable customer service

- You must be able to:*
- P12 record and store customer service information accurately following organisational guidelines
 - P13 select and retrieve customer service information that is relevant, sufficient and in an appropriate format
 - P14 quickly locate information that will help solve a customer's query
 - P15 supply accurate customer service information to others using the most appropriate method of communication

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Organise the delivery of reliable customer service

Knowledge and understanding

You need to know and understand:

- K1 organisational procedures for unexpected situations and your role within them
- K2 resource implications in times of staff sickness and holiday periods and your responsibility at these times
- K3 the importance of having reliable and fast information for your customers and your organisation
- K4 organisational procedures and systems for delivering customer service
- K5 how to identify useful customer feedback and how to decide which feedback should be acted on
- K6 how to communicate feedback from customers to others
- K7 organisational procedures and systems for recording, storing, retrieving and supplying customer service information.
- K8 legal and regulatory requirements regarding the storage of data

CFACSB10 - SQA Unit Code FY7H 04

Organise the delivery of reliable customer service

Developed by	Skills CFA
Version number	2
Date approved	January 2013
Indicative review date	January 2016
Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFACSB10
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Organising; delivery; reliable; resources; systems; support service; customer service; communication; problem solving; behaviours; work with others; team working; giving information; receiving information services; products

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit.

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

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

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

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

Your evidence must show that you have:

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

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

Overview

This Standard is part of the Customer Service Theme of Delivery. This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

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.

CFACSB11 - SQA Unit Code H5BN 04

Improve the customer relationship

Performance criteria

Improve communication with your customers

- You must be able to:*
- P1 select and use the best method of communication to meet your customers' expectations
 - P2 take the initiative to contact your customers to update them when things are not going to plan or when you require further information
 - P3 adapt your communication to respond to individual customers' feelings
 - P4 monitor information about your interaction with customers using all available information channels

Balance the needs of your customer and your organisation

- You must be able to:*
- P5 meet your customers' expectations within your organisation's service offer
 - P6 explain the reasons to your customers sensitively and positively when their expectations cannot be met
 - P7 identify alternative solutions for your customers either within or outside the organisation
 - P8 identify the costs and benefits of these solutions to your organisation and to your customers
 - P9 negotiate and agree solutions with your customers which satisfy them and are acceptable to your organisation
 - P10 take action to satisfy your customers with the agreed solution when balancing their needs with those of your organisation

Exceed customer expectations to develop the relationship

- You must be able to:*
- P11 make extra efforts to improve your relationship with your customers
 - P12 recognise opportunities to exceed your customers' expectations
 - P13 take action to exceed your customers' expectations within the limits of your own authority
 - P14 gain the help and support of others to exceed your customers' expectations

CFACSB11 - SQA Unit Code H5BN 04

Improve the customer relationship

Knowledge and understanding

You need to know and understand:

- K1 how to make best use of the method of communication chosen for dealing with your customers
- K2 how to negotiate effectively with your customers
- K3 how to assess the costs and benefits to your customer and your organisation of any unusual agreement you make
- K4 the importance of customer loyalty and/or improved internal customer relationships to your organisation
- K5 how to monitor information about your interaction with customers from every available source including internet communication channels and social media platforms

CFACSB11 - SQA Unit Code H5BN 04

Improve the customer relationship

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Status	Original
Originating organisation	Skills CFA
Original URN	CFACSB11
Relevant occupations	Customer Service Occupations
Suite	Customer Service (2013)
Key words	Relationships; customer service; reliable; exceed expectations; external customer; internal customer; loyalty; service partnerships; customer service; communication; problem solving; behaviours; work with others; giving Information; teamwork

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit.

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

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

Your evidence must include examples of using:

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

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

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

Give customers a positive impression of yourself and your organisation

Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

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 Standard 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.

Performance criteria

Meet your organisation's standards of appearance and behaviour

You must be able to:

- P1 greet your customer respectfully and in a friendly manner
- P2 communicate with your customer in a way that makes them feel valued and respected
- P3 identify and confirm your customer's expectations
- P4 treat your customer courteously and helpfully
- P5 keep your customer informed and reassured
- P6 adapt your behaviour to respond to different customer behaviour

Respond appropriately to customers

You must be able to:

- P7 respond promptly to a customer seeking help
- P8 choose the most appropriate way to communicate with your customer
- P9 check with your customer that you have fully understood their expectations
- P10 respond promptly and positively to your customer's questions and comments
- P11 allow your customer time to consider your response and give further explanation when appropriate

Communicate information to customers

You must be able to:

- P12 quickly find information that will help your customer
- P13 give your customer information they need about the services or products offered by your organisation
- P14 recognise information that your customer might find complicated and check whether they fully understand
- P15 explain clearly to your customers any reasons why their expectations cannot be met

Knowledge and understanding

You need to know and understand:

- K1 your organisation's standards for appearance and behaviour
- K2 your organisation's guidelines for how to recognise what your customer wants and respond appropriately
- K3 your organisation's rules and procedures regarding the methods of communication you use when dealing with customers
- K4 how to recognise when a customer is angry or confused
- K5 your organisation's standards for timeliness in responding to customer questions and requests for information

Developed by	Skills CFA
Version number	1
Date approved	January 2013
Indicative review date	January 2016
Validity	Current
Status	Original
Originating organisation	Skills CFA
Original URN	CFACSA4
Relevant occupations	Customer Service Occupations; Agricultural Machinery Operator; Agricultural Technician; Tractor Driver; Supervisor; General Farm Worker; Farmer; Farm Worker; Arts, Media and Publishing; Librarians and Related Professionals; Crafts, creative arts and design; Quality and Customer Care Managers; Artistic and Literary Occupations; Customer Service Occupations; Paper and wood machine operatives; Sales and related occupations NEC; Other goods handling and storage occupations NEC; Ticketing Occupations; Admissions; Box Office; Visitor Services; Booking Office
Suite	Customer Service (2013); Agricultural Crop Production; Livestock Production; Cultural & Heritage Venue Operations; Wood Merchants; Ticketing
Key words	listening, hearing, speaking ,communicate, positive impression, behaviour, problem solving, behaviours, customer service principles, customer service professional, work with others, customer service language, knowledge, understanding; venue; Wood, timber, sales; merchants; Ticketing; Customer; Communicate; Box Office; Admissions; Visitor

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit.

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

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

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

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

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

You must provide evidence that you communicate effectively by:

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

Overview

This Standard is part of the Customer Service Theme of Development and Improvement. This Theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

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 Standard 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.

CFACSD2 - SQA Unit Code HK21 04

Support customer service improvements

Performance criteria

Use feedback to identify potential customer service improvements

- You must be able to:*
- P1 gather informal feedback from your customers
 - P2 use your organisation's procedures to collect feedback from your customers
 - P3 use the information from your customers to develop a better understanding of their customer service experience
 - P4 identify ways the service you give could be improved based on information you have gathered
 - P5 share your ideas for improving customer service with colleagues

Implement changes in customer service

- You must be able to:*
- P6 identify a possible change that could be made to improve customer service
 - P7 present your idea for improving customer service to a colleague with the appropriate authority to approve the change
 - P8 carry out changes to customer service procedures based on your own idea or proposed by your organisation
 - P9 keep your customers informed of changes to customer service
 - P10 give customers a positive impression of changes that have been made
 - P11 work positively with others to support customer service changes

Assist with the evaluation of changes in customer service

- You must be able to:*
- P12 discuss with others how changes to customer service are working
 - P13 work with others to identify any negative effects of changes and how these can be avoided

CFACSD2 - SQA Unit Code HK21 04

Support customer service improvements

Knowledge and understanding

You need to know and understand:

- K1 how customer experience is influenced by the way service is delivered
- K2 how customer feedback is obtained
- K3 how to work with others to identify and support change in the way service is delivered
- K4 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

CFACSD2 - SQA Unit Code HK21 04

Support customer service improvements

Developed by Skills CFA

Version number 2

Date approved January 2013

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Validity Current

Status Original

Originating organisation Skills CFA

Original URN CFACSD2

Relevant occupations Customer Service Occupations

CFACSD2 - SQA Unit Code HK21 04

Support customer service improvements

Suite

Customer Service (2013)

Key words

customer service; contact centres; improvements; develop; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information services; products

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit.

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

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

You must provide evidence that you have:

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

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

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

Your evidence for each change must show how:

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

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

Decorate fixtures and panels for retail displays

Overview

This standard is about decorating fixtures and panels for use in retail displays in store.

This standard is for staff who are visual merchandising specialists and personnel given authority to decorate display fixtures.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Decorate fixtures and panels for retail displays

Decorate fixtures and panels for retail displays

Performance criteria

You must be able to:

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

Decorate fixtures and panels for retail displays

Knowledge and understanding

You need to know and understand:

1. how to choose decorative materials and techniques
2. how to check and evaluate decorative work as it is being done
3. how to use materials efficiently
4. how to check the quality of finish of decorative panels and fixtures for retail displays
5. how to judge the suitability of, and choose, new and creative decorative techniques
6. how to apply innovative decorative techniques
7. how to complete decorative work within cost limits and **policy**
8. how light, colour, texture, shape and dimension combine to achieve the visual effects required for a retail display
9. why panels and fixtures need to be decorated in creative ways
10. why different kinds of merchandise require different approaches to decoration
11. how decorated panels and fixtures contribute to visual effects
12. how to identify the range of decorative techniques and materials that can be chosen
13. how to identify the purpose of the retail display
14. your retail organisation's visual design **policy**

Decorate fixtures and panels for retail displays

Glossary

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

Links to other NOS

PPL.C239 Confirm the requirements for props and prototypes for retail displays

PPL.C240 Make life-size copies of items for retail displays

PPL.C241 Make scale models of items for retail displays

Decorate fixtures and panels for retail displays

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C242
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; decorates; decorating; shelves; visual merchandising

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

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

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

Interpret retail display layout requirements from plans, elevations and drawings

Overview

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

This standard is for staff who are visual merchandising specialists and personnel with authority or responsibilities to interpret display layouts.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Interpret retail display layout requirements from plans, elevations and drawings

Interpret retail display layout requirements from plans, elevations and drawings

Performance criteria

You must be able to:

1. interpret accurately the essential features and detailed requirements of retail display layouts from plans, elevations and drawings
2. identify accurately health, safety and security arrangements from plans, elevations and drawings
3. work out what activities and resources are required to put layouts together as shown in plans, elevations and drawings
4. identify possible problems in putting layouts together and work out ways of resolving them

Interpret retail display layout requirements from plans, elevations and drawings

Knowledge and understanding

You need to know and understand:

1. how to interpret the layout requirements and the essential features of retail display layouts from plans, elevations and drawings
2. how to work out what activities and resources are required to put retail display layouts together
3. how to identify the health, safety and security arrangements required for layouts and what they are
4. what layout design is and its part in effective visual design practice
5. the techniques of layout design, including drawing conventions and standards
6. sources of information to use when calculating what is required for layouts
7. who can make decisions when a problem needs to be resolved with layouts



Interpret retail display layout requirements from plans, elevations and drawings

Links to other NOS PPL.C244 Follow guidelines for putting retail display layouts together

Interpret retail display layout requirements from plans, elevations and drawings

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Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C243
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; interprets; interpreting; understands; understanding; layouts; needs; designs; instructions; visual merchandising

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Assess and report the effect of retail displays and layouts

Overview

This standard is about assessing the effect of retail displays and layouts on retail performance. It also involves reporting findings to decision-makers.

This standard is for trained visual merchandising personnel.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Assess and report the effect of retail displays and layouts

Assess and report the effect of retail displays and layouts

Performance criteria

You must be able to:

1. agree suitable standards for assessing the effect of retail displays and layouts
2. assess fairly the evidence of the effect of retail displays and layouts against the agreed standards
3. draw conclusions that are reasonable in terms of the purpose of retail displays and retail **customers' responses** to them
4. clearly identify improvements that could be made to the way visual merchandising is carried out in your retail organisation
5. report findings and recommendations clearly to decision-makers

Assess and report the effect of retail displays and layouts

Knowledge and understanding

You need to know and understand:

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

Assess and report the effect of retail displays and layouts

Glossary

Customers' responses:

1. whether they are attracted to the display
2. whether they show interest in the display features
3. whether they buy the goods or services featured in the display

Links to other NOS

PPL.C335 Gather information about retail customers' responses to displays and layouts

Assess and report the effect of retail displays and layouts

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Originating Organisation	Skillsmart Retail
Original URN	SSR.C336
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; assesses; assessing; evaluates; evaluating; interprets; interpreting; reports; reporting; finds; findings; effects; effectiveness; visual merchandising

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Glossary: The glossary contains definitions of the terms used in unit PPL.C336. These definitions do not constitute range.

Customers' responses:

1. whether they are attracted to the display
2. whether they show interest in the display features
3. whether they buy the goods or services featured in the display

Negotiate and agree costs for visual merchandising projects

Overview

This standard is about obtaining the money required to fund proposed visual merchandising projects. It involves working out the likely costs of proposed projects, negotiating and agreeing costs and justifying recommendations to decision-makers.

This standard is for trained visual merchandising personnel.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Negotiate and agree costs for visual merchandising projects

Negotiate and agree costs for visual merchandising projects

Performance criteria

You must be able to:

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

Negotiate and agree costs for visual merchandising projects

Knowledge and understanding

You need to know and understand:

1. how to make reasonable estimates of the costs of proposed visual merchandising projects
2. how to use estimated costs to support the business case for proposed visual merchandising projects
3. how to negotiate successfully
4. who to ask for comments to help strengthen the business case for the spending that is being recommended
5. the approved layout for budget proposals
6. how to present budget proposals clearly to decision-makers
7. who to agree costs with for visual merchandising projects
8. where information can be obtained about the costs of activities and resources
9. how to put together accurate budgets from agreed budget proposals
10. how to brief colleagues about the cost limits they must work within
11. how controlling spending and using resources efficiently help your retail organisation
12. your retail organisation's budgeting procedures and deadlines

PPL.C337 - SQA Unit Code J0A4 04

Negotiate and agree costs for visual merchandising projects



Links to other NOS PPL.C338 Record and monitor costs for visual merchandising projects

Negotiate and agree costs for visual merchandising projects

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Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C337
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; negotiates; negotiating; agrees; agreeing; costing; funds; funding; expenses

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Record and monitor costs for visual merchandising projects

Overview

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

This standard is for trained visual merchandising personnel.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Record and monitor costs for visual merchandising projects

Record and monitor costs for visual merchandising projects

Performance criteria

You must be able to:

1. keep accurate, complete and up-to-date records of visual merchandising project spending
2. identify unacceptable differences in visual merchandising project costs promptly, resolve them as soon as possible, and report them immediately to the correct person when outside your authority
3. recognise opportunities to improve value for money within budget limits and promptly act on these
4. monitor ongoing costs
5. keep the correct people informed of activities and costs for visual merchandising projects

Record and monitor costs for visual merchandising projects

Knowledge and understanding

You need to know and understand:

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

Record and monitor costs for visual merchandising projects

Links to other NOS PPL.C337 Negotiate and agree costs for visual merchandising projects

Record and monitor costs for visual merchandising projects

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Originating Organisation	Skillsmart Retail
Original URN	SSR.C338
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; controls; controlling; costing; spends; spending; funds; funding; expenses; expends; budgets; budgeting

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Contribute to developing a retail organisation's visual-design policy

Overview

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

This standard is for trained visual merchandising personnel.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Contribute to developing a retail organisation's visual-design policy

Performance criteria

You must be able to:

1. gather accurate and up-to-date information about what internal and external customers require and expect from the visual-design policy
2. analyse information accurately to identify internal and external customers' wishes and expectations
3. decide if current and recent designs follow accepted good practice in visual-design
4. use available information to identify opportunities for improving visual-design policy and for contributing and introducing new design ideas in relation to the policy
5. draw conclusions as to whether the new ideas and suggestions for improvement are relevant to the requirements of your retail organisation and the development of the visual-design policy
6. recommend clearly to decision-makers those improvements and new ideas that are relevant and present these in the required format and by the agreed deadlines

Contribute to developing a retail organisation's visual-design policy

Knowledge and understanding

You need to know and understand:

1. your retail organisation's current visual-design policy
2. who the internal and external retail customers are
3. how to find out about and recognise what internal and external retail customers hope for and expect from the visual-design policy
4. accepted good practice in visual-design
5. how to decide if your retail organisation's current and recent designs follow accepted good practice in visual-design
6. how to identify opportunities for new and improved ways of using visual-design
7. the format to use when making recommendations
8. how to put together and present recommendations for developing the visual-design policy
9. how visual-design helps to promote and sell goods and services
10. what retail customer-focused design is
11. how merchandising helps your retail organisation to achieve its aims

Contribute to developing a retail organisation's visual-design policy

Links to other NOS PPL.C340 Support staff putting into practice a retail organisation's visual-design policy

Contribute to developing a retail organisation's visual-design policy

Developed by	People 1st
Version Number	3
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C339
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; contributes; contributing; assists; assisting; helps; helping; develops; improves; improving; updates; updating; visual designs; policies; procedures; practices; visual merchandising

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Support staff putting into practice a retail organisation's visual-design policy

Overview

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

This standard is for trained visual merchandising personnel.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Support staff putting into practice a retail organisation's visual-design policy

Support staff putting into practice a retail organisation's visual-design policy

Performance criteria

You must be able to:

1. present information about your retail organisation's visual-design policy to staff and check that they understand and are committed
2. give staff the opportunity to ask questions about the visual-design policy
3. support staff who are putting into practice your retail organisation's visual-design policy
4. check that visual-designs are consistent with your retail organisation's visual-design policy
5. correct any designs promptly that do not conform to the visual-design policy
6. give staff and colleagues accurate information about the visual-design policy and how it affects visual merchandising in their areas
7. check displays to make sure they conform to your retail organisation's visual-design policy, are used correctly and kept in the required condition required for as long as they are in use
8. report to your manager promptly any problems with keeping displays in the required condition

Support staff putting into practice a retail organisation's visual-design policy

Knowledge and understanding

You need to know and understand:

1. what your retail organisation's visual-design policy is
2. the role of visual-design in retail
3. good practice in creating visual effect by using displays
4. the different purposes of displays and their use in visual merchandising
5. why different kinds of merchandise require displaying in different ways
6. different approaches to using visual-design for different types of merchandising
7. how designs achieve the visual effects required by displays
8. how to brief staff and colleagues about your retail organisation's visual-design policy
9. how to support staff putting your retail organisation's visual-design policy into practice
10. how to explain your retail organisation's visual-design policy so that staff and colleagues will understand it
11. how to check that staff understand and are committed to follow your retail organisation's visual-design policy
12. how to check that visual-designs are consistent with the visual-design policy



Support staff putting into practice a retail organisation's visual-design policy

Links to other NOS PPL.C339 Contribute to developing the retail organisation's visual-design policy

Support staff putting into practice a retail organisation's visual-design policy

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C340
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; supports; supporting; puts; displays; layouts; visual merchandising; visual designs; policies; procedures; practices

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Develop and test solutions for retail display layouts

Overview

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

This standard is for trained visual merchandising personnel.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Develop and test solutions for retail display layouts

Develop and test solutions for retail display layouts

Performance criteria

You must be able to:

1. work out what kind of retail display layout is required and check this with decision-makers
2. gather information from reliable sources about layout design and ideas for retail display layout design
3. evaluate information and ideas about retail display layout design to see how relevant they are for your retail organisation's requirements
4. suggest a wide enough range of retail display layout options so that a creative solution can be decided upon
5. choose and combine dimension, shape, colour, texture, location and focal points to produce creative design solutions
6. evaluate retail display layout options against your retail organisation's design requirements and choose those which offer the most creative solution possible within time and cost limits
7. test the retail display layout solutions that have been selected
8. continue improving the preferred retail display layouts until there is a detailed layout that meets your retail organisation's design requirements and that can be achieved within the agreed time and cost limits
9. check carefully that there is enough space for the preferred retail display layout in the sales area
10. adapt the layout when there is not enough space available for the preferred retail display layout, so that it will fit the space and can still be used as intended and have the desired effect
11. 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

Develop and test solutions for retail display layouts

Knowledge and understanding

You need to know and understand:

1. how to gather and evaluate ideas and information about retail display layout design
2. how to develop, evaluate and modify design options
3. how to develop designs in detail and maintain a creative approach while doing so
4. how to choose and combine scale, shape, colour, texture and focal points to produce creative design solutions
5. how to apply techniques of retail display layout design, including drawing conventions and standards
6. how to test and judge whether designs are practical
7. who the relevant decision-makers are
8. how to consult with decision-makers throughout the design process
9. why retail display layout designs need to be reviewed and solutions that are both creative and suitable suggested
10. what retail display layout design is and its part in effective visual merchandising
11. the nature and processes of creativity and retail display layout design
12. the part played in creative design by dimension, shape, colour, texture and location
13. sources of information about the design requirements and possible retail display layout solutions

PPL.C341 - SQA Unit Code J0A8 04

Develop and test solutions for retail display layouts



Links to other NOS PPL.C342 Produce guidance for putting retail display layouts together

Develop and test solutions for retail display layouts

Developed by	People 1st
Version Number	2
Date Approved	March 2017
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C341
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; develops; developing; development; tests; testing; evaluates; evaluating; displays; visual merchandising

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Provide an after-sales service to retail clients as a result of retail client consultations

Overview

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

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Provide an after-sales service to retail clients as a result of retail client consultations

Provide an after-sales service to retail clients as a result of retail client consultations

Performance criteria

You must be able to:

1. follow your retail organisation's procedures for keeping retail client records up-to-date as part of the after-sales service
2. record retail clients' information accurately and store it in the right places in your retail organisation's system
3. keep retail clients' information confidential and share it only with people who have authority to access it
4. keep to retail clients' wishes as to how and when they may be contacted as a result of consultations
5. follow your retail organisation's policy and procedures for contacting retail clients
6. inform retail clients promptly where promises cannot be kept and offer any alternative suitable products or services

Provide an after-sales service to retail clients as a result of retail client consultations

Knowledge and understanding

You need to know and understand:

1. why providing an after sales service to retail clients as a result of consultations is important
2. why retail client records need to be kept up-to-date and stored correctly
3. your retail organisation's procedures for updating retail client records
4. your retail organisation's systems and procedures for recording and storing retail clients' information
5. relevant aspects of the data protection laws and your retail organisation's policy for retail client confidentiality
6. why retail clients' wishes should be kept regarding how and when they may be contacted by your retail organisation
7. why promises to retail clients should be kept



Provide an after-sales service to retail clients as a result of retail client consultations

Links to other NOS PPL.C313 Provide a consultative selling service to retail clients

Provide an after-sales service to retail clients as a result of retail client consultations

Developed by	People 1st
Version Number	3
Date Approved	March 2017
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C314
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; provides; providing; gives; giving; after sales; services; sells; selling

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

It is highly unlikely that this unit will be able to be observed therefore the evidence generated will come from professional discussion supported by statistics relating to performance and testimony from an Expert Witness to confirm the candidate's competence

CFACSD11 - SQA Unit Code J0AA 04

Lead a team to improve customer service



Overview

This Standard is part of the Customer Service Theme of Development and Improvement. This Theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

If you are responsible for leading a team delivering customer service, you need to plan and organise their work and support them as they develop their performance. This Standard is about looking at both your organisation and your staffing resources and bringing these together in a constructive way to improve overall customer service.

You need to give support and guidance to your team to encourage them to improve their customer service delivery. It is about having a passion for customer service and sharing this enthusiasm with your colleagues and staff team. It is about leading by example.

CFACSD11 - SQA Unit Code J0AA 04

Lead a team to improve customer service

Performance criteria

Plan and organise the work of a team

- You must be able to:*
- P1 treat team members with respect at all times
 - P2 agree with team members their role in delivering effective customer service
 - P3 involve team members in planning and organising their customer service work
 - P4 allocate work which takes full account of team members' customer service skills and the objectives of the organisation
 - P5 motivate team members to work together to raise their customer service performance

Provide support for team members

- You must be able to:*
- P6 check that team members understand what they have to do to improve their work with customers and why that is important
 - P7 check with team members what support they feel they may need throughout this process
 - P8 provide team members with support and direction when they need help
 - P9 encourage team members to work together to improve customer service

Review performance of team members

- You must be able to:*
- P10 provide sensitive feedback to team members about their customer service performance
 - P11 encourage team members to discuss their customer service performance
 - P12 discuss sensitively with team members action they need to take to continue to improve their customer service performance

CFACSD11 - SQA Unit Code J0AA 04

Lead a team to improve customer service

Knowledge and understanding

You need to know and understand:

- K1 the roles and responsibilities of your team members and where they fit in with the overall structure of the organisation
- K2 how team and individual performance can affect the achievement of organisational objectives
- K3 the implications of failure to improve customer service for your team members and your organisation
- K4 how to plan work activities
- K5 how to present plans to others to gain understanding and commitment
- K6 how to facilitate meetings to encourage frank and open discussion
- K7 how to involve and motivate staff to encourage teamwork
- K8 how to recognise and deal sensitively with issues of underperformance

CFACSD11 - SQA Unit Code J0AA 04

Lead a team to improve customer service

Developed by	Skills CFA
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Version number	2
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Date approved	January 2013
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Indicative review date	January 2016
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Validity	Current
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Status	Original
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Originating organisation	Skills CFA
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Original URN	CFACSD11
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Relevant occupations	Customer Service Occupations; Ticketing Occupations; Admissions; Box Office; Visitor Services; Booking Office;
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Suite	Customer Service (2013); Ticketing;
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Key words	team leading; customer service; contact centres; staffing resources; support, guidance; leading by example; developing; improving; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information; services; Ticketing; Customer; Communicate; Box Office; Admissions; Visitor;
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Support effective team working in a retail organisation

Overview

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

This standard is for owners, managers and team leaders and team members.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Support effective team working in a retail organisation

Support effective team working in a retail organisation

Performance criteria

You must be able to:

1. share work equally with colleagues, taking account of yours and others' preferences, strengths, skills and time available
2. make realistic commitments to colleagues so your retail organisation's targets can be met
3. let colleagues know promptly if results and targets cannot be met
4. use leadership skills to effectively support individual members of your team
5. encourage and support colleagues when working conditions are difficult
6. encourage colleagues who are finding it **difficult to work together** to treat each other equally, politely and with respect
7. follow your retail organisation's health and safety procedures during all work activities

Support effective team working in a retail organisation

Knowledge and understanding

You need to know and understand:

1. the team's purpose, aims and targets
2. your responsibility for contributing to the team's success
3. your colleagues' roles and main responsibilities
4. the importance of sharing work equally with colleagues
5. the factors that can affect your and colleagues' willingness to carry out work, including skills and existing workload
6. the importance of being a reliable team member
7. the types of leadership skills and techniques to use to effectively support teams and individuals
8. 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
9. the importance of maintaining team morale, the circumstances when morale is likely to deteriorate, and the kinds of encouragement and support that are likely to be valued by colleagues
10. the importance of good working relations, and techniques for removing tension between colleagues
11. the importance of following your retail organisation's policies and procedures for health and safety, including setting a good example to colleagues

Support effective team working in a retail organisation

Glossary

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

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

Links to other NOS

PPL.E336 Contribute to the planning, organisation and evaluation of your own learning in a retail organisation

PPL.E337 Help colleagues to learn in a retail organisation

Support effective team working in a retail organisation

Developed by	People 1st
Version Number	3
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E335
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Sales Related Occupations; Owner/Manager; Manager; Team Leader
Suite	Retail; Retail Buying; Retail Merchandising
Keywords	Retailing; retailers; supports; supporting; encourages; encouraging; efficient; efficiency; effectively; teamwork; team work; buyers; buys; buying; merchandisers; merchandises; merchandising

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

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

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

1. disagreements on work-related issues
2. personality clashes, unfair, insulting or threatening behavior

Contribute to the planning, organisation and evaluation of your own learning in a retail organisation

Overview

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

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

This standard is for managers, team leaders and trainees.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Contribute to the planning, organisation and evaluation of your own learning in a retail organisation

Contribute to the planning, organisation and evaluation of your own learning in a retail organisation

Performance criteria

You must be able to:

1. discuss and agree with the correct people learning goals that are relevant, realistic and clear
2. identify the knowledge and skills required to achieve your goals
3. agree action points and deadlines that are realistic, taking account of past learning experiences and the time and resources available for learning
4. contribute to making a **SMART** plan to organise your own learning
5. organise your learning using internal or external suppliers of learning used by your retail organisation
6. check your progress regularly and when necessary change your ways of working, revisiting your learning plan at regular intervals
7. ask for feedback on your progress from those in a position to give it, and use their feedback to improve your performance
8. evaluate your learning aims and outcomes when your learning has finished to see if it has met the overall learning aim
9. report your findings of your learning to relevant people in your retail organisation

Contribute to the planning, organisation and evaluation of your own learning in a retail organisation

Knowledge and understanding

You need to know and understand:

1. who can help set your goals, aims and objective, help plan your learning, and give feedback about your progress
2. how to identify the knowledge and skills required to achieve your goals
3. how reflecting on past learning experiences can contribute to plan future learning, and techniques for doing so
4. what **SMART** planning is and how to use it to effectively plan learning
5. how to work out how much time you need to devote to learning
6. how to organise your learning using internal and external suppliers of learning used by your retail organisation
7. how often to check your progress and how to do this
8. how to adjust your plans as required to meet your goal and the aims and objectives of the learning
9. why to ask for feedback on your progress, how to do so, and how to respond positively
10. how to evaluate learning and who to report it to in your retail organisation



Contribute to the planning, organisation and evaluation of your own learning in a retail organisation

Glossary

SMART – **S**pecific, **M**easurable, **A**chievable, **R**ealistic, **T**ime bound

Links to other NOS

PPL.E335 Support effective team working in a retail organisation

PPL.E337 Help colleagues to learn in a retail organisation

Contribute to the planning, organisation and evaluation of your own learning in a retail organisation

Developed by	People 1st
Version Number	3
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E336
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Sales Related Occupations; Owner/Manager; Manager; Team Leader
Suite	Retail; Retail Buying; Retail Merchandising
Keywords	Retailing; retailers; helps; helping; assists; assisting; plans; planning; organises; organising; learns; trains; training; buyers; buys; buying; merchandisers; merchandises; merchandising

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

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

SMART – Specific, Measurable, Achievable, Realistic, Time bound

Recruit and retain staff in a retail organisation

Overview

This standard is about having a recruitment process that assists in retaining staff. It saves time and money as well ensures new staff settle in, thus reducing staff turnover.

This standard is for owners, managers, recruitment and selection personnel and team leaders.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Recruit and retain staff in a retail organisation

Recruit and retain staff in a retail organisation

Performance criteria

You must be able to:

1. allow enough time for the recruitment process so that new staff can join your retail organisation when required
2. develop a clear idea of the job required, including their duties and the skills and personal qualities staff will need before starting to recruit
3. keep a written record of the details of the job in case of later dispute
4. define terms of employment which meet relevant legal requirements, meet the needs of your retail organisation, and take into account the local employment market
5. weigh up the costs and likely effectiveness of the available methods of advertising job vacancies, including word of mouth where applicable
6. advertise job vacancies in ways which meet relevant legal requirements, supportive of your retail organisation's brand image, and likely to attract suitable applicants
7. present your retail organisation in as positive a light as possible to applicants whilst being realistic about the job role
8. use effective and relevant legal methods of obtaining relevant information about applicants to help decide how suitable they are for the job
9. keep personal information about applicants confidential
10. use relevant regulations and your retail organisation's procedures to recruit and inform suitable applicants
11. use relevant regulations and your retail organisation's procedures to inform unsuitable applicants
12. plan for new staff to be given a positive welcome on arrival and to be given the support, information and training they will need to do their jobs effectively
13. check that new staff are settling in and deal promptly with any problems in ways that demonstrate that they are valued
14. regularly tell staff how important they are to your retail organisation and check the need to do anything further to retain them

Recruit and retain staff in a retail organisation

Knowledge and understanding

You need to know and understand:

1. what is involved in the recruitment process and how long the process typically takes
2. how to work out what skills and personal qualities are needed for specific job roles
3. why it is important to keep a written record of what the job involves
4. the current relevant legal requirements relating to recruitment, including advertising and interviewing, and how to stay informed about these requirements
5. the relevant characteristics of the local employment market, including which kinds of employer are competing to attract the type of employee your retail organisation is looking for, and the pay, benefits and working conditions and employment contracts they typically offer
6. the different ways to advertise job vacancies, and how to work out which would be the most cost effective and beneficial for your retail organisation to use
7. what characteristics a recruitment advertisement needs in order to attract suitable applicants
8. who is likely to be aware of any new job advertisements, such as retail customers or suppliers, and how to take their perceptions into account when preparing advertisements
9. the ways of conducting job interviews that will give all applicants a positive image of your retail organisation, whilst being realistic about the job role
10. the types of information that will help in assessing applicants' suitability, and legal and effective methods of getting this information
11. the current laws relating to the recording, storage and use of personal data, and how to stay informed about these laws
12. the relevant regulations and your retail organisation's procedures to recruit and inform suitable applicants
13. the relevant regulations and your retail organisation's procedures to inform unsuitable applicants
14. the kinds of support, information and training that new staff are likely to need in order to feel welcome and to perform their jobs effectively
15. how to let staff know they are valued and the effective ways of retaining key staff

Recruit and retain staff in a retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E002
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Owner/Manager; Manager; Team Leader; HR Staff
Suite	Independent retailers
Keywords	Retailing; retailers; SMEs; small-medium enterprises; small medium enterprises; small enterprises; medium enterprises; independents; finds; finding; keeps; keeping; recruits; recruiting; retains; retaining; workers

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Recommend, agree and contribute to implementing improvements to retail operations

Overview

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

This standard is for owners, managers, team leaders and retail team members who have been tasked to recommend and contribute to implementing improvements to retail operations.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Recommend, agree and contribute to implementing improvements to retail operations

Recommend, agree and contribute to implementing improvements to retail operations

Performance criteria

You must be able to:

1. present recommendations about improvements to retail operations to decision makers that are clear, concise, in a suitable format and supported by relevant information
2. acknowledge recommendations made by others during the process of researching possible improvements to retail operations
3. explain the benefits the recommended retail improvements could bring and request the resources needed to put them into practice
4. discuss recommendations with the relevant decision-makers and answer all questions clearly
5. agree with decision makers to go ahead with the recommended improvement to retail operations
6. contribute to creating plans for implementing improvements which is agreed by decision makers
7. agree and prepare the staff and resources required to begin the improvement to retail operations
8. give appropriate support, encouragement, advice and training to members of staff for as long as they require it
9. contribute to the implementation of improvements to retail operations following each planned stage
10. report to decision makers if the improvement to retail operations will not be completed on time
11. conclude all aspects of the improvement to retail operations and evaluate its impact on your retail organisation

Recommend, agree and contribute to implementing improvements to retail operations

Knowledge and understanding

You need to know and understand:

1. how to present recommendations to retail improvements to management clearly, concisely and in a suitable format
2. why it is important to make sure you acknowledge other colleagues' recommendations
3. the types of questions and concerns decision makers are likely to have when considering recommendations to improvements to retail operations, and how to handle these
4. how to explain the benefits of the recommended retail improvements
5. how to request all the resources and staffing requirements to make improvements to retail operations
6. the different ways to get agreement from decision makers to go ahead with recommendations to retail operations
7. how to contribute to creating plans for implementing improvements to retail operations
8. how to gather and prepare the staff and resources required to begin the improvement to retail operations
9. how to give appropriate support, encouragement, advice and training to members of staff for as long as they require it
10. how to contribute to the implementation of retail improvements to retail operations following each planned stage
11. when to report to decision makers if the improvements to retail operations will not be completed on time
12. how and when to conclude all aspects of the improvements to retail operations and evaluate its impact on your retail organisation



Recommend, agree and contribute to implementing improvements to retail operations

Links to other NOS PPL.E301 Identify and analyse opportunities for solving problems and improving retail operations

Recommend, agree and contribute to implementing improvements to retail operations

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E302, SSR.E303
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; recommends; recommending; suggests; suggesting; improves; improvements; enhances; enhancing; enhancements

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

It is highly unlikely that this unit will be able to be observed therefore the evidence generated will come from professional discussion supported by oral reports of real achievements and testimony from an Expert Witness to confirm the candidate's competence

Plan staffing levels and prepare work schedules for a retail organisation

Overview

This standard is about planning how many staff are required to be on duty in your retail organisation to maintain the best levels of customer service and profitability. It involves producing plans and schedules so that staff know when and where they will be required to work.

This standard is for owners, managers and team leaders.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Plan staffing levels and prepare work schedules for a retail organisation

Plan staffing levels and prepare work schedules for a retail organisation

Performance criteria

You must be able to:

1. follow your retail organisation's procedures for checking with colleagues about the levels of staffing they require
2. follow your retail organisation's policy for contracting arrangements when preparing and planning staffing levels and work schedules
3. prepare staffing plans and schedules that cover all operational needs and take account of operational limits
4. 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
5. produce staffing plans and schedules that ensure customer service and profitability is maintained
6. schedule hours of work that keep to relevant laws, your retail organisation's policy and contracts of employment
7. produce plans that are clear for the relevant people to understand and use
8. include realistic contingency plans to cope with abnormal situations

Plan staffing levels and prepare work schedules for a retail organisation

Knowledge and understanding

You need to know and understand:

1. why staffing plans are required
2. the relevant laws, your retail organisation's policy and contract terms and conditions that affect the hours that staff can work
3. how to plan and calculate staffing levels that cover all operational needs and take account of operational limits
4. how to produce staffing plans and prepare work schedules that include accurate numbers and realistic levels of skill, work allocation, places where people will work, and start and finish times
5. how planning staffing levels and work schedules maintain customer service and profitability
6. your retail organisation's requirements for producing work schedules that are clear to understand and use
7. why to include realistic contingency plans to cope with abnormal situations

Plan staffing levels and prepare work schedules for a retail organisation

Links to other NOS PPL.E309 Monitor work targets to make changes in staffing levels in a retail organisation

Plan staffing levels and prepare work schedules for a retail organisation

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Originating Organisation	Skillsmart Retail
Original URN	SSR.E308
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Owner/Manager; Team Leader; Manager
Suite	Retail
Keywords	Retailing; retailers; plans; planning; workforce; numbers; prepares; preparing; working; works; hours; rotas

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Help colleagues to learn in a retail organisation

Overview

This standard is about helping colleagues to gain the information and skills they need to learn to do their jobs in your retail organisation. It involves passing onto colleagues, knowledge and skills on a daily basis. This standard is **not** about being a professional trainer and it is not about assessing others' performance formally.

This standard is for owners, managers and team leaders.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Help colleagues to learn in a retail organisation

Help colleagues to learn in a retail organisation

Performance criteria

You must be able to:

1. encourage colleagues to ask about tasks they are not confident with in your retail organisation
2. notice when colleagues are having difficulty performing tasks that are within your competence and offer advice
3. give clear, accurate and relevant information and advice relating to tasks and procedures to help them learn
4. allow colleagues time to learn new skills and understanding
5. explain and demonstrate procedures clearly, accurately and in a logical sequence
6. encourage colleagues to ask questions if they don't understand the information and advice offered
7. give colleagues opportunities to practise new skills, and give constructive feedback
8. check that health, safety and security are not compromised when helping colleagues to learn
9. recognise the limits of your knowledge and authority and direct colleagues to other suitable sources of help as needed

Help colleagues to learn in a retail organisation

Knowledge and understanding

You need to know and understand:

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

Help colleagues to learn in a retail organisation

Glossary

Methods of helping colleagues to learn – Suitable methods might include:

1. spoken or signed explanation
2. demonstration
3. guided practice
4. constructive feedback

Links to other NOS

PPL.E335 Support effective team working in a retail organisation

PPL.E336 Contribute to the planning, organisation and evaluation of your own learning in a retail organisation

Help colleagues to learn in a retail organisation

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Originating Organisation	Skillsmart Retail
Original URN	SSR.E337
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Sales Related Occupations; Owner/Manager; Manager; Team Leader
Suite	Retail; Retail Buying; Retail Merchandising
Keywords	Retailing; retailers; helps; helping; assists; assisting; colleagues; learns; learning; trains; training; buyers; buys; buying; merchandisers; merchandises; merchandising

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Organise staff to receive, check and record incoming deliveries in a retail organisation

Overview

This standard is about organising staff to receive, check and record incoming deliveries in your retail organisation.

This standard is for owners, managers and team leaders.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Organise staff to receive, check and record incoming deliveries in a retail organisation

Organise staff to receive, check and record incoming deliveries in a retail organisation

Performance criteria

You must be able to:

1. organise sufficient capable staff and brief them before incoming deliveries are received
2. make sure that the area for receiving deliveries is prepared and that there is enough storage space for the delivery
3. check that deliveries are received and unloaded safely and securely
4. make sure that deliveries are promptly checked against incoming delivery records
5. make sure that incoming delivery records are complete and accurate and processed promptly
6. use delivery records to check that each supplier has met your retail organisation's service needs
7. identify problems with incoming deliveries and resolve them promptly

Organise staff to receive, check and record incoming deliveries in a retail organisation

Knowledge and understanding

You need to know and understand:

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

Organise staff to receive, check and record incoming deliveries in a retail organisation

Links to other NOS PPL.B302 Manage staff and maintain stock records in a storage facility in a retail organisation
PPL.B303 Check the storage and care of stock in a retail organisation



Organise staff to receive, check and record incoming deliveries in a retail organisation

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Original URN	SSR.B301
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; organises; organising; arranges; arranging; receives; receipt; receiving; checks; checking; delivery; stocks; goods; materials; items; produce; products; inventorying; inventories

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Check the storage and care of stock in a retail organisation

Overview

This standard is about checking the quality of goods, checking the way stock is cared for and stored and making improvements to increase profitability.

This standard is for owners, managers, team leaders.

When you have completed this standard you will be able to demonstrate your understanding and ability to:

- Check the storage and care of stock in a retail organisation

Check the storage and care of stock in a retail organisation

Performance criteria

You must be able to:

1. keep up a routine for checking storage facilities and stock
2. follow your retail organisation's requirements and quality standards for storage and care of stock
3. carry out spot checks of storage facilities and stock at suitable intervals
4. make sure staff have the information and training they need to identify stock that is out of date or at risk of deteriorating, and to deal with it in line with the relevant legal and your retail organisation's requirements
5. check the storage and movement of stock to make sure that stock is reaching the shop floor as it is required
6. make sure staff follow your retail organisation's procedures for protecting the quality of stock
7. check the storage, care and movement of stock and identify ways of running storage and movement systems more profitably

Check the storage and care of stock in a retail organisation

Knowledge and understanding

You need to know and understand:

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

Check the storage and care of stock in a retail organisation

Links to other NOS PPL.B301 Organise staff to receive, check and record incoming deliveries in a retail organisation
PPL.B302 Manage staff and maintain stock records in a storage facility in a retail organisation

Check the storage and care of stock in a retail organisation

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Original URN	SSR.B303
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; checks; checking; stores; stocks; goods; materials; items; produce; products

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Investigate problems and report the findings of stock audits in a retail organisation

Overview

This standard is about investigating problems and reporting the findings of stock audits in a retail organisation and sending the report to relevant personnel in the retail organisation.

This standard is for managers and team leaders.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Investigate problems and report the finding of stock audits in a retail organisation

Investigate problems and report the findings of stock audits in a retail organisation

Performance criteria

You must be able to:

1. organise stock audit findings so problems can be identified easily
2. identify problems and note them clearly for investigation
3. work out which problems are most important to your retail organisation and which ones should be investigated first
4. investigate problems methodically and sort them out as far as possible within the scope of the audit and with the resources available
5. prepare the final report in the format required and include comments on any problems that still exist
6. include all investigation findings in your final report
7. communicate the report to the relevant personnel who need to see it, so that each person receives it on time

Investigate problems and report the findings of stock audits in a retail organisation

Knowledge and understanding

You need to know and understand:

1. how to organise stock audit findings so that problems can be easily identified
2. methods for investigation and identifying problems in audit findings
3. the types of problem that can happen in your retail organisation and how to resolve them
4. the format required for the audit report
5. how to write a stock audit report for your retail organisation
6. who needs to see the report
7. how to distribute the report so that all relevant personnel receive it on time



Investigate problems and report the findings of stock audits in a retail organisation

Links to other NOS PPL.B304 Organise an audit programme and put it into practice with a team in a retail organisation



Investigate problems and report the findings of stock audits in a retail organisation

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Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; reports; reporting; found; results; audits; audited; inventoried; inventories

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Choose and contract with suppliers and order stock in a retail organisation

Overview

This standard is about choosing and contracting with suppliers who can provide the best prices and service, and placing orders for stock in a retail organisation.

This standard is for owners, managers, buyers and team leaders.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Choose and contract with suppliers and order stock in a retail organisation

Choose and contract with suppliers and order stock in a retail organisation

Performance criteria

You must be able to:

1. check the stock records at suitable intervals and identify which stock requires replenishing
2. ask colleagues if they expect to have any special orders
3. compare purchase requisitions to identify items that can be ordered together
4. use the purchasing records to find out who regular suppliers have been, if any
5. choose suitable suppliers to use, taking account of stock availability, prices, delivery times and the extent to which suppliers' practices are compatible with your retail organisation's sustainability policy
6. check chosen suppliers' contracts and terms and conditions are suitable for your retail organisation
7. order items accurately, promptly and from suitable suppliers
8. work out the total cost of an order for stock accurately
9. keep complete, accurate and up-to-date purchasing records
10. store purchasing records so that they can be easily found by the people who require them

Choose and contract with suppliers and order stock in a retail organisation

Knowledge and understanding

You need to know and understand:

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



Choose and contract with suppliers and order stock in a retail organisation

Links to other NOS PPL.B307 Check and evaluate the performance of suppliers of stock

Choose and contract with suppliers and order stock in a retail organisation

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B306
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Sales Related Occupations
Suite	Retail; Retail Buying
Keywords	Retailing; retailers; sources; sourcing; finds; finding; chooses; choosing; supply; supplies; supplying; stocks; items; goods; materials; products; produce; buyers; buys; buying; orders; ordering

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Check and evaluate the performance of suppliers of stock

Overview

This standard is about checking the performance of suppliers and includes dealing with overdue orders and returns, as well as evaluating suppliers to see if they are fulfilling their contract.

This standard is for owners, managers and team leaders.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Check and evaluate the performance of suppliers of stock

Check and evaluate the performance of suppliers of stock

Performance criteria

You must be able to:

1. match deliveries with orders promptly so overdue stock can be identified
2. identify stock that is overdue and promptly contact the relevant suppliers about it
3. inform colleagues and/or customers promptly if their orders will not be fulfilled on time and tell them what choices they have
4. follow your retail organisation's procedures for returning stock and getting it replaced
5. check the quality, price and times of deliveries against your retail organisation's requirements
6. use your retail organisation's evaluation specifications to make judgements on the performance of suppliers
7. ask colleagues and/or customers for comments about the quality and delivery times of stock received from suppliers
8. provide accurate comments to suppliers on the level of service they provide
9. keep records of evaluation and feedback findings

Check and evaluate the performance of suppliers of stock

Knowledge and understanding

You need to know and understand:

1. how to check overdue stock orders and the range suppliers your retail organisation uses for ordering stock
2. how to inform colleagues and/or customers if orders will not be delivered on time
3. how to return stock to suppliers and order replacement stock
4. how to check the quality, price and times of deliveries against your retail organisation's requirements
5. the records your retail organisation keeps about suppliers' performance and how to find and use them
6. your retail organisation's evaluation specifications when checking the performance of suppliers
7. who in your retail organisation can comment on the quality and delivery time of items or services received, and when and
8. how to ask for their comments how to contact and complain to suppliers of stock to your retail organisation
9. how to respond positively when colleagues and/or customers complain about the speed or quality of suppliers' performance

Check and evaluate the performance of suppliers of stock

Links to other NOS PPL.B306 Choose and contract with suppliers and order stock in a retail organisation



Check and evaluate the performance of suppliers of stock

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Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B307
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; checks; checking; evaluates; evaluating; performs; performing; supply; stocks; items; goods; materials; products; produce; supplies; supplying; assesses; assessing

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Offer customers information on insurance products associated with a retail organisation's credit card

Overview

This standard is about offering insurance products to customers who apply for your retail organisation's credit card, and giving customers information to help them decide whether to take out insurance. The sale of insurance products is carefully regulated so as to protect customers from being pressurised or misled. Your retail organisation needs to ensure that you fulfil your legal responsibilities and act within the limits of your legal authority.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Offer customers information on insurance products associated with a retail organisation's own credit card

Offer customers information on insurance products associated with a retail organisation's credit card

Performance criteria

You must be able to:

1. use **compliant wording** to give your retail organisation's credit card applicants consistent, clear, unbiased and factually correct information about the associated insurance products available and fully explain whether or not the insurance is optional, the cost of the insurance, the cover available, significant and unusual exclusions and customers' right to cancel the insurance
2. offer customers the policy summary and explain clearly the benefits of reading it
3. allow customers enough time to read the policy summary if they wish
4. check politely that customers are eligible for the insurance products being offered
5. explain clearly and politely that requests for advice or recommendations cannot be answered and tell customers who they can contact for further help
6. check that customers understand the product information by listening carefully to what they say and observing their body language

Offer customers information on insurance products associated with a retail organisation's credit card

Knowledge and understanding

You need to know and understand:

1. the difference between informing and advising customers about insurance products and why only information must be given and not advice
2. the limits of your authority about which associated insurance products with your retail organisation's credit card to offer and to whom
3. product features that customers must be told about, including whether or not the insurance is optional, the cost of the insurance, the cover available, significant and unusual exclusions, and customers' rights to cancel the insurance
4. how to give customers information about insurance products that is consistent, clear, unbiased, factually correct, and compliant with relevant legislation, regulations and guidelines
5. the benefits to customers of reading the policy summary
6. relevant legal requirements for offering the customer the opportunity to read the policy summary
7. who is eligible for the insurance products and how to check eligibility
8. how to deal with customers' requests for advice and recommendations concerning insurance products
9. who customers can contact for help with queries that cannot be handled at the time
10. why it is important to check that customers understand the product information given, and the verbal and non-verbal indications to listen and look for
11. what the legal issues around misselling are and why they are important

Offer customers information on insurance products associated with a retail organisation's credit card

Glossary

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

Links to other NOS PPL.C270 Promote a retail organisation's own credit card to customers
PPL.C272 Help customers to apply for a retail organisation's credit card and associated insurance products

Offer customers information on insurance products associated with a retail organisation's credit card

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Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; offers; offering; informs; informing; policies; policy

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Glossary: *The glossary contains definitions of the terms used in unit PPL.C271. These definitions do not constitute range.*

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

Help customers to apply for a retail organisation's credit card and associated insurance products

Overview

This standard is about helping customers apply for your retail organisation's own credit card and any associated insurance products offered. Your retail organisation must ensure it complies with financial regulations, including mis-selling and data protection legislation throughout the application process. Customer service skills are also an important aspect of this standard, including treating customers with courtesy and tact.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Help customers to apply for a retail organisation's credit card and associated insurance products

Help customers to apply for a retail organisation's credit card and associated insurance products

Performance criteria

You must be able to:

1. meet relevant legal and your retail organisation's requirements when helping customers to apply for a credit card and associated insurance products and giving information about the process
2. allow customers to take the application form away to consider its contents, make it clear that they are welcome to do so and follow relevant legal and your retail organisation's procedures for voiding the blank form
3. ask customers politely for proof of identity and check that suitable proof is provided
4. keep customers' personal data secure throughout the application process
5. process applications in line with the procedures agreed between your retail organisation and the insurer
6. confirm clearly to customers the decision, their credit limit, the Annual Percentage Rate that applies, any discounts that apply to purchases and any balance transfer options from other cards, where an application is accepted
7. follow procedures to enable accounts to be set up for customers whose applications have been accepted
8. tell customers tactfully where an application is declined and explain how they can enquire about the reasons
9. deal with technical problems when they occur with the application system or equipment and report promptly to the correct person any problems not within your authority
10. ensure you follow all relevant legal and your retail organisation's procedures to avoid misselling of credit cards and associated insurance products

Help customers to apply for a retail organisation's credit card and associated insurance products

Knowledge and understanding

You need to know and understand:

1. the relevant legal and your retail organisation's requirements for helping customers apply for a credit card and associated insurance products and the information that needs to be given about the application process
2. why customers may wish to take application forms away to study in detail and why this is to be welcomed
3. why blank application forms must be voided and how to do so
4. why customers must prove their identity, what proofs can be accepted and how they are validated
5. why customers' personal data must be kept secure during the application process and how to do this
6. the procedures agreed between your retail organisation and the insurer for processing applications
7. the procedures to follow when an application is accepted
8. how to treat customers with courtesy and tact when their applications have been declined
9. why the possible reasons for customers' applications being declined must not be speculated upon
10. the contact details that can be given to customers who want to enquire further about declined applications
11. how to use the application system and equipment and how to deal with technical problems that may occur with these
12. what the relevant legal and your retail organisation's procedures are to avoid misselling of credit cards and associated insurance products



Help customers to apply for a retail organisation's credit card and associated insurance products

Links to other NOS PPL.C270 Promote a retail organisation's own credit card to customers
PPL.C271 Offer customers information on insurance products associated with a retail organisation's credit card

Help customers to apply for a retail organisation's credit card and associated insurance products

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Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; helps; helping; assists; assisting; applies; applying; policies; policy

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Overview

This standard is about identifying the borrowing facilities that can be offered to individual retail customers to help them fulfil their credit or hire-purchase requirements from your retail organisation. It involves agreeing with the customer how much they will pay as a deposit and working out the remaining balance including any interest. These arrangements must be legally and ethically sourced.

This standard is for owners, managers, team leaders and sales personnel with authority to check retail customers' credit or hire purchase requirements.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

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

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

Performance criteria

You must be able to:

1. communicate with retail customers to identify their requirements
2. agree with retail customers the deposit they need to pay to qualify for credit or hire-purchase facilities
3. calculate accurately the balance retail customers need to borrow so they can pay in full
4. calculate accurately the interest retail customers will have to pay on the amount they have borrowed
5. agree retail customers' credit or hire-purchase requirements with them
6. identify the options you can offer to retail customers in relation to their credit or hire-purchase requirements
7. follow relevant legal requirements in relation to credit and hire-purchase facilities strictly, in all aspects of the transaction

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

Knowledge and understanding

You need to know and understand:

1. the range of credit and hire-purchase facilities your retail organisation offers
2. the relevant legal requirements for all aspects of credit and hire-purchase transactions
3. the terms and conditions that apply to specific credit or hire-purchase facilities
4. how to calculate the Annual Percentage Rate (APR) and the difference between the Annual Percentage Rate and simple interest
5. how to carry out credit checks and authorise credit applications

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

Links to other NOS PPL.C307 Advise retail customers on the features of borrowing facilities
PPL.C308 Process credit or hire-purchase applications on behalf of retail customers

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

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Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; identifies; identifying; determines; determining; works out; working out; HP; hire purchases; hire-purchases; needs

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Overview

This standard is about processing applications for credit or hire-purchase facilities on behalf of retail customers, including making any credit checks required. It involves treating retail customers politely and tactfully, particularly when questioning information they have provided or telling them that their application has been refused.

This standard is for owners, managers, department managers and team leaders and sales personnel with authority to process credit arrangements.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Process credit or hire-purchase applications on behalf of retail customers

Performance criteria

You must be able to:

1. complete all the documents required for the credit or hire purchase application accurately
2. complete the necessary credit checks and authorisation procedures
3. request more information from retail customers tactfully and politely where credit checks reveal problems in any information given
4. keep retail customers' information strictly confidential
5. refer problems with applications to the correct person when your level of authority has been reached
6. tell retail customers politely and clearly the decisions about their application to access credit or borrow funds
7. give reasons to retail customers when credit has been refused and give contact details so that they can query or complain about the decision
8. process the application for credit or hire purchase on behalf of retail customers
9. offer additional or associated services to retail customers where appropriate
10. keep all information about retail customers confidential whilst processing the application

Knowledge and understanding

You need to know and understand:

1. the documents required for credit or hire-purchase applications, and how to fill them in accurately
2. how to check for problems with information about retail customers, and how to question retail customers tactfully about any problems
3. the credit checks to be carried out and how to do this
4. your retail organisation's procedures for authorising credit applications
5. relevant legal requirements that apply to credit or hire purchase including data protection
6. the ethical and moral issues around promoting credit arrangements
7. reasons why credit applications may be refused
8. how to explain tactfully to retail customers that credit or hire purchase applications have been refused
9. additional or associated services your retail organisation is authorised to offer to retail customers, and how to spot suitable opportunities to offer these
10. your level of authority to make judgements about credit applications
11. who can help sort out problems with processing applications
12. why confidentiality is important when processing applications

Process credit or hire-purchase applications on behalf of retail customers

- Links to other NOS**
- PPL.C306 Identify the retail customer's credit or hire-purchase requirements
 - PPL.C307 Advise retail customers on the features of borrowing facilities

Process credit or hire-purchase applications on behalf of retail customers

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Originating Organisation	Skillsmart Retail
Original URN	SSR.C308
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; processes; processing; hire purchases; hire-purchases; applies; applying; HP

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Manage a social network on a trading website

Overview

This standard is about initiating and moderating through monitoring a social network on a trading website.

Comments posted by customers on social networking sites can impact on your retail organisation almost instantly and so need to be monitored carefully and dealt with promptly.

This standard is for owners, managers, department managers and team leaders or other staff given the responsibility for social media networking.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Monitor a social network on a trading website

Manage a social network on a trading website

Performance criteria

You must be able to:

1. take into account the **access points and devices** that customers will use to gain access to the social network on your trading website
2. use the social network to promote all the channels in which your retail organisation operates
3. ensure the social network operates in a way that is consistent with the **brand values** of your retail organisation
4. promote the benefits of the social network to **colleagues**
5. encourage **colleagues** to suggest ideas for discussion topics
6. choose online discussion topics that are likely to help your retail organisation achieve its objectives and targets
7. initiate and contribute to online discussions at times when doing so will best support the objectives and targets of your retail organisation
8. monitor the social network closely to allow effective moderation
9. moderate discussions in accordance with your retail organisation's rules
10. ensure that all the content added to the network is factually accurate, up-to-date, legally compliant and, where necessary, authorised by **colleagues**
11. alert **colleagues** to retail customers' comments where these are relevant to those **colleagues'** responsibilities
12. keep up-to-date with trends and technological developments relating to social networking

Manage a social network on a trading website

Knowledge and understanding

You need to know and understand:

1. the **access points and devices** currently available to customers and the implications of each of these for a social network on a trading website
2. which parts of your retail organisation could benefit from or contribute to the success of the social network
3. the **brand values** of your retail organisation
4. the currently accepted conventions of social networking and how these are evolving
5. the objectives and targets that the social network is expected to help your retail organisation to achieve
6. the rules under which the network operates
7. your role as moderator in ensuring discussions stay within the rules
8. why it is important to monitor the social network on your trading website
9. how to recognise when to intervene in discussions
10. where to find accurate, up-to-date information about the products and services offered by your retail organisation
11. the relevant legal requirements relating to social networking and product information
12. which **colleagues** can authorise content for the social network
13. the sources of up-to-date information about trends and technological developments relating to social networking

Glossary

Access points and devices – These may include for example:

1. computer monitors
2. mobile phones
3. kiosks
4. television screens

Brand values – the core values and qualities that define your retail organisation from the customer's viewpoint

Colleagues – those who work in any of the following:

1. your team
2. the same channel of your retail organisation
3. other channels of your retail organisation
4. external organisations, if applicable

Manage a social network on a trading website

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.MCR07
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Owner/Manager; Manager; Team Leader; Media and communication
Suite	Multi-channel Retailing
Keywords	Retailing; retailers; internet; e-commerce; e-tailing; etailing; e-tailers; etailers; multi channel; multi-channel; manages; managing; moderates; moderating; moderator; forums; chat; networks; networking

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit.

Monitor and contribute to improving food safety in a retail organisation

Overview

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

This standard is for owners, managers and team leaders.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Monitor and contribute to improving food safety in a retail organisation

Monitor and contribute to improving food safety in a retail organisation

Performance criteria

You must be able to:

1. identify and monitor **critical control points** in your retail organisation
2. identify relevant food safety **control measures**
3. allocate and supervise food safety responsibilities
4. identify and meet staff **training** needs
5. complete all your retail organisation's specified operational controls and checks at the set time frequency
6. keep accurate and complete records of monitoring
7. obtain **verification** for completed monitoring checks, following your retail organisation's **procedures**
8. take suitable **corrective action** with the appropriate degree of urgency when **control measures** fail
9. report to the appropriate person any **procedures** that are out of line with **critical limits**
10. seek expert advice and support for matters outside your level of authority or expertise
11. highlight and suggest areas for improvement
12. identify and report any factors or issues that arise that may affect the safety of food
13. identify and report any factors or issues within your retail organisation, supplies or products that may affect the safety of food
14. contribute to improving food safety
15. contribute to team meetings with ideas and suggestions to improve **procedures** or processes
16. contribute to introducing new **procedures** and/or reviewing existing ones in order to improve food safety
17. interpret and use **food safety management procedures**
18. check your understanding and that you can use any new **control measures** that are introduced related to food safety

Monitor and contribute to improving food safety in a retail organisation

Knowledge and understanding

You need to know and understand:

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

Glossary

Control measures – Actions required to prevent or remove a food safety hazard, or reduce it to an acceptable level

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

Corrective actions – The actions to be taken when a critical limit is breached

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

Critical limits – The minimum and maximum limits allowed in order to control a particular task or process

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

1. microbiological (e.g. bacteria, moulds, viruses)
2. chemical (e.g. pesticides used on fruit and vegetables, chemicals used in cleaning or for pest control)
3. physical (e.g. insects, parasites, glass, nails)
4. allergenic (e.g. nuts, milk, eggs)

Food safety management – Putting into practice the policies, procedures, practices, controls and documentation that ensure that food is safe for consumers

Procedures – A series of clear steps or instructions on how to do things: rules. Some organisations document their procedures formally in writing, and others simply have procedures that all staff understand and follow, but that are not written down

Training – Bringing an individual up to a desired level or standard of proficiency. This can be done by means of informal instruction or by formal training courses

Variance – The difference between the planned or standard limits

allowed and the actual values monitored

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

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Version Number	3
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B308
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Skilled Trades Occupations; Food Preparation Trades; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; monitors; monitoring; improves; improving; helps; helping; assists; assisting; meat; fish; produce; bakery; butchery

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

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

Control measures

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

Control points

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

Corrective actions

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

Critical control points

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

Critical limits

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

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

- microbiological (e.g. bacteria, moulds, viruses)
- chemical (e.g. pesticides used on fruit and vegetables, chemicals used in cleaning or for pest control)
- physical (e.g. insects, parasites, glass, nails)
- allergenic (e.g. nuts, milk, eggs)

Food safety management

- Putting into practice the policies, procedures, practices, controls and documentation that ensure that food is safe for consumers

Procedures

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

Training

- Bringing an individual up to a desired level or standard of proficiency. This can be done by means of informal instruction or by formal training courses

Variance

- The difference between the planned or standard limits allowed and the actual values monitored

Verification

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

Help retail customers to choose specialist products in a retail organisation

Overview

This standard is for a salesperson working in retail who gives expert advice and helps retail customers to choose specialist products. Specialist products are ones for which many retail customers will welcome in-depth advice to help them to choose the products that best meet their requirements.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Help retail customers to choose specialist products in a retail organisation

Help retail customers to choose specialist products in a retail organisation

Performance criteria

You must be able to:

1. judge from retail customers' body language and immediate circumstances whether they are likely to respond positively to an attempt to engage them in conversation
2. adapt speech and body language so as to establish and maintain a rapport with individual retail customers
3. interact with retail customers in ways that support your retail organisation's brand values
4. explore retail customers' requirements with them to establish what they are looking for
5. provide retail customers with specialist product information that is clear, factually correct, legally compliant and selected for its relevance to the retail customers' requirements
6. match the features and benefits of available specialist products as closely as possible to retail customers' requirements
7. compare and contrast products in ways that help retail customers to choose the specialist products that best meet their requirements
8. respond to retail customers' questions in a confident manner and in ways that follow your retail organisation's customer service standards
9. recommend to retail customers related specialist products that are likely to enhance their experience of the specialist product they are purchasing
10. help retail customers choose specialist products
11. keep up to date about new specialist products and product trends in your area of expertise
12. actively seek ways of maintaining your enthusiasm for the specialist products in your area of expertise

Help retail customers to choose specialist products in a retail organisation

Knowledge and understanding

You need to know and understand:

1. your retail organisation's brand values in relation to its specialist product offers, pricing and service
2. how your retail organisation compares with its competitors on specialist product offer, pricing and service
3. the retail customer profiles for your retail organisation
4. the elements of a positive retail customer experience in relation to both your retail organisation and to the specialist products being sold
5. how retail customers' circumstances, such as who they are with or the time of day, affect their willingness to engage in conversation with a salesperson
6. how to recognise from retail customers' body language whether they are likely to respond positively to an approach from a salesperson
7. how to establish and maintain a rapport with individual retail customers
8. the meaning of specialist terminology that knowledgeable retail customers are likely to use in relation to the specialist products being sold
9. how the specialist products being sold are produced or obtained, and how these methods affect the nature and quality of the specialist products
10. any legal restrictions relating to the specialist products being sold, such as where the specialist products come from or who can buy or use the specialist products, and how to explain these to retail customers
11. any health and safety considerations that retail customers must be warned about, or are likely to ask about, in relation to the specialist products being sold
12. any ethical and environmental concerns that customers are likely to have about the specialist products being sold, and how to address these
13. what related products are available from your retail organisation that would enhance retail customers' experience of the specialist products being sold
14. sources of up-to-date production information and how to access and use these
15. the sources of after-sales advice and support that are available to retail customers
16. the retail customers' legal rights and your retail organisation's policy concerning returns
17. the importance of maintaining your enthusiasm for the specialist products being sold whilst helping retail customers to choose specialist products
18. how to search for and evaluate opportunities to maintain your enthusiasm for the specialist products being sold



Help retail customers to choose specialist products in a retail organisation

Links to other NOS PPL.C356 Demonstrate specialist products to customers in a retail organisation



Help retail customers to choose specialist products in a retail organisation

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Version Number	2
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C355
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; helps; helping; assists; assisting; informs; informing; chooses; choosing; picks; picking; selects; selecting; choices; selections; advises; advising; advice; sells; selling; sales; information

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Help retail customers choose products

Overview

This standard is about helping retail customers choose products. This means helping retail customers decide whether specific products are suitable for their requirements, as well as helping them choose the most suitable product from a range of options. Retail customers need to be helped with their buying decisions in ways that promote sales.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Help retail customers choose products

Help retail customers choose products

Performance criteria

You must be able to:

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

Help retail customers choose products

Knowledge and understanding

You need to know and understand:

1. why there is a requirement to promote sales and how helping retail customers to choose products contributes to this
2. your responsibility for selling certain products and their features and benefits
3. why there is a requirement to explain product features and benefits to retail customers in ways that they understand and promote the product
4. how to check and interpret retail customers' responses to explanations
5. how to adapt explanations and respond to questions and comments in ways that promote sales
6. how to encourage retail customers to ask for clarification and more information
7. the risks of not monitoring in terms of security, safety and lost sales

- Links to other NOS**
- PPL.C214 Provide a payment service at point of sale in a retail organisation
 - PPL.C223 Check the customer's preferences and buying decisions when making retail sales
 - PPL.C253 Demonstrate beauty products to retail customers
 - PPL.C254 Maintain the retail customer record-card system in a retail organisation
 - PPL.C280 Demonstrate products to customers in a retail organisation



Help retail customers choose products

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C205
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; helps; helping; assists; assisting; choosing; items; produce; goods; materials

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Identify opportunities to increase sales of particular products

Overview

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

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

When you have completed this standard you will have demonstrated your understanding of and ability to:

- Identify opportunities to increase sales of particular products

Identify opportunities to increase sales of particular products

Performance criteria

You must be able to:

1. research **promotional opportunities** that offer the greatest potential to increase retail sales
2. identify the **promotional opportunities** and estimate the increase in expected retail sales
3. present **promotional opportunities** to the right person and gain authority to carry out the retail sales activity
4. fill in the relevant records fully and accurately

Identify opportunities to increase sales of particular products

Knowledge and understanding

You need to know and understand:

1. seasonal trends and how they affect opportunities for retail sales
2. the difference between the features and benefits of products
3. how to promote the features and benefits of products to retail customers
4. how to estimate and compare the potential of **promotional opportunities** to increase retail sales
5. who to approach about **promotional opportunities** identified

Identify opportunities to increase sales of particular products

Glossary

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

Links to other NOS PPL.C207 Promote particular retail products

Identify opportunities to increase sales of particular products

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Version Number	2
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C206
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; identifies; identifying; notices; noticing; spots; spotting; boosts; boosting; increases; increasing; selling

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Promotional opportunities

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

Make and review plans for finding new retail clients

Overview

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

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Make and review plans for finding new retail clients

Make and review plans for finding new retail clients

Performance criteria

You must be able to:

1. identify the types of new retail clients who would benefit from your retail organisation's service and whose custom would help achieve set sales targets
2. suggest ideas for building the client base that are suitable for the retail client profiles and achievable, bearing in mind the budget and time available and your retail organisation's image and policy
3. follow your retail organisation's policies and procedures for building the new retail client base
4. compile a plan based on the findings and ideas and present to the correct person
5. review progress against the plan at suitable intervals
6. recognise whether results are being achieved and adjust plans when necessary
7. give the owner or manager of your retail organisation clear and accurate reports of progress at the agreed times

Make and review plans for finding new retail clients

Knowledge and understanding

You need to know and understand:

1. sales targets and when they should be achieved
2. retail client profiles relevant to the brands and services that members of staff are responsible for selling
3. the number and types of new retail clients likely to be required in order to meet sales targets
4. your retail organisation's policies and procedures for developing business relationships with retail clients
5. how best to balance time between finding new retail clients and selling to existing retail clients
6. how to compile a plan for finding new retail clients
7. how often to review the plan in finding new retail clients
8. how to measure progress in ways that help to decide if a change is required in the approach being taken
9. when and how progress should be reported to the owner or manager of your retail organisation

PPL.C311 - SQA Unit Code J0B4 04



Make and review plans for finding new retail clients

Links to other NOS PPL.C312 Market a retail organisation's services to potential clients

Make and review plans for finding new retail clients

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C311
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; planning; makes; making; finds; additional; markets; marketing; sales; sells; selling

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

It is highly unlikely that this unit will be able to be observed therefore the evidence generated will come from professional discussion supported by statistics relating to performance and testimony from an Expert Witness to confirm the candidate's competence

Market a retail organisation's services to potential clients

Overview

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

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Market a retail organisation's services to potential clients

Market a retail organisation's services to potential clients

Performance criteria

You must be able to:

1. identify suitable opportunities to approach potential clients
2. approach potential clients in a way that projects your retail organisation's image effectively and is likely to help create a business relationship
3. create a rapport with potential clients quickly
4. talk to potential clients in a persuasive way about available services
5. compare your retail organisation's service with competitors' services in ways that make clear the advantages of your retail organisation's service
6. exchange relevant information with potential clients and market your retail organisation's services
7. record client information promptly, accurately and in a way that allows it to be used effectively
8. store and use client information in line with relevant data protection laws and your retail organisation's policy
9. inform potential clients promptly when it is not possible to keep promises and offer any other suitable information or help

Market a retail organisation's services to potential clients

Knowledge and understanding

You need to know and understand:

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

Market a retail organisation's services to potential clients

Links to other NOS PPL.C311 Make and review plans for finding new retail clients

Market a retail organisation's services to potential clients

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Version Number	3
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C312
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; markets; marketing; sells; selling; sales; services, sales pipelines

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

It is highly unlikely that this unit will be able to be observed therefore the evidence generated will come from professional discussion supported by statistics relating to performance and testimony from an Expert Witness to confirm the candidate's competence

Provide a consultative selling service to retail clients

Overview

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

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Provide a consultative selling service to retail clients

Provide a consultative selling service to retail clients

Performance criteria

You must be able to:

1. use available information in the retail client records to help prepare for consultations
2. check that the work area is clean and tidy before starting a consultative selling service and that all the equipment and/or products required are to hand
3. create a rapport quickly with retail clients at the start of the consultation
4. talk and behave towards retail clients in ways that project your retail organisation's image effectively
5. ask questions that encourage retail clients to state their buying needs, preferences and priorities
6. check tactfully how much retail clients want to spend
7. provide retail clients with the features and benefits of the products or services that are being recommended and relate these to the clients' individual requirements
8. identify suitable opportunities to sell additional or related products or services that are suited to retail clients' requirements
9. make recommendations to retail clients in a confident and polite way and without pressurising them
10. pace client consultations so that you optimise the selling time while maintaining good relations
11. meet your retail organisation's customer service standards in dealings with retail clients

Provide a consultative selling service to retail clients

Knowledge and understanding

You need to know and understand:

1. what consultative selling is, and how this is different from other kinds of retail selling
2. your retail organisation's desired image and how to project this to retail clients
3. how to use information in retail client records to prepare for consultations
4. how to create and maintain a rapport with retail clients, both new and existing
5. the types of question to ask retail clients to find out about their buying requirements, preferences and priorities
6. when and how to ask retail clients tactfully how much they want to spend
7. how to keep informed about the brands and services that 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
8. how to relate the features and benefits of products or services to retail clients' requirements
9. how to identify suitable opportunities to sell additional or related products
10. how to make recommendations to retail clients in a way that encourages them to take advice, without pressurising them
11. why there needs to be a balance in making immediate sales and the requirement to maintain good business relations with retail clients, and how to do so
12. your retail organisation's customer service standards and how to apply these when providing a consultative selling service to retail clients

Provide a consultative selling service to retail clients

Links to other NOS PPL.C314 Provide an after-sales service to retail clients as a result of retail client consultations

Provide a consultative selling service to retail clients

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C313
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; provides; providing; gives; giving; personalises; personalising; custom; customised; customising; tailored; tailoring; tailors; services; sales; sells; selling

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

It is highly unlikely that this unit will be able to be observed therefore the evidence generated will come from professional discussion supported by statistics relating to performance and testimony from an Expert Witness to confirm the candidate's competence

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

Overview

This standard is about following your retail organisation's guidelines in deciding on the value of items offered in part-exchange by retail customers.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

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

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

Performance criteria

You must be able to:

1. inspect the items being offered thoroughly
2. protect the items from damage while handling them
3. identify accurately any repairs and cleaning required and the costs involved
4. decide on the exchange value of the items accurately within your retail organisation's guidelines
5. explain to retail customers clearly and accurately the part-exchange value of the items and the benefits of a part-exchange arrangement
6. tell retail customers politely that the items are not acceptable for part-exchange, when this applies
7. treat retail customers politely throughout the valuation process

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

Knowledge and understanding

You need to know and understand:

1. the type and quality of items that can be accepted in part-exchange
2. relevant aspects of the law relating to ownership and resale of goods
3. how to check that items are clean and operate normally, including different kinds of checks and when to use them
4. the potential for reselling the items offered in part-exchange
5. your retail organisation's pricing guidelines for part-exchange items
6. how to decide on the value of items
7. the benefits to retail customers of part-exchange arrangements
8. how to treat retail customers politely, including telling retail customers the items cannot be accepted in part-exchange



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

-
- Links to other NOS**
- PPL.C214 Provide a payment service at point of sale in a retail organisation
 - PPL.C316 Negotiate part-exchange sales transactions with retail customers

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

Developed by	People 1st
Version Number	3
Date Approved	March 2017
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C315
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; decides; deciding; determines; determining; calculates; calculating; works out; working out; values; valuations; objects; goods; products; offers; offering; part exchange; sales; sells; selling

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Negotiate part-exchange sales transactions with retail customers

Overview

This standard is about negotiating part-exchange sales transactions with retail customers, where the items offered in part-exchange have been inspected and valued according to your retail organisation's policies and procedures.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Negotiate part-exchange sales transactions with retail customers

Negotiate part-exchange sales transactions with retail customers

Performance criteria

You must be able to:

1. follow your retail organisation's policies and procedures and any relevant laws for checking who owns the items
2. work out accurately the balance retail customers should pay on the items they want to buy
3. accept or refuse retail customers' offers according to your retail organisation's policies and procedures
4. end part exchange sales transactions politely if retail customers are not willing to go ahead
5. explain clearly and accurately the terms and conditions of the part exchange sale
6. fill in the paperwork for the transaction
7. treat retail customers politely throughout negotiations

Negotiate part-exchange sales transactions with retail customers

Knowledge and understanding

You need to know and understand:

1. your retail organisation's policies and procedures and any relevant laws for checking who owns the items
2. what might happen if ownership checks are not carried out properly
3. the terms and conditions of sale for items your retail organisation buys
4. how to deal with retail customers' objections
5. how to treat retail customers' politely during negotiations
6. how to fill in the paperwork when carrying out a part-exchange transaction

Negotiate part-exchange sales transactions with retail customers

Links to other NOS PPL.C214 Provide a payment service at point of sale in a retail organisation
PPL.C315 Decide on the value of items offered in part-exchange by retail customers



Negotiate part-exchange sales transactions with retail customers

Developed by	People 1st
Version Number	3
Date Approved	March 2017
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C316
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; negotiates; negotiating; agrees; agreeing; part exchange; sells; selling

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Assemble retail products at customers' premises and assist with installation and initial use

Overview

This standard is about assembling retail products and testing them in the customer's home or other place of delivery. It involves helping the customer understand how to install and use the product initially. This is not a selling role, but opportunities should be taken to promote other products when they arise.

This standard is for members of staff that are required to visit customers' premises to assemble products. This may be the main role of the job or only part of it.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Assemble retail products at customers' premises and assist with installation and initial use

Assemble retail products at customers' premises and assist with installation and initial use

Performance criteria

You must be able to:

1. identify the exact place where customers want the retail product to be assembled and installed, from information they provide
2. agree a suitable place for assembling the retail products if customers' chosen place is not suitable
3. check accurately that all the basic features of the retail product are working properly
4. explain and demonstrate to customers clearly and accurately how to use the retail products and their basic features
5. provide clear explanations if customers require more help in understanding how to use the retail products
6. tell customers about any sources of information they can consult concerning the retail products
7. promote additional or associated retail products to customers where appropriate
8. behave appropriately in customers' premises and represent your retail organisation positively
9. protect the health, safety and security of yourself and others at all times

Assemble retail products at customers' premises and assist with installation and initial use

Knowledge and understanding

You need to know and understand:

1. how to assemble and install your retail products at customers' premises
2. how to protect the health, safety and security of yourself and others while assembling retail products
3. the sources of information and advice that customers can consult about the retail products' their installation and how to use them
4. the associated or additional retail products that can be promoted to customers
5. how to judge when it is appropriate to promote associated or additional retail products to customers
6. how to behave appropriately in customers' premises and represent your retail organisation positively
7. how to explain the features of retail products in ways that customers can understand

Assemble retail products at customers' premises and assist with installation and initial use

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Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C220
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; assembles; assembling; puts; putting; constructs; constructing; builds; building; items; materials; goods; customers; homes; workplaces; delivers; delivery; delivering; transports; transporting

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Demonstrate specialist products to customers in a retail organisation

Overview

This standard is about creating and making the most of opportunities to demonstrate specialist products to customers in a retail organisation.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Demonstrate specialist products to customers in a retail organisation

Demonstrate specialist products to customers in a retail organisation

Performance criteria

You must be able to:

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 specialist product demonstration
2. organise specialist product demonstrations in ways that ensure a smoothly-run, efficient demonstration that meets relevant health and safety requirements
3. give demonstrations that clearly show customers the use and value of specialist products
4. offer customers the opportunity to use the specialist products themselves, when it is safe, legal and cost-effective to do so
5. encourage customers to ask questions about the specialist products being demonstrated
6. respond to customers' comments and questions during demonstrations following your retail organisation's customer service standards
7. take the necessary steps, within the limits of your authority, to minimise any security risks associated with demonstrations of specialist products

Demonstrate specialist products to customers in a retail organisation

Knowledge and understanding

You need to know and understand:

1. how demonstrations can help to promote and sell specialist products in your retail organisation
2. the elements of a positive customer experience in relation both to your retail organisation and to the specialist products demonstrated
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 specialist product demonstration
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 demonstration of specialist products
5. how to establish a rapport with individual customers and maintain this throughout a specialist product demonstration
6. the health and safety requirements that apply to demonstrations of specialist products
7. what constitutes a smoothly-run and efficient specialist product demonstration
8. how to keep customers interested during specialist product demonstrations
9. how to respond to customers' comments and questions during specialist product demonstrations in ways that promote sales and goodwill
10. the steps that are undertaken to minimise the security risks associated with specialist product demonstrations



Demonstrate specialist products to customers in a retail organisation

Links to other NOS PPL.C355 Help retail customers to choose specialist products in a retail organisation

Demonstrate specialist products to customers in a retail organisation

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Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C356
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; demonstrates; demonstrating; demonstrations; items; goods; sells; selling; sales

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Replenish goods on sale in a retail organisation

Overview

This standard is about replenishing goods on sale in a retail organisation by ordering new supplies of goods from the stores area, preparing goods for sale, placing goods in relevant places, rotating goods and checking demand for goods. This standard involves using a stock control system.

This standard is for all staff who replenish and order goods from the stores area for sale in a retail organisation.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Replenish goods on sale in a retail organisation

Replenish goods on sale in a retail organisation

Performance criteria

You must be able to:

1. order sufficient goods to maintain the correct levels of goods on sale
2. prepare goods for sale within the time allowed
3. arrange for goods to be moved to the sales floor when it is required
4. follow your retail organisation's procedures for replenishing various types of goods on sale
5. use your retail organisation's display fixtures and equipment safely ensuring goods are secure
6. rotate goods correctly and with the least possible disturbance to customers and staff
7. follow your retail organisation's procedures for recycling packaging waste
8. update your retail organisation's stock control system
9. notice changes in demand for goods and decide what levels are suitable
10. recommend changes in goods ordering to suit demand

Replenish goods on sale in a retail organisation

Knowledge and understanding

You need to know and understand:

1. how to use the stock control system to identify the types and quantities of goods to order for sale in your retail organisation
2. how to prepare and send orders for goods, and why this should be done accurately and at the right times
3. how to prepare different types of goods for sale in your retail organisation
4. how to decide when to move goods to the sales floor and the arrangements to make for moving goods
5. your retail organisations procedures for replenishing various types of goods
6. your retail organisations procedures for using display fixtures and equipment safely and securely
7. your retail organisation's procedures for recycling packaging waste
8. why goods need rotating
9. how to rotate goods correctly and without disturbing customers and staff any more than required
10. why your retail organisation's stock control systems need to be accurately updated
11. why demand for goods should be regularly checked
12. factors that can affect demand
13. who to approach with suggestions for changes to the levels of goods carried

Replenish goods on sale in a retail organisation

Links to other NOS PPL.B205 Check the level of goods on sale in a retail organisation

Replenish goods on sale in a retail organisation

Developed by	People 1st
Version Number	3
Date Approved	March 2017
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B206
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Storage and Retailing
Suite	Retail
Keywords	Retailing; retailers; checks; checking; stocking; stocks; goods; products; items; produce; materials; replenishes; replenishing; replenishment; shelf filling; facing up

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Check the availability of goods for customer orders

Overview

This standard is about identifying customers' specific requirements for goods they want to order and identifying who can supply the goods on what terms. This can include face to face, over the phone or online requests by customers. It is also about keeping customers' informed.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Check the availability of goods for customer orders

Check the availability of goods for customer orders

Performance criteria

You must be able to:

1. identify goods that will meet customers' requirements and check with customers that these are satisfactory
2. identify customers' requirements accurately by asking open questions to get correct details
3. find out who can supply the goods required and on what terms
4. check the availability of goods so customers' orders can be fulfilled
5. keep customers informed of progress in finding the goods they require
6. let customers know when orders cannot be met
7. suggest alternatives or other suppliers of goods
8. give customers clear, accurate and complete information about the availability of goods and the terms of supply

Check the availability of goods for customer orders

Knowledge and understanding

You need to know and understand:

1. how to ask the correct questions to find out exactly what customers want
2. which goods are held in stock
3. how to check whether there are sufficient goods to meet the order
4. which goods are available to order and which suppliers and manufacturers can provide them
5. how to check whether external suppliers and manufacturers can provide goods, and on what terms
6. why customers need to be kept informed of progress in finding the goods they require
7. how to let customers know when orders cannot be fulfilled
8. ways to advise customers of alternatives or other suppliers
9. why customers must be given clear, accurate and complete information about the terms of supply

PPL.B207 - SQA Unit Code JOBE 04



Check the availability of goods for customer orders

[Links to other NOS](#) PPL.B208 Process orders for retail customers



Check the availability of goods for customer orders

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Version Number	2
Date Approved	March 2017
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B207
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; checks; checking; verifies; verifying; available; stocks; products; items; produce; materials

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Use the dressing room facilities to create sales opportunities

Overview

This standard is about using the dressing room facilities to create sales whilst assisting customers and making them feel valued. It is also about ensuring security and minimising stock losses.

This standard is for owners, managers, department managers, team leaders and sales/customer service staff.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Use the dressing room facilities to create sales opportunities

Use the dressing room facilities to create sales opportunities

Performance criteria

You must be able to:

1. monitor the sales floor for customers who may be interested in trying clothes on
2. approach customers in the sales area to offer use of the dressing room facilities with a view to creating sales opportunities
3. welcome customers in a friendly manner when they approach the dressing room
4. check how many items are being taken into the dressing room, and follow your retail organisation's policy for restricting the number of items when necessary
5. advise the customer politely but firmly of your retail organisation's policy regarding how many items of clothing are allowed in a dressing room at any one time and deal with any disputes
6. let customers know how to get further help if required
7. inform customers about special offers and promotions to help create sales opportunities
8. suggest matching items and accessories to help create sales opportunities
9. keep track of the number of dressing rooms that are in use whilst carrying out other duties
10. check politely that customers have brought all the items of clothing out of the dressing room that they took into it in case of any discrepancies
11. follow your retail organisation's procedures promptly on how to deal with possible stock loss if there is a discrepancy
12. acknowledge customers who are waiting to use the dressing room and direct them to alternative facilities if these are available

Use the dressing room facilities to create sales opportunities

Knowledge and understanding

You need to know and understand:

1. how many dressing rooms there are and what other facilities are available
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
3. why approaching customers on the sales floor and offering use of the dressing room facilities can create sales opportunities
4. how to greet customers in a welcoming manner
5. your retail organisation's policy on checking how many items are being taken into the dressing room facilities and how to deal with customers who dispute the policy
6. how to keep up-to-date about in-store offers and promotions and how to advise customers about them
7. how to engage customers in conversation in order to create sales opportunities
8. how informing customers about special offers and promotions can lead to sales opportunities
9. how suggesting matching items and accessories can lead to sales opportunities
10. how to monitor customers entering and leaving the dressing rooms so none remain empty whilst customers are waiting
11. your retail organisation's procedures for dealing with suspected stock loss
12. the right person to contact if stock loss is suspected
13. how to check whether alternative dressing room areas are available at busy times

Use the dressing room facilities to create sales opportunities

Links to other NOS PPL.C274 Keep dressing room facilities ready for customer use

Use the dressing room facilities to create sales opportunities

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Version Number	2
Date Approved	March 2017
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C273
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; uses; using; dressing rooms; changing rooms; fitting rooms; sells; selling

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Help customers to choose alcoholic beverages in a retail organisation by advising on and recommending relevant products

Overview

This standard is about helping customers to choose the alcoholic beverages that best match their requirements in a retail organisation. This involves finding out what customers are looking for, advising on products and supporting any recommendations with relevant product information.

Strict laws apply to the sale of alcohol in retail organisations in the United Kingdom and they need to be complied with at all times.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Help customers to choose alcoholic beverages in a retail organisation by advising on and recommending relevant products

Help customers to choose alcoholic beverages in a retail organisation by advising on and recommending relevant products

Performance criteria

You must be able to:

1. follow all relevant laws and your retail organisation's policies relating to the sale of alcoholic beverages
2. explain clearly and politely to customers, when necessary, the relevant laws and your retail organisation's policies relating to the sale of alcoholic beverages
3. use effective questioning techniques to establish a rapport with customers and find out what they are looking for
4. advise and recommend products as closely as possible to customers' stated requirements, from the relevant alcoholic beverages available
5. support your product recommendations with factually correct information that is likely to give customers confidence in your recommendations
6. compare and contrast products in ways that help customers choose the products that best meet their requirements
7. encourage customers to ask questions and respond to their questions, comments and objections in ways that promote alcoholic beverage sales
8. recognise and act on suitable opportunities to recommend to customers associated or additional products
9. check for security risks in the sales area whilst assisting customers
10. check for further retail sales opportunities in the sales area

Help customers to choose alcoholic beverages in a retail organisation by advising on and recommending relevant products

Knowledge and understanding

You need to know and understand:

1. the relevant laws and your retail organisation's policies relating to the sale of alcoholic beverages
2. why the relevant laws and your retail organisation's policies for selling alcohol must be followed and what can happen to you and to your retail organisation if these are not followed
3. when and how to explain to customers the relevant law and your retail organisation's policies for selling alcohol
4. how to establish a rapport with customers
5. the kinds of questions to ask customers in order to find out their requirements and advise them accurately
6. where to find reliable information about the alcoholic content of the alcoholic beverages your retail organisation sells
7. the characteristics of different alcoholic beverages and how to match these to customers' requirements
8. how product information can give customers confidence in your product recommendations and advice
9. how to decide which product features are relevant and how much detail customers require to help them choose products
10. effective ways of comparing and contrasting products for customers
11. why it is important to encourage customers to ask questions about products
12. how to respond to customers' questions in ways that promote sales
13. how to recognise opportunities to recommend associated or additional products
14. why it is important to check the whole area for security and potential sales whilst helping customers

Help customers to choose alcoholic beverages in a retail organisation by advising on and recommending relevant products

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C268
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; helps; helping; assists; assisting; chooses; choosing; picks; picking; selects; selecting; wines; beers; lagers; stouts; ales; ciders; spirits; alcopops; alco-pops; liqueurs; drinks; bottles; cans

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Advise customers upon the fixing of their own tiles

Overview

This standard is about establishing customers' circumstances and advising them upon the fixing of their own tiles upon surface preparation.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Advise customers upon the fixing of their own tiles

Advise customers upon the fixing of their own tiles

Performance criteria

You must be able to:

1. determine required details about the surfaces upon which customers' tiles are to be fixed, establishing the nature of the surface being tiled
2. advise customers correctly regarding any required preparation of the surface
3. establish how the finished tiled surfaces are to be used
4. identify and select appropriate adhesives and grout to meet customers' requirements
5. inform customers about the products that will be used, including the order of application and how products are to be applied
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
7. determine whether there is, or will be, underfloor heating and determine correctly the impact for the fixing of the proposed tiles
8. agree with customers how best to accommodate any existing or planned fixtures, fittings, pipework or cabling
9. brief customers on safe working and best practice techniques
10. explore with customers and gain agreement on how the tiled surfaces are to be finished off
11. explain correctly how to take care of the tiled surfaces
12. offer the appropriate cleaning and maintenance products to customers, where relevant
13. provide confidence to customers that the decisions taken throughout the process will meet their expectations and tiling requirements

Advise customers upon the fixing of their own tiles

Knowledge and understanding

You need to know and understand:

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
2. those surfaces that are not suitable for tiling, including flaking paint and wallpaper, the reasons why and what can be done to make them suitable
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
4. the purpose of movement joints and how these are sited
5. what a tanking system is, and the circumstances when it is required
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
7. the principal methods for applying adhesives and grout and the importance of following manufacturers' instructions
8. the terms 'slip', 'open time', 'drying/curing time' and their relevance to the use of adhesives and grouts
9. the principal types of tools used in the fixing, grouting and finishing of tiles
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
11. how to cut and drill tiles safely and effectively and which tiles cannot be cut or drilled and why
12. methods and materials for fitting, fixing and sealing underfloor heating systems
13. how to finish tiled surfaces off upon completion of tiling
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
15. the various cleaning and maintenance products available, the application of these and how to use them safely
16. why it is important to advise customers correctly upon fixing tiles

Advise customers upon the fixing of their own tiles

Links to other NOS PPL.C262 Establish retail customer requirements and provide advice regarding tiling products
PPL.C263 Advise customers upon measuring and planning for the fixing of tiles

Advise customers upon the fixing of their own tiles

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Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C264
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; advice; advises; advising; fixes; provides; providing; gives; giving; tiling

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Receive deliveries and transfer fuel on a forecourt

Overview

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

This standard is for all personnel involved in the control and transfer of fuel on a forecourt including owners, managers, team leaders and authorised staff.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Receive deliveries and transfer fuel on a forecourt

Receive deliveries and transfer fuel on a forecourt

Performance criteria

You must be able to:

1. before receiving deliveries of fuel, check that the details in the delivery documents match the order, including details of the type and quantity of fuel ordered
2. follow relevant legal regulations relating to the UK geographical location of your retail organisation
3. identify any problems with the fuel delivery, take suitable action within the limits of your authority, and refer to the correct person any problems you cannot handle
4. check the areas of transfer on the forecourt for risks and hazards
5. transfer fuel only when all risks and hazards are removed
6. transfer the fuel on the forecourt in line with your retail organisation's procedures following all relevant health and safety precautions
7. throughout the delivery, remain alert for potential safety hazards and emergencies and deal with these promptly and in line with the relevant legal and your retail organisation's requirements
8. stop the transfer if any risks or hazards are encountered, in line with your retail organisation's procedures
9. follow all relevant safety and emergency procedures if a fuel spill occurs
10. complete all the necessary paperwork in line with your retail organisation's requirements
11. make the site ready for normal use when the deliveries and transfers are complete
12. follow personal hygiene requirements after deliveries and transfers

Receive deliveries and transfer fuel on a forecourt

Knowledge and understanding

You need to know and understand:

1. the delivery details you need to check before fuel is received
2. the delivery details you need to check before fuel is transferred to the tanks
3. how to check that the details in the delivery documents match the order, including details of the type and quantity of fuel
4. typical safety hazards associated with fuel deliveries and the relevant legal and your retail organisation's requirements for dealing with them
5. typical problems with fuel deliveries on the forecourt and how to solve them
6. your retail organisations procedures for transferring fuel to tanks
7. the conditions that indicate when a transfer must be stopped
8. what to do in the event of an emergency, such as a fuel spill
9. the paperwork you need to complete and how to complete it
10. how to make the site ready for normal use after deliveries and transfers
11. the personal hygiene requirements associated with fuel deliveries and transfers
12. relevant legal regulations relating to the UK geographical location of your retail organisation

Receive deliveries and transfer fuel on a forecourt

Glossary

Driver-controlled transfer – when fuel is transferred to the storage tanks on the forecourt by the driver

Fuel – all types of motor fuel stored in your retail organisation's forecourt

Links to other NOS

PPL.B238 Prepare to receive deliveries of fuel (for driver-controlled transfers) on a forecourt

PPL.B239 Check that driver-controlled fuel transfers have been completed

Receive deliveries and transfer fuel on a forecourt

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B240
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; delivery; delivering; delivered; petrol; diesel; forecourts; petrol stations; stations

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence

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

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

Driver-controlled transfer

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

Fuel

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

Demonstrate beauty products to retail customers

Overview

This standard is about demonstrating the features and benefits of beauty products to retail customers.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Demonstrate beauty products to retail customers

Demonstrate beauty products to retail customers

Performance criteria

You must be able to:

1. collect all the tools, materials and products required for an effective and hygienic demonstration of beauty products to retail customers
2. obtain retail customers' permission to carry out the demonstration
3. explain to retail customers clearly and in sufficient detail which beauty products are going to be applied and why
4. check with retail customers whether they are allergic to any beauty products or ingredients, and take care not to apply any of these
5. follow your retail organisation's grooming guidelines and maintain your personal hygiene whilst demonstrating beauty products
6. protect retail customers' hair and clothing from coming into contact with the beauty products being demonstrated
7. apply beauty products in a logical sequence, using effective and hygienic techniques
8. explain clearly the features and benefits that are required to gain retail customers' interest in making a purchase of the beauty products being demonstrated
9. complete demonstrations taking into consideration retail customers' time pressures
10. check whether retail customers want any adjustments made to the beauty products that have been applied
11. clear away promptly the equipment and beauty products at the end of the demonstration to reduce retail customers' waiting time
12. give retail customers the opportunity to look in a mirror at the end of the demonstration ensuring the light and angle of the mirror promote the beauty products that have been applied

Demonstrate beauty products to retail customers

Knowledge and understanding

You need to know and understand:

1. the purpose and value of demonstrations in promoting and selling beauty products
2. the tools, materials and products required for demonstrating beauty products effectively and hygienically
3. how your personal hygiene and grooming contribute to making the demonstration comfortable for the retail customer
4. why the retail customer's permission must be gained for the demonstration
5. how to protect the retail customer's hair and clothing from contact with the beauty products being demonstrated
6. the opinions and concerns that retail customers typically have about demonstrations of beauty products and how to tackle these
7. the difference between features and benefits of beauty products
8. the features and benefits of the beauty products your retail organisation is responsible for demonstrating
9. techniques for applying products effectively and hygienically
10. how to organise demonstrations into logical steps and stages, and the importance of doing so
11. how to communicate clear and accurate information before and during demonstrations
12. why equipment and products should be cleared away promptly at the end of the demonstration to reduce retail customers' waiting time

Demonstrate beauty products to retail customers

Links to other NOS PPL.C205 Help retail customers choose products
PPL.C254 Maintain the retail customer record-card system in a retail organisation

Demonstrate beauty products to retail customers

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C253
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; demonstrates; demonstrating; cosmetics; skincare; skin care; make-up; make up; items; goods; materials; toiletries

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

The evidence should take into account the training provided by the cosmetic house that the candidate is working for where this occurs

Evaluate and improve retail displays

Overview

This standard is about evaluating finished retail displays to see if they are suitable, easy to reach, safe and secure, sorting out any problems you identify and then considering how they could be improved.

This standard is for specialist staff who are responsible for visual merchandising personnel or those who have been allocated visual display responsibilities.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Evaluate and improve retail displays

Evaluate and improve retail displays

Performance criteria

You must be able to:

1. check that all the parts of retail displays are suitable for the purpose of the retail display
2. check that retail displays meet requirements for easy access, safety and security
3. identify safety and security risks to retail displays and choose suitable ways of reducing risks
4. consider how retail displays look from all the directions from which customers will approach them
5. encourage colleagues to provide constructive comments about retail displays
6. evaluate retail displays
7. make any authorised improvements promptly that are required to achieve the required visual effects and to make retail displays safe and secure
8. check regularly retail displays' visual effects
9. report promptly to the correct person any problems and risks

Evaluate and improve retail displays

Knowledge and understanding

You need to know and understand:

1. how to decide if items are suitable for retail displays
2. how to identify risks to items and measures to protect them
3. how to evaluate the visual effect of retail displays
4. how to make adjustments and improvements to retail displays
5. how to use scale when creating visual effects
6. why retail displays need to be evaluated and improved
7. how light, colour, texture, shape and dimension combine to achieve the visual effects required for retail displays
8. different approaches to using retail displays for different types of merchandise
9. the dressing techniques for different types of merchandise
10. how to identify the purpose of retail displays
11. your retail organisation's visual design and merchandising policies
12. the types of risk retail displays face, why these risks must be reduced as far as possible and how to do so
13. the reporting arrangements for resolving problems and reducing risks
14. the levels of your authority to change retail displays

Evaluate and improve retail displays

Links to other NOS PPL.C232 Dress in-store retail displays to guidelines
PPL.C233 Dress window displays following the retail organisation's guidelines

Evaluate and improve retail displays

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C234
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; design briefs; designs; evaluates; evaluating; assesses; assessing; improves; improving; adjusts; adjusting; visual merchandising

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Order graphic materials to meet retail display requirements

Overview

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

This standard is for staff who are visual merchandising specialists or personnel who have responsibilities for visual displays.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Order graphic materials to meet retail display requirements

Order graphic materials to meet retail display requirements

Performance criteria

You must be able to:

1. state what graphic materials are required to suppliers for retail displays
2. check that suppliers can meet the requirements of your retail organisation
3. order supplies of graphic materials promptly and within the available budget
4. check the progress of orders
5. check the quality and quantity of graphic materials when they are delivered and that they match the order

Order graphic materials to meet retail display requirements

Knowledge and understanding

You need to know and understand:

1. how graphic materials help to make retail displays more effective
2. different ways to use graphic materials for different types of merchandise
3. how to choose graphic materials that will achieve the desired effects
4. who can supply graphic materials
5. your retail organisation's procedures for ordering graphic materials
6. how to make clear to suppliers what graphic materials are required to meet the retail display requirements
7. how to check the quantity and quality of graphic materials when they are delivered
8. how to confirm the cost limits and deadlines for buying graphic materials and the importance of following these

PPL.C235 - SQA Unit Code J0BP 04



Order graphic materials to meet retail display requirements

Links to other NOS PPL.C236 Position graphic materials to support retail displays

Order graphic materials to meet retail display requirements

Developed by	People 1st
Version Number	2
Date Approved	March 2017
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C235
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; orders; ordering; graphics; images; pictures; displays; visual merchandising

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Identify and obtain graphic materials for retail displays

Overview

This standard is about identifying, obtaining and choosing graphic materials including signs and tickets to make retail displays more attractive and informative to customers.

This standard is for trained visual merchandising personnel.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Identify and obtain graphic materials for retail displays

Identify and obtain graphic materials for retail displays

Performance criteria

You must be able to:

1. use the design brief and information about the layout to identify the graphic materials required for retail displays
2. identify the types and quantities of graphic materials you need to obtain and the associated costs, delivery dates and delivery addresses
3. confirm what is required with the relevant decision-makers
4. choose graphic materials that are consistent with relevant legal requirements and your retail organisation's visual-design **policy**
5. use the accepted ways of describing the type and quantity of graphic materials required
6. confirm that proposals for using graphic materials are consistent with your retail organisation's visual-design **policy** and aims and are acceptable to decision-makers
7. specify clearly to suppliers what graphic materials are required for retail displays

Identify and obtain graphic materials for retail displays

Knowledge and understanding

You need to know and understand:

1. how to identify the requirement for graphic materials, and the factors affecting their use and style
2. how to check the interpretations of the graphic materials that you need to obtain
3. how to choose graphic materials and say how they should be used
4. how to check that proposals for graphic materials are consistent with your retail organisation's visual-design **policy** and aims
5. how to brief suppliers about requirements
6. the part graphic materials play in retail displays
7. the part graphic materials have in attracting retail customers and giving them information
8. approaches to using graphic materials for different types of merchandise
9. your retail organisation's visual-design **policy**
10. relevant legal requirements relating to graphic materials
11. the accepted ways of describing types and quantities of graphic materials so that suppliers understand what is required
12. your retail organisation's procedures and requirements for ordering graphic materials
13. who the relevant decision-makers are
14. who can supply graphic materials

Identify and obtain graphic materials for retail displays

Glossary

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

Links to other NOS

PPL.C333 Co-ordinate how graphic materials are used in retail displays
PPL.C334 Check how graphic materials are used in retail displays

Identify and obtain graphic materials for retail displays

Developed by	People 1st
Version Number	2
Date Approved	March 2017
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C332
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; identifies; identifying; gets hold; getting hold; sources; sourcing; acquires; acquiring; graphics; images; pictures; visual merchandising

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Glossary: The glossary contains definitions of the terms used in unit PPL.C332. These definitions do not constitute range.

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

Co-ordinate how graphic materials are used in retail displays

Overview

This standard is about co-ordinating the distribution of graphic materials, including signs and tickets, and how they are used in retail displays.

This standard is for trained visual merchandising personnel.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

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

Co-ordinate how graphic materials are used in retail displays

Performance criteria

You must be able to:

1. check that graphic materials meet specifications, relevant legal requirements and your retail organisation's **policy**
2. distribute graphic materials to the correct places by the agreed deadlines and co-ordinate how they are used in retail displays
3. give colleagues clear, accurate and up-to-date instructions for installing graphic materials promptly
4. check that graphic materials are correctly installed and maintained

Co-ordinate how graphic materials are used in retail displays

Knowledge and understanding

You need to know and understand:

1. how to confirm whether graphic materials are available
2. how to check that graphic materials are suitable for use in retail displays
3. how to produce instructions for installing graphic materials and co-ordinate how they are carried out
4. how to check that installations are satisfactory
5. the part graphic materials play in retail displays
6. the part graphic materials have in attracting and informing retail customers
7. different approaches to using graphic materials for different merchandise
8. your retail organisation's **policy** and relevant legal requirements for graphic materials

Co-ordinate how graphic materials are used in retail displays

Glossary

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

Links to other NOS

SSR.C332 Identify and obtain graphic materials for retail displays
SSR.C334 Check how graphic materials are used in retail displays

Co-ordinate how graphic materials are used in retail displays

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C333
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; co-ordinates; co-ordinating; coordinates; coordinating; organises; organising; arranges; arranging; directs; directing; graphics; images; pictures; uses; using; visual merchandising

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Glossary: The glossary contains definitions of the terms used in unit PPL.C333. These definitions do not constitute range.

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

Gather information about retail customers' responses to displays and layouts

Overview

This standard is about gathering valid and reliable information that will allow judgements to be made about whether displays and layouts are having the desired effect on retail customers and encouraging them to purchase the items being promoted.

This standard is for visual merchandising specialists and personnel responsible for gathering feedback on visual displays and layouts.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Gather information about retail customers' responses to displays and layouts

Gather information about retail customers' responses to displays and layouts

Performance criteria

You must be able to:

1. accurately recognise when information is required about retail **customers' responses**, why it is required, and what type of information would be most useful
2. gather information about retail **customers' responses** in ways that are suitable for your purposes, in line with your retail organisation's communications **policy**
3. gather sufficient information to allow accurate judgements about retail **customers' responses** to displays and layouts to be made
4. accurately interpret information about retail **customers' responses**
5. assess information fairly when reviewing the effect of displays and layouts

Gather information about retail customers' responses to displays and layouts

Knowledge and understanding

You need to know and understand:

1. how to organise the gathering of information about retail **customers' responses**, such as sales figures, footfall and customer flow
2. how to bring together, compare and interpret information about retail **customers' responses** to displays and layouts
3. how to choose the information that is most useful for judging the effect of displays and layouts
4. why information about retail **customers' responses** to displays and layouts is required and how to use it to decide what requires improvement
5. how constantly improving the design of displays and layouts helps to attract and interest retail customers
6. how to recognise what different designs are meant to achieve and the types of retail customer they should attract
7. what customer-focused trading is
8. the meaning of 'validity' and 'reliability' in relation to retail **customers' responses**
9. useful sources of information about retail **customers' responses**
10. your retail organisation's procedures and requirements for gathering information about retail **customers' responses** to displays and layouts

Gather information about retail customers' responses to displays and layouts

Glossary

Customers' responses:

1. whether they are attracted to the display
2. whether they show interest in the display features
3. whether they buy the goods or services featured in the display

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

Links to other NOS PPL.C336 Assess and report the effect of retail displays and layouts

Gather information about retail customers' responses to displays and layouts

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C335
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; gathers; gathering; collects; collecting; statistics; facts; figures; numbers; reactions; respond; visual merchandising

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Glossary: The glossary contains definitions of the terms used in unit PPL.C335. These definitions do not constitute range.

Customers' responses:

1. whether they are attracted to the display
2. whether they show interest in the display features
3. whether they buy the goods or services featured in the display

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

Check the accuracy of records of hours worked in a retail organisation

Overview

This standard is about checking the accuracy of records of hours worked by colleagues in your retail organisation. This can be in a store or branch of a retail organisation. It involves processing data accurately and responding to colleague's queries politely and confidentially. It is also about observing good timekeeping and attendance and maintaining relevant data protection legislation.

This standard is for owners, managers, team leaders and personnel responsible for recording colleagues' working hours.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Check the accuracy of records of hours worked in a retail organisation

Check the accuracy of records of hours worked in a retail organisation

Performance criteria

You must be able to:

1. use efficient and effective methods of checking that data and calculations are complete and accurate
2. identify discrepancies and unusual features of data and query these promptly with the correct people
3. identify recurring data inaccuracies and report these promptly to the correct people
4. give information and reports to the correct people at the required times and in suitable formats
5. provide information and advice promptly, courteously and accurately in response to colleagues' queries about records of hours worked
6. refer colleagues' queries promptly to the correct person when they cannot be resolved within your area of responsibility
7. use data processing equipment and materials safely, effectively and efficiently
8. maintain relevant legislation and your retail organisations procedures for keeping data protected

Check the accuracy of records of hours worked in a retail organisation

Knowledge and understanding

You need to know and understand:

1. why records of hours worked need to be checked
2. the records your retail organisation keeps of hours worked, and where to find these
3. the efficient and effective methods for checking data and calculations accurately
4. the discrepancies and unusual features to check for, and how to recognise these
5. why it is important to identify recurring data inaccuracies, how to do this and who needs to be informed about such problems
6. what information and reports to produce, when and how to produce them and who needs to see them
7. what it means to treat colleagues as internal 'customers' and why it is important to do this
8. the types of query within your area of responsibility and how to resolve these
9. who to refer queries to when outside your area of responsibility
10. what data processing equipment and materials to use and how to do so safely, effectively and efficiently
11. the relevant legislation and your retail organisation's procedures for keeping data protected

Check the accuracy of records of hours worked in a retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E212
Relevant Occupations	Administration and Secretarial Occupations; Finance; General; Records; Secretarial and Related Occupations; Retail and commercial enterprise; Retailing and wholesaling; Manager; Team Leader; Owner/Manager
Suite	Retail
Keywords	Retailing; retailers; checks; checking; confirms; confirming; accurate; discrepancies; discrepancy; working hours; payroll; pay roll; pay-roll; errors

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Manage a team on a temporary basis in a retail organisation

Overview

This standard is about managing a team in your retail organisation on a temporary basis. For example being responsible for:

- a special event
- sales preparation
- stock taking or emergency situations
- covering when managers are absent

It is about understanding your limitations: it is not about formally developing or disciplining team members.

This standard is for personnel who have been given temporary leadership responsibilities.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Manage a team on a temporary basis in a retail organisation

Manage a team on a temporary basis in a retail organisation

Performance criteria

You must be able to:

1. set an example for the team by following your retail organisation's procedures and policies at all times
2. check that team members are following your retail organisation's procedures and policies
3. take prompt and suitable action when team members are not following your retail organisation's procedures and policies
4. give clear information and instructions to the team
5. use methods suited to individual team members' levels of motivation and expertise, when encouraging them to complete tasks
6. recognise when team members need support
7. choose and apply suitable methods for supporting team members
8. praise good performance promptly and tell your manager about it
9. manage your time so that your usual and temporary management duties can be carried out effectively
10. recognise when information is confidential and release it only to those who have a right to it
11. share work and privileges equally between team members
12. act within the limits of your responsibility and authority
13. ask the correct person for advice promptly when problems are beyond your responsibility, authority or expertise to resolve

Manage a team on a temporary basis in a retail organisation

Knowledge and understanding

You need to know and understand:

1. your retail organisation's procedures and policies relating to the work of the team and the way the team's daily activities are managed, including:
 - health and safety
 - security
 - staffing levels
 - absence reporting
 - timekeeping
 - personal appearance
 - handling customer complaints
 - laws and regulations relating to the products the team sells
2. why to set an example to team members by following your retail organisation's procedures and policies at all times
3. how to check that team members are following your retail organisation's procedures and policies
4. what must be done when team members are not following your retail organisation's procedures and policies
5. how clear communication helps teams to work effectively
6. how to give instructions so that team members will readily understand them and feel motivated to follow them
7. why to be approachable as a team leader
8. the different ways of motivating and encouraging staff, and how to choose which method to use
9. the kinds of support team members are likely to need, and what kinds of support within your area of responsibility can be provided
10. how to plan, prioritise and delegate so that your usual and temporary management duties can be fulfilled
11. the types of confidential information to which team leaders have access, and the importance of respecting confidentiality
12. why all team members must be treated equally
13. the challenges involved in managing people who are a friend or fellow team member, and techniques for resisting pressure from team members to abuse these temporary responsibilities
14. the limits of your responsibility and authority when managing the team
15. who can help to sort out problems that are beyond your responsibility, authority or expertise
16. the kinds of information your manager needs, when it is needed and in what format

Manage a team on a temporary basis in a retail organisation

Developed by	People 1st
Version Number	4
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E338
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Team Leader
Suite	Retail
Keywords	Retailing; retailers; helps; helping; assists; assisting; manages; managing; management

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Plan and allocate work to staff in a retail organisation

Overview

This standard is about being able to plan and allocate work to staff in your retail organisation equally and in ways that enable staff to be effective.

This standard is for owners, managers and team leaders.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Plan and allocate work to staff in a retail organisation

Plan and allocate work to staff in a retail organisation

Performance criteria

You must be able to:

1. plan staff rotas that take account of the needs of your retail organisation and demonstrate equality to individual staff
2. plan staff activities so that they can be as productive as possible, taking into account the abilities and development needs of individuals
3. ensure that staff have the equipment, materials, information and training they need to do the work expected of them
4. brief staff about their work tasks in ways that are likely to encourage them to do their best
5. check that staff understand what is needed of them, when it needs to be done, and the standards expected of them
6. allocate work to individual staff
7. give staff enough opportunity to ask questions about the work allocated to them
8. investigate when work is not completed in line with instructions, asking staff about problems that are preventing them from working effectively

Plan and allocate work to staff in a retail organisation

Knowledge and understanding

You need to know and understand:

1. the factors it is useful to take into account when planning staff rotas in your retail organisation
2. how allocating work effectively can improve staff productivity
3. what equipment, materials, training and information staff need to carry out their work, the available options for training staff, and how to evaluate these options
4. clear and motivational ways of briefing staff when allocating work
5. the typical reasons why staff do not complete work satisfactorily, and effective ways of addressing these difficulties
6. ways to encourage staff about any problems preventing them from working effectively
7. how to monitor the work being carried out by staff and make justified assessments of individuals' effort and competence
8. the different ways of rewarding a job well done, and how to choose the most motivating response for the individual and situation

Plan and allocate work to staff in a retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E003
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Owner/Manager; Manager; Team Leader
Suite	Independent retailers
Keywords	Retailing; retailers; SMEs; small medium enterprises; small enterprises; medium enterprises; independents; allocates; allocating; assigns; assigning; delegates; delegating; tasks; jobs; workers

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Monitor work targets to make changes in staffing levels in a retail organisation

Overview

This standard is about collecting, monitoring information about progress towards work targets, and making justifiable recommendations for changes in staffing levels in your retail organisation.

This standard is for owners, managers, and team leaders.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Monitor work targets to make changes in staffing levels in a retail organisation

Monitor work targets to make changes in staffing levels in a retail organisation

Performance criteria

You must be able to:

1. collect and organise information about the staff available and the work they are doing in your retail organisation
2. assess whether there are sufficient staff for work targets to be realistically achieved
3. monitor and collect information about what progress is being made towards achieving work targets
4. use the information about staffing and progress towards work targets to make realistic and justifiable judgements of how effective staff are
5. recommend changes in staffing clearly and promptly to the correct people
6. change staffing levels and schedules so that targets can be met
7. pass on the results of your monitoring promptly to the people who need them
8. use the results of your monitoring to encourage staff to reach their targets

Monitor work targets to make changes in staffing levels in a retail organisation

Knowledge and understanding

You need to know and understand:

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



Monitor work targets to make changes in staffing levels in a retail organisation

Links to other NOS PPL.E308 Plan staffing levels and prepare work schedules for a retail organisation

Monitor work targets to make changes in staffing levels in a retail organisation

Developed by	People 1st
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Originating Organisation	Skillsmart Retail
Original URN	SSR.E309
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Owner/Manager; Team Leader; Manager
Suite	Retail
Keywords	Retailing; retailers; monitors; monitoring; watches; watching; workforce; numbers; compares; comparing; rotas

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Organise an audit programme and put it into practice with a team in a retail organisation

Overview

This standard is about organising an audit programme and putting it into practice with a team in your retail organisation.

This standard is for owners, managers and team leaders.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Organise an audit programme and put it into practice with a team in a retail organisation

Organise an audit programme and put it into practice with a team in a retail organisation

Performance criteria

You must be able to:

1. find out and understand when to carry out an audit, why it is required, what it should cover and who requires the audit programme
2. find out how the programme plan should be laid out and the level of detail required
3. find out what resources are available to carry out the audit in your retail organisation
4. identify any problems that are likely to prevent the audit being carried out effectively in the time available, and resolve them before the audit is started
5. organise the resources and information required to carry out an audit programme
6. choose staff to assist with the audit, check their availability and give responsibilities to each of them
7. brief the team so that they know what their responsibilities are during the audit, and how to carry out those responsibilities
8. plan the work of the team to make sure it is accurate and will cause as little disruption as possible to normal work
9. put the audit into practice and organise the team's activities during the audit
10. check on the team's progress at suitable intervals and help them resolve any problems they may be having in completing the audit

Organise an audit programme and put it into practice with a team in a retail organisation

Knowledge and understanding

You need to know and understand:

1. why it is important to audit levels of stock and stock inventories
2. how often audit programmes need to be carried out
3. the information held in your retail organisation's stock inventory and how to access it
4. how to interpret information and correct mistakes in your retail organisation's stock inventory
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
6. the resources required to implement an audit programme
7. when and how to tell colleagues that an audit is to take place, and how it is likely to affect colleagues' work
8. how to organise the resources and information to put an audit programme into practice
9. how to choose people to help with the audit and give them responsibilities
10. how to explain to the team what their responsibilities are during the audit, and how these responsibilities are to be carried out
11. how to put an audit programme into practice in your retail organisation
12. how to organise the team's activities during an audit
13. how to check on the progress of the audit



Organise an audit programme and put it into practice with a team in a retail organisation

Links to other NOS PPL.B305 Investigate problems and report the findings of stock audits in a retail organisation



Organise an audit programme and put it into practice with a team in a retail organisation

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Version Number	3
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B304
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; puts; putting; audits; auditing; inventories; inventorying; practise; carry out; carries out; carrying out

Assess how effective displays are in a retail organisation

Overview

This standard is about assessing how effective displays prepared by retail staff under supervision are in a retail organisation. Specialist visual merchandising skills are not required.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Assess how effective displays are in a retail organisation

Assess how effective displays are in a retail organisation

Performance criteria

You must be able to:

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

Assess how effective displays are in a retail organisation

Knowledge and understanding

You need to know and understand:

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

Assess how effective displays are in a retail organisation

Links to other NOS PPL.C301 Organise staff to display goods for retail sale
PPL.C303 Keep stock available, correctly priced and maintain quality of stock in a retail organisation

Assess how effective displays are in a retail organisation

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C302
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; assesses; assessing; evaluates; evaluating; effectiveness; efficient; efficiency

Overview

This standard is about working productively with colleagues both in the same channel of your retail organisation and within other channels. Cooperation across channels is essential to the success of your retail organisation as a whole. This standard describes what everyone within your multi-channel retail organisation needs to do in order to work together effectively. It applies to everyone in your retail organisation regardless of their particular specialism, their level of responsibility or the channel within which they work.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Work productively with colleagues in a multi-channel retail organisation

Work productively with colleagues in a multi-channel retail organisation

Performance criteria

You must be able to:

1. use effective methods of communicating with **colleagues** within a multi-channel retail organisation
2. recognise and value the work of **colleagues** and their contribution to the success of your retail organisation
3. liaise with **colleagues** in a courteous and respectful manner
4. offer and accept constructive criticism to and from **colleagues** when necessary whilst ensuring they work productively
5. offer support and encouragement to **colleagues**, particularly if they have new roles or responsibilities
6. explore with **colleagues** regularly possible new ways of working that will benefit your retail organisation
7. ensure the information you share with **colleagues** is up-to-date, relevant and clear
8. take appropriate action to resolve difficulties in working with **colleagues** when work is not being carried out productively
9. work with **colleagues** in ways that support the purpose, objectives and **brand values** of your retail organisation

Work productively with colleagues in a multi-channel retail organisation

Knowledge and understanding

You need to know and understand:

1. mutually acceptable ways of communicating with **colleagues** in a multi-channel retail organisation
2. how your work and that of **colleagues** contributes towards the success of your retail organisation
3. why there is a need to be courteous and respectful when liaising with **colleagues**
4. how to offer and respond to constructive criticism
5. the types of support and encouragement **colleagues** are likely to need and in what circumstances to work productively
6. effective ways of seeking and suggesting ideas for new ways of working that will benefit your retail organisation
7. what information **colleagues** need
8. potential sources of conflict within your retail organisation
9. effective ways to resolve conflict
10. the purpose, objectives and **brand values** of your retail organisation

Glossary

Brand values – the core values and qualities that define your retail organisation from the customer’s viewpoint

Colleagues – those who work in any of the following:

1. your team
2. the same channel of your retail organisation
3. other channels of your retail organisation
4. external organisations, if applicable

Work productively with colleagues in a multi-channel retail organisation

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.MCR01
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Owner/Manager; Manager; Team Leader
Suite	Multi-channel Retailing
Keywords	Retailing; retailers; internet; e-commerce; e-tailing; etailing; e-tailers; etailers; works; working; cooperates; cooperating; effectively; efficiently; co-workers; coworkers; multi channel

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Work with colleagues to encourage innovation in a multi-channel retail organisation

Overview

Competition between retail organisations is fierce and unrelenting, and so a constant supply of innovative ideas is needed in order for your retail organisation to survive and thrive. Within your multi-channel retail organisation, innovative thinking is needed to drive sales not just within individual channels but across the channels too. This standard is about working with colleagues to encourage and support one another's innovative thinking.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Work with colleagues to encourage innovation in a multi-channel retail organisation

Work with colleagues to encourage innovation in a multi-channel retail organisation

Performance criteria

You must be able to:

1. keep up-to-date with developments in your multi-channel retail organisation and encourage **colleagues** to do the same
2. seek out and act on opportunities to work with **colleagues** to encourage, generate and develop new ideas
3. challenge existing ways of working constructively
4. consult **colleagues** about the likely effects on their work of changes being considered within your sphere of influence
5. offer constructive advice from your field of expertise to **colleagues** who are developing new ideas
6. offer practical support to **colleagues** who are implementing new ideas where your workload allows
7. acknowledge **colleagues'** contributions to innovations within your retail organisation openly and fairly
8. keep relevant **colleagues** informed about any new ideas being tried out
9. make a clearly-argued case to decision-makers where there is a need to request resources for innovation

Work with colleagues to encourage innovation in a multi-channel retail organisation

Knowledge and understanding

You need to know and understand:

1. the benefits to your multi-channel retail organisation of encouraging innovation
2. what kinds of opportunities for innovation are likely to exist within your retail organisation, and which could be acted upon
3. how to keep up-to-date with new developments in your retail organisation and why it is important for everyone to do so
4. the role of open and constructive communication in encouraging innovation
5. the types of difficulties that may arise when exploring new ideas, and ways that **colleagues** can be worked with to overcome these difficulties
6. how to ensure that **colleagues** receive the credit they deserve for their contributions to innovation within your multi-channel retail organisation
7. the types of advice and support available to **colleagues**
8. who needs to be kept informed of any new ideas that are tried out
9. who has the authority to make resources available for innovation
10. how to develop a persuasive case for resources to support innovation

Work with colleagues to encourage innovation in a multi-channel retail organisation

Glossary

Colleagues – those who work in any of the following:

1. your team
2. the same channel of your retail organisation
3. other channels of your retail organisation
4. external organisations, if applicable

Work with colleagues to encourage innovation in a multi-channel retail organisation

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Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.MCR02
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Owner/Manager; Manager; Team Leader
Suite	Multi-channel Retailing
Keywords	Retailing; retailers; internet; e-commerce; e-tailing; etailing; e-tailers; etailers; multi channel; working; works; cooperates; cooperating; encourages; encouraging; promotes; promoting; co-workers; coworkers; innovative

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit.

Organise staff to display goods for retail sale

Overview

This standard is about organising staff to display goods for retail sale through briefing and supervising. Specialist visual merchandising skills are not required.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Organise staff to display goods for retail sale

Organise staff to display goods for retail sale

Performance criteria

You must be able to:

1. organise staff by briefing them on the purpose of the display and relevant requirements and standards
2. check relevant requirements and standards with the appropriate authority where necessary
3. provide opportunities for staff to check they understand the requirements and standards of the display
4. supervise the staff preparing the display area and putting the display together in a way that causes the least inconvenience to customers
5. provide constructive feedback to staff on their performance
6. check that the assembled display conforms to the supplier's and your retail organisation's requirements
7. obtain permission from the appropriate authority to modify or change the display
8. monitor that information has been placed accurately and legally, and is chosen and positioned to promote sales effectively
9. keep complete, accurate and up-to-date records of displays

Organise staff to display goods for retail sale

Knowledge and understanding

You need to know and understand:

1. how to organise staff responsible for displaying goods for retail sale
2. how different types of display help to reach sales targets
3. how information can be positioned so that it helps to promote sales
4. how the layout of the selling area affects sales
5. the relevant legal requirements for pricing goods for sale
6. your retail organisation's standards for putting displays together, including standards for cleaning and preparation
7. how to work out what type and quantity of resources are required to set up displays
8. how to brief staff in a way that encourages their involvement
9. how to check the work of staff preparing and putting displays together and how to give feedback to staff on their performance
10. the security, health and safety requirements and procedures relating to displaying goods
11. the customer's legal rights and your retail organisation's legal duties and responsibilities in relation to the display of goods, including descriptions of goods
12. how to check that the information in displays is accurate and legal
13. how to use different price marking methods and technologies

Organise staff to display goods for retail sale

Links to other NOS PPL.C302 Assess how effective displays are in a retail organisation
PPL.C303 Keep stock available, correctly priced and maintain quality of stock in a retail organisation

Organise staff to display goods for retail sale

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Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C301
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; organises; organising; displaying; displays; items; products; produce; materials; stocks; planograms

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Update product information on a trading website

Overview

An up-to-date and readily-searchable product database is an essential component of a successful trading website. This standard is about the role in maintaining product information databases that contribute to sales and customer satisfaction.

Data concerning product details and prices must comply with any relevant legislation.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Update product information on a trading website

Update product information on a trading website

Performance criteria

You must be able to:

1. use a classification system that takes into account the search criteria likely to be used by retail customers
2. explain clearly the classification system to **colleagues** who are required to know about it
3. cross-reference associated and related products in ways that are likely to promote additional sales
4. use sources of product information and prices that are up-to-date, accurate and legally-compliant
5. use information about customer behaviour on the trading website to improve the functioning of the database
6. keep up-to-date with new ideas and technology relating to product databases
7. implement effective routines for data back-up
8. upload updates to the live database in accordance with the agreed procedures and timescales of your retail organisation
9. seek advice and support from designated **colleagues** to resolve problems with uploads to the live database when necessary

Update product information on a trading website

Knowledge and understanding

You need to know and understand:

1. how a well-maintained product database contributes to the success of your retail organisation as a whole
2. the sources of information about the criteria used by retail customers to search for products on the trading website
3. which **colleagues** need to know about the classification system used
4. the accepted ways of classifying products and the advantages and disadvantages of each
5. the sources of product information and prices that are up-to-date, accurate and legally-compliant
6. the likely consequences for your retail organisation of non-compliant product information appearing on the trading website
7. the importance of having effective routines in place for data back-up
8. how to back-up the data
9. which **colleagues** can provide information about retail customer behaviour on the trading website
10. the sources of information about new ideas and technology relating to product databases
11. when and how to upload updates to the live database
12. the sources of advice and support to resolve problems with uploads to the live database

Update product information on a trading website

Glossary

Colleagues – those who work in any of the following:

1. your team
2. the same channel of your retail organisation
3. other channels of your retail organisation
4. external organisations, if applicable

Update product information on a trading website

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.MCR03
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Owner/Manager; Manager; Team Leader
Suite	Multi-channel Retailing
Keywords	Retailing; retailers; internet; e-commerce; e-tailing; etailing; e-tailers;etailers; multi-channel; multi channel; updates; updating; refreshes; refreshing; products; items; goods; services; materials; produce; details

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit.

Advise customers upon measuring and planning for the fixing of tiles

Overview

This standard is about establishing customers' circumstances and advising those seeking to measure and plan for the fixing of tiles upon how best to achieve this.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Advise customers upon measuring and planning for the fixing of tiles

Advise customers upon measuring and planning for the fixing of tiles

Performance criteria

You must be able to:

1. determine correctly the nature of the location being tiled, and the subsequent use to which the tiled surfaces are to be put when advising customers on measuring and planning for the fixing of tiles
2. identify correctly the nature of the materials suited for the intended location
3. check and confirm, where possible, the accuracy of measurements provided by customers
4. calculate correctly the area of the surface to be tiled
5. calculate correctly the number of tiles required, taking into account the intended design and any use of motif and border tiles
6. determine correctly the amount of trim, edging material and sealants required
7. calculate correctly the amount and type of adhesive needed
8. identify correctly the number and size of spacers required
9. determine correctly the type, colour and amount of grout required
10. calculate correctly how any other requirements, such as underfloor heating, will affect the measuring and planning process
11. provide accurate estimates for customers, explaining clearly and correctly the component parts
12. listen actively and encourage questions from customers towards promoting customers' understanding

Advise customers upon measuring and planning for the fixing of tiles

Knowledge and understanding

You need to know and understand:

1. why measuring, setting out and planning for tiling is important, and the general procedures for doing this
2. the principal types of tools and materials required for measuring, planning and setting out, and their respective purposes
3. the information to be sought from customers when advising upon tiling different locations
4. the importance of ensuring that tiles are from the same batch, and the potential difficulties that might arise where this does not occur
5. how to measure the surfaces to be tiled, and the factors to be determined in identifying the number of tiles required
6. how to convert between metric and imperial measures
7. methods for planning for incorporating motif and border tiles
8. the types of tile fixing trim, and those most appropriate for different applications
9. the types and methods of applying adhesive
10. the types of grout available
11. methods for calculating the size of the underfloor heating system required
12. where to seek help or information for customers' non-standard or particular requirements

Advise customers upon measuring and planning for the fixing of tiles

Links to other NOS PPL.C262 Establish retail customer requirements and provide advice regarding tiling products
PPL.C264 Advise customers upon the fixing of their own tiles

Advise customers upon measuring and planning for the fixing of tiles

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C263
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; advice; advises; advising; measures; plans; fixes; provides; providing; gives; giving; tiling

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Advise and support customers in a retail organisation on the use of online retail facilities

Overview

This standard is about advising and supporting retail customers in the use of the web-based facilities available to them within your retail organisation. This includes their use of 'kiosks', standalone terminals and mobile apps and how customers can use these to browse and research products, to check stock availability, to place orders, and where appropriate, to pay for their purchases.

In supporting retail customers in the use of the web-based facilities you will need to demonstrate the online processes in a manner that promotes understanding and that is sensitive to different retail customers' existing understanding and attitude to online technology.

This standard is for all sales personnel who help customers in store.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Advise and support customers in a retail organisation on the use of online retail facilities

Advise and support customers in a retail organisation on the use of online retail facilities

Performance criteria

You must be able to:

1. operate all aspects of your retail organisation's relevant in-store web-based retail selling facilities correctly
2. determine retail customers' requirements in accessing the web-based facilities and their level of understanding regarding how to use the facilities
3. promote the use of your retail organisation's web-based facilities, relating the features and benefits to the relevant requirements of retail customers
4. determine and explain clearly and correctly the use of the web-based facilities in meeting customers' needs
5. explain the use of the facilities to retail customers taking into consideration retail customers' existing appreciation and attitude to the technology being demonstrated
6. advise customers to ask questions, check for understanding, and respond in ways that promotes your retail organisation
7. support retail customers in operating the web-based facilities as appropriate to their requirements and level of confidence
8. seek feedback from retail customers upon their experience of using your retail organisation's web-based facilities and respond appropriately
9. inform the correct person regarding positive comments and any aspects for enhancement suggested by the feedback

Advise and support customers in a retail organisation on the use of online retail facilities

Knowledge and understanding

You need to know and understand:

1. how to operate the range of web-based retail selling facilities available in-store within your retail organisation, including any mobile apps
2. the features of the web-based retail selling facilities and their associated benefits, both to retail customers and to your retail organisation
3. the impact of multi-channel retailing upon in-store selling within your retail organisation, including its impact on retail customers' ability to research and order products from your retail organisation and your competitors
4. the importance of achieving a balance between demonstration, instruction and retail customers' own activity in operating the facilities, as appropriate to retail customers' levels of expertise, attitude and confidence
5. your retail organisation's practices and requirements relating to advising and supporting customers on the use of web-based retail facilities
6. the impact of distance selling relevant legislation and consumer rights upon your area of responsibility, and in particular upon online retail selling

Advise and support customers in a retail organisation on the use of online retail facilities

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Validity	Current
Status	Original
Originating Organisation	People 1st
Original URN	PPL.MCR16
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales and Related Associate Professionals; Sales Assistants and Retail Cashiers
Suite	Multi-channel Retailing
Keywords	online; on-line; customer; web; internet; web-based retail; multi-channel; coaching; selling

Motivate colleagues to promote online retail facilities to retail customers

Overview

This standard is about motivating your retail colleagues to use the available web-based online retail facilities and to recognise and respond positively to the opportunities that these facilities provide for engaging with customers and for building sales overall.

Your colleagues can be those who work with you in your immediate retail area, or others with whom you have contact. You need not necessarily have supervisory responsibility for these colleagues. Indeed, such colleagues might be amongst those more senior to you, and they can also include those in your peer group. As this standard is about motivating colleagues, you need not be a 'subject expert' in the use of facilities, although you must know how to operate the web-based retail facilities available in your store.

This standard is for all sales team members.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Motivate colleagues to promote online retail facilities to retail customers

Motivate colleagues to promote online retail facilities to retail customers

Performance criteria

You must be able to:

1. explain to colleagues the purpose of all aspects of your retail organisation's relevant in-store online retail selling facilities and the benefits for retail customers
2. promote to colleagues the value of the facilities to your retail organisation, including the opportunities they present for engaging with retail customers in-store
3. determine any learning needs of colleagues relating to their use of the online retail facilities, and address these in line with your retail organisation's procedures
4. encourage and support colleagues in the use of the online retail facilities
5. identify positive and negative attitudes amongst colleagues regarding the online retail facilities
6. identify any barriers and conflicts that may impact negatively upon colleagues' attitudes to the use of online retail facilities
7. discuss the needs of colleagues relating to their use of the online retail facilities with relevant people in your retail organisation
8. make recommendations regarding activities designed to promote positive attitudes and use of online retail facilities
9. demonstrate respect for your colleagues and communicate effectively with them whilst motivating them to promote online retail facilities
10. recognise achievement by colleagues in the use of online retail facilities
11. discuss an individual's needs with others in ways that protect the individual's confidentiality where required
12. act within your levels of authority and expertise

Motivate colleagues to promote online retail facilities to retail customers

Knowledge and understanding

You need to know and understand:

1. how to operate the range of online retail selling facilities available in-store within your retail organisation, including any mobile apps
2. the features of the online retail selling facilities and their associated benefits, both to customers and to your retail organisation
3. the impact of multi-channel retailing upon in-store selling within your retail organisation, including its impact for customers' ability to research and order products from your retail organisation and its competitors
4. the importance of providing a 'seamless' service to your retail organisation's customers, irrespective of the customer journey taken, and what this means for yourself and colleagues in dealings with customers in-store
5. the principal reasons why some colleagues may be concerned about the development and availability of online retail selling facilities in-store
6. the activities appropriate to supporting colleagues in addressing their concerns
7. those personnel within your retail organisation with whom it is appropriate to discuss activities designed to overcome barriers and concerns regarding the use of online retail selling activities in-store
8. how colleagues learn and develop their skills in using the online technology
9. the different learning styles and their impact for how colleagues learn and develop their skills in using online technology
10. the importance of demonstrating respect for colleagues when helping them in their use of online technology and methods of achieving this
11. the sources of information within your retail organisation regarding developments in multi-channel retail online facilities affecting your retail organisation



Motivate colleagues to promote online retail facilities to retail customers

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Validity	Current
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Originating Organisation	People 1st
Original URN	PPL.MCR17
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales and Related Associate Professionals; Sales Assistants and Retail Cashiers
Suite	Multi-channel Retailing
Keywords	online; on-line; customer; web; internet; web-based retail; motivate; multi- channel; colleagues; communication

Analyse feedback from retail customers of a multi-channel retail organisation

Overview

Customer feedback is invaluable to your multi-channel retail organisation. In order to keep improving customer satisfaction and sales, your retail organisation needs to know the specific reasons why retail customers return goods and what they like or dislike about particular products or services.

This standard is about analysing such feedback and making recommendations based on the analysis.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Analyse feedback from retail customers of a multi-channel retail organisation

Analyse feedback from retail customers of a multi-channel retail organisation

Performance criteria

You must be able to:

1. choose a reliable source to gather data and feedback on returned goods from the multi-channels your retail organisation trades in
2. use a reliable source to collate and assess the data and feedback to ensure it clearly shows the reasons given by retail customers for returning the goods
3. use an efficient method to analyse the data and feedback and interpret the results to identify and highlight trends
4. prepare accurate, relevant and legal reports for colleagues and send them by the agreed method and in a timely manner
5. store and back-up data and reports safely and in line with relevant legal requirements
6. review the work regularly in your area of responsibility to identify any areas for improvement as a result of feedback
7. encourage colleagues to review the work in their areas of responsibility and make innovative suggestions for improvements
8. provide clear and concise feedback on the assessment of any suggestions
9. monitor and keep up-to-date with developments in your area of responsibility

Analyse feedback from retail customers of a multi-channel retail organisation

Knowledge and understanding

You need to know and understand:

1. the retail multi-channels your retail organisation wants data and feedback to be gathered from
2. the reliable sources of retail customer feedback your retail organisation can use and the advantages and disadvantages of each
3. the different types of analytical tools and software applications available and the advantages and disadvantages of each
4. how data can be collated and the content assessed
5. the different ways in which data can be analysed and interpreted and the advantages and disadvantages of each
6. how to produce legal, relevant and accurate reports for colleagues in a timely manner
7. how to safely and legally store reports
8. how to keep up-to-date with your retail organisation's commercial objectives and how the work in your area of responsibility contributes to meeting these
9. how to encourage colleagues to suggest improvements in their areas of responsibility
10. how to give constructive feedback to colleagues' suggestions for improvements
11. why you need to keep up-to-date with developments in your area of responsibility

Analyse feedback from retail customers of a multi-channel retail organisation

Developed by	People 1st
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.MCR06
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Owner/Manager; Manager; Team Leader
Suite	Multi-channel Retailing
Keywords	Retailing; retailers; internet; e-commerce; e-tailing; etailing; e-tailers; etailers; multi channel; analyses; analysing; analysis; comments; criticism; praise; consumers; shoppers

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit.

Provide support to individual retail customers of a trading website

Overview

This standard is about the role of the member of staff who provides support to individual retail customers using the retail organisation's trading website. Support could be provided by e-mail, phone, fax or post. It is about taking the opportunity to offer other products or services when dealing with retail customers. It is also about ensuring customer satisfaction and loyalty.

This standard is for contact centre staff working in an online customer service role.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Provide support to individual retail customers of a trading website

Provide support to individual retail customers of a trading website

Performance criteria

You must be able to:

1. respond within the required timescales when providing support to individual retail customers
2. communicate with individual retail customers clearly, politely, and in ways that are consistent with the **brand values** of your retail organisation
3. make sure what the individual retail customer requires has been understood
4. offer the solutions available that best meet the individual retail customer's needs
5. let the individual retail customer know what will happen and within what timescales when further steps need to be taken to resolve the retail customer's queries
6. suggest additional products and services related to the individual retail customer's current purchase when appropriate
7. explain clearly to individual retail customers where and how they can make any additional purchases in which they have shown an interest
8. help the individual retail customer to complete on-line purchases when required, doing so in a manner that is likely to encourage the individual retail customer to use your retail organisation's trading website again in future
9. suggest to the individual retail customer alternative ways of buying products from your retail organisation's when appropriate

Provide support to individual retail customers of a trading website

Knowledge and understanding

You need to know and understand:

1. the ways in which individual retail customers can use contact tools for support
2. how to use information and communication technology to communicate with individual retail customers
3. the **brand values** of your retail organisation
4. how to communicate with individual retail customers in ways that are consistent with the **brand values** of your retail organisation, and why this is important
5. the typical retail customer queries and the types of solution that can be offered
6. how to ask questions to help to clarify the individual retail customer's requirements
7. the help available to resolve individual retail customer queries that cannot be immediately resolved
8. where to find up-to-date information about products and services sold by your retail organisation
9. how to recognise opportunities to suggest additional products and services to the individual retail customer
10. the options available to the individual retail customer for shopping with your retail organisation
11. how to locate products and complete purchases on your retail organisation's trading website

Provide support to individual retail customers of a trading website

Glossary

Brand values – the core values and qualities that define your retail organisation from the customer’s viewpoint

Provide support to individual retail customers of a trading website

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.MCR05
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Contact; Customer Service Adviser; Customer Service Occupations; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Multi-channel Retailing
Keywords	Retailing; retailers; internet; e-commerce; e-tailing; etailing; e-tailers; etailers; multi-channel; multi channel; provides; providing; gives; giving; offers; offering; supports; supporting; assistance; assists; assisting; helps; helping; individuals

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Monitor and maintain security in a retail organisation

Overview

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

This standard is for owners, managers and team leaders.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Monitor and maintain security in a retail organisation

Monitor and maintain security in a retail organisation

Performance criteria

You must be able to:

1. monitor the work area daily in your retail organisation to identify possible problems with the security of the following:
 - outside locations
 - inside the premises
 - stock and resources
 - people
 - cash
2. follow your retail organisation's requirements for maintaining security when opening, monitoring and closing premises
3. identify problems with security and resolve them promptly, legally and in line with your retail organisation's requirements
4. brief and update staff clearly and regularly about security procedures and their responsibilities for maintaining security
5. follow relevant regulations and your retail organisation's authorisation policy about who can stop and search colleagues and retail customers
6. contact relevant authorities when security has been breached

Monitor and maintain security in a retail organisation

Knowledge and understanding

You need to know and understand:

1. your retail organisations' security procedures to support opening, operating and closing your retail organisation's premises
2. the security threats most likely to happen in your retail organisation for the following:
 - outside locations
 - inside the premises
 - stock and resources
 - people
 - cash
3. how your retail organisation expects you to monitor and maintain the following:
 - outside locations
 - inside the premises
 - stock and resources
 - people
 - cash
4. how to identify problems with security and resolve them promptly, legally and in line with your retail organisation's requirements
5. the different methods of briefing staff about security arrangements, and when it is appropriate to use each method
6. who has authority to stop and search staff and customers and how to contact the relevant authorities

Monitor and maintain security in a retail organisation

- Links to other NOS**
- PPL.E305 Monitor, identify and investigate loss and wastage in a retail organisation
 - PPL.E306 Assess, monitor and control risks to health and safety and provide training in a retail organisation
 - PPL.E307 Take a safe and active role when accidents and emergencies occur in a retail organisation

Monitor and maintain security in a retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E304
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; practices; practises; implements; implementing; implementation; maintains; maintaining; secures; securing

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

This unit can be achieved in isolation of other units. However evidence for this unit will be generated holistically whilst the candidate is working towards competence in their selected units for the qualification. The evidence should take into account specialist training for evacuation.

Take a safe and active role when accidents and emergencies occur in a retail organisation

Overview

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

This standard is for owners, managers, team leaders and staff trained or training to be fire marshals and first aiders.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Take a safe and active role when accidents and emergencies occur in a retail organisation

Take a safe and active role when accidents and emergencies occur in a retail organisation

Performance criteria

You must be able to:

1. act promptly and in line with your retail organisation's procedures to prevent injury and damage and to contain potential unsafe situations in the work area when accidents and emergencies occur
2. follow your retail organisation's procedures for raising the alarm in the event of accidents and emergencies
3. make sure that staff and customers leave immediately using approved escape routes when evacuating the building
4. follow your retail organisation's procedures for contacting the relevant emergency service when accidents and emergencies occur
5. communicate and respond calmly when handling accidents that have caused injury to colleagues or customers
6. use safety and accident equipment in line with the manufacturer's guidelines
7. arrange for emergency services and their authorised personnel to have access to the building in the event of accidents and emergencies
8. follow your retail organisation's procedures for checking all staff have evacuated the building and are present at designated assembly points
9. follow relevant legislation and your retail organisation's procedures for allowing staff and customers to return to the premises, once the all clear has been authorised and when it is safe
10. identify threatening and violent behaviour, and act promptly and safely to protect staff and customers before contacting security staff or the police

Take a safe and active role when accidents and emergencies occur in a retail organisation

Knowledge and understanding

You need to know and understand:

1. your retail organisation's procedures to prevent injury and damage and to contain potential unsafe situations in the work area when accidents and emergencies occur
2. your retail organisation's procedures for raising the alarm in the event of accidents and emergencies
3. how to safely evacuate your retail organisation's building and where the emergency exits are
4. your retail organisation's procedures for contacting the relevant emergency service when accidents and emergencies occur
5. how to respond and act calmly when accidents have caused injury to colleagues and customers
6. the manufacturer's guidelines for safely using safety and accident equipment
7. how to make sure emergency services and their authorised personnel are given access to the building in the event of accidents and emergencies
8. how to follow your retail organisation's procedures for checking staff at assembly points
9. the relevant legislation and your retail organisation's procedures for allowing staff and customers to return to the premises after emergencies
10. how to identify threatening and violent behaviour
11. who to contact when security of colleagues, customers and premises are at risk

Take a safe and active role when accidents and emergencies occur in a retail organisation

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- Links to other NOS**
- PPL.E304 Monitor and maintain security in a retail organisation
 - PPL.E305 Monitor, identify and investigate loss and wastage in a retail organisation
 - PPL.E306 Assess, monitor and control risks to health and safety and provide training in a retail organisation

Take a safe and active role when accidents and emergencies occur in a retail organisation

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E307
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Safety officer; Manager; Team Leader; Owner/Manager
Suite	Retail
Keywords	Retailing; retailers; puts; putting; accidents; emergencies; policy; policies; practise; health; safety

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

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

Keep stock available, correctly priced and maintain quality of stock in a retail organisation

Overview

This standard is about making sure that stock is kept available, correctly priced and maintained for quality. It also includes making sure that displays are kept in an attractive condition. Specialist visual merchandising skills are not required.

This standard is for owners, managers, team leaders and sales floor personnel.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Keep stock available, correctly priced and maintain quality of stock in a retail organisation

Keep stock available, correctly priced and maintain quality of stock in a retail organisation

Performance criteria

You must be able to:

1. make sure that stock replenishment plans are up-to-date and realistic
2. keep stock available at all times, where possible
3. collect and record correct information on price changes
4. give accurate, up-to-date price information to the staff who require it
5. check price marking regularly and promptly sort out any pricing problems identified
6. maintain quality of stock in line with your retail organisation's standards and procedures
7. deal with out-of-date or deteriorating stock in line with your retail organisation's policy and any relevant laws
8. identify realistic and effective ways of improving how stock is organised and presented through discussion with staff
9. obtain permission from the correct person, where necessary, to improve the way stock is organised and presented
10. follow your retail organisation's standards of customer care at all times when replenishing, pricing and maintaining quality of stock

Keep stock available, correctly priced and maintain quality of stock in a retail organisation

Knowledge and understanding

You need to know and understand:

1. why it is important to keep stock available
2. why it is important that stock replenishment plans are up to date and realistic
3. how to collect and record information about prices
4. why it is important to record price changes accurately
5. how to check pricing and price marking, correct mistakes and change prices
6. how to check stock rotation and maintain the quality of goods on display
7. what can happen to stock that is not stored correctly or renewed as required
8. how to replenish and rotate stock and deal with sub-standard goods
9. why it is important to follow your retail organisation's customer service standards whilst replenishing, pricing and maintaining quality of stock



Keep stock available, correctly priced and maintain quality of stock in a retail organisation

Links to other NOS PPL.C301 Organise staff to display goods for retail sale
PPL.C302 Assess how effective displays are in a retail organisation

Keep stock available, correctly priced and maintain quality of stock in a retail organisation

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C303
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; keeps; keeping; produce; items; goods; stocks; materials; maintains; maintaining; shelf filling; facing up; shelf fills; faces up; facing-up; faces-up; face-up; replenishes; replenishing; rotates; rotating; refreshes; refreshing

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Cash up one or more payment registers

Overview

This standard is about your responsibility for cashing up one or more payment registers. This includes identifying and dealing with discrepancies. It is very important that cash and cash equivalents are kept secure when cashing up.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Cash up one or more payment registers

Cash up one or more payment registers

Performance criteria

You must be able to:

1. cash up one or more cash registers in line with your retail organisation's routines and procedures
2. identify register discrepancies and deal with these in line with your retail organisation's procedures and within the limits of your authority
3. report discrepancies promptly to the correct person where the level of authority is above that given to you to resolve problems
4. follow your retail organisation's procedures for keeping cash, cash equivalents and yourself secure throughout the cashing up process
5. follow your retail organisation's procedures for cash deliveries and uplifts
6. use cashing up equipment safely, effectively and efficiently

Cash up one or more payment registers

Knowledge and understanding

You need to know and understand:

1. your retail organisation's routines and procedures for cashing up one or more cash registers
2. how to check for any discrepancies
3. the reasons why discrepancies occur
4. the level of your authority to deal with discrepancies
5. who to contact regarding those discrepancies not within your authority
6. your retail organisation's procedures for keeping cash, cash equivalents and yourself secure throughout the cashing up process
7. your retail organisation's procedures for taking cash deliveries and cash uplifts
8. what equipment to use for cashing up and how to use it safely, effectively and efficiently

Cash up one or more payment registers

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Version Number	2
Date Approved	March 2017
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C269
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; cashes up; cashes-up; cashing up; cashing-up; cash-up; totalling; totals; tills

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Monitor the service provided to customers by external suppliers of a retail organisation

Overview

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

This standard is for owners, managers and team leaders and sales staff with responsibility for monitoring external suppliers.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Monitor the service provided to customers by external suppliers of a retail organisation

Monitor the service provided to customers by external suppliers of a retail organisation

Performance criteria

You must be able to:

1. keep accurate and up-to-date records of the **external suppliers** used in your retail organisation
2. keep accurate and up-to-date records of the customer orders sent or collected from your retail organisation to **external suppliers**
3. monitor the progress of the service regularly to identify any difficulties or delays in processing them
4. obtain an explanation when products or services are delayed and tell the customer promptly and accurately what is happening
5. identify accurately whether your retail customer is satisfied with the ordering service or product provided
6. identify any customer dissatisfaction with the ordering service or products and the causes of this accurately
7. explain clearly and politely when a problem is the customer's responsibility
8. explain clearly and accurately the retail customer's rights when the cause of the problem lies with the **external supplier**
9. collect regularly and accurately report, to those who need to know, feedback on the quality of **external suppliers'** service

Monitor the service provided to customers by external suppliers of a retail organisation

Knowledge and understanding

You need to know and understand:

1. which services **external suppliers** are providing to customers of your retail organisation
2. the records required to keep, including those your retail organisation needs
3. how to monitor the services provided by **external suppliers**
4. how to get feedback from retail customers
5. how to find out what is making retail customers dissatisfied
6. how to deal with dissatisfied retail customers in ways that maintain good customer service

Monitor the service provided to customers by external suppliers of a retail organisation

Glossary

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

Links to other NOS

PPL.E315 Evaluate and improve external suppliers' service to customers of a retail organisation

Monitor the service provided to customers by external suppliers of a retail organisation

Developed by	People 1st
Version Number	3
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E314
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; monitors; monitoring; watches; watching; assesses; assessing; assessments; services; provides; providing; providers

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

It is highly unlikely that this unit will be able to be observed therefore the evidence generated will come from professional discussion supported by significant activity and testimony from an Expert Witness to confirm the candidate's competence

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

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

Work effectively as part of a team in a retail organisation

Overview

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

This standard is for all retail team members.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Work effectively as part of a team in a retail organisation

Work effectively as part of a team in a retail organisation

Performance criteria

You must be able to:

1. ask colleagues promptly and politely for the help and information needed to carry out your duties effectively in your team
2. use your retail organisation's procedures for reporting to team leaders and how teams are formed
3. participate in team briefings and meetings in ways that benefit the team and your retail organisation
4. work effectively to follow your retail teams daily, weekly, monthly and yearly targets
5. 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
6. follow relevant legal and your retail organisation's procedures when other team members are not working effectively or fairly to others
7. follow your retail organisation's instructions for safeguarding health and safety during all work activities

Work effectively as part of a team in a retail organisation

Knowledge and understanding

You need to know and understand:

1. how to keep track of how much work is to be done and how long it is likely to take
2. why and when help should be sought
3. how teams work effectively together
4. what team briefings and meetings there are and when they are held
5. how to participate effectively in team briefing and meetings
6. what your retail organisation's procedures are for forming teams and 'who is who' in each team
7. why help should be offered to colleagues and how to respond positively to requests for help, whenever possible
8. what your team's daily, weekly, monthly and yearly targets are
9. how the relevant law and your retail organisation define discrimination, bullying and harassment
10. your retail organisation's procedures for dealing with discrimination, bullying and harassment
11. why your retail organisation's instructions for safeguarding health and safety must be followed

Work effectively as part of a team in a retail organisation

Links to other NOS PPL.E106 Follow a training plan for your own learning to improve your skills and knowledge in a retail organisation

Work effectively as part of a team in a retail organisation

Developed by	People 1st
Version Number	3
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E105
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Elementary Occupations; Elementary Goods Storage Occupations; Elementary Sales Occupations; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; works; working; teamwork; team members

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

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

Identify and report security risks in a retail organisation

Overview

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

This standard is for all staff who do not have authority to handle security risks.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Identify and report security risks in a retail organisation

Identify and report security risks in a retail organisation

Performance criteria

You must be able to:

1. notice and correctly identify **security risks** such as shoplifting, theft by staff, aggressive customers or staff, vandalism and terrorist activity
2. follow your retail organisation's procedures for reporting **security risks**
3. report **security risks** to the correct people promptly and accurately
4. follow your retail organisation's procedures for preventing **security risks** during work activities
5. notice when stock may have been stolen and tell the correct person about it

Identify and report security risks in a retail organisation

Knowledge and understanding

You need to know and understand:

1. why workplace security matters
2. what can happen, to yourself and to your retail organisation, if the workplace is not kept secure
3. your responsibility for helping to keep the workplace secure by noticing and reporting **security risks**
4. the types of **security risks** to be alert for, including: shoplifting, theft by staff, aggressive customers or staff, vandalism and terrorist activity
5. how to identify **security risks**
6. the situations that can make other staff and yourself less alert for **security risks**, and how to deal with those situations
7. why **security risks** must be reported promptly and accurately
8. who to report **security risks** to and how to communicate these risks
9. the reasons to not take on more responsibility than you are authorised to when faced with **security risks**, including: personal safety, relevant legal considerations and your retail organisation's policy and procedures

Identify and report security risks in a retail organisation

Glossary

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

Identify and report security risks in a retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E101
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Elementary Occupations; Elementary Goods Storage Occupations; Elementary Sales Occupations; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Sales and Related Associate Professionals; Sales Controller (Automotive); Sales Executive (Automotive)
Suite	Retail
Keywords	Retailing; retailers; identifies; identifying; spots; spotting; determine; determining; reports; reporting; hazards; dangers; threats; alerts; alerting

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

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

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

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

Identify and seek assistance when accidents and emergencies occur in a retail organisation

Overview

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

This standard is for everyone working in a retail organisation.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Identify and seek assistance when accidents and emergencies occur a retail organisation

Identify and seek assistance when accidents and emergencies occur in a retail organisation

Performance criteria

You must be able to:

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

Identify and seek assistance when accidents and emergencies occur in a retail organisation

Knowledge and understanding

You need to know and understand:

1. how to identify the types of **accidents** and **emergencies** that tend to happen in your retail organisation and why they happen
2. how to seek assistance in the event of **accidents** or **emergencies**
3. the actions that can safely and usefully be taken while waiting for help to arrive
4. why not to take on more responsibility than you are authorised to do when **accidents** and **emergencies** happen, including:
 - personal safety
 - relevant legal considerations
 - your retail organisation's policy and procedures

Identify and seek assistance when accidents and emergencies occur in a retail organisation

Glossary

Accidents – Incidents where people have been injured

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

Links to other NOS PPL.E103 Maintain health and safety procedures in a retail organisation
PPL.E104 Manually lift and handle goods and materials safely in a retail organisation

Identify and seek assistance when accidents and emergencies occur in a retail organisation

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E102
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Elementary Occupations; Elementary Goods Storage Occupations; Elementary Sales Occupations; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Manager; Owner/Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; identifies; identifying; spots; spotting; determines; determining; reports; reporting; accidental; emergency; health; safety; alerts; alerting; responds; responding

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

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

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

Accidents – Incidents where people have been injured

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

Manually lift and handle goods and materials safely in a retail organisation

Overview

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

This standard is for everyone who lifts and handles goods manually.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Manually lift and handle goods and materials safely in a retail organisation

Manually lift and handle goods and materials safely in a retail organisation

Performance criteria

You must be able to:

1. take suitable safety measures before manually lifting and handling **goods and materials** to protect yourself and other people
2. follow the relevant weight restrictions regulations for manual lifting
3. use approved manual lifting and handling techniques whilst also following your retail organisation's procedures
4. check that any equipment needed is fit for purpose
5. use lifting and handling equipment in line with your retail organisation's guidelines and manufacturers' instructions
6. plan a safe and efficient route for moving goods
7. understand your responsibilities when requesting help from others in lifting and handling operations

Manually lift and handle goods and materials safely in a retail organisation

Knowledge and understanding

You need to know and understand:

1. how to find out what **goods and materials** can be manually lifted and handled safely
2. how to find out the weight of the loads being lifted
3. the relevant and your retail organisation's guidelines for weight restrictions when manually lifting
4. approved techniques for safe handling and lifting
5. your retail organisation's guidelines and manufacturers' instructions for using lifting and handling equipment
6. why routes must be planned when moving goods
7. how to plan the route when moving goods, including the types of obstacles to look for and how to remove or avoid them
8. how using unsafe techniques for lifting and handling can affect yourself, the people assisting in a lift and others close by



Manually lift and handle goods and materials safely in a retail organisation

Glossary

Goods and materials – Retail goods for sale and your retail organisation’s materials such as consumables and equipment etc.

Links to other NOS

PPL.E102 Identify and seek assistance when accidents and emergencies occur in a retail organisation

PPL.E103 Maintain health and safety procedures in a retail organisation

Manually lift and handle goods and materials safely in a retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E104
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Elementary Occupations; Elementary Goods Storage Occupations; Elementary Sales Occupations; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Manager; Owner/Manager; Warehouse and distribution
Suite	Retail
Keywords	Retailing; retailers; lifts; lifting; handles; handling; moves; moving; items; products; produce; stock; materials; safety; health

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

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

Goods and materials – Retail goods for sale and your retail organisation’s materials such as consumables and equipment etc.

Process applications from retail customers for credit facilities

Overview

This standard is about processing retail customers' applications for credit facilities. This includes completion of paperwork, giving information to retail customers and carrying out the necessary checks and authorisation.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Process applications from retail customers for credit facilities

Performance criteria

You must be able to:

1. identify retail customers' requests for credit facilities
2. explain clearly to retail customers the features and conditions of credit facilities
3. provide enough time and opportunities for retail customers to ask for clarification or more information
4. fill in the documents required accurately to allow retail customers to obtain credit
5. carry out the necessary credit checks and authorisation procedures in order for the application to be processed
6. refer unsuccessful applications for credit facilities to the correct person promptly

Knowledge and understanding

You need to know and understand:

1. the features and conditions of the credit facilities offered by your retail organisation and any other external organisations used in the application process
2. the relevant legal and your retail organisation's requirements for giving information to retail customers when offering them credit facilities
3. the relevant legal and your retail organisation's procedures for carrying out credit checks and getting authorisation for credit facilities
4. who to approach for advice and help in resolving unsuccessful applications, either internally or externally as appropriate

Process applications from retail customers for credit facilities

Links to other NOS PPL.C213 Work out the price of customers' retail purchases
PPL.C214 Provide a payment service at point of sale in a retail organisation

Process applications from retail customers for credit facilities

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C215
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; processes; processing; requests; requesting; facility

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Keep work surfaces clean in a retail organisation

Overview

This standard is about cleaning work surfaces in your retail organisation to keep them hygienic and ready for use. It is also about following the Control of Substances Hazardous to Health (CoSHH) guidelines when using cleaning products and using relevant Personal Protective Equipment (PPE).

This standard is for everyone who is required to clean surfaces in a retail workplace.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Keep work surfaces clean in a retail organisation

Keep work surfaces clean in a retail organisation

Performance criteria

You must be able to:

1. obtain the equipment and materials that are suitable for the work surfaces that need cleaning
2. follow CoSHH guidelines and your retail organisations procedures for using chemicals when keeping work surfaces clean
3. position the cleaning equipment and materials and any other items that must be moved safely
4. use relevant PPE when cleaning work surfaces
5. keep the risk of spillages to a minimum and clean up any spillages promptly and thoroughly
6. remove and dispose of rubbish and waste promptly and safely
7. disturb other people as little as possible while cleaning work surfaces
8. check that surfaces are thoroughly clean
9. store away cleaning equipment and materials correctly and promptly when cleaning is finished

Keep work surfaces clean in a retail organisation

Knowledge and understanding

You need to know and understand:

1. your retail organisation's procedures for cleaning work surfaces
2. the equipment and materials for cleaning work surfaces and their uses
3. where cleaning equipment and materials are stored, and why they should be put away promptly after use
4. why cleaning chemicals must be controlled when cleaning work surfaces and
5. why cleaning equipment and materials and other items must be positioned safely, and how to do so
6. what PPE you need to use when cleaning work surfaces
7. the health and safety risks posed by spillages on work surfaces and why they must be cleaned up promptly
8. the techniques for reducing as far as possible the risk of spillages and how to clean up spillages thoroughly
9. why rubbish and waste must be removed and disposed of promptly and safely, and how to do so
10. why other people must be disturbed as little as possible while cleaning, and how to do so
11. your retail organisation's standards for clean work surfaces, and how to check they have been achieved

Keep work surfaces clean in a retail organisation

Links to other NOS PPL.E108 Safely remove and dispose of waste and litter in a retail organisation
PPL.E109 Maintain personal hygiene in a retail organisation



Keep work surfaces clean in a retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E107
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Elementary Occupations; Elementary Goods Storage Occupations; Elementary Sales Occupations; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; keeping; keeps; worktops; cleans; cleaning

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

Safely remove and dispose of waste and litter in a retail organisation

Overview

This standard is about keeping work areas in your retail organisation tidy and hygienic by removing and disposing of waste and litter, the health and safety involved, appropriate use of Personal Protective Equipment (PPE) and following Control of Substances Hazardous to Health (CoSHH) guidelines when dealing with hazardous waste.

This standard is for everyone who is responsible for removing and disposing of waste and litter.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Safely remove and dispose of waste and litter in a retail organisation

Safely remove and dispose of waste and litter in a retail organisation

Performance criteria

You must be able to:

1. use suitable equipment to tidy work areas including relevant PPE
2. check that equipment is safe to use before starting to use it
3. remove and dispose of waste and litter safely and in line with your retail organisation's procedures
4. follow CoSHH guidelines when removing and disposing of hazardous waste and litter
5. disturb other people as little as possible while removing and disposing of waste and litter
6. store equipment correctly and promptly after use

Safely remove and dispose of waste and litter in a retail organisation

Knowledge and understanding

You need to know and understand:

1. why work areas should be kept free of waste and litter, including health and safety reasons
2. the equipment and PPE to use and how to check it is safe to use
3. your retail organisation's procedures for removing and disposing of waste and litter safely
4. your retail organisation's CoSHH guidelines when removing and disposing of hazardous waste and litter
5. where equipment is stored and why you should put it away promptly after use
6. how to cause the least disturbance to other people when removing and disposing of waste and litter

Safely remove and dispose of waste and litter in a retail organisation

Links to other NOS PPL.E107 Keep work surfaces clean in a retail organisation
PPL.E109 Maintain personal hygiene in a retail organisation

Safely remove and dispose of waste and litter in a retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E108
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Elementary Occupations; Elementary Goods Storage Occupations; Elementary Sales Occupations; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; gets rid of; getting rid of; disposes; disposing; rubbish; cleans; cleaning; tidies; tidying

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

Help maintain security in a retail organisation

Overview

This standard is about helping to maintain the security of premises, stock, cash, colleagues and customers in your retail organisation. It is also about being able to recognise behaviour that puts yourself and others at risk. How to handle risks within your area of authority, following relevant legislation and your retail organisations policies and procedures.

This standard is for team leaders, sales and storage area personnel.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Help maintain security in a retail organisation

Help maintain security in a retail organisation

Performance criteria

You must be able to:

1. take prompt and suitable action to help reduce security risks as far as possible, where it is within the limits of your responsibility and authority to do so
2. follow your retail **organisation's policies** and relevant legal requirements for security and act within your own level of authority when colleagues, customers, stock, premises and cash are at risk
3. recognise when security risks are beyond your authority and responsibility to resolve, and report these risks promptly to the correct person
4. use your retail organisation procedures for protecting your personal safety when security risks arise
5. follow your retail **organisation's policies** and procedures for maintaining security during work activities
6. follow your retail **organisation's policies** and procedures for making sure that security will be maintained during breaks and the end of a shift or close of business

Help maintain security in a retail organisation

Knowledge and understanding

You need to know and understand:

1. the types of security risk that can arise in the workplace including risks to other colleagues, customers, stock, premises and cash
2. your authority to help with security risks, including your legal rights and duties when colleagues, customers, stock, premises and cash are at risk
3. your retail **organisation's policies** and procedures for dealing with security risks in the workplace
4. who to report security risks to, and how to contact them
5. the approved procedures and techniques for protecting your personal safety when security risks arise
6. your retail **organisation's policies** and procedures for maintaining security during work activities
7. your retail **organisation's policies** and procedures for making sure that security will be maintained during breaks and at the end of a shift or close of business

Help maintain security in a retail organisation

Glossary

Organisation policy – This may be a set of principles, procedures or both. These may be written or not, however owners and managers need to be clear to all personnel about what procedures should be followed and when

Help maintain security in a retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E205
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Manager; Team Leader; Sales and Related Associate Professionals
Suite	Retail
Keywords	Retailing; retailers; helps; helping; assists; assisting; keeps; keeping; maintains; maintaining; security; secures; securing; protects; protecting

Specific Evidence Requirement: It is expected that simulation will be used to gather evidence for taking action to deal with or contain security risks, threats & breaches and incidents of theft. Simulation is also allowed for the remaining performance evidence within this Unit, but only if no opportunities exist to gather workplace evidence.

This unit can be achieved in isolation of other units: However evidence for this unit will be generated holistically whilst the candidate is working towards competence in their selected units for the qualification. The evidence should take into account specialist training for evacuation

Glossary: The glossary contains definitions of the terms used in unit PPL.E205. These definitions do not constitute range.

Organisation policy – This may be a set of principles, procedures or both. These may be written or not, however owners and managers need to be clear to all personnel about what procedures should be followed and when

Deal with accidents and emergencies within the limits of your own authority in a retail organisation

Overview

This standard is about dealing with accidents and emergencies within the limits of your own responsibility in your retail organisation.

This standard is for team leaders, sales and storage personnel.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Deal with accidents and emergencies within the limits of your own authority in a retail organisation

Deal with accidents and emergencies within the limits of your own authority in a retail organisation

Performance criteria

You must be able to:

1. follow your retail organisation's procedures and relevant legal requirements for dealing with accidents and emergencies
2. work within the limits of your own authority as set by your retail organisation
3. communicate and respond calmly while dealing with accidents and emergencies
4. report accidents and emergencies promptly, accurately and to the correct person
5. recognise when evacuation procedures have been started and follow your retail organisation's procedures for evacuation

Deal with accidents and emergencies within the limits of your own authority in a retail organisation

Knowledge and understanding

You need to know and understand:

1. your retail organisation's procedures and relevant legal requirements for dealing with accidents and emergencies
2. what your own limits of authority are in your retail organisation
3. how communicating and responding calmly helps to promote safety during accident and emergency situations
4. the techniques for communicating and responding calmly while dealing with accidents and emergencies
5. how reporting accidents and emergencies promotes health and safety
6. the relevant legal and your retail organisation's requirements for reporting accidents and emergencies
7. your retail organisation's procedures for evacuation, including how the alarm is raised and where emergency exits and assembly points are



Deal with accidents and emergencies within the limits of your own authority in a retail organisation

Links to other NOS PPL.E207 Contribute to reducing risks to health and safety in a retail organisation

Deal with accidents and emergencies within the limits of your own authority in a retail organisation

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Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E206
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Team Leader; Manager
Suite	Retail
Keywords	Retailing; retailers; deals; dealing; copes; coping; handles; handling; responds; responding; reacts; reacting; accidental; emergency; evacuations; evacuating; health; safety

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

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

Contribute to reducing risks to health and safety in a retail organisation

Overview

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

This standard is for team leaders, sales and storage personnel.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Contribute to reducing risks to health and safety in a retail organisation

Contribute to reducing risks to health and safety in a retail organisation

Performance criteria

You must be able to:

1. follow the health and safety requirements laid down by your retail organisation and by relevant legislation, and encourage colleagues to do the same
2. contribute to health and safety discussions and meetings and suggest ideas for reducing risks
3. take appropriate action immediately to deal with risks within your area of authorisation
4. report risks promptly to the correct person
5. use equipment and materials in line with the manufacturer's instructions

Contribute to reducing risks to health and safety in a retail organisation

Knowledge and understanding

You need to know and understand:

1. the health and safety requirements laid down by your retail organisation and by law
2. how setting a good example can contribute to health and safety in the workplace
3. when health and safety is discussed in your retail organisation and how to contribute to discussions and meetings to help reduce risks
4. the limits of your authority and responsibility for dealing with health and safety risks, and the importance of not taking on more responsibility without authorisation
5. your retail organisation's approved procedures for dealing with health and safety risks
6. who to report health and safety risks to
7. what can happen to yourself and others if equipment and materials are not used correctly in line with manufacturer's instructions
8. where to find instructions for using equipment and materials

Contribute to reducing risks to health and safety in a retail organisation

Links to other NOS PPL.E206 Deal with accidents and emergencies within the limits of your own authority in a retail organisation

Contribute to reducing risks to health and safety in a retail organisation

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Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E207
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Team Leader; Storage and Retailing
Suite	Retail
Keywords	Retailing; retailers; helps; helping; assists; assisting; reduces; reducing; limits; limiting; dangers; threats

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

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

Provide a payment service at point of sale in a retail organisation

Overview

This standard is about taking payment from retail customers at the payment point. It covers all payment types and also identifying suspected fraudulent or counterfeit payments.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Provide a payment service at point of sale in a retail organisation

Provide a payment service at point of sale in a retail organisation

Performance criteria

You must be able to:

1. greet retail customers at the point of sale according to your retail organisation's procedures
2. check the items requiring payment and inform retail customers of the correct amount to pay
3. check accurately the amount and means of payment offered by retail customers including the following (where it is acceptable):
 - cash, ensuring it is legal tender
 - store, credit and debit card payments
 - digital payments
4. process the payment in line with your retail organisation's procedures
5. tell retail customers tactfully when payment cannot be approved
6. offer additional payment services to retail customers where these are available
7. treat retail customers politely throughout the payment service process
8. balance the need to give attention to individual retail customers with the need to acknowledge retail customers who are waiting for help

Provide a payment service at point of sale in a retail organisation

Knowledge and understanding

You need to know and understand:

1. how to keep cash and other payments secure
2. the types of payment that your retail organisation is authorised to receive
3. procedures for authorising non-cash transactions
4. how to check for and identify counterfeit or fraudulent payments
5. how to check for stolen cash equivalents, such as:
 - debit cards
 - credit cards
 - loyalty cards
 - credit applications
 - digital payments
6. how to deal with retail customers offering suspect payments
7. your retail customers' and your retail organisation's relevant legal rights, duties and responsibilities
8. your retail organisation's procedures for taking payments
9. your retail organisation's procedures for dealing with suspected fraudulent payments
10. why it is important to balance the needs of retail customers when providing a payment service

Provide a payment service at point of sale in a retail organisation

- Links to other NOS**
- PPL.C204 Help retail customers find products
 - PPL.C205 Help retail customers choose products
 - PPL.C213 Work out the price of customers' retail purchases
 - PPL.C215 Process applications from retail customers for credit facilities
 - PPL.C223 Check the customer's preferences and buying decisions when making retail sales
 - PPL.C252 Follow procedures for retail sales of age-restricted products
 - PPL.C260 Sell National Lottery products to retail customers
 - PPL.C266 Authorise and monitor the self-service dispensing of motor fuel on a forecourt
 - PPL.C315 Decide on the value of items offered in part-exchange by retail customers
 - PPL.C316 Negotiate part-exchange sales transactions with retail customers

Provide a payment service at point of sale in a retail organisation

Developed by	People 1st
Version Number	5
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C214
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; provides; providing; gives; giving; serves; serving; checkouts; check outs; tills; cashiers; operators; payments; pays; paying; fraudulent

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Prepare to receive deliveries in a retail organisation

Overview

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

This standard is for staff who regularly receive deliveries.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Prepare to receive deliveries in a retail organisation

Prepare to receive deliveries in a retail organisation

Performance criteria

You must be able to:

1. identify accurately the quantity and nature of the **goods and materials** that are expected and the storage space required
2. check accurately the storage space that is available and promptly report any shortage to the correct person in your retail organisation
3. check that the receiving area is clean, tidy and free from obstructions and dangers
4. check that any handling equipment required is available and is in good working order
5. check that the relevant paperwork is complete, accurate and up-to-date

Prepare to receive deliveries in a retail organisation

Knowledge and understanding

You need to know and understand:

1. why you must prepare thoroughly before receiving deliveries of **goods and materials** in your retail organisation
2. the information required about the quantity and nature of deliveries, and how to access and interpret this information
3. how to identify the quantity and type of storage space needed, and how to check if this is available
4. who to tell about any shortage of storage space, and why this should be done promptly
5. your retail organisation's procedures for receiving deliveries
6. why accurate, complete and up-to-date paperwork is required, and the possible consequences of not having this
7. the documentation or records that must be checked and how to identify problems with them
8. the legal and your retail organisation's requirements for maintaining security and safety during deliveries, and how these relate to the preparations for receiving **goods and materials**

Prepare to receive deliveries in a retail organisation

Glossary

Goods and materials – Retail goods for sale and your retail organisation’s materials such as consumables and equipment etc.

Links to other NOS

PPL.B202 Receive deliveries and check storage arrangements of goods in a retail organisation



Prepare to receive deliveries in a retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B201
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Storage and Retailing; Warehouse and distribution
Suite	Retail
Keywords	Retailing; retailers; preparation; receiving; delivery; stocks; items; products; goods; materials; produce; storage; stores; storing

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Goods and materials – Retail goods for sale and your retail organisation’s materials such as consumables and equipment etc.

Process payments made to retail customer accounts

Overview

This standard is about processing various forms of payment from retail customers and crediting them to retail customers' accounts.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Process payments made to retail customer accounts

Process payments made to retail customer accounts

Performance criteria

You must be able to:

1. check that payments from retail customers are valid and accurate
2. process and record payments from retail customers promptly and accurately
3. record clearly and accurately the reasons why payments are overdue on retail customer accounts
4. identify problems accurately and resolve them promptly
5. inform the correct person promptly about any problems that cannot be resolved
6. secure payments in line with your retail organisation's procedures

Process payments made to retail customer accounts

Knowledge and understanding

You need to know and understand:

1. the acceptable ways for retail customers to make payments
2. how to process all types of payments
3. what counts as **legal tender** in **your country**
4. how to identify counterfeit payments
5. your retail organisation's procedures for storing cash and cash equivalents securely

Process payments made to retail customer accounts

Glossary

Legal tender – Coins and notes that your retail organisation must accept in payment

Your country – England, Wales, Scotland or Northern Ireland

Links to other NOS

PPL.C216 Set, monitor and take action with retail customers' credit accounts

PPL.C218 Reconcile retail customer accounts

Process payments made to retail customer accounts

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C217
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; processes; processing; pays; paying; credits; crediting; customers

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Greengrocery products are to include vegetables, fruit and salad.

Follow procedures for retail sales of age-restricted products

Overview

This standard is about your responsibility for selling age-restricted products only to retail customers who are old enough to buy them legally. You need to follow the relevant law and your retail organisation's policies and procedures. You also need to refuse retail sales when necessary, in ways that follow your retail organisation's customer service standards 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
- painkilling drugs containing paracetamol, ibuprofen and aspirin

This standard is for all staff members that sell the above items.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Follow procedures for retail sales of age-restricted products

Follow procedures for retail sales of age-restricted products

Performance criteria

You must be able to:

1. follow relevant legal requirements and your retail organisation's policies and procedures when requesting proof of age for age-restricted products
2. when proof of the retail customer's age is required, make the retail sale only if they provide it and it meets relevant legal and your retail organisation's conditions
3. follow relevant legal requirements and your retail organisation's policies and procedures for refusing retail sales of age-restricted products
4. refuse politely and firmly to make retail sales that are against the relevant law or any of your retail organisation's procedures and policies
5. explain clearly and accurately to retail customers which type of identification for proof of age can be accepted

Follow procedures for retail sales of age-restricted products

Knowledge and understanding

You need to know and understand:

1. which age-restricted products your retail organisation is authorised to sell
2. the relevant legislation that governs the selling of the different age-restricted products your retail organisation sells
3. the age restrictions on the products your retail organisation is authorised to sell, and what can happen to you and your retail organisation if you fail to follow these restrictions
4. your retail organisation's policies and procedures for requesting proof of age, including the types of proof that may be accepted
5. your retail organisation's policies and procedures for refusing retail sales of age-restricted products
6. why when requesting proof of age and refusing retail sales it should be carried out in ways that are both firm and polite, and how to do so

Follow procedures for retail sales of age-restricted products

Links to other NOS PPL.C214 Provide a payment service at point of sale in a retail organisation
PPL.C260 Sell National Lottery products to retail customers

Follow procedures for retail sales of age-restricted products

Developed by	People 1st
Version Number	4
Date Approved	March 2017
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C252
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; follows; following; observes; observing; sells; selling; age restricted; restrictions; items; goods; materials; products; alcoholic; cigarettes; lottery; scratchcards; scratch cards

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Help retail customers find products

Overview

This standard is about helping retail customers find the product they are looking for. You need to do this in ways that make it more likely that retail customers will buy something immediately and that they will shop with the retail organisation again.

This standard is for all sales personnel.

When you have competed this standard you will be able to demonstrate your understanding of and ability to:

- Help retail customers find products

Help retail customers find products

Performance criteria

You must be able to:

1. check for and notice retail customers who may need help finding products at all times
2. offer help to retail customers in line with your retail organisation's customer service policy and procedures at all times
3. respond promptly and willingly to retail customers' requests for help in finding products
4. identify what retail customers are looking for from the information they give
5. identify suitable opportunities for telling retail customers about associated or additional products whilst following your retail organisation's customer service standards at all times
6. follow your retail organisation's procedures for finding products for retail customers
7. check for security, safety and potential sales while helping individual retail customers at all times

Help retail customers find products

Knowledge and understanding

You need to know and understand:

1. how helping retail customers find products promotes immediate sales and longer-term loyalty to your retail organisation
2. your personal responsibility for helping retail customers find products
3. your retail organisation's policies and procedures for offering help to retail customers
4. retail customer behaviours that may show they require help finding products
5. the layout of your retail organisation, products offered and where products are located
6. how to stay informed of changes to the layout of your retail organisation, products in stock and where they are
7. your responsibility for promoting associated or additional products and how to identify suitable times to do this
8. your retail organisation's procedures for finding products for retail customers, and why these should be followed
9. the risks of not monitoring in terms of security, safety and lost sales

Help retail customers find products

Links to other NOS PPL.C214 Provide a payment service at point of sale in a retail organisation

Help retail customers find products

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C204
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; helps; helping; finds; finding; locates; locating; items; produce; goods; materials

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Provide information and advice to meet the requirements of retail customers

Overview

This standard is about listening to retail customers' requirements and providing information and advice to meet those requirements. It does not involve selling directly to retail customers, but does involve treating the retail customer in ways that follow the retail organisation's customer service standards.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Provide information and advice to meet the requirements of retail customers

Provide information and advice to meet the requirements of retail customers

Performance criteria

You must be able to:

1. acknowledge retail customers' requests for **information and advice** promptly and politely
2. identify retail customers' requirements for **information and advice**
3. communicate **information and advice** to retail customers in ways they can understand
4. provide **information and advice** to retail customers that is relevant, complete, accurate and up-to-date
5. check politely that the **information and advice** provided meets retail customers' requirements
6. find other ways to help retail customers when the **information and advice** given is not satisfactory
7. refer requests for **information or advice** to the right person when it is not possible for you to help retail customers

Provide information and advice to meet the requirements of retail customers

Knowledge and understanding

You need to know and understand:

1. how to identify retail customers' requirements for **information and advice**
2. how to give clear and accurate information and check retail customers understand
3. sources of information about the products and services that your retail organisation offers to retail customers, including information about where products are from, what they consist of and whether they can be recycled after use
4. who to approach for help if it is not possible for you to provide **information and advice**
5. why it is important to keep retail customers' loyalty and confidence
6. how to maintain retail customers' loyalty and confidence while dealing with requests for **information and advice**
7. your retail organisation's policy on customer service and how this applies to giving **information and advice** to retail customers

Provide information and advice to meet the requirements of retail customers

Glossary

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

1. finding products in stock
2. ordering products not in stock
3. helping customers to make informed buying decisions
4. helping customers to return goods

Links to other NOS PPL.C209 Help retail customers resolve complaints

Provide information and advice to meet the requirements of retail customers

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Version Number	4
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C208
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; provides; providing; gives; giving; advises; advising; informs; informing; helps; helping

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

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

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

Help retail customers resolve complaints

Overview

This standard is about helping retail customers resolve complaints and dealing with day-to-day complaints. Retail customers' complaints are usually about the quality of products or, sometimes, service. This standard is **not** for people who handle complaints as a major part of their job, for example, it is not for people working in customer contact centres.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Help retail customers resolve complaints

Help retail customers resolve complaints

Performance criteria

You must be able to:

1. identify the nature of the complaint from information obtained from retail customers
2. acknowledge retail customers and their complaints clearly and accurately
3. follow legal requirements and your retail organisation's policies and procedures for dealing with complaints
4. help retail customers resolve their complaints where possible
5. refer complaints to the correct person if you are unable to deal with them and explain the referral procedure clearly to retail customers

Help retail customers resolve complaints

Knowledge and understanding

You need to know and understand:

1. why it is important to acknowledge retail customers and their complaints
2. how to manage angry retail customers
3. what your level of responsibility is for sorting out complaints
4. who to refer complaints to when they exceed your level of responsibility
5. how to assess complaints and decide what action to take
6. why it is important to help retail customers resolve complaints where possible
7. your retail organisation's policy concerning returns
8. why it is important to keep retail customers' loyalty and confidence
9. how to keep retail customers' loyalty and confidence when dealing with complaints
10. the relevant legal rights of retail customers and your retail organisation
11. your retail organisation's policy on customer service and how this applies to dealing with complaints
12. your retail organisation's procedures for dealing with complaints



Help retail customers resolve complaints

Links to other NOS PPL.C208 Provide information and advice to meet the requirements of retail customers

Help retail customers resolve complaints

Developed by	People 1st
Version Number	5
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C209
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; helps; helping; assists; assisting; sorts out; sorting out; fixes; fixing; complaining; problems

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Gain customer commitment to a retail organisation's loyalty scheme and assist them in completing the application

Overview

This standard is about recognising when customers are interested in joining your retail organisation's loyalty scheme, gaining their commitment and assisting them to complete the membership application.

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

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Gain customer commitment to a retail organisation's loyalty scheme and assist them in completing the application

Gain customer commitment to a retail organisation's loyalty scheme and assist them in completing the application

Performance criteria

You must be able to:

1. recognise accurately when customers are interested in joining your retail organisation's loyalty scheme
2. take opportunities to ask customers who are showing signs of interest to sign up for your retail organisation's loyalty scheme
3. assist in completing the membership application accurately with customers, using the information they provide once you have gained their commitment
4. check with customers that their details, as shown on the membership documentation, are correct
5. give customers proof of their membership
6. give application forms to customers who show interest but are not willing to join your retail organisation's loyalty scheme there and then
7. inform customers of any further information they need to know about your retail organisation's loyalty scheme and when it will commence

Gain customer commitment to a retail organisation's loyalty scheme and assist them in completing the application

Knowledge and understanding

You need to know and understand:

1. how to recognise signals that customers are interested in joining your retail organisation's loyalty scheme
2. how to ask customers to sign up for your retail organisation's scheme in a way that encourages them to co-operate willingly
3. how to recognise when you have gained customers' commitment
4. the layout of the membership application form, the questions it asks, and how to assist customers in completing the form accurately
5. the proof of membership your retail organisation provides, and how to prepare this
6. how to correct or replace incorrect proof of membership
7. why it is important to inform customers at what point your retail organisation's loyalty scheme starts

Gain customer commitment to a retail organisation's loyalty scheme and assist them in completing the application

Links to other NOS PPL.C221 Explain to customers the features and benefits of the retail organisation's loyalty scheme and how the scheme works

Gain customer commitment to a retail organisation's loyalty scheme and assist them in completing the application

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Version Number	5
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C222
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; gains; gaining; helps; helping; fills out; filling out; fills in; filling in; applications; forms; commits; applies; applying; committing; rewards; reward schemes; schemes

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Check customers' preferences and buying decisions when making retail sales

Overview

This standard is about checking the customer's preferences and buying decisions when they are making retail sales. It is also about closing the sale once a decision has been made by the customer.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Check customers' preferences and buying decisions when making retail sales

Check customers' preferences and buying decisions when making retail sales

Performance criteria

You must be able to:

1. give customers enough time to evaluate products and ask questions
2. check the customers' preferences with them to assist in them making a buying decision
3. handle customers' questions in a way that promotes retail sales and keeps the customers' confidence
4. identify additional and associated products and take the opportunity to increase retail sales
5. use open and closed questioning techniques when customers are making retail sales decisions
6. acknowledge clearly the customers' buying decisions
7. close the retail sale when possible
8. explain clearly any customer rights that apply
9. explain clearly to customers where to pay for their purchases

Check customers' preferences and buying decisions when making retail sales

Knowledge and understanding

You need to know and understand:

1. how to recognise buying signals from customers
2. how to handle customers' questions confidently and effectively
3. questioning techniques for closing the retail sale
4. what the additional and associated products are and why it is important to promote these
5. why customer confidence and loyalty matter to your organisation and how members of staff contribute towards these
6. relevant legal rights and responsibilities of your retail organisation and customers in regard to the returning of unsatisfactory goods

Check customers' preferences and buying decisions when making retail sales

- Links to other NOS**
- PPL.C205 Help retail customers choose products
 - PPL.C214 Provide a payment service at point of sale in a retail organisation
 - PPL.C250 Identify the retail customer's requirements for lingerie
 - PPL.C251 Measure and fit the retail customer for lingerie

Check customers' preferences and buying decisions when making retail sales

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Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C223
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; checks; checking; confirms; confirming; purchases; purchasing; buys; selling

Provide assistance at the self-service payment point in a retail organisation

Overview

This standard is about assisting customers who use self-service payment points in your retail organisation, ensuring customer queues are monitored effectively as well as supporting customers who require help. It is also about observing customers who are acting suspiciously.

This standard is for payment point support staff.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Provide assistance at the self-service payment point in a retail organisation

Provide assistance at the self-service payment point in a retail organisation

Performance criteria

You must be able to:

1. monitor and manage customer flow at the queuing areas of the self-service payment point area
2. inform waiting customers when payment points become available
3. observe customer behaviour during transactions, being aware of the following:
 - confusion
 - frustration
 - suspicious behaviour
 - age of customers when purchasing age restricted goods
4. follow your retail organisation's procedures for dealing with customers when providing assistance for the following:
 - items with security tags
 - authorisation of age restricted items
 - resetting of self-service point after a forced halt of transaction
 - carrier bag purchases
5. monitor and report customers who are acting suspiciously in line with your retail organisation's procedures
6. offer additional services to customers in line with your retail organisation's procedures
7. treat customers with respect and in line with your retail organisation's service policy throughout the payment process
8. balance the need to give attention to individual customers with the requirement to acknowledge customers who are waiting for help
9. keep the payment point area free of obstructions and debris

Provide assistance at the self-service payment point in a retail organisation

Knowledge and understanding

You need to know and understand:

1. your retail organisation's procedures for monitoring queues
2. your retail organisation's procedures for the purchase of carrier bags
3. types of suspicious behaviour displayed at the self service area
4. when colleague assistance is required
5. how to authorise items that are of high value, age restricted or require security tags removing
6. how to reset self-service equipment when errors occur
7. the types of payment accepted at the self-service payment point
8. your retail organisation's procedures for identification of counterfeit payments
9. your retail organisation's procedures for security and housekeeping of the self-service areas

Provide assistance at the self-service payment point in a retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	People 1st
Original URN	PPL.C224
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; provides; providing; gives; giving; serves; serving; checkouts; check outs; tills; cashiers; operators; payments; pays; paying; fraudulent; counterfeit

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Demonstrate products to customers in a retail organisation

Overview

This standard is about demonstrating the features and benefits of products to customers in your retail organisation.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Demonstrate products to customers in a retail organisation

Demonstrate products to customers in a retail organisation

Performance criteria

You must be able to:

1. take the necessary safety precautions before, during and immediately after demonstrating products in your retail organisation
2. check that all the equipment and products required are available and ready for use before starting the demonstration
3. present the demonstration in a logical sequence of steps and stages
4. cover all the features and benefits that are required to gain customers' interest
5. provide clear and accurate supporting commentary when required
6. clear equipment and products away promptly and without keeping customers waiting unduly, after the demonstration is finished

Demonstrate products to customers in a retail organisation

Knowledge and understanding

You need to know and understand:

1. how demonstrations can help to promote and sell products in your retail organisation
2. the safety precautions to take before, during and immediately after product demonstrations
3. how to obtain the equipment and products required for demonstrations
4. the difference between 'features' and 'benefits' of products
5. the features and benefits of the products being demonstrated
6. which product features and benefits can be demonstrated and which may need describing to customers
7. how to organise product demonstrations into logical steps and stages and why this is important
8. when and how to provide supporting commentary to help customers understand the features and benefits of the products being demonstrated
9. why it is important to clear equipment and products away promptly and without keeping customers waiting unduly, after a demonstration is finished

PPL.C280 - SQA Unit Code J0DB 04



Demonstrate products to customers in a retail organisation

[Links to other NOS](#) PPL.C205 Help retail customers choose products



Demonstrate products to customers in a retail organisation

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C280
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; demonstrates; demonstrating; shows; showing; items; goods; materials; demonstrations

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Display and maintain greengrocery products to attract sales in a retail organisation

Overview

This standard is about displaying and maintaining greengrocery products on display to attract sales, regularly checking displays and dealing with substandard produce on display in your retail organisation.

This standard is for staff who are responsible for displaying and maintaining greengrocery products.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Display and maintain greengrocery products to attract sales in a retail organisation

Display and maintain greengrocery products to attract sales in a retail organisation

Performance criteria

You must be able to:

1. check that display areas are clean and in the correct condition for **greengrocery products** to be displayed
2. place specific **greengrocery products** in the correct display areas
3. make displays attractive to encourage sales whilst following your retail organisation's display plan and procedures
4. check the quality and shelf life of **greengrocery products** on display regularly
5. follow your retail organisation's procedures for displaying and maintaining **greengrocery products** to keep them attractive to customers
6. follow the relevant legal procedures for recycling and removing items that have little or no shelf life or that have deteriorated in quality
7. rotate **greengrocery products** correctly according to their shelf life
8. check that ticketing and coding is accurate and correct
9. check the condition and cleanliness of displays regularly and correct them if needed

Display and maintain greengrocery products to attract sales in a retail organisation

Knowledge and understanding

You need to know and understand:

1. the **greengrocery products** that are sold by your retail organisation and how they should be displayed
2. why **greengrocery products** need displaying in the correct **display areas**
3. your retail organisation's display procedures and how **greengrocery products** are displayed to attract sales
4. why regular checks should be made on the quality and shelf life of **greengrocery products**, and how to do so
5. why products need rotating
6. how to rotate products
7. how to price and display **greengrocery products** with limited shelf life to encourage customers to buy them
8. the relevant legal and your organisation's procedures for recycling **greengrocery products** that cannot be sold because they have deteriorated or are past their shelf life
9. your retail organisation's procedures for maintaining **greengrocery products'** attractiveness to customers
10. how to clean and maintain **display areas**

Display and maintain greengrocery products to attract sales in a retail organisation

Glossary

Display areas:

1. shelves
2. chillers
3. displays

Greengrocery products:

1. vegetables
2. fruit
3. salad

Links to other NOS [PPL.B224 Prepare greengrocery products for sale in a retail organisation](#)

Display and maintain greengrocery products to attract sales in a retail organisation

Developed by	People 1st
Version Number	4
Date Approved	March 2017
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B225
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Skilled Trades Occupations; Food Preparation Trades
Suite	Retail
Keywords	Retailing; retailers; displaying; displays; vegetables; fruits; salads; produce; facing up

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate’s competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Greengrocery products are to include vegetables, fruit and salad

Put goods into storage in a retail organisation

Overview

This standard is about storing goods in the right places so that they are safe and secure and can be reached when required. It **can** involve handling goods manually as well as using **lift trucks** in a retail organisation.

This standard is for staff who have responsibility for placing goods into storage manually and/or using safe and maintained lifting equipment.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Put goods into storage in a retail organisation

Important safety requirement

Current Health and Safety Executive's (HSE) requirements and Approved Codes of Practice for operators **must** be followed when using fork lift trucks.

Put goods into storage in a retail organisation

Performance criteria

You must be able to:

1. put **goods** in the right storage facilities within the time expected by your retail organisation
2. follow relevant legal requirements for storing deliveries of **goods** safely, securely and hygienically
3. follow your retail organisation's requirements for storing deliveries of **goods** safely, securely and hygienically
4. use lifting equipment safely and in accordance with current HSE approved codes of practice and your retail organisation's health and safety procedures
5. position **goods** in the correct storage locations so that they can be easily identified and reached when required
6. use your retail organisation's stock rotation system
7. use the available storage space safely and follow relevant housekeeping procedures
8. identify faulty equipment within your area of responsibility
9. report promptly and to the correct person any faulty equipment that is not within your area of responsibility or ability to repair
10. follow your retail organisation's requirements for completing relevant paperwork or records

Put goods into storage in a retail organisation

Knowledge and understanding

You need to know and understand:

1. the relevant legal requirements for storing deliveries of **goods** safely, securely and hygienically
2. your retail organisation's requirements for storing deliveries safely, securely and hygienically
3. why **goods** need to be rotated
4. how to position **goods** so that batches of stock can be reached easily and in the right order
5. your retail organisation's requirements for using available storage space safely.
6. your retail organisation's requirements for housekeeping of storage areas
7. the current HSE requirements and your retail organisation's health and safety requirements for using lifting equipment
8. the instructions required for storing **goods** in the correct places and in the correct order
9. where to get instructions for storing **goods**
10. how to work safely, securely and efficiently when putting **goods** into storage
11. how to recognise when equipment is faulty and how to report it if it is not within your own authority to repair it
12. what, when and how to complete your retail organisation's paperwork or records

Put goods into storage in a retail organisation

Glossary

Goods – this includes your retail organisation's consumables such as equipment and materials as well as retail goods for sale

Links to other NOS

PPL.B201 Prepare to receive deliveries in a retail organisation

PPL.B202 Receive deliveries and check storage arrangements of goods in a retail organisation

Put goods into storage in a retail organisation

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B204
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Storage and Retailing
Suite	Retail
Keywords	Retailing; retailers; move; moving; puts; putting; stores; storing; stocks; items; products; produce

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Check the level of goods on sale in a retail organisation

Overview

This standard is about using a stock control system to record and check the level of goods on sale in a retail organisation.

This standard is for all staff involved in checking levels of goods on the sales floor.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Check the level of goods on sale in a retail organisation

Check the level of goods on sale in a retail organisation

Performance criteria

You must be able to:

1. use your retail organisation's stock control system to identify current levels, what is required and shortfalls in goods on sale
2. use your retail organisation's procedures for checking minimum and maximum levels of goods on sale
3. work out how often to check goods on sale so that there will be enough time to replace them before they run out
4. follow your retail organisation's procedures for checking the level of goods on sale at required intervals
5. tell the correct person promptly when goods need replacing
6. follow your retail organisation's requirements for reporting or recording when goods are no longer saleable

Check the level of goods on sale in a retail organisation

Knowledge and understanding

You need to know and understand:

1. why your retail organisation needs to hold the correct levels of goods on sale
2. why the quality and quantity of goods on sale need to be checked regularly
3. the maximum and minimum levels of goods that need to be on sale
4. the factors that can affect demand for goods, and how to work out how often to check levels of goods on sale
5. how to ensure goods are checked at suitable intervals
6. how to use the stock control system to identify current levels, what is required and shortfalls in goods on sale
7. how to identify unsaleable goods
8. how process unsaleable goods
9. how to update the stock control system

Check the level of goods on sale in a retail organisation

Links to other NOS PPL.B206 Replenish goods on sale in a retail organisation



Check the level of goods on sale in a retail organisation

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B205
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Storage and Retailing
Suite	Retail
Keywords	Retailing; retailers; checks; checking; stocking; stocks; goods; products; items; produce; materials; stock taking; inventorying

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Process orders for retail customers

Overview

This standard is about processing retail customer orders, processing goods to be picked, sent out, and arranging payments. This standard includes the relevant legalities of customer credit and customer data sharing when authorising payment and collecting customer information.

This standard is for owners, managers, team leaders, stores and sales personnel.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Process orders for retail customers

Process orders for retail customers

Performance criteria

You must be able to:

1. follow relevant legal procedures for checking your retail customer's identity payment preference and credit status if necessary
2. follow your retail organisations procedures for checking your retail customer's details and additional information
3. follow your retail organisations procedure for processing payments for orders
4. follow your retail **organisation's policy** for offering to order goods your retail customer requires if they are not in stock
5. complete information about orders and pass this information promptly to the people responsible for fulfilling orders
6. process orders for picking from stock held in your retail organisation
7. follow your retail organisation's procedures for arranging order(s) to be sent out
8. let your retail customer know promptly if their order cannot be fulfilled within the time agreed
9. store your retail customers' details securely and show them only to people who have a right to see them

Process orders for retail customers

Knowledge and understanding

You need to know and understand:

1. the relevant legal procedures for checking your retail customers' identity, preferred payment options and credit status, and why procedures should be followed
2. your retail organisation's procedures for collecting additional information
3. who is responsible for fulfilling your retail customers' orders, what information they require and why they require it
4. who is responsible for processing payments for your retail customers for orders, what information they require, and why they require it
5. who to tell if an order cannot be processed
6. why your retail customers should be informed promptly about delays in fulfilling orders
7. why your retail customers should be informed if orders cannot be fulfilled
8. the relevant legal and your organisation's requirements relating to retail customer confidentiality what the penalties are if retail customers' information is not kept confidential
9. your retail organisation's procedures for storing retail customers' information securely
10. who is entitled to see your retail customers' information, and in what situations

Process orders for retail customers

Glossary

Organisation policy – This may be a set of principles, procedures or both. These may be written or not, however owners and managers need to be clear to all personnel about what procedures should be followed and when

Links to other NOS PPL.B207 Check the availability of goods for customer orders



Process orders for retail customers

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B208
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Owner/Manager; Team Leader; Manager
Suite	Retail
Keywords	Retailing; retailers; processing; ordering; stocks; items; products; produce; materials; goods

Pick goods to fulfil customer orders in a retail organisation

Overview

This standard is about providing a service to customers by picking goods from stock in response to their orders. Personnel may be picking from a shop floor display or within a storage area of the retail organisation. This standard is for retail organisations using it as part of its 'dot.com' online service or for other retail organisations who use it as an additional service to its customers. It is also about being able to pick out alternatives if the goods customers' require are not available.

This standard is for sales and retail stores personnel who are employed to fulfil orders or as part of their sales role.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Pick goods to fulfil customer orders in a retail organisation

Pick goods to fulfil customer orders in a retail organisation

Performance criteria

You must be able to:

1. check customers' order details and relevant records
2. plan a route around the display area or storage area that is efficient and that enables goods to be picked within the time allowed
3. pick goods in ways that minimise the inconvenience caused to other staff or customers whilst ensuring that goods are picked within the required time
4. ask the correct person for advice if picking instructions are unclear
5. check that the goods picked are of saleable quality
6. protect picked goods from damage and deterioration throughout the picking process
7. follow your retail organisation's procedures for recording picked goods and prices
8. follow your retail organisation's policy and procedures for choosing alternatives when goods requested by customers are not in stock
9. use effective methods for separating goods for different orders when picking for more than one customer
10. pack goods so as to keep them in saleable condition without using excessive packaging
11. put customers' packed orders in the correct places ready for collection or despatch

Pick goods to fulfil customer orders in a retail organisation

Knowledge and understanding

You need to know and understand:

1. what documentation or records to check for customers' orders
2. the layout of the display area or storage area and how to work out the most efficient routes for picking customers' orders
3. why it is important to try not to inconvenience other staff or customers during picking activities
4. how to pick goods in ways that cause the least possible inconvenience to other staff or customers whilst ensuring that orders are picked within the required time
5. how to interpret picking instructions and who to ask for advice if picking instructions are unclear
6. what counts as 'saleable quality' for the goods and how to check the quality of the goods as they are being picked
7. the common types of damage and deterioration that can affect goods during picking, and how to prevent these
8. your retail organisation's procedures for recording picked goods and prices
9. your retail organisation's policy and procedures for choosing alternatives when the goods requested by customers are not in stock
10. how to avoid mixing up orders when picking for more than one customer
11. how to pack goods so as to keep them in saleable condition without using excessive amounts of packaging
12. where to put customers' packed orders ready for collection or despatch



Pick goods to fulfil customer orders in a retail organisation

Developed by	People 1st
Version Number	3
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B245
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; picking; picks; internet; loads; loading; online shopping; online

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Identify retail customers' requirements for lingerie

Overview

This standard is about explaining the lingerie-fitting service and finding out what type of lingerie your retail customers require, sometimes when they are unclear about their own requirements.

This standard is for sales staff who may or may not conduct lingerie fitting as part of their responsibility.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Identify retail customers' requirements for lingerie

Identify retail customers' requirements for lingerie

Performance criteria

You must be able to:

1. approach retail customers in the lingerie department and accurately identify what their requirements are from the information given
2. describe accurately to retail customers the process and benefits of the lingerie-fitting service
3. offer retail customers the lingerie-fitting service or, if the retail customer prefers, book a later appointment

Identify retail customers' requirements for lingerie

Knowledge and understanding

You need to know and understand:

1. how to approach retail customers in the lingerie department
2. how to use information offered by retail customers to identify their requirements
3. what is involved in the lingerie-fitting service and how long a fitting session is likely to take
4. questioning techniques used to clarify and agree retail customers' buying requirements
5. how to build trust and relax retail customers using the lingerie fitting service
6. how to talk to different types of retail customers and help them to understand the information provided

Identify retail customers' requirements for lingerie

Links to other NOS PPL.C223 Check the customer's preferences and buying decisions when making retail sales
PPL.C251 Measure and fit the retail customer for lingerie

Identify retail customers' requirements for lingerie

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C250
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; identifies; identifying; finds out; finding out; works out; working out; requirements; customers; bras

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

It is highly unlikely that this unit will be able to be observed therefore the evidence generated will be around the training undertaken and testimony of the Expert Witness to confirm the candidate's competence.

Measure and fit retail customers for lingerie

Overview

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

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

It also covers the relevant legislation related to equality and diversity as well as dealing with minors.

This standard is for staff who conduct lingerie fitting as part of their role.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Measure and fit retail customers for lingerie

Measure and fit retail customers for lingerie

Performance criteria

You must be able to:

1. follow your retail organisation's customer service standards at all times with retail customers while assessing their measuring and fitting requirements
2. explain clearly and tactfully to retail customers that an accurate fit cannot be guaranteed if measurements are taken on top of the retail customers' clothing
3. follow your retail organisation's and relevant legal requirements when dealing with retail customers with special requirements
4. position yourself and the retail customers correctly so that:
 - measurements can be taken accurately
 - the product can be adjusted to fit retail customers
 - retail customers can see the product when worn and correctly fitted
5. meet the retail customers' requirements for privacy and help while they are trying products on
6. take and record the required measurements accurately
7. choose accurately and offer a range of products in the retail customer's size and that meet retail customers' requirements
8. adjust and fit products to provide retail customers comfort and prolong the life of the products
9. check the fit of the products and whether retail customers are satisfied with the product
10. explain other possible courses of action if lingerie cannot be found to fit retail customers

Measure and fit retail customers for lingerie

Knowledge and understanding

You need to know and understand:

1. basic styles, shapes and sizes of lingerie
2. the different parts of lingerie and their technical names
3. brands, colours, fabrics, trims and price range of available products
4. the size range and fit of the lingerie in stock and where different types of lingerie can be found
5. the features, advantages and benefits of different types of lingerie
6. the ordering service using in-house systems or brand catalogues for lines either not in stock or not carried by your retail organisation
7. solution dressing – what to wear under different outfits
8. accessories such as enhancers and co-ordinating garments
9. the manufacturer's guidance on washing and caring for products
10. scheduled delivery dates for new products
11. trends in design, technological solutions and fabrics
12. how to assess the retail customer's body size and age
13. the equipment and layout required for the lingerie fitting room
14. how and where to measure for the retail customer's band size using a tape measure
15. how to estimate the cup size required
16. how to choose the correct lingerie for the fitting
17. how to educate the retail customer on band sizes, cup sizes and correct fitting using the lingerie chosen
18. body shapes and breast sizes
19. what special requirements a range of retail customers may have
20. how to adjust and fit the lingerie both inside and outside the fitting room
21. how to build trust and relax retail customers whilst working with them
22. how to talk to different types of retail customers and help them understand the information provided
23. how to deal with challenging situations, including unusual body shape, body odour, disability, mastectomy and maternity
24. the importance of retail customers' confidence and loyalty to your retail organisation and how to contribute to them
25. the relevant legal and your retail organisation's requirements when dealing with retail customers with special requirements

Measure and fit retail customers for lingerie

Links to other NOS PPL.C223 Check the customer's preferences and buying decisions when making retail sales
PPL.C250 Identify the retail customer's requirements for lingerie

Measure and fit retail customers for lingerie

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Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C251
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; measures; measuring; sizes; sizing; fits; fitting; customers; bras

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

It is highly unlikely that this unit will be able to be observed therefore the evidence generated will be around the training undertaken and testimony of the Expert Witness to confirm the candidate's competence.

Bake (bake-off) products for sale in a retail organisation

Overview

This standard is about preparing bake-off products in an oven for sale in a retail organisation. These products may arrive in retail bakeries ready to be baked-off and sold in store, or prepared in the bakery and kept for future sales. It involves following specifications for baking a range of bake-off products as well as using a variety of different items of equipment safely. Hygiene and safety are important factors as well as making decisions about the quality of products, and taking suitable actions if they do not meet the quality required.

This standard is for bakery personnel who are responsible for 'bake-off' products.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Bake (bake-off) products for sale in a retail organisation

Bake (bake-off) products for sale in a retail organisation

Performance criteria

You must be able to:

1. use approved procedures for checking that the quantity and quality of baked **products** is satisfactory
2. follow procedures for dealing with **products** that fail to meet the product specification before baking and after baking
3. use approved methods to **bake** the correct quantity and quality of bake-off **products** for sale in your retail organisation
4. use relevant regulations and your retail organisation's procedures for working hygienically with bake off **products**
5. store **products** at the correct temperature for the next stage in the bakery process

Bake (bake-off) products for sale in a retail organisation

Knowledge and understanding

You need to know and understand:

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

Glossary

Bake [baking methods] – Oven work

Legal and organisation requirements:

1. food hygiene regulations, health and safety at work regulations and associated laws, regulations and approved codes of practice
2. standard operational policies and procedures
3. product specification
4. production schedule

Products:

Fermented products can include:

1. soft rolls
2. crusty rolls
3. white bread
4. wholemeal bread
5. fruited bread or buns
6. fermented pastries

Non-fermented products can include:

1. non-laminated pastry
2. biscuits
3. scones

Links to other NOS [PPL.B221 Finish bake-off products in a retail organisation](#)

Bake (bake-off) products for sale in a retail organisation

Developed by	People 1st
Version Number	4
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B220
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Skilled Trades Occupations; Food Preparation Trades
Suite	Retail
Keywords	Retailing; retailers; baking; bakes; preparing; prepares; cooking; cooks; bake off; bakery; CDF

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Finish bake-off products in a retail organisation

Overview

This standard is about finishing bake-off products in your retail organisation. It involves working with specifications for finishing a range of bake-off products as well as using a variety of different items of equipment safely. It includes glazing, coating and decorating finishing techniques. Hygiene and safety are important factors in the performance of this standard. The standard also includes making decisions about the quality of the products and what to do with them if they do not meet the quality required.

This standard is for all bakery personnel who finish off bake off products.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Finish bake-off products in a retail organisation

Finish bake-off products in a retail organisation

Performance criteria

You must be able to:

1. check that bake-off **products** are in the right condition for finishing including coating, glazing or decorating
2. make sure that **finishing** materials have the right texture, thickness, colour and temperature
3. check that coated, glazed and decorated **products** meet the specification and are correctly positioned for the next stage in the bakery process
4. follow your retail organisation's procedures for dealing with finished **products** that fail to meet the product specification
5. make the amount of coated, glazed and decorated **products** needed
6. follow your retail organisations procedures for **hygiene** and safety when finishing bake-off **products**
7. follow your retail organisation's procedures for re-using and recycling waste materials

Finish bake-off products in a retail organisation

Knowledge and understanding

You need to know and understand:

1. types of **finishing** materials for bake-off **products** your retail organisation supplies and how to use them
2. how to apply coatings, glazes and decorative materials
3. how to maintain the quality of coatings, glazes and decorative materials while applying them
4. how to recognise **products** that are not fit to sell and how to deal with them
5. the relevant **legal requirements** to follow during working practices
6. your retail organisations procedures for hygiene and safety when finishing bake-off products
7. procedures for reporting problems with finishing bake-off **products**

Finish bake-off products in a retail organisation

Glossary

Finishing [materials] – Examples of finishing materials can include:

1. coatings and toppings
2. glazes
3. edible decorative material
4. basic piping
5. pastes

Finishing [methods] – Examples of finishing methods can include:

1. glazing
2. piping
3. spreading
4. coating
5. positioning
6. dipping

Legal and organisation requirements:

1. food hygiene regulations, health and safety at work regulations and associated laws, regulations and approved codes of practice
2. standard operational policies and procedures
3. product specification
4. production schedule

Products:

Fermented products can include:

1. soft rolls
2. crusty rolls
3. white bread
4. wholemeal bread
5. fruited bread or buns
6. fermented pastries

Non-fermented products can include:

1. non-laminated pastry
2. biscuits
3. scones

Links to other NOS [PPL.B220 Bake \(bake-off\) products for sale in a retail organisation](#)

Finish bake-off products in a retail organisation

Developed by	People 1st
Version Number	5
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B221
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Skilled Trades Occupations; Food Preparation Trades
Suite	Retail
Keywords	Retailing; retailers; bake off; bakery; glazing; glazes; coating; coats; decorating; decorates; finishes; finishing

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Prepare greengrocery products for sale in a retail organisation

Overview

This standard is about preparing greengrocery products for sale in a retail organisation. Preparation covers unpacking, handling and removing unwanted parts of vegetables, fruits and salad products.

This standard is for owners, managers, team leaders and sales personnel who work in a greengrocery department or greengrocery retail organisation.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Prepare greengrocery products for sale in a retail organisation

Prepare greengrocery products for sale in a retail organisation

Performance criteria

You must be able to:

1. remove unwanted packaging from a range of **greengrocery products** including vegetables, fruit and salad
2. follow your retail organisation's procedures for recycling unwanted packaging and waste from **greengrocery products**
3. handle **greengrocery products** hygienically at all times and in a way that protects them from damage
4. choose only those **greengrocery products** that match the quality your retail organisation sells
5. deal with **greengrocery products** that do not match your retail organisation's requirements for quality
6. remove unwanted parts of **greengrocery products** to make them as attractive as possible to customers
7. weigh, classify and package **greengrocery products**

Prepare greengrocery products for sale in a retail organisation

Knowledge and understanding

You need to know and understand:

1. the **greengrocery products** that are prepared by your retail organisation and how to handle them without damaging them
2. your retail organisation's procedures for recycling unwanted packaging and waste from **greengrocery products**
3. why **greengrocery products** must be handled hygienically
4. your retail organisation's quality standards for **greengrocery products**
5. how to recognise **greengrocery products** that must be rejected or reclassified
6. how to recognise parts of **greengrocery products** that must be removed to make the products more attractive to customers
7. how to prepare **greengrocery products** so they are attractive to customers

Prepare greengrocery products for sale in a retail organisation

Glossary

Greengrocery products:

1. vegetables
2. fruit
3. salad

Links to other NOS

PPL.B225 Display and maintain greengrocery products to attract sales in a retail organisation

Prepare greengrocery products for sale in a retail organisation

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B224
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Skilled Trades Occupations; Food Preparation Trades
Suite	Retail
Keywords	Retailing; retailers; preparing; prepares; vegetables; fruits; salads; produce

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Greengrocery products are to include vegetables, fruit and salad.

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

Overview

This standard is about your responsibility for authorising and monitoring customers dispensing fuel safely and legally through a self-service system into modes of transport or fuel containers on a forecourt. It can involve transferring the transaction to point of sale when automated systems are not in place. Motor fuel poses serious risks to health and safety and it is vitally important that you authorise the dispensing of fuel only when it is safe to do so.

This standard is for owners, managers, department managers, team leaders and sales/customer service assistants working on a forecourt.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Authorise and monitor the self-service dispensing of motor fuel on a forecourt into modes of transport

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

Performance criteria

You must be able to:

1. authorise customers to dispense motor fuel from self-service pumps in line with the relevant safety requirements laid down by the law and by your retail organisation
2. follow relevant legal and your retail organisation's requirements for checking that customers are legally old enough to dispense motor fuel into modes of transport and that any motor fuel containers customers use comply with relevant legal requirements
3. activate the self-service pumps promptly when it is safe and legal do so, and in line with the manufacturer's instructions
4. monitor customers and remain alert for safety hazards while motor fuel is being dispensed
5. take prompt and suitable action to deal with any hazards that arise
6. notice when dispensing equipment is not working properly and take prompt and suitable action
7. when necessary support the transfer of transaction information to the point of sale promptly when customers have finished dispensing motor fuel, in line with manufacturer's instructions
8. remain alert for security risks while customers are dispensing motor fuel
9. notice when customers have driven away without paying, and follow your retail organisation's procedures for recording and reporting drive-offs

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

Knowledge and understanding

You need to know and understand:

1. the importance of only authorising customers allowed to dispense motor fuel in line with safety requirements and relevant law
2. the safety requirements laid down by the relevant law and by your retail organisation for the safe self service dispensing of motor fuel by customers
3. the layout of the forecourt including the positions of the self-service pumps
4. the age over which customers may legally dispense motor fuel, and relevant legal and your retail organisation's requirements for checking that customer are over the legal age
5. relevant legal requirements concerning customers filling containers with motor fuel
6. the importance of monitoring and remaining alert for safety hazards while customers are dispensing motor fuel, what hazards can arise, and how to deal with them
7. reasons why dispensing equipment might not work properly, and what action to take when this happens
8. the types of security risk that can arise when customers are dispensing motor fuel and how to remain alert for these
9. how to tell when a drive-off has occurred, and your retail organisation's procedures for recording and reporting drive-offs



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

Links to other NOS PPL.C214 Provide a payment service at point of sale in a retail organisation

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

Developed by	People 1st
Version Number	2
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C266
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; authorises; authorising; allows; allowing; permits; permitting; monitors; monitoring; checks; checking; watches; watching; dispenses; dispensing; petrol; diesel; petrol stations; forecourts; stations

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: It is expected that simulation will be used to gather evidence for taking action to deal with or contain safety hazards, security risks and drive-offs.

Quality check the suitability of meat products for finishing in a retail organisation

Overview

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

This standard is for staff responsible for checking the quality of meat products in a meat department of a retail organisation or an independent retail butchery store.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Quality check the suitability of meat products for finishing in a retail organisation

Quality check the suitability of meat products for finishing in a retail organisation

Performance criteria

You must be able to:

1. select suitable meat **products** for finishing following your retail organisation's procedures
2. carry out **product quality and suitability checks** effectively against your retail organisation's specifications
3. identify and reject meat **products** that are unsuitable for finishing
4. place rejected meat **products** in allocated areas away from other **products**
5. deal with rejected meat **products** safely and hygienically
6. keep meat **products** at the specified temperature during transfer and storage once they have been passed as suitable for finishing
7. record relevant information on meat **products** and storage temperatures accurately

Quality check the suitability of meat products for finishing in a retail organisation

Knowledge and understanding

You need to know and understand:

1. the meat **products** your retail organisation prepare for sale
2. how to carry out **quality and suitability checks** on meat **products** and recognise when they are suitable for finishing
3. the reasons why meat **products** should be rejected
4. the temperatures at which meat **products** should be held during handling, transfer and storage, and why they are important
5. why accurate and up to date records about meat **products** and storage temperatures must be kept
6. the reasons for checking temperature records and why problems must be identified and reported
7. how to refer to and use your retail organisation's policy and procedures for quality checking meat **products**

Quality check the suitability of meat products for finishing in a retail organisation

Glossary

Products:

1. meat
2. poultry
3. ingredients

Product quality and suitability checks:

1. temperature
2. visual
3. touch
4. smell

Links to other NOS

PPL.B227 Prepare to finish meat products in a retail organisation

PPL.B228 Achieve meat product yield and finish in a retail organisation



Quality check the suitability of meat products for finishing in a retail organisation

Developed by	People 1st
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Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B226
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Skilled Trades Occupations; Food Preparation Trades
Suite	Retail
Keywords	Retailing; retailers; checks; checking; butchery; butchers; butchering

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Finishing is to include both meat and poultry

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

Products:

- Meat
- poultry
- ingredients

Product quality and suitability checks:

- Temperature
- Visual
- touch
- smell

Prepare to finish meat products in a retail organisation

Overview

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

This standard is for all staff who finish meat products in a meat department of a retail organisation or independent butchery store.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Prepare to finish meat products in a retail organisation

Prepare to finish meat products in a retail organisation

Performance criteria

You must be able to:

1. obtain your retail organisation's instructions for finishing meat products and organise your work in line with them
2. keep the work area free from dangers and prepare and organise it to meet your retail organisation's **safety** and **processing** needs
3. choose butchery tools that are appropriate for the task
4. prepare tools and equipment in line with your retail organisation's **safety** and **processing** requirements
5. identify faulty tools and equipment and follow your retail organisation's procedures for dealing with them
6. follow your retail organisation's **safe and hygienic working practices** when preparing meat products for finishing at all times

Prepare to finish meat products in a retail organisation

Knowledge and understanding

You need to know and understand:

1. the dangers associated with butchery tools and equipment and the safety precautions to take
2. why it is important to use the correct processes for storing and using tools and equipment
3. which tools and equipment are used for finishing meat products in your retail organisation
4. reasons for preparing tools and equipment
5. how to keep tools and equipment clean and in good working order
6. how to prepare knives and keep them sharp and in good working order using **safe and hygienic working practices**
7. what to do about faulty tools and equipment
8. how to prepare a range of meat products for finishing in your retail organisation

Prepare to finish meat products in a retail organisation

Glossary

Processing [needs/requirements]:

1. organisation policies for storing and preparing ingredients and products
2. procedures for processing meat products
3. instructions for carrying out specifications
4. organisation policies for storing tools and equipment

Safe and hygienic working practices:

1. using checking procedures
2. maintaining personal hygiene
3. using personal protective clothing and equipment

Safety [needs/requirements]:

1. UK and NI laws
2. codes of practice and guidance notes

Links to other NOS

PPL.B226 Quality check the suitability of meat products for finishing in a retail organisation

PPL.B228 Achieve meat product yield and finish in a retail organisation

Prepare to finish meat products in a retail organisation

Developed by	People 1st
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B227
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Skilled Trades Occupations; Food Preparation Trades
Suite	Retail
Keywords	Retailing; retailers; prepares; preparing; preparation; finishes; finishing; butchery; butchers; butchering; poultry

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Finishing is to include both meat and poultry

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

Processing [needs/requirements]:

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

Safe and hygienic working practices:

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

Safety [needs/requirements]:

- UK and NI laws

codes of practice and guidance notes

Achieve meat product yield and finish in a retail organisation

Overview

This standard is about finishing meat products to achieve the yield and finish required.

This standard is for all staff who finish meat products in a meat department of a retail organisation or an independent retail butchery store.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Achieve meat product yield and finish in a retail organisation

Achieve meat product yield and finish in a retail organisation

Performance criteria

You must be able to:

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

Achieve meat product yield and finish in a retail organisation

Knowledge and understanding

You need to know and understand:

1. your retail organisation's **product specifications** for achieving meat **product** yield
2. your retail organisation's **specifications** for finishing meat **products**
3. the temperatures at which meat **products** should be kept during handling, transfer and storage, and the reasons for this
4. reasons for rejecting finished meat **products**
5. procedures to deal with finished meat **products** that have been rejected
6. how to clean tools and equipment
7. reasons for storing tools and equipment as instructed
8. your retail organisation's **safe and hygienic working practices**

Glossary

Products:

1. meat
2. poultry
3. ingredients

Product specification:

1. yield
2. finish

Safe and hygienic working practices:

1. working on your own
2. working in a team
3. using checking procedures
4. maintaining personal hygiene

Links to other NOS

PPL.B226 Quality check the suitability of meat products for finishing in a retail organisation

PPL.B227 Prepare to finish meat products in a retail organisation

Achieve meat product yield and finish in a retail organisation

Developed by	People 1st
Version Number	3
Date Approved	March 2017
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B228
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Skilled Trades Occupations; Food Preparation Trades
Suite	Retail
Keywords	Retailing; retailers; finishes; finishing; butchery; butchers; butchering; poultry

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Finishing is to include both meat and poultry

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

Products:

- meat
- poultry
- ingredients

Product specification:

- yield
- finish

Safe and hygienic working practices:

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

Maintain food safety while working with food in a retail organisation

Overview

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

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

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Maintain food safety in a food preparation area of a retail organisation

Maintain food safety while working with food in a retail organisation

Performance criteria

You must be able to:

1. keep yourself clean and protected during work activities in food preparation areas
2. keep your hair, skin and nails in a suitable condition for working with food
3. remove any jewellery and other **accessories** that could cause food safety hazards
4. maintain and wear clean clothes including any **protective clothing** your retail organisation provides
5. maintain and wear the **protective clothing** correctly and change them following your retail organisation's policies and procedures
6. wash your hands at the **right times** and using effective washing methods
7. avoid **unsafe behaviour** that could contaminate the food being prepared
8. report any open wounds, skin infections and infectious illnesses promptly to the **correct person**
9. make sure any open wounds and skin infections are treated and covered with a suitable dressing
10. keep your work area and food preparation area in the right condition for working with food
11. keep the immediate work area clean and tidy during all work activities
12. carry out any scheduled cleaning at the right times and in line with your retail organisation's **procedures**
13. keep tools, utensils and equipment in good working order, in a hygienic condition and stored correctly
14. work in a way that keeps food safe for customers
15. follow your retail organisation's **procedures** to dispose of food waste promptly and hygienically
16. protect food from **food safety hazards** and **cross-contamination** during all work activities
17. follow your retail organisation's **procedures** for dealing with contaminated food
18. follow your retail organisation's **procedures** for items that may cause allergic reactions
19. label products clearly with the correct use-by/expiry dates
20. check and record the condition of food
21. check food and food preparation and storage areas in line with your retail organisation's schedules and **procedures**
22. maintain food safety at all times when working in food preparation areas
23. follow your retail organisation's **procedures** for keeping accurate and complete records of the checks that need to be made
24. follow your retail organisation's **procedures** for any **indicators of potential**

Maintain food safety while working with food in a retail organisation

- food safety hazards** within your authority to deal with
25. follow your retail organisation's procedures for identifying **infestations** in the food preparation area and report them to the **correct person**
 26. promptly report to the **correct person** any **indicators of potential food safety hazards** not within your authority to address

Maintain food safety while working with food in a retail organisation

Knowledge and understanding

You need to know and understand:

1. how personal hygiene and behaviour affect food safety in the workplace
2. the types of illness the relevant legal regulations require to be reported to an employer
3. why skin infections and wounds must be reported and treated
4. what the relevant **procedures** are for covering open wounds
5. how **food handling practices** affect food safety in the workplace
6. why the immediate work area must be kept clean and tidy
7. your retail organisation's schedules and **procedures** for cleaning the workplace and why these must be followed
8. why certain foods must be kept at **specified temperatures** and how to do so
9. your retail organisation's schedule and **procedures** for checking and reporting the condition of food and food storage areas, and why these must be followed
10. your retail organisation's **procedures** for maintaining food safety in food preparation areas
11. the main types of **infestation** in food preparation areas, how they can happen, how to prevent them, how to recognise them and what to do if these are discovered
12. the main types of **food safety hazards** and **cross-contamination**, how they can happen, how to prevent or reduce the risk of them happening and what to do if indicators of **food safety hazards** or **cross-contamination** are discovered
13. the causes of **food spoilage**, how to recognise **food spoilage** and what to do if it is discovered

Glossary

Accessories – Additional items apart from clothing and jewellery, for example, false nails

Correct person [to report to] – This could be a supervisor or manager

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

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

Food handling practices – Depending on the type of food and the activities being carried out, food handling practices may include:
keeping finished products separate from other materials
keeping raw and cooked meat products separate
getting rid of waste, and contaminated or damaged products

Food spoilage – When food goes bad and has a noticeable change in its taste, smell or appearance

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

1. damaged packaging
2. spillage into another food
3. out of date stock
4. food not stored where it should be (for example, if customers have moved food)
5. chiller cabinets or freezers that are not operating at the right temperature
6. ovens or hot hold cabinets that are not operating at the right temperature
7. use of the same utensils to handle different foods
8. food waste that needs disposing of

Maintain food safety while working with food in a retail organisation

9. dirt
10. pests such as rodents or insects

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

Procedures – A series of clear steps or instructions on how to do things: rules. Some organisations document their procedures formally in writing, and others simply have procedures that all staff understand and follow, but that are not written down

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

1. trousers
2. tops such as jackets or tabards
3. coats
4. disposable gloves
5. headgear such as caps or hairnets
6. aprons
7. shoe protectors

Right times [to wash hands] – Appropriate times to wash hands would include:

1. after going to the toilet
2. before going into food production areas, including after any work breaks
3. after getting rid of waste
4. after cleaning
5. before and after changing a dressing or touching an open wound

Specified temperatures – Temperatures specified by relevant legislation or in your retail organisation's procedures

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

1. touching the face, nose or mouth
2. smoking
3. chewing gum
4. eating
5. scratching

Maintain food safety while working with food in a retail organisation

6. coughing or sneezing

Maintain food safety while working with food in a retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B235
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Skilled Trades Occupations; Food Preparation Trades
Suite	Retail
Keywords	Retailing; retailers; maintains; maintaining; meat; fish; poultry; produce; vegetables; cheese; baking; bakery; butchers; butchering; butchery

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

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

Accessories

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

Correct person [to report to]

- This could be a supervisor or manager

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

1. the transfer of harmful bacteria between foods by direct contact (e.g. the juices of raw meat dripping onto cooked meat stored on a lower shelf), or indirect contact (e.g. via the hands, clothing, cloths, equipment or other surfaces)

Maintain food safety while working with food in a retail organisation

2. the cross-contamination of foods containing specific allergens (e.g. nuts, milk, eggs) with other food (e.g. by use of common utensils on cold meat counters and salad bars, slicers on deli counters, etc., by the mixing of foods due to damaged packaging or spillages, or via hands, clothing, cloths or other surfaces)

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

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

Food spoilage

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

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

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

Infestation

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

Procedures

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

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

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

Right times [to wash hands] – Appropriate times to wash hands would include:

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

Specified temperatures

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

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

- touching the face, nose or mouth
- smoking
- chewing gum
- eating

Maintain food safety while working with food in a retail organisation

- scratching
- coughing or sneezing

Organise your work to meet a dough production schedule in a retail organisation

Overview

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

This standard is for individuals responsible for working to bakery schedules and targets and includes owners, managers, team leaders and bakery personnel.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Organise your work to meet a dough production schedule in a retail organisation

Organise your work to meet a dough production schedule in a retail organisation

Performance criteria

You must be able to:

1. check all the instructions needed for your **dough** production schedule in your retail organisation
2. organise your work within the **dough** production schedule making best use of time and resources
3. tell the correct person about any problems with the quantity or quality of resources available to make **dough** production achievable
4. tell the correct person if your **dough** production schedule does not seem to be realistically achievable
5. meet the **dough** production schedule in your retail organisation
6. work within the relevant requirements for health and safety and food safety and hygiene
7. make suggestions to the correct person about how **dough** production schedules can be more effective

Organise your work to meet a dough production schedule in a retail organisation

Knowledge and understanding

You need to know and understand:

1. how to organise your work efficiently within a **dough** production schedule, including re-organising your work to meet changing **dough** production needs and your retail organisation's expectations
2. how to organise your work so as to avoid delays that result in **dough** no longer being in the required condition
3. how to get the instructions needed for your **dough** production schedule
4. the limits of your authority and responsibility for organising your work within the **dough** production schedule
5. how to organise your work within the **dough** production schedule to make best use of your time and other resources
6. where and when to get help and advice about problems with **dough** production schedules and resources
7. how to meet **dough** schedules for your retail organisation
8. the requirements for health and safety and food safety and hygiene that apply to your work within the **dough** production schedule, and why these must be followed
9. how to make suggestions about improvements that can make **dough** production schedules more effective

Organise your work to meet a dough production schedule in a retail organisation

Glossary

Dough:

Common types of fermented dough include those used for:

1. bread
2. plain and fruited buns
3. Danish pastries
4. croissants

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

1. puff pastry
2. scones
3. biscuits

Organise your work to meet a dough production schedule in a retail organisation

Developed by	People 1st
Version Number	3
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B243
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Skilled Trades Occupations; Food Preparation Trades; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; bakery; baking; bakes; doughs; pastries; biscuits; scones; pastry; buns; organising; organises

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit.

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

Dough

Common types of fermented dough include those used for:

- Bread
- plain and fruited buns
- Danish pastries
- croissants

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

- puff pastry
- scones
- biscuits

Divide, mould and shape fermented dough in bakery operations

Overview

This standard covers the skills and knowledge needed to divide, mould and shape fermented dough by hand, in craft, artisan or in-store bakery operations. Fermented dough typically includes that for bread, rolls sticks, enriched, sour and laminated dough and dough for free-from products.

You need to show and understand how you 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 a rolling pin. You need to know how to recognise and prevent contamination during processing. You need to understand the role of yeast and the principles of the fermentation process in dough. You need to know the basic structure of dough and how processing affects gas production and retention rates. You also need to know, how the control of fermentation during processing determines product quality. Complying with and understanding health and safety, food safety, allergen and organisational requirements are essential features of this standard.

This standard is for you if you work in bakery operations, and is applied in the context of fermented dough production.

Divide, mould and shape fermented dough in bakery operations

Performance criteria

You must be able to:

Divide fermented dough

1. check the available dough against your instructions and specifications and take prompt action on discovering any discrepancy
2. obtain and check the condition of dividing tools and the accuracy of equipment in accordance with procedures
3. hand divide dough in accordance with product specifications
4. minimise waste and deal with scrap material in accordance with procedures
5. position and maintain divided dough portions for further processing
6. comply with health, safety, food safety, allergen and organisational requirements throughout dividing operations

Mould and shape fermented dough

7. check the available portioned dough against your instructions and specifications and take prompt action on discovering and discrepancy
8. prepare and maintain an appropriate table surface for moulding and shaping
9. hand mould and shape portioned dough in accordance with product specifications
10. wash and dress shaped dough surfaces as required to specification
11. minimize waste and deal with scrap material in accordance with procedures
12. place dough in the correct condition and location for further processing
13. comply with health, safety, food safety, allergen and organisational requirements throughout moulding and shaping operations
14. carry out cleaning, lubrication and detection activities in accordance with procedures
15. operate within the limits of your own authority and capabilities

Divide, mould and shape fermented dough in bakery operations

Knowledge and understanding

You need to know and understand:

1. the standards of health and safety and food safety you are required to comply with, why it is important that you do so, and what might happen if standards are not met
2. why it is important to follow work instructions and product specifications or recipes throughout dough processing
3. how to recognise and report dough that do not meet specification, and the procedure for rejecting and isolating failed dough and dough portions
4. the importance of accurate dividing and check weighing of fermented dough
5. 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
6. how to prevent dough contamination and cross contamination during processing and what might happen if this is not done
7. what the lines and methods of effective communication are and why it is important to use them correctly
8. what the documentation requirements are and why it is important to meet them
9. 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
10. the cell structure and properties of yeast as a living organism, the feeding, growth and multiplication of yeast cells
11. the principles of fermentation in dough; the role and action of enzymes, carbon dioxide gas and alcohol production
12. the factors affecting fermentation rate; temperature, sugar, salt, pH, nitrogen, fats, spices, mould and rope inhibitors
13. what happens if dough fermentation is allowed to progress without processing controls
14. how the rate of dough fermentation is controlled in dough by temperature and humidity controlled processing environments
15. the structure of dough, its capacity to form gas cells and trap gas bubbles and changes that occur during moulding, shaping and resting that are critical to successful dough fermentation and development
16. the function of key ingredients in dough making which can influence dough fermentation rates
17. the gas production and retention properties of long process dough processing methods; bulk fermentation process (BFP), sponge and dough process

Divide, mould and shape fermented dough in bakery operations

18. the gas production and retention properties of short process dough processing methods; mechanical dough development in the Chorleywood Bread Process (CBP), activated dough development (ADD), no-time dough process
19. how to maintain dough condition and deal with fermentation time constraints
20. how to recognise dough fermentation problems which do not comply with specification

Divide, mould and shape fermented dough in bakery operations

Developed by	NSAFD
Version Number	3
Date Approved	March 2017
Indicative Review Date	January 2022
Validity	Current
Status	Original
Originating Organisation	Improve
Original URN	IMPCB105
Relevant Occupations	Engineering and manufacturing technologies; Manufacturing technologies; Process Operatives; Food Production Operatives
Suite	Craft Bakery
Keywords	Divide; Mould; Shape; Dough; Fermentation; Bakery; Baker;

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Hand-process fish in a retail organisation

Overview

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

This standard is for owners, managers, team leaders and sales personnel on a fish counter or in a retail fishmongers.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Hand-process fish in a retail organisation

Hand-process fish in a retail organisation

Performance criteria

You must be able to:

1. organise your work area, equipment and tools so that fish can be dealt with safely, hygienically and efficiently
2. maintain hygienic working conditions when checking and hand-processing fish
3. check that the fish is of saleable quality
4. hand-process fish in ways that achieve specifications for yield and quality, minimise waste, and keep fish in a saleable condition throughout processing
5. maintain the health and safety of yourself, colleagues and customers
6. dispose of waste in ways that are safe and hygienic and that meet the relevant legal and your retail organisation's requirements for recycling
7. follow the schedule for cleaning and tidying the work area, tools and equipment
8. put hand-processed products that meet specifications into containers that will keep the products in a saleable condition

Hand-process fish in a retail organisation

Knowledge and understanding

You need to know and understand:

1. the importance of hygiene in relation to hand-processing fish
2. your retail organisation's hygiene policy relating to hand-processing fish
3. safe working practices relating to hand-processing fish
4. why it is important to follow safe working practices when hand-processing fish
5. the dangers and disadvantages of using unsafe and blunt tools to hand-process fish
6. the types of accident and injury associated with hand-processing fish
7. the relevant procedures for dealing with accidents and injuries that occur when hand-processing fish
8. your retail organisation's cleaning schedule for your work area and why it is important to follow it
9. procedures for disposing safely and hygienically of waste resulting from hand-processing fish
10. the relevant legal and your retail organisation's requirements for recycling waste resulting from hand-processing fish
11. how to recognise the species of fish commonly sold in the United Kingdom
12. how the arrangement of body parts of a flat fish differs from that of a round fish
13. how the different arrangement of body parts affects the way that flat and round fish are hand-processed
14. hand-processing techniques that are safe and hygienic and that produce the yield and quality of fish required

Hand-process fish in a retail organisation

**Scope/range related
to knowledge and
understanding**

Fish

1. flat fish
2. round fish

Hand-processing

1. filleting
2. skinning
3. heading
4. scaling
5. gutting
6. boning
7. portioning
8. steaking

Hand-process fish in a retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B248
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Skilled Trades Occupations; Food Preparation Trades; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; processes; processing; hand-processes; hand-processing; preparing; prepares; flatfish

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

*Candidates need to be able to fillet **both** a flat and a round fish.*

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

Help customers to choose delicatessen products in a specialist retail organisation

Overview

This standard is about helping customers to choose delicatessen products in your specialist retail organisation. It also covers providing information about delicatessen products to help customers make choices and suggesting alternatives where appropriate.

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

This standard is for owners, managers, department managers, team leaders and sales/customer service assistants with suitable food safety training.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Help customers choose delicatessen products in a specialist retail organisation

Help customers to choose delicatessen products in a specialist retail organisation

Performance criteria

You must be able to:

1. use questioning techniques effectively to establish a rapport with customers and find out what they are looking for
2. match products as closely as possible to customers' stated requirements, from the delicatessen products available
3. support product recommendations with factually correct information that is likely to help customers choose delicatessen products
4. compare and contrast products in ways that help customers choose the products that best meet their requirements
5. recognise and act on suitable opportunities to recommend to customers associated or additional products
6. suggest alternative portion sizes or products in a tactful way when customers' requests are impractical

Help customers to choose delicatessen products in a specialist retail organisation

Knowledge and understanding

You need to know and understand:

1. how to establish a rapport with customers
2. the kinds of questions you need to ask customers in order to find out their requirements
3. where to find reliable information about the delicatessen products on sale that will help customers choose appropriately
4. effective ways of comparing and contrasting products for customers
5. how to recognise opportunities to recommend associated or additional products
6. practical limits on portion weight, size or shape
7. how to explain tactfully to customers when portion requirements cannot be met, and what alternatives can be offered

Help customers to choose delicatessen products in a specialist retail organisation

-
- Links to other NOS**
- PPL.B235 Maintain food safety while working with food in a retail organisation
 - PPL.C275 Promote sales of food or drink products by offering samples to customers and following relevant food safety requirements
 - PPL.C279 Portion delicatessen products to meet individual customers' requirements in a specialised retail organisation or specialist counter within a general retail organisation

Help customers to choose delicatessen products in a specialist retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C278
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; helps; helping; assists; assisting; chooses; choosing; choices; picks; picking; selects; selecting; delicatessens; produce; goods; items; cheeses; cold meats; meats; salads

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Portion delicatessen products to meet individual customers' requirements in a specialised retail organisation or specialist counter within a general retail organisation

Overview

This standard is about helping customers to choose delicatessen products in your specialist retail organisation or on a specialist counter within a more general retail organisation, portioning products to meet individual customers' requirements.

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

Customers specify the portion size or weight and expect the resulting portions to be very close to the specified size or weight and to be in a presentable condition.

This standard is for owners, managers, department managers, team leaders and sales/customer service assistants who have received suitable food safety training.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Portion delicatessen products to meet individual customers requirements in a specialist retail organisation or on a specialist counter within a general retail organisation

Portion delicatessen products to meet individual customers' requirements in a specialised retail organisation or specialist counter within a general retail organisation

Performance criteria

You must be able to:

1. handle and portion delicatessen products in ways that comply with all relevant food safety legislation and meet individual customers' requirements
2. use tools and utensils suited to the products
3. cut products so as to produce conventionally acceptable portion shapes, maintain the attractiveness of the product, minimise waste and comply with all relevant health and safety requirements
4. take into account the weight of any additional items on the scales such as containers when weighing portions
5. check that customers are satisfied with the portioned products before they are wrapped
6. place portioned products in suitable packaging
7. check that the products from which portions have been taken are still in saleable condition, and adjust, remove or replace them as required
8. dispose of any unsaleable products in line with all relevant health and safety requirements, including food safety requirements

Portion delicatessen products to meet individual customers' requirements in a specialised retail organisation or specialist counter within a general retail organisation

Knowledge and understanding

You need to know and understand:

1. the relevant food safety and general health and safety requirements to be complied with when handling, portioning and disposing of products
2. why it is important to meet individual customers requirements
3. which tools and utensils to use with which products and why
4. how to cut products safely and in ways that achieve the required portions whilst minimising waste
5. the conventionally accepted portion shapes for the products requiring portioning
6. how to use weighing scales, including how to allow for the weight of additional items such as containers
7. how to choose packaging to suit the product type and portion size
8. accepted standards of presentation for products from which portions have been taken
9. when and how to adjust or dispose of remaining products

Portion delicatessen products to meet individual customers' requirements in a specialised retail organisation or specialist counter within a general retail organisation

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- Links to other NOS**
- PPL.B235 Maintain food safety while working with food in a retail organisation
 - PPL.C275 Promote sales of food or drink products by offering samples to customers and following relevant food safety requirements
 - PPL.C278 Help customers to choose delicatessen products in a specialist retail organisation

Portion delicatessen products to meet individual customers' requirements in a specialised retail organisation or specialist counter within a general retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C279
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Food Preparation Trades
Suite	Retail
Keywords	Retailing; retailers; portions; portioning; cuts; cutting; slices; slicing; delicatessens; produce; goods; items; cheeses; cold meats; meats; salads; individuals; needs

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Establish retail customers' requirements and provide advice regarding tiling products

Overview

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

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Establish retail customers' requirements and provide advice regarding tiling products

Establish retail customers' requirements and provide advice regarding tiling products

Performance criteria

You must be able to:

1. establish correctly where retail customers intend to use the tiling products and why they are being considered
2. determine retail customers' budget and delivery timescale for the tiling products
3. establish the nature of the surface to be tiled, and determine correctly any consequent considerations regarding the suitability of particular tiling products and how they might be fixed
4. identify whether retail customers require any fixtures or fittings once their requirements have been established and advise them accordingly
5. establish how the tiled surfaces are to be used and advise retail customers correctly upon the available types of tile suited to the intended use
6. explore and determine retail customers' preferred colours, styles, design and layout of tiles
7. provide retail customers with samples of appropriate tiles and displays according to their requirements
8. advise why certain styles may be better suited to particular types of homes
9. advise retail customers correctly regarding the relevant tiling finishes available, including appropriate trims and beadings
10. determine correctly whether retail customers are seeking other requirements such as underfloor heating
11. follow your retail organisation's customer service standards whilst establishing retail customers' requirements and advising them regarding tiling products
12. listen actively and promote understanding by using words that are clear, concise and suited to retail customers' requirements

Establish retail customers' requirements and provide advice regarding tiling products

Knowledge and understanding

You need to know and understand:

1. the different locations where tiles are used, the factors to consider when determining which tiles are suitable and why this is important when advising retail customers
2. the relative advantages and disadvantages of a tiled area compared with the principal other types of surfaces
3. how to use questioning to establish retail customers' requirements regarding tiling products
4. the constituent materials and general manufacturing process of the tiling products that your retail organisation is involved in selling
5. the delivery times for the tiles that your retail organisation is involved in selling
6. the implications of building regulations and **sustainability** for the tiles that your retail organisation offers
7. the principal types of adhesives and grouts and what these are used for
8. the principal types of integral fittings and accessories available and which can be installed during or after tiling
9. procedures for cutting and drilling through tiles
10. the reasons for possible differences in sizes and shading of tiles, and the purpose of batch numbers
11. current trends in tiling design and fashion
12. the types of tile fixing, trim and beading and those most appropriate for different applications
13. the circumstances when it is important to use silicone sealants
14. where to seek information appropriate to retail customers' requirements, particularly non-standard requirements
15. how to follow your retail organisation's customer service standards when advising retail customers on tiling products
16. how to listen actively
17. the principal forms of underfloor heating, and those floor finishes that are suitable

Establish retail customers' requirements and provide advice regarding tiling products

Glossary

Sustainability – Any environmental considerations that apply, such as:

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

Links to other NOS

PPL.C263 Advise customers upon measuring and planning for the fixing of tiles

PPL.C264 Advise customers upon the fixing of their own tiles



Establish retail customers' requirements and provide advice regarding tiling products

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C262
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; establishes; establishing; identifies; identifying; works out; working out; determines; determining; requirements; provides; providing; gives; giving; advises; advising; tiles; grouts; sealants; ceramics; customers

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate’s competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit.

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

- Sustainability – Any environmental considerations that apply, such as:
1. the impact of the manufacturing process upon the environment
 2. the scarcity of the natural materials used in the manufacturing process
 3. any effects the finished product may have on the environment

Prepare to receive deliveries of fuel (for driver-controlled transfers) on a forecourt

Overview

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

This standard is for all personnel who are responsible for preparing for deliveries of driver-controlled transfers, including owners, managers, team leaders, and authorised staff.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Prepare to receive deliveries of fuel (for driver-controlled transfers) on a forecourt

Prepare to receive deliveries of fuel (for driver-controlled transfers) on a forecourt

Performance criteria

You must be able to:

1. find out the expected delivery time and the type and amount of **fuel** to be received and check these against the relevant documentation relating to the order of **fuel**
2. check that there is sufficient space in the relevant **fuel** storage tanks for the expected **fuel** so that **driver-controlled transfers** can be carried out
3. check and prepare the equipment and materials needed to ensure safe and effective **fuel** delivery
4. check equipment and materials are in working order
5. identify potential hazards and problems and follow the relevant legal and your retail organisation's requirements for removing them or making them safe
6. record and report potential hazards in line with the relevant legal and your retail organisation's requirements for **fuel** forecourts
7. give the driver adequate information about the space in the **fuel** storage tanks
8. tell the driver where to find the relevant health and safety equipment
9. follow the relevant legal and your retail organisation's requirements for preparing a hazard zone around the **fuel** delivery area and coning off the relevant areas on the forecourt
10. refer problems not within your area of responsibility promptly to the correct person
11. check with the driver that all relevant documentation, equipment and space is available prior to the transfer of **fuel**
12. follow relevant legal regulations relating to the UK geographical location of your retail organisation

Prepare to receive deliveries of fuel (for driver-controlled transfers) on a forecourt

Knowledge and understanding

You need to know and understand:

1. the relevant documentation you need to prepare to receive deliveries of **fuel** for **driver-controlled transfers** to **fuel** tanks and how to interpret it
2. how to work out the amount of space available in the **fuel** storage tanks on the forecourt for **driver-controlled transfers**
3. what equipment and materials to prepare for safe and effective delivery, what they are used for and where to find them
4. typical hazards and problems that occur in relation to deliveries, and how to deal with problems within your area of responsibility
5. the relevant legal and your retail organisation's requirements relating to **fuel** on forecourts
6. which problems are not within your area of responsibility and who to refer them to
7. how **fuel** can be dangerous
8. where all relevant health and safety equipment is and how to access it
9. how to set up a hazard zone around the delivery area and cone off relevant areas of the forecourt
10. what information drivers require prior to transferring **fuel**
11. what the relevant legal regulations are relating to the UK geographical location of your retail organisation

Prepare to receive deliveries of fuel (for driver-controlled transfers) on a forecourt

Glossary

Driver-controlled transfer – when fuel is transferred to the storage tanks on the forecourt by the driver

Fuel – all types of motor fuel stored in your retail organisation's forecourt

Links to other NOS

PPL.B239 Check that driver-controlled fuel transfers have been completed

PPL.B240 Receive deliveries and transfer fuel on a forecourt

Prepare to receive deliveries of fuel (for driver-controlled transfers) on a forecourt

Developed by	People 1st
Version Number	3
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B238
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; delivery; delivering; receives; receiving; accepts; accepting; takes; taking; petrol; diesel; forecourts; petrol stations; stations

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

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

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

Driver-controlled transfer

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

Fuel

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

Check that driver-controlled fuel transfers have been completed

Overview

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

This standard is for all forecourt personnel with authority to check driver-controlled transfers of fuel.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Check that driver-controlled deliveries of fuel have been completed

Check that driver-controlled fuel transfers have been completed

Performance criteria

You must be able to:

1. follow the relevant legal requirements relating to **fuel** safety in your UK geographical location
2. follow your retail organisation's procedures for monitoring the driver during **driver-controlled fuel transfer** activities
3. follow your retail organisation's procedures for checking with the driver that the necessary safety checks have been made
4. follow your retail organisation's procedures when **driver-controlled fuel transfers** have not been completed safely
5. follow your retail organisation's procedures for confirming with the driver that the expected type and amount of **fuel** has been delivered to each tank and all transfers have been completed
6. identify any safety hazards remaining after delivery, remove them or make them safe and record or report them
7. follow your retail organisation's procedures for reporting unsafe practices to the correct person
8. follow your retail organisation's procedures for completing the relevant documentation after the driver has completed all the transfers
9. follow relevant legal requirements relating to **fuel** safety

Check that driver-controlled fuel transfers have been completed

Knowledge and understanding

You need to know and understand:

1. the relevant legal requirements relating to **fuel** safety in your retail organisation's UK geographical location
2. your retail organisation's requirements for monitoring the driver during **fuel** transfer activities
3. the safety checks the driver is responsible for making when **fuel** delivery is complete, and why these checks are needed
4. your retail organisation's procedures for confirming with the driver that the necessary safety checks have been made
5. your retail organisation's procedures when **driver-controlled fuel transfers** have not been completed safely
6. your retail organisation's procedures for confirming with the driver that the expected type and amount of **fuel** has been delivered to each tank and all transfers have been completed
7. typical safety hazards associated with **driver-controlled transfers** and how to identify these, remove them or make them safe, and record or report them
8. how to report unsafe practices to the correct person
9. the documentation you need to complete, and how to complete it

Check that driver-controlled fuel transfers have been completed

Glossary

Driver-controlled transfer – when fuel is transferred to the storage tanks on the forecourt by the driver

Fuel – all types of motor fuel stored in your retail organisation's forecourt

Links to other NOS

PPL.B238 Prepare to receive deliveries of fuel (for driver-controlled transfers) on a forecourt

PPL.B240 Receive deliveries and transfer fuel on a forecourt

Check that driver-controlled fuel transfers have been completed

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	PPL.B239
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; delivery; delivering; delivered; checks; checking; petrol; diesel; forecourts; petrol stations; stations

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

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

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

Driver-controlled transfer

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

Fuel

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

Prepare and assemble products for selling to retail customers

Overview

This standard is about preparing and assembling products so that they are attractive to retail customers and ready to be used in displays, demonstrations or sales activities. It also involves regularly checking the condition of assembled products on display. 'Products' includes stock that needs assembly and/or requires support equipment to display or demonstrate.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Prepare and assemble products for selling to retail customers

Prepare and assemble products for selling to retail customers

Performance criteria

You must be able to:

1. remove all unwanted packaging of the unassembled products when they arrive in store
2. check that all expected items and parts of the product are in the package
3. follow your retail organisation's procedures for waste and unwanted packaging for recycling
4. gather and prepare all the tools and equipment required for assembling products
5. assemble products in the correct location
6. use safe work methods and follow manufacturers' instructions when assembling products
7. check that products have been assembled correctly and can be used safely
8. ask for help when products are proving difficult to assemble
9. place assembled products in the correct location for the display, demonstration or sales activity
10. check regularly that assembled products on display are in a satisfactory condition
11. remove damaged assembled products promptly from display and follow your retail organisation's procedures for dealing with them

Prepare and assemble products for selling to retail customers

Knowledge and understanding

You need to know and understand:

1. which products within your authority need to be prepared for assembling
2. how to unpack product parts required for assembly
3. your retail organisation's procedures for waste and unwanted packaging for recycling
4. which tools to prepare and use when you assemble products
5. where to assemble products and display equipment
6. where to place assembled products
7. how to work safely when assembling products for sale
8. how to check that products have been correctly assembled and are safe to display
9. who to approach for help when products are proving difficult to assemble
10. why the condition of products on display should be checked regularly
11. your retail organisation's quality standards for assembled products on display
12. how to check the condition of assembled products on display and how often to carry out checks
13. your retail organisation's procedures for dealing with assembled products that are damaged or unsafe



Prepare and assemble products for selling to retail customers

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Version Number	3
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B212
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; preparing; prepares; items; goods; materials; produce; sale

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Assist in loading customer orders for despatch in a retail organisation

Overview

This standard is about assisting - from time to time - to ensure that customer orders are loaded safely, securely, and in an order that assists the delivery process to run smoothly and efficiently in your retail organisation.

This standard is for managers, team leaders, stores and sales personnel who assist in loading customer orders onto vehicles from time to time.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Assist in loading customer orders for despatch in a retail organisation

Assist in loading customer orders for despatch in a retail organisation

Performance criteria

You must be able to:

1. check the loading area for obstacles, litter and spillages and clear these away safely and promptly
2. check that customers' orders are clearly labelled with all the necessary information and placed in the right areas ready for loading
3. check that loading equipment is fit for use by yourself or other staff
4. report any equipment that is faulty
5. assist other staff, when required, with lifting and moving packed orders in ways that prevent damage and injury
6. use safe lifting techniques when lifting customers' orders on your own
7. follow instructions for positioning orders in the vehicle to ensure efficient delivery
8. follow your retail organisation's procedures for positioning orders so that they remain secure and protected from damage during transit

Assist in loading customer orders for despatch in a retail organisation

Knowledge and understanding

You need to know and understand:

1. why it is important to check the loading area regularly for obstacles, litter and spillages and how to do so
2. why it is important to clear away obstacles, litter and spillages promptly and how to do so safely
3. the information that must be shown on order labels
4. where customers' orders need to be placed for loading
5. why it is important to check the condition of loading equipment regularly
6. who to report faulty equipment to and why
7. how to assist other staff with lifting and moving packed orders without damaging them or injuring yourself or other people
8. how to use safe lifting techniques when lifting customers' orders on your own
9. how the positioning of orders in the vehicle can help the delivery process to run smoothly and efficiently
10. your retail organisation's procedures for positioning orders so that these remain secure and undamaged during transit

Assist in loading customer orders for despatch in a retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B246
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; loads; loading; online shopping; online; internet; despatches; despatching; dispatches; dispatching

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Maintain the retail customer record-card system in a retail organisation

Overview

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

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Maintain the retail customer record-card system in a retail organisation

Maintain the retail customer record-card system in a retail organisation

Performance criteria

You must be able to:

1. identify suitable opportunities to ask retail customers whether a record-card may be set up for them
2. explain clearly to retail customers the benefits to the record-card system
3. record information clearly and accurately
4. keep information about retail customers confidential
5. follow your retail organisation's rules and procedures for setting up, maintaining and updating retail customers' record-cards
6. maintain and update the record-card system regularly to ensure effectiveness and efficiency
7. ask retail customers whether they have any special requirements and record this information accurately
8. identify which products and details of retail customers require special consideration when completing the record-card system
9. identify the top retail customers from the record-card system and use this information to help increase sales
10. offer retail customers opportunities to make appointments for return visits to your retail organisation while setting up new record-cards

Maintain the retail customer record-card system in a retail organisation

Knowledge and understanding

You need to know and understand:

1. how using a retail customer record-card system can help achieve sales targets
2. your retail organisation's rules and procedures relating to the retail customer record-card system
3. the benefits to retail customers of the record-card system
4. the importance of updating and maintaining the record-card system regularly and how to do this effectively and efficiently
5. how to find time in the working day to update the retail customer record-card system
6. the relevant aspects of current data protection laws and the importance of keeping to these laws
7. how to identify opportunities to make follow-up appointments
8. the importance of asking retail customers about any special considerations
9. where to find information about products or services and how to interpret this information

Maintain the retail customer record-card system in a retail organisation

- Links to other NOS**
- PPL.C205 Help retail customers choose products
 - PPL.C253 Demonstrate beauty products to retail customers

Maintain the retail customer record-card system in a retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C254
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; maintaining; maintains; customers; records; record card; cards; systems

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

The evidence should take into account the training provided by the cosmetic house that the candidate is working for where this occurs

Maintain a display of cut flowers in a retail organisation that does not specialise in floristry

Overview

This standard is about maintaining displays of cut flowers in your retail organisation when it does not specialise in floristry, for example, supermarkets or petrol forecourt shops.

Cut flowers in non-specialist retailers are usually bought on impulse, so it is essential that the display always looks fresh and attractive. It involves being able to spot and get rid of flowers that make the display unattractive. It also requires being able to answer basic customer queries about the flowers on display.

This standard is for members of staff who have responsibility for the displays of cut flowers in a organisation.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Maintain a display of cut flowers in a retail organisation that does not specialise in floristry

Maintain a display of cut flowers in a retail organisation that does not specialise in floristry

Performance criteria

You must be able to:

1. check, tidy and replenish the cut flower display at suitable times
2. handle flowers in ways that keep them in a saleable condition
3. add water to the flowers on display at suitable times
4. balance the requirement to maintain the display with the requirement to allow customers to view and choose flowers
5. identify flowers that don't meet your retail organisation's standards for freshness, and remove them promptly
6. clean up water spillages safely and effectively on and around the cut-flower display
7. respond to customers' queries about the flowers on display politely and in ways that are likely to encourage customers to buy flowers on sale
8. identify the flowers on display when customers ask, and help them find the flowers they want if these are available
9. advise on the likely life of the flowers and how to prolong the life of the flowers when customers enquire

Maintain a display of cut flowers in a retail organisation that does not specialise in floristry

Knowledge and understanding

You need to know and understand:

1. the names of the cut flowers on sale, and how to identify these flowers
2. the main reasons why customers buy cut flowers from retail organisations that do not specialise in floristry, what they expect in terms of freshness and long life, and how the quality of the display affects sales
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
4. why flowers that are not fresh enough need to be removed, including how they affect the condition of nearby flowers
5. when and how to check, tidy, and replenish the cut flower display and add water to the flowers as required
6. how to handle cut flowers without damaging them
7. how to balance the requirement to tidy and replenish the display with the requirement to allow customers to view and choose flowers when maintaining the display
8. how to safely and effectively clean up water spillages on or near the flower display
9. how to dispose of unsaleable flowers safely
10. how to respond to customer queries about cut flowers in ways that are polite and encourage sales
11. the likely life of cut flowers once customers have bought them, and how customers can prolong the life of the cut flowers they buy

Maintain a display of cut flowers in a retail organisation that does not specialise in floristry

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C267
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; maintains; maintaining; displays; plants

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Deliver products to customers' premises making the best use of time and resources

Overview

This standard is about delivering products to the customer's premises or other place of delivery. It includes planning delivery schedules that make the best use of time and other resources. Giving good customer service during the delivery will encourage repeat business.

This standard is for suitability insured owners, managers, department managers, team leaders and sales/customer service assistants.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Deliver products to customers' premises making the best use of time and resources

Deliver products to customers' premises making the best use of time and resources

Performance criteria

You must be able to:

1. check that all the products due for delivery are available and ready
2. check that all equipment and paperwork required for the delivery is ready
3. check that all the delivery details and the correct delivery addresses are present
4. plan a schedule of deliveries that makes the best use of time and other resources
5. check the vehicle and insurance arrangements are current and correct
6. check that there is enough fuel for the delivery schedule and follow your retail organisation's procedures for getting more fuel if required
7. transport products and equipment safely and securely
8. deliver products at the times agreed with customers
9. take action in line with your retail organisation's procedures if the expected arrival time at customers' premises is early or late
10. follow your retail organisation's procedures for ensuring that deliveries are left only with individuals who may legally receive them
11. take action in line with your retail organisation's procedures if no one is available who can receive the delivery or if customers reject a delivery ensuring all relevant legal requirements are followed
12. unload deliveries safely and in ways that protect the products from damage
13. treat customers courteously throughout the delivery process
14. update records of delivery and non-delivery promptly and in line with your retail organisation's procedures

Deliver products to customers' premises making the best use of time and resources

Knowledge and understanding

You need to know and understand:

1. how to check that all the products you are due to deliver are present
2. the equipment and paperwork required to make deliveries and where to obtain these
3. what delivery details are required and where to obtain these
4. what sources of information to use for route planning and how to use these
5. how an efficient delivery schedule benefits your retail organisation and the environment
6. how to plan a delivery schedule that makes the best use of time and other resources
7. how to check the vehicle and insurance arrangements are current and correct
8. how to check that there is enough fuel for the delivery schedule and your retail organisation's procedures for getting more fuel if required
9. how to transport products and equipment safely and securely
10. why it is important to deliver products at the times agreed with customers
11. your retail organisation's procedures to follow if the expected arrival time at customers' premises is early or late
12. relevant legal restrictions on who can receive deliveries
13. your retail organisation's procedures to follow when no one is available who can receive the delivery and when customers reject a delivery
14. how to unload products safely and in ways that protect them from damage
15. why it is important to treat customers courteously, and how to do this
16. the records to keep of deliveries and non-deliveries and your retail organisation's procedures for completing these records

Deliver products to customers' premises making the best use of time and resources

Developed by	People 1st
Version Number	3
Date Approved	March 2017
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C276
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; delivers; delivering; delivery; items; goods; materials; produce; homes; houses; workplaces; internet; online; catalogs; telephones

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit.

Maintain health and safety procedures in a retail organisation

Overview

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

This standard is for everyone working in a retail organisation.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Maintain health and safety procedures in a retail organisation

Maintain health and safety procedures in a retail organisation

Performance criteria

You must be able to:

1. follow and maintain your retail organisation's procedures and relevant legal requirements for reducing health and safety risks as far as possible during all work activities
2. maintain the health and safety of yourself, customers, visitors and staff during work and rest activities - when you are on your retail organisations premises.
3. use safety equipment correctly and in the correct situations
4. obtain advice and help from the right people when concerned about your ability to work safely

Maintain health and safety procedures in a retail organisation

Knowledge and understanding

You need to know and understand:

1. the types of health and safety risk that can arise in your retail organisation
2. your retail organisation's procedures and relevant legal requirements for reducing health and safety risks as far as possible during work activities
3. how to maintain the health and safety of yourself, customers, visitors and staff during work and rest activities
4. why you are required to follow safe working practices during rest breaks whilst still on your retail organisation's premises
5. what can happen to yourself and to your retail organisation if health and safety procedures are not followed
6. the safety equipment to use and why
7. your retail organisation's procedures for using safety equipment
8. who can provide advice and help when concerned about your ability to work safely

Maintain health and safety procedures in a retail organisation

Links to other NOS PPL.E102 Identify and seek assistance when accidents and emergencies occur in a retail organisation
PPL.E104 Manually lift and handle goods and materials safely in a retail organisation

Maintain health and safety procedures in a retail organisation

Developed by	People 1st
Version Number	2
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E103
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Elementary Occupations; Elementary Goods Storage Occupations; Elementary Sales Occupations; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Manager; Owner/Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; protects; protecting; safeguards; safeguarding; works; working

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

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

Receive deliveries and check storage arrangements of goods in a retail organisation

Overview

This standard is about receiving deliveries, checking goods, refusing them if they are faulty and updating the stock control systems and records. These records can be electronic/digital or paper based. This standard is also about ensuring the storage arrangements are suitable and locations are fit for purpose. This standard does not involve physically moving deliveries into storage.

This standard is for all staff who receive deliveries and check storage arrangements for goods in a retail organisation.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Receive deliveries and check storage arrangements of goods in a retail organisation

Receive deliveries and check storage arrangements of goods in a retail organisation

Performance criteria

You must be able to:

1. check that the type, quantity and quality of goods received are acceptable
2. follow your retail organisation's procedures for refusing incorrect or damaged deliveries
3. record any refusals accurately and tell the correct person about them promptly
4. check deliveries using methods that are safe and that protect the goods from damage or contamination
5. follow your retail organisation's procedures for goods to be removed from delivery vehicles and placed in the allocated holding or storage areas
6. update stock control systems promptly and accurately
7. identify storage arrangements and conditions for goods received into storage
8. check that suitable storage locations are available and fit for purpose
9. inform the correct person immediately when storage locations are insufficient
10. check that suitable handling equipment is available for use
11. follow relevant legal requirements for maintaining safety and security when receiving goods into storage
12. follow your retail organisation's procedures for maintaining safety and security when receiving goods into storage

Receive deliveries and check storage arrangements of goods in a retail organisation

Knowledge and understanding

You need to know and understand:

1. your retail organisation's requirements for checking the type, quantity and quality of goods received
2. your retail organisation's requirements for dealing with incorrect or damaged goods
3. why and how goods must be handled safely, hygienically and without damage to them
4. what your retail organisation's requirements are for removing goods from delivery vehicles
5. what your retail organisation's requirements are for updating stock records and systems
6. how to check that suitable storage locations and arrangements are available and fit for purpose
7. who to report to if storage locations are insufficient
8. the handling equipment used for storing goods and how to check it is available to use
9. where deliveries of goods should be placed after being removed from delivery vehicles
10. the relevant legal requirements for maintaining security and safety while receiving deliveries
11. your retail organisation's requirements for maintaining security and safety while receiving deliveries

Receive deliveries and check storage arrangements of goods in a retail organisation

Links to other NOS PPL.B201 Prepare to receive deliveries in a retail organisation
PPL.B204 Put goods into storage in a retail organisation

Receive deliveries and check storage arrangements of goods in a retail organisation

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B202, SSR.B203
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Storage and Retailing; Warehouse and distribution
Suite	Retail
Keywords	Retailing; retailers; receives; receiving; accepts; accepting; verifies; verifying; delivery; stocks; items; products; goods; materials; produce

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Count stock levels and resolve problems with stock levels in a retail organisation

Overview

This standard is about maintaining stock levels so that sales are not lost because stock was not available for sale. It is about counting stock and identifying and resolving problems with quality or insufficient stock.

This standard is for owners, managers, team leaders, sales and store personnel.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Count stock levels and resolve problems with stock levels in a retail organisation

Count stock levels and resolve problems with stock levels in a retail organisation

Performance criteria

You must be able to:

1. follow relevant instructions for counting stock in the right areas of the store and at the right times
2. follow your retail organisation's procedures for counting stock and recording stock levels
3. follow your retail organisation's procedures for identifying problems with the quality of stock and stock levels
4. follow your retail organisation's procedures for safeguarding the health and safety of yourself and other staff or customers whilst counting stock
5. minimise the disturbance when it is necessary to disturb other staff or customers in order to count stock accurately and within the time allowed
6. resolve problems with the quality of stock and insufficient stock levels when authorised to, promptly and in line with your retail organisation's procedures
7. tell the correct person about any problems with the quality of stock and stock levels not in your area of responsibility

Count stock levels and resolve problems with stock levels in a retail organisation

Knowledge and understanding

You need to know and understand:

1. how accurate stock counting contributes to maintaining stock levels and to customer satisfaction and sales
2. how to find out what stock must be counted and when to count it
3. your retail organisation's procedures for counting stock and recording stock levels, including relevant health and safety procedures
4. your retail organisation's procedures for noting problems with stock levels
5. why it is important to minimise disturbance to other staff and customers when counting stock, and how to do so
6. the problems with stock and stock levels within your area of responsibility and the procedures for resolving problems
7. who to tell about problems with stock and insufficient stock levels not in your area of responsibility



Count stock levels and resolve problems with stock levels in a retail organisation

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Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B247
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; checks; checking; stocks; stock taking; problem solving; solves; sorts; resolves; rectifies

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Store equipment, props and graphics for retail displays

Overview

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

This standard is for staff who are visual merchandising specialists and personnel with responsibilities for visual displays and equipment.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Store equipment, props and graphics for retail displays

Store equipment, props and graphics for retail displays

Performance criteria

You must be able to:

1. work out accurately the storage space required
2. identify the protective packaging required and the security measures that must be in place
3. store equipment, props and graphics for retail displays in suitable places and with clear and accurate labels
4. keep accurate and up-to-date records of equipment, props and graphics in storage
5. identify damaged or missing equipment, props and graphics or any item that poses a danger or risk to health and safety, and report these promptly to the correct person
6. check that storage facilities and items in storage are clean, safe, secure and accessible only to those with authority to access them

Store equipment, props and graphics for retail displays

Knowledge and understanding

You need to know and understand:

1. how to work out the storage space required
2. how to identify requirements for protective packaging and security measures
3. how to check the condition of equipment, props and graphics for retail displays
4. how to deal with equipment, props and graphics that require repair
5. why equipment, props and graphics for retail displays must be labelled accurately
6. why records must be kept of items and where to store them
7. why equipment, props and graphics for retail displays must be stored securely
8. what suitable storage facilities are available
9. which equipment, props and graphics are required to be stored
10. possible dangers and risks to health, safety and security in relation to storage facilities and stored items
11. who to report dangers and risks to

PPL.C238 - SQA Unit Code J0EJ 04



Store equipment, props and graphics for retail displays

[Links to other NOS](#) PPL.C237 Dismantle retail displays

Store equipment, props and graphics for retail displays

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C238
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; stores; storing; items; goods; materials; products; models; cutouts; cut-outs; cut outs; images; pictures; visual merchandising

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Prepare display areas and materials in a retail organisation in line with display plans

Overview

This standard is about preparing display areas and related materials in a retail organisation in line with display plans.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Prepare display areas and materials in a retail organisation in line with display plans

Prepare display areas and materials in a retail organisation in line with display plans

Performance criteria

You must be able to:

1. follow your retail organisation's procedures for clearing, cleaning and preparing the display area before use
2. identify what is required for the display in relation to stock, space, position of the display and dates
3. ask for clarification promptly when it is not clear what is required for the display
4. check that the display will not cause an obstruction, and report any problems promptly to the correct person
5. check that the display area is the right size and report any problems promptly to the correct person
6. gather the materials, equipment and stock required for the display and check that they are clean, safe and in good working order

Prepare display areas and materials in a retail organisation in line with display plans

Knowledge and understanding

You need to know and understand:

1. how to prepare display areas and materials in your retail organisation and why
2. why display requirements for stock, space, position and dates need to be clear, and where to get this information
3. who to ask for advice and help in solving problems with display plans
4. how to identify what is required for a display from plans and sketches
5. why checks for possible dangers to health and safety must be made before setting up displays
6. how to check whether displays will cause an obstruction

Prepare display areas and materials in a retail organisation in line with display plans

Links to other NOS PPL.C202 Set up and dismantle displays in line with display plans in a retail organisation
PPL.C203 Label displays of stock in a retail organisation

Prepare display areas and materials in a retail organisation in line with display plans

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C201
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; prepares; preparing; preparation; displays; stock; items; products; produce; goods

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Set up and dismantle displays in line with display plans in a retail organisation

Overview

This standard is about setting up displays in line with display plans, and dismantling displays when they are no longer required in a retail organisation.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Set up and dismantle displays in line with display plans in a retail organisation

Set up and dismantle displays in line with display plans in a retail organisation

Performance criteria

You must be able to:

1. set up and dismantle the display safely, in line with display plans and within the time allowed
2. check that the display is clean, tidy and safe for use once it is set up
3. check that the display has the levels of stock required
4. clean and store equipment and excess materials and dispose of waste safely, correctly and promptly
5. set up and dismantle displays with minimum disturbance to other people

Set up and dismantle displays in line with display plans in a retail organisation

Knowledge and understanding

You need to know and understand:

1. the value of displays and promoting new products in your retail organisation
2. how placing products in specific places attracts attention and promotes sales
3. how to use space effectively when displaying products
4. why checks must be made for possible dangers to health and safety when setting up and dismantling displays
5. how to check that any equipment to be used is in working order
6. why materials and equipment used in displays should be cleaned and stored and waste disposed of safely
7. how to identify and correct unsafe displays in your retail organisation
8. why it is important to reduce any disruption and disturbance whilst setting up and dismantling displays



Set up and dismantle displays in line with display plans in a retail organisation

Links to other NOS PPL.C201 Prepare display areas and materials in a retail organisation in line with display plans
PPL.C203 Label displays of stock in a retail organisation



Set up and dismantle displays in line with display plans in a retail organisation

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C202
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Owner/Manager; Manager; Team Leader; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; constructs; constructing; creates; creating; dismantles; dismantling; sets up; setting up; takes down; taking down

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Source merchandise and props to be featured in retail displays

Overview

This standard is about sourcing the merchandise and props shown in the design brief that will be featured in retail displays.

This standard is for members of staff that are visual merchandising specialists.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Source merchandise and props to be featured in retail displays

Source merchandise and props to be featured in retail displays

Performance criteria

You must be able to:

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

Source merchandise and props to be featured in retail displays

Knowledge and understanding

You need to know and understand:

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



Source merchandise and props to be featured in retail displays

[Links to other NOS](#) PPL.C230 Interpret design briefs for retail displays



Source merchandise and props to be featured in retail displays

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Status	Original
Originating Organisation	Skillsmart Retail
Original URN	PPL.C231
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; design briefs; designs; items; goods; materials; products; produce; gets; getting; acquires; acquiring; sources; sourcing; models; cutouts; cut-outs; cut outs; features; featuring; displaying; visual merchandising

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate’s competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Interpret design briefs for retail displays

Overview

This standard is for visual merchandising specialists. It is about interpreting design briefs for retail displays in a retail organisation.

This standard is for staff who are visual merchandising specialists.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Interpret design briefs for retail displays

Interpret design briefs for retail displays

Performance criteria

You must be able to:

1. identify the purpose, content and style of the retail display when interpreting the design brief
2. identify the equipment, materials, merchandise and props required to create and install the retail display and the dates for completing it
3. evaluate whether the planned place to put the retail display is likely to fulfil the design brief
4. create new and effective ways of improving the visual effect of retail displays, within the limits of the design brief, your retail organisation's visual design policies and the authority given to you

Interpret design briefs for retail displays

Knowledge and understanding

You need to know and understand:

1. the role of retail displays in marketing, promotional and sales campaigns and activities
2. the importance and content of the design brief and how to interpret it
3. how to use the design brief to identify what is required for the retail display
4. different approaches to designing retail displays for different types of merchandise, and why these are effective
5. how to evaluate the potential places to put the retail display so the design brief is met
6. your retail organisation's policies for visual design

Interpret design briefs for retail displays

Links to other NOS PPL.C231 Source merchandise and props to be features in retail displays



Interpret design briefs for retail displays

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C230
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; designs; interprets; interpreting; understands; understanding; instructions; plans; layouts; visual merchandising

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate’s competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Dress in-store retail displays to guidelines

Overview

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

This standard is for specialist staff who are responsible for visual merchandising.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Dress in-store retail displays to guidelines

Dress in-store retail displays to guidelines

Performance criteria

You must be able to:

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

Dress in-store retail displays to guidelines

Knowledge and understanding

You need to know and understand:

1. how to create and use focal points within in-store retail displays
2. how to put together merchandising displays for use inside the store
3. how to choose and combine dimension, shape, colour, texture and lighting to create the visual effect required from in-store retail displays
4. how to dress mannequins, busts and other props
5. how to display different types of merchandise
6. how to choose suitable types of grouping
7. how to use different types, directions and levels of light to create atmosphere
8. how retail displays can achieve add-on sales and why this is important
9. why visual merchandise personnel are expected to install creative in-store retail displays and to be aware of trends
10. different approaches to displaying merchandise and how to choose the best approach
11. the different purposes of in-store retail displays and how they are used in visual merchandising
12. how props, prototypes, dressing and fixtures create visual effects
13. health and safety guidelines and relevant legal requirements for in-store retail displays
14. how to identify the selling features of merchandise to be used in in-store retail displays

Dress in-store retail displays to guidelines

Glossary

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

Links to other NOS

PPL.C233 Dress window displays following the retail organisation's guidelines

PPL.C234 Evaluate and improve retail displays

Dress in-store retail displays to guidelines

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Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C232
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; design briefs; designs; dresses; dressing; instructions; visual merchandising

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

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

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

Dress window displays following a retail organisation's guidelines

Overview

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

This standard is for specialist staff who are responsible for visual merchandising.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Dress window displays following a retail organisation's guidelines

Dress window displays following a retail organisation's guidelines

Performance criteria

You must be able to:

1. position merchandise, graphics and signs following your retail organisation's guidelines and in ways that attract the attention and interest of customers
2. ensure window displays give retail customers the information they require
3. group merchandise appropriately for the purpose and style of window display, the selling features of the merchandise and the visual effect required under the design brief
4. make sure that lighting is installed in line with lighting requirements when dressing window displays
5. check that finished window displays meet health and safety guidelines and relevant legal requirements

Dress window displays following a retail organisation's guidelines

Knowledge and understanding

You need to know and understand:

1. what your retail organisation's guidelines are on dressing window displays
2. how to choose and combine dimension, shape, colour, texture and lighting to create the visual effects required from window displays
3. how to dress mannequins and other props
4. how to display different types of merchandise
5. how to choose suitable ways of grouping merchandise
6. how to light window displays and who in your retail organisation is responsible for installing lighting when dressing a window display
7. how window displays can achieve add-on sales and why this is important
8. why visual merchandising personnel are expected to install window displays creatively and to be aware of trends
9. why different kinds of merchandise require different approaches to window displays and what these approaches are important
10. the different purposes of window displays and how they are used in visual merchandising
11. how props, prototypes, dressings and fixtures create visual effects
12. the dressing techniques to use for different types of merchandise
13. health and safety guidelines for window displays
14. the relevant legal requirements that apply to pricing and ticketing
15. how to identify the selling features of merchandise to be used in window displays

Dress window displays following a retail organisation's guidelines

Links to other NOS PPL.C232 Dress in-store retail displays to guidelines
PPL.C234 Evaluate and improve retail displays

Dress window displays following a retail organisation's guidelines

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Originating Organisation	Skillsmart Retail
Original URN	SSR.C233
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; design briefs; designs; dresses; dressing; instructions; windows; visual merchandising

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Position graphic materials to support retail displays

Overview

This standard is about positioning graphic materials, including signs and tickets, so that they support the purpose of retail displays and meet all relevant requirements.

This standard is for staff who are visual merchandising specialists and personnel responsibilities for visual displays.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Position graphic materials to support retail displays

Position graphic materials to support retail displays

Performance criteria

You must be able to:

1. position graphic materials according to the following:
 - design brief
 - house style
 - your retail organisation's **policy** on signs
 - manufacturers' branding requirements
 - legal requirements
2. position graphic materials in ways that support retail displays' intended visual effects and messages
3. check that graphic materials are positioned safely and securely and in line with relevant legal requirements

Position graphic materials to support retail displays

Knowledge and understanding

You need to know and understand:

1. house style, your retail organisation's **policy** and relevant legal requirements for using graphic materials
2. how to identify and interpret manufacturers' branding requirements
3. how to interpret the design brief
4. how to choose where to position graphic materials to support retail displays
5. how to check that graphics and signs are safe and secure
6. how graphic materials help to attract and inform retail customers
7. different ways to use graphic materials for different types of merchandise

Position graphic materials to support retail displays

Glossary

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

Links to other NOS

PPL.C235 Order graphic materials to meet retail display requirements

Position graphic materials to support retail displays

Developed by	People 1st
Version Number	2
Date Approved	March 2017
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C236
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; positions; positioning; places; placing; graphics; images; pictures; visual merchandising

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

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

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

Follow guidelines for putting retail display layouts together

Overview

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

This standard is for staff who are visual merchandising specialists and personnel with authority to put display layouts together.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Follow guidelines for putting retail display layouts together

Follow guidelines for putting retail display layouts together

Performance criteria

You must be able to:

1. check that the parts required for retail display layouts are available and in working order
2. put retail display layouts together following the guidelines, agreed deadlines, health and safety policies and relevant legal requirements
3. identify opportunities for achieving creative effects and do so within the guidelines
4. identify possible problems that may arise and take prompt and suitable action within the guidelines to resolve them

Follow guidelines for putting retail display layouts together

Knowledge and understanding

You need to know and understand:

1. how to follow guidelines for putting retail display layouts together
2. how to identify opportunities to achieve creative effects
3. how to work creatively within your retail organisation's visual merchandising **policy**
4. how to identify and resolve problems when putting retail display layouts together
5. when creative effects are suitable
6. the parts required to put retail display layouts together
7. the relevant health, safety and relevant legal requirements
8. where to find the parts required for retail display layouts

Follow guidelines for putting retail display layouts together

Glossary

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

Links to other NOS

PPL.C243 Interpret retail display layout requirements from plans, elevations and drawings

Follow guidelines for putting retail display layouts together

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C244
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; follows; following; instructions; puts; creates; creating; assembling; assembles; designs; visual merchandising

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

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

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

Interpret requirements for retail displays

Overview

This standard is about interpreting requirements to identify what is required for retail displays. Retail displays may be in-store or window displays.

This standard is for trained visual merchandising personnel.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Interpret requirements for retail displays

Interpret requirements for retail displays

Performance criteria

You must be able to:

1. use design information to identify the purpose of retail displays, the merchandise that will be used and how the merchandise will feature in retail displays
2. interpret the requirements for retail displays in line with your retail organisation's design **policy** where there is scope for interpretation
3. check any interpretations with the correct person before work starts on putting retail displays together

Interpret requirements for retail displays

Knowledge and understanding

You need to know and understand:

1. how to identify the purpose of retail displays from design information
2. how to identify the merchandise that will be used
3. how retail displays attract the interest of customers and persuade them to make buying decisions
4. the role of retail displays in marketing, promotional and sales campaigns and activities
5. good practice in creating retail displays that have the visual effect required
6. your retail organisation's **policy** for merchandising and visual design
7. sources of information about the merchandise that will be used
8. who to check the required interpretations with

Glossary

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

Interpret requirements for retail displays

Developed by	People 1st
Version Number	3
Date Approved	March 2017
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C330
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; interprets; interpreting; determines; determining; needs; visual merchandising

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Glossary: The glossary contains definitions of the terms used in unit PPL.C330. These definitions do not constitute range.

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

Choose and agree retail merchandise to be featured in retail displays

Overview

This standard is about choosing and agreeing retail merchandise to feature in retail displays. Displays may be in-store or window displays.

This standard is for trained visual merchandising personnel.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Choose and agree retail merchandise to be featured in retail displays

Choose and agree retail merchandise to be featured in retail displays

Performance criteria

You must be able to:

1. evaluate the potential of retail merchandise to attract retail customers' attention and interest
2. choose retail merchandise that is the most likely to attract and interest retail customers, meets the requirements of retail displays and is consistent with your retail organisation's visual-display **policy**
3. check the suitability and availability of retail merchandise that is to be featured in the displays with the relevant decision-makers
4. reach agreement with decision-makers concerning realistic arrangements and timescales for supply
5. make any additional arrangements promptly to acquire retail merchandise if it is not otherwise available within the timescales and cost limits

Choose and agree retail merchandise to be featured in retail displays

Knowledge and understanding

You need to know and understand:

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

Choose and agree retail merchandise to be featured in retail displays

Glossary

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

Links to other NOS PPL.C330 Interpret requirements for retail displays

Choose and agree retail merchandise to be featured in retail displays

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C331
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; chooses; choosing; picks; picking; selects; selecting; agrees; agreeing; stock; items; products; produce; materials; features; featuring; visual merchandising

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Glossary: The glossary contains definitions of the terms used in unit PPL.C331. These definitions do not constitute range.

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

Check how graphic materials are used in retail displays

Overview

This standard is about checking that graphic materials, including signs and tickets, are being used consistently with the purpose of retail displays and any relevant requirements.

This standard is for trained visual merchandising personnel.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Check how graphic materials are used in retail displays

Check how graphic materials are used in retail displays

Performance criteria

You must be able to:

1. check any retail displays as far as possible and encourage colleagues to provide relevant information about using graphic materials
2. collect enough relevant information about whether graphic materials are being used suitably and effectively
3. take prompt and suitable action when graphic materials are not being used or maintained in line with your retail organisation's **policy** or the design brief
4. identify situations where the way graphic materials are used should change, promptly making any alterations required

Check how graphic materials are used in retail displays

Knowledge and understanding

You need to know and understand:

1. how to check how graphic materials should be used
2. how to ask for and collect comments from colleagues about using graphic materials
3. why it is important to check how graphic materials are used
4. the action to take when graphic materials are not being used correctly
5. the part graphic materials play in retail displays
6. the part graphic materials have in attracting retail customers and giving them information
7. alternative approaches to using graphic materials for different merchandise
8. what your retail organisation's **policy** and procedures are on how graphic materials are used in retail displays
9. your retail organisation's procedures for dealing with cases where graphic materials are not being used in line with **policy**

Check how graphic materials are used in retail displays

Glossary

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

Links to other NOS

PPL.C332 Identify and obtain graphic materials for retail displays

PPL.C333 Co-ordinate how graphic materials are used in retail displays

Check how graphic materials are used in retail displays

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C334
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; checks; checking; looks at; looking at; graphics; images; pictures; uses; using; visual merchandising

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Glossary: The glossary contains definitions of the terms used in unit PPL.C334. These definitions do not constitute range.

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

Reconcile retail customers' accounts

Overview

This standard is about reconciling retail customers' accounts, checking that account details are consistent with other financial records and identifying and sorting out problems.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Reconcile retail customers' accounts

Reconcile retail customers' accounts

Performance criteria

You must be able to:

1. check that charges made to retail customers' accounts are correct
2. check that credits made to retail customers' accounts are correct
3. identify and sort out problems with retail customers' accounts
4. reconcile retail customers' accounts
5. tell the correct person about problems with retail customers' accounts that you cannot resolve or that are beyond your level of responsibility and control

Reconcile retail customers' accounts

Knowledge and understanding

You need to know and understand:

1. why accurate financial checks are required
2. how to reconcile retail customers' accounts accurately
3. the types of problems within your level of responsibility and how to identify and resolve them
4. who to approach for advice and help in sorting out problems with retail customers' accounts that are not within your responsibility and control

Reconcile retail customers' accounts

Links to other NOS PPL.C216 Set, monitor and take action with retail customers' credit accounts
PPL.C217 Process payments made to retail customer accounts

Reconcile retail customers' accounts

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Version Number	2
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C218
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; processes; processing; reconciles; reconciling; checks; checking; customers

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Maintain the retail customer record-card system in a retail organisation

Overview

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

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Maintain the retail customer record-card system in a retail organisation

Maintain the retail customer record-card system in a retail organisation

Performance criteria

You must be able to:

1. identify suitable opportunities to ask retail customers whether a record-card may be set up for them
2. explain clearly to retail customers the benefits to the record-card system
3. record information clearly and accurately
4. keep information about retail customers confidential
5. follow your retail organisation's rules and procedures for setting up, maintaining and updating retail customers' record-cards
6. maintain and update the record-card system regularly to ensure effectiveness and efficiency
7. ask retail customers whether they have any special requirements and record this information accurately
8. identify which products and details of retail customers require special consideration when completing the record-card system
9. identify the top retail customers from the record-card system and use this information to help increase sales
10. offer retail customers opportunities to make appointments for return visits to your retail organisation while setting up new record-cards

Maintain the retail customer record-card system in a retail organisation

Knowledge and understanding

You need to know and understand:

1. how using a retail customer record-card system can help achieve sales targets
2. your retail organisation's rules and procedures relating to the retail customer record-card system
3. the benefits to retail customers of the record-card system
4. the importance of updating and maintaining the record-card system regularly and how to do this effectively and efficiently
5. how to find time in the working day to update the retail customer record-card system
6. the relevant aspects of current data protection laws and the importance of keeping to these laws
7. how to identify opportunities to make follow-up appointments
8. the importance of asking retail customers about any special considerations
9. where to find information about products or services and how to interpret this information

Maintain the retail customer record-card system in a retail organisation

- Links to other NOS**
- PPL.C205 Help retail customers choose products
 - PPL.C253 Demonstrate beauty products to retail customers

Maintain the retail customer record-card system in a retail organisation

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C254
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; maintaining; maintains; customers; records; record card; cards; systems

Monitor and support secure use of the payment register and service area in a retail organisation

Overview

This standard is about your individual responsibility for maintaining the secure use of payment register and the service area in your retail organisation during trading hours.

The standard refers to a single register, but can be taken to mean all the registers in service areas when you are responsible for these.

This standard is for managers, team leaders and payment point operators.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Monitor and support secure use of the payment register and service area in a retail organisation

Monitor and support secure use of the payment register and service area in a retail organisation

Performance criteria

You must be able to:

1. monitor the payment register regularly to ensure that personal data is kept confidential in the service area during opening hours
2. authorise payment register transactions and adjustments within the limits of your authority and in line with your retail organisation's procedures for:
 - customer service
 - security
 - stock control
3. support colleagues when they need assistance with transaction and security problems
4. refer payment register transactions and adjustments promptly to the correct person when these are outside your level of authority to authorise
5. replenish and monitor change requirements in the payment register in a timely fashion and in line with your retail organisation's security procedures
6. monitor the service area for security risks during all payment transactions
7. check the authorisation of anyone who draws cash or cash equivalents from the register during trading hours
8. prioritise your tasks so as to minimise customer waiting times and queue size

Monitor and support secure use of the payment register and service area in a retail organisation

Knowledge and understanding

You need to know and understand:

1. the payment register and service area within your area of responsibility to monitor and support
2. why it is important to keep personal data confidential
3. the data security risks that can arise at the payment register and how to minimise these
4. the types of register transactions and adjustments within your area of authority
5. how to carry out payment register transactions and adjustments within your area of authority
6. when and how to support colleagues when they require support with a range of problems
7. who can authorise a transaction that is outside your level of authority, and how to contact that person
8. how to replenish and monitor the change in the payment register, including your retail organisation's procedures for keeping cash, colleagues and yourself secure in the process
9. how to monitor the payment register and service area whilst completing other tasks
10. who is authorised to draw cash and cash equivalents from the payment register during trading hours

Monitor and support secure use of the payment register and service area in a retail organisation

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E211
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; monitors; monitoring; watches; watching; supports; supporting; ensures; ensuring; secures; securing; registers; checkouts; check outs; uses; using; working hours; opening hours

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Use in-store online facilities to achieve retail sales

Overview

This standard is about using the web-based activities available in-store to promote and achieve retail sales. It includes using the online facilities to help fulfil customers' requirements and making customers aware of the availability and scope of the web-based facilities available to them. This can include checking stock availability, placing orders on behalf of customers, and processing payments using online facilities available in-store.

It also includes providing a positive and 'seamless' service to customers, irrespective of the customer journey, i.e. whether customers shop in person in-store using designated terminals or online via their own PC, tablet or mobile telephone etc.

This standard is for all sales personnel who deal with customers in-store.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Use in-store online facilities to achieve retail sales

Use in-store online facilities to achieve retail sales

Performance criteria

You must be able to:

1. make retail customers aware of the availability and scope of your retail organisation's in-store web-based retail facilities
2. communicate the features and benefits of the online facilities to retail customers
3. operate all aspects of your retail organisation's relevant in-store web-based retail selling facilities correctly
4. use in-store online facilities for the benefit of retail customers, based upon identifying retail customer requirements
5. respond to retail customer requirements from, and interest in, the online facilities, involving them in using the online process where appropriate in order to achieve retail sales
6. be proactive in checking online the availability of stock sought by retail customers and in placing orders online on behalf of retail customers, where relevant
7. process retail customer payments using online facilities correctly, where relevant, applying appropriate discounts, and in line with your retail organisation's requirements to achieve retail sales
8. seek feedback from customers upon their experience of using your retail organisation's web-based retail facilities
9. monitor in-store web-based selling facilities, ensuring that good housekeeping standards are maintained and report any faults promptly to the correct person

Use in-store online facilities to achieve retail sales

Knowledge and understanding

You need to know and understand:

1. how to operate the range of web-based retail selling facilities available in-store within your retail organisation, including any mobile apps
2. the features of the web-based retail selling facilities and their associated benefits, both to retail customers and to your retail organisation
3. the impact of multi-channel retailing upon in-store selling within your retail organisation, including its impact for retail customers' ability to research and order products from your retail organisation and its competitors
4. the importance of providing a 'seamless' service to your retail organisation's customers, irrespective of the customer journey taken, and what this means when dealing with retail customers in-store
5. the opportunities for building retail customer relations when retail customers visit stores to collect and to return products purchased online
6. how retail customers' attitudes and understanding of online technology can affect their use of in-store online facilities and the need to be sensitive to such attitudes and to respond accordingly
7. your responsibilities for monitoring and maintaining in-store online retail facilities
8. the impact of relevant distance selling legislation and consumer rights upon your area of responsibility and in particular upon online retail selling
9. the impact of relevant legislation and regulatory requirements upon the selling of products within your area of responsibility

Use in-store online facilities to achieve retail sales

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Validity	Current
Status	Original
Originating Organisation	People 1st
Original URN	PPL.MCR15
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales and Related Associate Professionals; Sales Assistants and Retail Cashiers
Suite	Multi-channel Retailing
Keywords	online; on-line; customer; web; internet; web-based retail; multi-channel

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit.

Maintain the confidentiality and security of online data regarding retail customers

Overview

This standard is about taking personal responsibility for maintaining the confidentiality and security of information held online regarding your retail organisation's customers. This includes managing requests for information from customers about their transactions and/or accounts, whether in person, online or by email or telephone and also from third parties, such as suppliers or partnered companies, for which permission may be required before passing on particular information.

It also includes protecting sensitive information within the workplace, with all actions being in line with the retail organisation's relevant policies relating to data protection and confidentiality.

This standard is for all team members who handle customer information in any format.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Maintain the confidentiality and security of online data regarding retail customers

Maintain the confidentiality and security of online data regarding retail customers

Performance criteria

You must be able to:

1. keep documents, computers or electronic equipment containing online data and information secure
2. check that information is not changed in any unauthorised way
3. encrypt all data entered electronically where required
4. check that any parties seeking information have the authority to receive it, following your retail organisation's procedures
5. provide information to third parties only where they have satisfied relevant security checks, in line with your retail organisation's procedures
6. share relevant information only with those who need to use the information
7. check your authority to release any information to others, and that when required, it is sent securely
8. make a record of only that information that needs to be recorded, according to your retail organisation's requirements
9. keep all records of confidential information away from public display
10. protect confidentiality by making sure that information is destroyed properly when it is no longer required
11. seek guidance about maintaining the security of online data when required
12. maintain your retail organisation's requirements relating to the confidentiality and security of data

Maintain the confidentiality and security of online data regarding retail customers

Knowledge and understanding

You need to know and understand:

1. the relevant legal and your retail organisation's requirements relating to maintaining the confidentiality and security of online data
2. how information should be recorded, shared and transmitted, and their impact for your area of responsibility
3. your retail organisation's policies and guidelines for the retention, protection and disposal of information, including that information that may be recorded
4. the reasons why different items of retail customer information are required
5. the customers' rights to see the data held about them by your retail organisation, and how to respond to any requests by customers to see such data
6. your retail organisation's guidelines regarding your use of social media in relation to maintaining retail customer confidentiality
7. why maintaining the protection of information is important to everyone in your retail organisation and others outside your retail organisation
8. the potential implications of an information security incident to you, your retail organisation and others outside your retail organisation
9. how to protect information held electronically, including the use of encryption and passwords
10. the security checks required by your retail organisation before releasing information to a third party by telephone and online
11. the actions to take where a retail customer or other third party is unable to satisfy the required security checks when seeking information by telephone and online
12. the methods of sending information securely according to the value and sensitivity of information and the level of protection that it needs
13. your retail organisation's procedures to arrange for computer media to be made unreadable, ahead of such media being disposed of properly

Maintain the confidentiality and security of online data regarding retail customers

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Originating Organisation	People 1st
Original URN	PPL.MCR18
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales and Related Associate Professionals; Sales Assistants and Retail Cashiers; Data Operations; Database Administration; Manager; Owner/Manager; Team Leader
Suite	Multi-channel Retailing
Keywords	online; on-line; customer; web; information; internet; web-based retail; multi- channel; data; confidentiality; security; social media; data protection; legal

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit.

Prepare newspapers and magazines for return to the merchandiser

Overview

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

This standard is for owners, managers, department managers, team leaders and sales/customer service staff.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Prepare newspapers and magazines for return to the merchandiser

Prepare newspapers and magazines for return to the merchandiser

Performance criteria

You must be able to:

1. allow enough time to prepare returns of unsold newspapers and magazines by the agreed collection time
2. use relevant information to select those items that need returning
3. safely stack returns in the required order
4. wrap returns using methods that protect items adequately and minimise wastage of wrapping materials
5. label returns clearly with all the required information
6. follow relevant legislation and your retail organisation's procedures for safely lifting and handling newspaper and magazine piles for return
7. put returns in the agreed place ready for collection
8. complete returns **documentation** correctly with all the required information
- 9. file returns **documentation** and use recording systems correctly**
10. follow your retail organisation's procedures for dealing with missed returns and those that are not collected by the merchandiser

Prepare newspapers and magazines for return to the merchandiser

Knowledge and understanding

You need to know and understand:

1. why it is important to return unsold newspapers and magazines promptly and in line with your retail organisation's procedures
2. the agreed collection times for returns with the merchandiser
3. how to organise your work so that returns for collection are ready by the agreed times
4. what information is required to enable preparation of returns, where to get this information and how to interpret it
5. the required order for stacking returns
6. the materials and methods to use for wrapping returns securely and with minimum waste
7. the information that needs to appear on labels for returns
8. the safe lifting and handling procedures
9. where to put returns ready for collection
10. the **documentation** required to complete a return and how to complete it
11. where to **file** and record returns **documentation**
12. your retail organisation's procedures for dealing with missed returns and returns that aren't collected by the merchandiser

Prepare newspapers and magazines for return to the merchandiser

Glossary

Documentation – ‘Documentation’ can mean either paper records or computer records

File [documentation] – ‘File documentation’ can mean either filing paper records or storing records on a computer

Prepare newspapers and magazines for return to the merchandiser

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E210
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; prepares; preparing; preparation; returns; returning

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Documentation – ‘Documentation’ can mean either paper records or computer records
 File [documentation] – ‘File documentation’ can mean either filing paper records or storing records on a computer

Follow a training plan for your own learning to improve your skills and knowledge in a retail organisation

Overview

This standard is about being an effective learner in your retail organisation. Learning new things in the workplace ensures continued improvement of skills and knowledge. Following a Specific, Measurable, Achievable, Realistic, Time bound (SMART) training plan for your own learning will help to ensure you gain the correct skills and knowledge within set timescales and become an effective worker.

This standard is for team leaders, sales and storeroom personnel and trainees.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Follow a training plan for your own learning to improve your skills and knowledge in a retail organisation

Follow a training plan for your own learning to improve your skills and knowledge in a retail organisation

Performance criteria

You must be able to:

1. check the details of what needs to be learnt, why it needs to be learnt and when it needs to be completed by
2. discuss your learning styles and capacity and commitment to complete a training or learning programme with your retail organisation training personnel or Training Provider
3. discuss a training plan with the relevant personnel in your retail organisation that is a Specific, Measurable, Achievable, Realistic, Time bound (**SMART**) plan
4. follow your retail organisation training plan, meeting your **SMART** actions and improve your skills and knowledge
5. review your plan and learning at regular intervals so that targets can be monitored
6. promptly ask the correct people for help if there are problems following the training programme

Follow a training plan for your own learning to improve your skills and knowledge in a retail organisation

Knowledge and understanding

You need to know and understand:

1. why effective learners are required at work
2. what are the training and learning opportunities there are to improve your skills and knowledge in your retail organisation
3. which people are responsible for setting targets and helping individuals learn
4. why training plans are needed and the importance of following **SMART** actions and meeting deadlines
5. your retail organisation's procedures for following and reviewing training and learning plans
6. why help should be sought if problems arise with training plans and programmes



Follow a training plan for your own learning to improve your skills and knowledge in a retail organisation

Glossary

SMART – **S**pecific, **M**easurable, **A**chievable, **R**ealistic, **T**ime bound

Links to other NOS

PPL.E105 Work effectively as part of a team in a retail organisation

Follow a training plan for your own learning to improve your skills and knowledge in a retail organisation

Developed by	People 1st
Version Number	3
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E106
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Elementary Occupations; Elementary Goods Storage Occupations; Elementary Sales Occupations; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; follows; following; policies; policy; practices; learns; trains; training

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

Maintain personal hygiene in a retail organisation

Overview

This standard is about maintaining your personal hygiene by keeping yourself and your clothing clean enough for work duties in your retail organisation. It is also about using relevant Personal Protective Equipment PPE and uniforms to help you maintain your personal hygiene.

This standard is for all personnel working in a **non-food** department, however this can be within a larger retail organisation that does sell food.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Maintain personnel hygiene in a retail organisation

Maintain personal hygiene in a retail organisation

Performance criteria

You must be able to:

1. maintain personal hygiene by keeping yourself and your clothes clean on a daily basis using effective practices and techniques for keeping hair, skin, nails and clothes clean
2. wash your hands regularly and always after visiting the toilet
3. wear PPE and uniforms as required by your retail organisation so that it is clean and suitable for work duties
4. dispose or replace PPE as required by your retail organisation
5. maintain a clean and tidy appearance at all times

Maintain personal hygiene in a retail organisation

Knowledge and understanding

You need to know and understand:

1. why maintaining personal hygiene is important in the workplace, and how keeping yourself clean contributes to this
2. effective cleaning practices and techniques for keeping hair, skin, nails and clothing clean enough for work duties
3. what PPE and/or uniform is required by your retail organisation
4. what your retail organisation's requirements are for maintaining hygienic practices after visiting the toilet
5. how a clean and tidy appearance helps to give customers a positive impression of you and your retail organisation

Maintain personal hygiene in a retail organisation

- Links to other NOS**
- PPL.B104 Contribute to food safety in a retail organisation
 - PPL.E107 Keep work surfaces clean in a retail organisation
 - PPL.E108 Safely remove and dispose of waste and litter in a retail organisation

Maintain personal hygiene in a retail organisation

Developed by	People 1st
Version Number	4
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E109
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Elementary Occupations; Elementary Goods Storage Occupations; Elementary Sales Occupations; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; maintains; maintaining; hygienic; healthy; cleans; cleaning; keeps; keeping

Move goods and materials manually in a retail organisation

Overview

This standard is about manually moving goods and materials. It does **not** involve using a lift truck, but it does include other types of lifting equipment. It is about working safely as well as placing goods and materials in the correct location in your retail organisation.

This standard is for staff involved in moving goods and materials manually in a retail organisation.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Move goods and materials manually in a retail organisation

Move goods and materials manually in a retail organisation

Performance criteria

You must be able to:

1. check where **goods and materials** are to be stored
2. check what time the task must be completed by
3. check that the equipment required is available and in working order
4. identify any faults with the equipment and report these to the right person
5. use safe and your retail organisation's approved techniques for manually handling **goods and materials**
6. recognise when assistance is required in moving **goods and materials** manually
7. ask for assistance when it is required to put **goods and materials** in the correct locations
8. place **goods and materials** so that they can be identified and reached easily
9. move and place **goods and materials** within the time allowed
10. ask the right person for advice when you are having trouble placing **goods and materials** correctly

Move goods and materials manually in a retail organisation

Knowledge and understanding

You need to know and understand:

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

Move goods and materials manually in a retail organisation

Glossary

Goods and materials – Retail goods for sale and your retail organisation’s materials such as consumables and equipment etc.

Move goods and materials manually in a retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B101
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Elementary Occupations; Elementary Goods Storage Occupations; Elementary Sales Occupations; Storage and Retailing
Suite	Retail
Keywords	Retailing; retailers; stocking; stocks; moving; moves; items; products

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

Promote sales of food or drink products by offering samples to customers and following relevant food safety requirements

Overview

This standard is about offering customers samples of food or drink products to consume immediately, as a way of promoting sales. Suitable products need to be selected, prepared and displayed so they look appealing. Customers need to be actively encouraged to sample and buy products. Relevant food safety requirements need to be followed when preparing, displaying and disposing of product samples.

This standard is for all sales personnel with food hygiene training.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Promote sales of food and drink products by offering samples to customers and following relevant food safety requirements

Promote sales of food or drink products by offering samples to customers and following relevant food safety requirements

Performance criteria

You must be able to:

1. identify suitable opportunities to promote sales by offering samples of food and drink products to customers
2. select suitable products for sampling
3. prepare product samples in line with your retail organisation's procedures and relevant legal food safety standards for preparation and presentation
4. follow your retail organisation's procedures for giving customers information about potentially allergenic ingredients
5. spot suitable opportunities to encourage individual customers to sample products
6. use persuasive words and body language to encourage customers to sample the products
7. deal politely with customers who misuse the sampling activity
8. explain clearly to customers, when necessary, where they can buy the food and drink products sampled
9. monitor the freshness of samples on display and remove samples that no longer meet requirements for freshness
10. dispose of waste products in line with your retail organisation's and legal food safety requirements
11. follow your retail organisation's procedures and legal requirements for recording food disposals

Promote sales of food or drink products by offering samples to customers and following relevant food safety requirements

Knowledge and understanding

You need to know and understand:

1. how the opportunity to sample food and drink products helps to promote sales
2. your retail organisation's criteria for selecting products for sampling, including product type and sell-by date
3. your retail organisation's procedures and standards for preparing and displaying samples
4. the required temperatures for safely storing and serving samples
5. the information that must be given to customers about potentially allergenic ingredients and your retail organisation's procedures for giving this information
6. how to spot opportunities to encourage customers to sample products
7. how to deal with customers politely who misuse the sampling activity
8. how to use words and body language to encourage customers to sample food and drink products
9. where customers can buy the food and drink products sampled and how to explain this clearly to customers
10. why it is important to monitor the freshness of samples on display, and how to do so
11. relevant legal requirements and your retail organisation's procedures for disposing of waste products and recording food disposals

Promote sales of food or drink products by offering samples to customers and following relevant food safety requirements

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C275
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Food Preparation Trades
Suite	Retail
Keywords	Retailing; retailers; promotes; promoting; advertises; advertising; sells; selling; items; produce; goods; offers; gives; giving; sampling

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Overview

This standard is about contributing to making the sales area clean and tidy and to ensure the ease of shopping is monitored and maintained. It is also about making it as easy as possible for customers to move freely around the sales area and make purchases. The overall impression of a clean, tidy and un-cluttered sales floor needs to be maintained without hindering customers whilst they shop.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

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

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

Performance criteria

You must be able to:

1. check the sales area at suitable times to ensure that the area is clean, tidy and free from hazards and obstructions, that merchandise is in a saleable condition and meets your retail organisation's standards for positioning and presentation and information concerning prices, products and promotions is clearly visible to customers
2. maintain the sales area to your retail organisation's standards without hindering customers from shopping
3. report promptly any problems that could have a negative effect on the customer experience
4. tell the correct person promptly about any customer feedback received

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

Knowledge and understanding

You need to know and understand:

1. how the layout and appearance of the sales area influences sales
2. your retail organisation's standards for the condition of the sales area in relation to cleanliness, tidiness, health and safety, positioning, condition and presentation of merchandise, and the positioning of information concerning products and prices and promotions
3. when and how to check the sales area meets your retail organisation's standards
4. how to balance checking the sales area during trading hours with other duties
5. how to recognise when the condition of the sales area is not satisfactory and how to correct it
6. the correct person to contact if it is not possible for you to restore the condition of the sales area to the required standard
7. how to identify realistic ways to improve the condition of the sales area so as to encourage sales
8. how to spot and report problems that could have a negative effect on customers' shopping experience
9. who to inform about any customer feedback received



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

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C277
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; contributes; contributing; monitors; maintains; facilitates; facilitating; shops; shoppers; customers; shop floors

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Identify and analyse opportunities for solving problems and improving retail operations

Overview

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

This standard is for owners, managers and team leaders.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Identify and analyse opportunities for solving problems and improving retail operations

Identify and analyse opportunities for solving problems and improving retail operations

Performance criteria

You must be able to:

1. obtain accurate, up-to-date information from relevant sources about operations within your area of responsibility
2. identify and analyse the causes of problems accurately where operations are not meeting your retail organisations quality standards or sales targets
3. identify the scope for further development clearly and accurately where operations are achieving your retail organisation's quality standards and sales targets
4. analyse the suggested improvements to operations accurately to see if they are practical, consistent with your retail organisation's policy and style, and be straightforward to put into practice
5. identify the ideas and resources that offer the greatest benefits for your retail organisation and its customers
6. weigh up the costs of suggested improvements against benefits to retail operations

Identify and analyse opportunities for solving problems and improving retail operations

Knowledge and understanding

You need to know and understand:

1. your retail organisation's quality standards
2. your retail organisation's policies, procedures and systems to be used to gather information
3. the different ways of identifying facts and opinions about retail operational performance and how useful each one is
4. the common causes of failure to achieve your retail organisation's quality standards
5. how to generate and analyse ideas for improving retail operations
6. how to evaluate the benefits of potential improvements and how urgent they are
7. how to work out what resources are required to put improvements into practice
8. how to weigh the costs of suggested improvements against the benefits



Identify and analyse opportunities for solving problems and improving retail operations

Links to other NOS PPL.E302 Recommend, agree and contribute to implementing improvements to retail operations

Identify and analyse opportunities for solving problems and improving retail operations

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E301
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Manager; Team Leader; Owner/Manager
Suite	Retail
Keywords	Retailing; retailers; identifies; identifying; spots; spotting; opportunity; chances; solves; issues; threats; dangers; improves; improvement

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

It is highly unlikely that this unit will be able to be observed therefore the evidence generated will come from professional discussion supported by oral reports of real achievements and testimony from an Expert Witness to confirm the candidate's competence

Assess, monitor and control risks to health and safety and provide training in a retail organisation

Overview

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

This standard is for owners, managers and team leaders and nominated Health and Safety representatives in retail organisations who do not hold recognised qualifications for Health and Safety in the workplace.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Assess, monitor and control risks to health and safety and provide training in a retail organisation

Assess, monitor and control risks to health and safety and provide training in a retail organisation

Performance criteria

You must be able to:

1. monitor your retail organisation continually to make sure it is clean and free from health and safety risks
2. assess any health and safety risks you observe for their severity and to check if they breach relevant legislation and your retail organisation's procedures
3. prioritise risks in the order in which they should be controlled and eliminated
4. control any health and safety risks using relevant procedures within your retail organisation
5. obtain advice immediately from the appropriate authority when a risk cannot be controlled
6. monitor staff to confirm that they are using equipment, PPE and hazardous substances according to the instructions they have been given and (CoSHH) regulations
7. provide or organise staff training, instructions and information when risks occur
8. carry out health, safety and maintenance checks in line with relevant legal and your retail organisation's requirements
9. review and update assessment procedures to take account of changes in factors affecting health and safety
10. record risk assessments accurately and make the records available to those who need them
11. maintain all relevant records to support your assessments, monitoring and control activities

Assess, monitor and control risks to health and safety and provide training in a retail organisation

Knowledge and understanding

You need to know and understand:

1. your rights, duties and responsibilities under relevant health and safety and risk assessment legislation
2. your rights, duties and responsibilities under relevant fire safety, accident reporting, first aid and CoSHH regulations
3. your retail organisation's procedures for assessing and monitoring health and safety and incidents
4. how to control risks to health and safety
5. how to arrange staff training on health and safety matters and incidents
6. where to get information and advice about relevant health and safety legislation, policy and procedures
7. who to and which authorities to report assessment results and risks to
8. what safety equipment and protective clothing is available and the instructions for using it
9. how to monitor staff to confirm that they are using equipment, PPE and hazardous substances according to the instructions they have been given
10. how to identify and control different risks
11. why there is a need to assess risks and how to do this
12. how to communicate effectively to others and relevant authorities to control risks
13. how to maintain all relevant records to support your assessments, monitoring and control activities



Assess, monitor and control risks to health and safety and provide training in a retail organisation

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- Links to other NOS**
- PPL.E304 Monitor and maintain security in a retail organisation
 - PPL.E305 Monitor, identify and investigate loss and wastage in a retail organisation
 - PPL.E307 Take a safe and active role when accidents and emergencies occur in a retail organisation

Assess, monitor and control risks to health and safety and provide training in a retail organisation

Developed by	People 1st
Version Number	3
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E306
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Safety officer; Manager; Owner/Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; assesses; assessing; assessments; controls; controlling; limits; limiting; monitors; monitoring; dangers; threats; evaluates; evaluating; evaluations

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

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

Overview

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

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

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

This standard is for owners, area/regional managers and managers.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Monitor and improve retail customers' experience of a retail organisation

Performance criteria

You must be able to:

1. **'walk the store'** regularly to experience it from retail customers' viewpoint
2. check your retail organisation inside and out from retail customers' point of view, noticing relevant features such as:
 - cleanliness and tidiness
 - staff dress and behaviour
 - queues at payment points
 - how easy it is to enter and move about in the sales area
 - information about special offers
 - how easy it is to find products
 - information to help retail customers choose retail products, including information about prices
3. train and encourage your retail organisation's staff to notice and report things that need improving
4. ensure your retail organisation's staff know your retail organisation's policy and procedures for dealing with refunds, exchanges and retail customer complaints, including the situations in which staff should ask for help
5. gather feedback from retail customers about their experience of your retail organisation using methods that are:
 - cost-effective
 - timely
 - likely to be acceptable to retail customers
 - likely to draw out honest and relevant feedback from retail customers
6. identify ways of improving the retail customer experience that are cost-effective and reflect the importance your retail organisation places on promoting sales and preventing theft
7. take prompt and suitable action to make improvements that are within your level of authority and budget
8. make realistic recommendations to the correct person for improvements that are above your level of authority

Knowledge and understanding

You need to know and understand:

1. what can be learnt by looking at your retail organisation from retail customers' point of view
2. how often, and at what times of day, a **'walk the store'** needs to be carried out
3. things that should be monitored that could affect the retail customer experience
4. which areas and facilities outside your retail organisation can be influenced
5. your retail organisation's legal requirements and policy towards disabled customers
6. the reasons why products can't always be placed where retail customers would prefer, such as the requirement to encourage impulse purchases or protect high value goods
7. your retail organisation's policy regarding:
 - layout and appearance
 - staff appearance and behaviour
 - service at point of sale
8. the types of special offers and promotions that run in your retail organisation and how these are intended to boost sales
9. any additional services or facilities your retail organisation offers, how they enhance the retail customer experience and how retail customers can access them
10. the methods available for gathering retail customer feedback and how they compare on:
 - cost-effectiveness
 - timeliness
 - acceptability to the retail customer
 - relevance and accuracy of the information they provide
11. the authority and the budget available to make improvements to the retail customer experience
12. who can authorise changes that are above your level of authority
13. the elements of a persuasive business case for making changes, including:
 - justifiable cost
 - likely impact on sales or goodwill
 - consistency with your retail organisation's ethos and desired image
 - suitability compared with alternatives
14. your retail organisation's policy and retail customers' legal rights regarding refunds and exchanges

Glossary

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

Monitor and improve retail customers' experience of a retail organisation

Developed by	People 1st
Version Number	3
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C412
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing
Suite	Retail
Keywords	Retailing; retailers; monitors; monitoring; watches; watching; checks; checking; improves; improving; enhances; enhancing; experiences; walks the floor; walking the floor

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

It is highly unlikely that this unit will be able to be observed therefore the evidence generated will come from professional discussion supported by statistics relating to performance and testimony from an Expert Witness to confirm the candidate's competence

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

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

Overview

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

This standard is for owners, regional and area managers and managers.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Develop effective relationships with customers within the retail organisation

Performance criteria

You must be able to:

1. take into account customer profiles, competitor activity and the brand image when deciding on an overall approach to developing effective customer relationships
2. take into account the profit margins, the risk of lost sales and the likelihood of repeat business when deciding whether to offer special terms to retail customers
3. negotiate with customers in ways that protect your own organisation's interests but follow your retail organisation's customer service standards
4. explain positively and sensitively where customers' expectations cannot be met for special terms and offer alternatives where possible
5. give individual members of staff a level of authority to negotiate with customers that reflects the staff member's ability to do this
6. ensure individual members of staff clearly understand the limits of their authority to agree to special terms with customers
7. ensure that everyone who negotiates with customers in your retail organisation records special terms agreed with customers and passes this information on promptly
8. monitor the effects of special terms on customer satisfaction
9. analyse the sales and profit figures and check if special terms have affected them positively or that the results seen are due to something else
10. review the approach to customer relationships often enough to be able to respond to changes in circumstances or customer expectations

Knowledge and understanding

You need to know and understand:

1. how to obtain information about customers and competitors that will help to decide how to develop relationships with customers
2. the typical benefits and drawbacks of offering special terms to customers, and how to estimate the effects these might have on your retail organisation
3. the negotiating techniques that will protect your retail organisation's interests and profit margins whilst following your retail organisation's customer service standards
4. the common negotiating tactics that customers use, how to recognise these, and how to choose a response to suit the circumstances
5. how to decide what level of authority individual staff members should have to negotiate with customers
6. the efficient and effective ways of keeping track of special terms agreed with customers, and how to pick the most suitable method for your retail organisation
7. the effective ways of measuring customer satisfaction and the effects of special terms
8. the factors that tend to influence customer expectations and the effectiveness of special terms, and how to monitor these factors

Develop effective relationships with customers within a retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.D002
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Area Manager; Manager
Suite	Independent retailers
Keywords	Retailing; retailers; SMEs; small-medium enterprises; small medium enterprises; small enterprises; medium enterprises; independents; develops; developing; devises; devising; creates; creating; encourages; encouraging; effectively; efficiently; personal

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

It is highly unlikely that this unit will be able to be observed therefore the evidence generated will come from professional discussion supported by statistics relating to performance and testimony from an Expert Witness to confirm the candidate's competence

Monitor and resolve customer complaints within a retail organisation

Overview

This standard is about ensuring customer complaints do not escalate if a customer is not satisfied with a first level resolution offer. It is also about monitoring customer complaints to ensure complex or serious complaints are passed to those with the authority to handle difficult complaints.

This standard is for owners, managers and department managers.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Monitor and resolve customer complaints within a retail organisation

Monitor and resolve customer complaints within a retail organisation

Performance criteria

You must be able to:

1. ensure that your retail organisation handles complaints in line with current laws relating to customers' rights and your responsibilities to customers
2. ensure staff have the training they need to enable them to handle common customer complaints in ways that follow your retail organisation's customer service standards
3. ensure staff are clear about the types of complaint they should refer and how they should do this
4. make sure staff have the support they need from others with the responsibility to deal with difficult customers
5. keep customers informed about the action being taken and the time this is likely to take when a complaint cannot be resolved immediately
6. discuss the nature of the complaint and an acceptable solution when there is a disagreement with the customer
7. ensure respect is shown to the customer at all times and your retail organisation's interests are protected
8. monitor recurring complaints and investigate the possible causes
9. resolve recurring complaints following your retail organisation's customer service standards at all times

Monitor and resolve customer complaints within a retail organisation

Knowledge and understanding

You need to know and understand:

1. the current laws relating to customers' rights and your responsibilities to customers and how to stay informed about relevant laws
2. how to identify the needs of staff for training in handling customer complaints
3. how to devise effective procedures for handling complaints, including deciding what the different roles should be
4. the effects that difficult customers can have on staff morale and behaviour, and effective ways of maintaining morale and standards of service when customers are difficult
5. the types of information that customers tend to appreciate when their complaints are not yet resolved
6. how to recognise and deal with customers in a respectful manner when there is not going to be an agreement about the nature of a problem
7. the ways of dealing respectfully with customers without necessarily changing your stance on a complaint
8. what to look for when identifying and monitoring recurring complaints in your retail organisation
9. the typical causes of recurring complaints in your retail organisation

Monitor and resolve customer complaints within a retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.D004
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Owner/Manager; Manager
Suite	Independent retailers
Keywords	Retailing; retailers; SMEs; small-medium enterprises; small medium enterprises; small enterprises; medium enterprises; independents; resolves; resolving; problems; issues

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Confirm the requirements for props and prototypes for retail displays

Overview

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

This standard is for staff who are visual merchandising specialists and personnel with responsibilities for visual display and equipment.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Confirm the requirements for props and prototypes for retail displays

Confirm the requirements for props and prototypes for retail displays

Performance criteria

You must be able to:

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

Confirm the requirements for props and prototypes for retail displays

Knowledge and understanding

You need to know and understand:

1. where to obtain the design brief
2. how to use design information to confirm the props and prototypes required for retail displays
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
4. how to specify the requirements for props and prototypes clearly, and what formats to use
5. how to use scale in creating visual effects
6. how props, prototypes, dressings and fixtures create visual effects
7. the types and styles of props and prototypes your retail organisation uses

Confirm the requirements for props and prototypes for retail displays

-
- Links to other NOS**
- PPL.C240 Make life-size copies of items for retail displays
 - PPL.C241 Make scale models of items for retail displays
 - PPL.C242 Decorate fixtures and panels for retail displays

Confirm the requirements for props and prototypes for retail displays

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C239
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; confirms; confirming; checks; checking; needs; models; cutouts; cut-outs; cut outs; items; goods; materials; products; visual merchandising

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Produce guidance for putting retail display layouts together

Overview

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

This standard is for trained visual merchandising personnel.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Produce guidance for putting retail display layouts together

Produce guidance for putting retail display layouts together

Performance criteria

You must be able to:

1. draw retail display layouts accurately
2. use accepted drawing techniques, graphic conventions and coding conventions to provide information
3. specify accurately and clearly the dimensions and orientation of retail display layouts and the standards of the finished work
4. estimate the quantities and costs of materials required within cost limits and the design requirement
5. estimate costs of materials if there are no existing stocks to be used
6. recognise when specialist services will be required
7. identify the correct methods for putting retail display layouts together and any risks to health and safety involved in putting retail display layouts together and using them
8. provide enough information to allow staff to put retail display layouts together efficiently
9. produce guidance for putting retail display layouts together in agreed **formats** and **platforms**
10. tell staff clearly and accurately what they must do to protect their own and others' health and safety while they are putting retail display layouts together

Produce guidance for putting retail display layouts together

Knowledge and understanding

You need to know and understand:

1. why specifications, drawings and supporting information are required for putting retail display layouts together
2. how to produce specifications and drawings to the technical standards required
3. how to estimate quantities and costs
4. how to specify the standard of finished work
5. how to identify and specify the requirement for specialist services
6. how to describe methods for putting retail display layouts together
7. how to recognise risks to health and safety arising from putting retail display layouts together
8. how to draw the attention of staff to health and safety risks and the preventative action they must take
9. how to identify and assess the conditions under which retail display layouts will be put together
10. who puts together retail display layouts in your retail organisation and who uses them
11. the drawing and coding conventions and standards to use
12. the agreed **formats** and **platforms** to be used when producing guidance for putting retail display layouts together and why it is important to follow them
13. the supporting information needed by staff who will put retail display layouts together

Produce guidance for putting retail display layouts together

Glossary

Formats – This refers to the type of document e.g. PDF, printed leaflet

Platforms – This refers to where the guidance can be found digitally e.g. intranet

Links to other NOS PPL.C341 Develop and test solutions for retail display layouts

Produce guidance for putting retail display layouts together

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C342
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; produces; producing; provides; providing; guidelines; instructions; guides; guiding; instructs; instructing; notes; puts; displays; assembles; assembling; visual merchandising

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

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

Formats – This refers to the type of document e.g. PDF, printed leaflet

Platforms – This refers to where the guidance can be found digitally e.g. intranet

Monitor, identify and investigate loss and wastage in a retail organisation

Overview

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

This standard is for owners, managers and team leaders.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Monitor, identify and investigate loss and wastage in a retail organisation

Monitor, identify and investigate loss and wastage in a retail organisation

Performance criteria

You must be able to:

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

Monitor, identify and investigate loss and wastage in a retail organisation

Knowledge and understanding

You need to know and understand:

1. your retail organisation's security policy and procedures
2. your retail organisation's procedures for monitoring, identifying and recording loss and wastage
3. your retail organisation's investigation procedures and its definition of unacceptable loss and wastage
4. how unacceptable loss and wastage are likely to happen in your retail organisation
5. the items most likely to be at risk in your retail organisation
6. the purpose of loss-control and stock-taking systems
7. different strategies for preventing loss and wastage and when to use each one
8. how to explain causes of loss and wastage to colleagues so that they can contribute to reducing them
9. how to check loss and wastage evaluations

Monitor, identify and investigate loss and wastage in a retail organisation

- Links to other NOS**
- PPL.E304 Monitor and maintain security in a retail organisation
 - PPL.E306 Assess, monitor and control risks to health and safety and provide training in a retail organisation
 - PPL.E307 Take a safe and active role when accidents and emergencies occur in a retail organisation

Monitor, identify and investigate loss and wastage in a retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E305
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; monitors; monitoring; checks; checking; investigates; investigation; assesses; assessing; assessment; waste; wastage

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

This unit can be achieved in isolation of other units. However evidence for this unit will be generated holistically whilst the candidate is working towards competence in their selected units for the qualification. The evidence should take into account specialist training for evacuation.



Manage staff and maintain stock records in a storage facility in a retail organisation

Overview

This standard is about managing staff and maintaining storage records in a storage facility.

This standard is for owners, managers and team leaders.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Manage staff and maintain stock records in a storage facility in a retail organisation

Manage staff and maintain stock records in a storage facility in a retail organisation

Performance criteria

You must be able to:

1. organise your retail organisation's storage facilities to take account of day-to-day work, safety requirements and the need to keep goods secure and in a saleable condition
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
3. give staff clear roles and responsibilities for storing and moving goods and check they understand these roles and responsibilities
4. develop and update plans to cope with unforeseen storage problems in your storage facility in your retail organisation
5. manage staff to ensure they are storing and moving goods competently, safely, securely and in line with relevant legal and health and safety requirements
6. maintain complete, accurate and up-to-date stock records that can be found easily by everyone in your retail organisation who requires them

Manage staff and maintain stock records in a storage facility in a retail organisation

Knowledge and understanding

You need to know and understand:

1. how effective storage systems contribute to reducing stock loss
2. how to organise what storage facilities are required for goods on order in your retail organisation
3. how to manage staff in your retail organisation's storage facility
4. how to protect goods from various causes of deterioration and damage
5. how to work out suitable storage layouts and solve storage problems efficiently, safely and securely
6. how to run your organisation's stock recording and controlling systems efficiently and accurately, including using them to monitor and record stock loss
7. the relevant legal requirements for storing stock, including health and safety requirements
8. why you need to maintain accurate and up to date stock records that can be found easily by relevant staff in your retail organisation



Manage staff and maintain stock records in a storage facility in a retail organisation

-
- Links to other NOS**
- PPL.B301 Organise staff to receive, check and record incoming deliveries in a retail organisation
 - PPL.B303 Check the storage and care of stock in a retail organisation



Manage staff and maintain stock records in a storage facility in a retail organisation

Developed by	People 1st
Version Number	3
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B302
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; organises; organising; maintains; maintaining; facility; areas; stores; storing; arranges; arranging; checks; checking; SMEs; small-medium enterprises; small medium enterprises; small enterprises; medium enterprises; independents

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Promote a retail organisation's own credit card to customers

Overview

This standard is about promoting your retail organisation's own credit card. The features and benefits of the card need to be explained persuasively and responsibly to customers.

A credit card is a financial product and its promotion is subject to strict laws that must be complied with at all times.

A credit card is not simply a card that offers rewards such as points or discounts, although it may have these additional features. The difference between a credit card and a card that is purely a loyalty card is that customers incur a financial debt when they use a credit card to pay for purchases. This debt must eventually be paid, and can cost customers extra money in the form of interest if payment is not made in full on the due date.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Promote the retail organisation's own credit card to customers

Promote a retail organisation's own credit card to customers

Performance criteria

You must be able to:

1. take suitable opportunities and use effective questioning techniques to find out if customers have credit cards with your retail organisation
2. promote the benefits to customers of having the credit card where they are not already holders
3. remind customers in a friendly and persuasive manner of the benefits of using the credit card after acknowledging they are already holders
4. give customers clear and factually accurate information about the costs involved, repayment terms, their right to cancel the credit card, any discounts that apply and any balance transfer options where they express an interest in having your retail organisation's credit card
5. address customers' concerns honestly whilst continuing to stress the benefits of the credit card where customers express concern about the credit card

Promote a retail organisation's own credit card to customers

Knowledge and understanding

You need to know and understand:

1. the benefits to your retail organisation of having card holders
2. the reasons for promoting your retail organisation's credit card to customers
3. when opportunities arise to ask if customers already have your retail organisation's credit card
4. friendly and engaging questioning techniques that can be used to find out if customers are credit card holders
5. the benefits to customers of having your retail organisation's credit card
6. how to explain to customers in a persuasive manner the benefits to them of being credit card holders
7. who is eligible to apply for the credit card
8. what the costs involved are and the repayment terms of your retail organisation's credit card,
9. what customers' rights to cancel the credit card are, any discounts that may apply to the credit card and what balance transfer options with your retail organisation's credit card there are
10. typical concerns that customers might have about the credit card
11. how to respond to customers' concerns honestly whilst continuing to stress the benefits of the credit card
12. why it is important to your retail organisation to make existing credit card holders feel special and to continue to promote to them the benefits of the credit card
13. what the legal issues are around misselling credit cards

Promote a retail organisation's own credit card to customers

Links to other NOS PPL.C271 Offer customers information on insurance products associated with a retail organisation's credit card
PPL.C272 Help customers to apply for a retail organisation's credit card and associated insurance products

Promote a retail organisation's own credit card to customers

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C270
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; promotes; promoting; advertises; advertising

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Advise retail customers on the features of borrowing facilities

Overview

This standard is about advising retail customers on the features of your retail organisation's borrowing facilities and helping customers to understand fully the rights and obligations involved so that they can make informed decisions. These borrowing facilities need to be legally and ethically promoted.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Advise retail customers on the features of borrowing facilities

Advise retail customers on the features of borrowing facilities

Performance criteria

You must be able to:

1. advise retail customers clearly and accurately on the terms and conditions of the borrowing facility
2. check with retail customers that they understand their responsibilities in relation to the borrowing facility
3. give retail customers the chance to check they understand and to ask questions about the borrowing facility and its features
4. give retail customers the chance to compare the benefit and value of different borrowing options where they are available
5. provide retail customers with accurate written quotations together with all the information your retail organisation and the law say must be provided
6. follow your retail organisation's customer service standards at all times whilst dealing with retail customers

Advise retail customers on the features of borrowing facilities

Knowledge and understanding

You need to know and understand:

1. the terms, conditions and features of the borrowing facilities your retail organisation is authorised to offer retail customers
2. why advice must be given to retail customers to help them understand their responsibilities in relation to the borrowing facility
3. how to explain the terms and conditions of borrowing facilities in ways that different retail customers can understand
4. how to give retail customers the chance to ask questions and check they understand the terms, conditions and features of the borrowing facility
5. how to prepare accurate written quotations from the information retail customers have given
6. the information that your retail organisation and the relevant legislation requires to be provided to retail customers in relation to borrowing facilities, and where this can be obtained
7. know the ethics and morals of promoting borrowing
8. why it is important to follow your retail organisation's customer service standards

Advise retail customers on the features of borrowing facilities

Links to other NOS PPL.C306 Identify the retail customer's credit or hire-purchase requirements
PPL.C308 Process credit or hire-purchase applications on behalf of retail customers

Advise retail customers on the features of borrowing facilities

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C307
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; advises; advising; informs; informing; explains; explaining; credit; HP; hire-purchases; hire purchases

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Evaluate takings practices and procedures in a retail organisation

Overview

This standard is about evaluating takings practices and procedures in a retail organisation and how they are processed by staff at point of sale. It also involves identifying any problems and sorting these out promptly. Takings practices include interim and final takings sampling.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Evaluate takings practices and procedures in a retail organisation

Evaluate takings practices and procedures in a retail organisation

Performance criteria

You must be able to:

1. check that staff carry out takings practices and procedures in line with your retail organisation's requirements
2. identify and promptly resolve any problems with takings practices and procedures
3. check payment processes and transaction procedures to make sure they follow your retail organisation's customer service standards
4. check at suitable times that review and control systems are providing up-to-date and accurate information
5. deal with any identified problems promptly, or refer them promptly to the correct person to resolve when problems are beyond your limits of authority
6. evaluate the takings practices and procedures and report findings to the correct person

Evaluate takings practices and procedures in a retail organisation

Knowledge and understanding

You need to know and understand:

1. the aims that takings practices and procedures are designed to achieve
2. how the way that payment transaction procedures are carried out can affect your retail organisation's reputation
3. your retail organisation's takings procedures, including safety and security arrangements
4. the control systems available and the information they provide
5. how to collect and interpret information about takings
6. how to check takings practices and procedures
7. types of problems with takings that staff need to be aware of
8. how to resolve problems with takings
9. the limits of your authority for resolving problems with takings
10. how to report the evaluation on takings practices and procedures

Evaluate takings practices and procedures in a retail organisation

Links to other NOS PPL.C310 Monitor practices and processes at the payment point in a retail organisation



Evaluate takings practices and procedures in a retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C309
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing
Suite	Retail
Keywords	Retailing; retailers; evaluates; evaluating; assesses; assessing; cash; cards; tills; checkouts; check-outs; point of sales; point-of-sales; POS

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Monitor practices and procedures at the payment point in a retail organisation

Overview

This standard is about monitoring staff and ensuring they are following your retail organisation's practices and procedures at the payment point.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Monitor practices and processes at the payment point in a retail organisation

Monitor practices and procedures at the payment point in a retail organisation

Performance criteria

You must be able to:

1. monitor at suitable times that staff are setting up and operating payment points correctly
2. resolve any problems with routine payment point practices and procedures promptly
3. check that staff are handling cash and cash equivalents efficiently and in line with your retail organisation's procedures
4. authorise refunds and payments promptly and in line with your retail organisation's procedures
5. follow payment point security procedures correctly
6. develop effective plans to cope with unexpected problems at the payment point

Monitor practices and procedures at the payment point in a retail organisation

Knowledge and understanding

You need to know and understand:

1. methods of payment that are accepted in your retail organisation
2. how to monitor that payment points are being correctly set up and operated
3. the problems that can arise in routine payment point practices and procedures and how to resolve them
4. your retail organisation's approved procedures for handling cash and cash equivalents and how to follow these efficiently
5. the types of refund and payment that require authorisation and the procedures for authorising these
6. your retail organisation's payment point security procedures
7. how to plan to cope with unexpected problems at the payment point



Monitor practices and procedures at the payment point in a retail organisation

Links to other NOS PPL.C309 Evaluate takings practices and procedures in a retail organisation



Monitor practices and procedures at the payment point in a retail organisation

Developed by	People 1st
Version Number	3
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C310
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing
Suite	Retail
Keywords	Retailing; retailers; monitors; monitoring; watches; watching; observes; observing; checks; checking; cards; tills; checkouts; check-outs; point of sales; point-of-sales; POS

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Evaluate and improve external suppliers' service to customers of a retail organisation

Overview

This standard is about evaluating feedback from customers of your retail organisation to decide how the service provided by external suppliers could be improved, and encouraging suppliers to make improvements.

This standard is for owners, managers and team leaders.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Evaluate and improve external suppliers' service to customers of a retail organisation

Evaluate and improve external suppliers' service to customers of a retail organisation

Performance criteria

You must be able to:

1. assess information objectively to identify **external suppliers'** overall quality of service to customers of your retail organisation
2. make evaluations that are consistent with the weight of evidence gathered
3. use evaluations to develop realistic and cost-effective improvements to customer service
4. present the results of evaluations and suggestions for improvement clearly to **external suppliers**
5. invite **external suppliers** to suggest improvements they can make
6. report to your manager and accurately note agreements to improve customer service
7. make an accurate report to your manager, together with your recommendations for action, if **external suppliers** do not improve service

Evaluate and improve external suppliers' service to customers of a retail organisation

Knowledge and understanding

You need to know and understand:

1. how to gather feedback to assist the evaluation process
2. what the level of customer satisfaction is with individual suppliers
3. how to evaluate the quality of service given to customers by **external suppliers**
4. the typical problems with services provided by **external suppliers** used by your retail organisation
5. who to report your evaluations and recommendations to in your retail organisation
6. how to present evaluations and suggestions to **external suppliers**
7. what to do when **external suppliers** refuse to improve the quality of service

Evaluate and improve external suppliers' service to customers of a retail organisation

Glossary

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

Links to other NOS

PPL.E314 Monitor the service provided to customers by external suppliers of a retail organisation

Evaluate and improve external suppliers' service to customers of a retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.E315
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Managers and Senior Officials; Managers in Distribution, Storage and Retailing; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; evaluates; evaluating; evaluations; improves; improving; improvements; services; provides; providing; providers

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

It is highly unlikely that this unit will be able to be observed therefore the evidence generated will come from professional discussion supported by significant activity and testimony from an Expert Witness to confirm the candidate's competence

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

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

Make life-size copies of items for retail displays

Overview

This standard is about making life-size copies of items to use as props in visual retail displays in stores.

This standard is for staff who are visual merchandising specialists with the authority and capabilities to make life sized items.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Make life-size copies of items for retail displays

Make life-size copies of items for retail displays

Performance criteria

You must be able to:

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

Make life-size copies of items for retail displays

Knowledge and understanding

You need to know and understand:

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

Make life-size copies of items for retail displays

-
- Links to other NOS**
- PPL.C239 Confirm the requirements for props and prototypes for retail displays
 - PPL.C241 Make scale models of items for retail displays
 - PPL.C242 Decorate fixtures and panels for retail displays

Make life-size copies of items for retail displays

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Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C240
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; making; makes; creating; creates; full size; copying; goods; materials; products; props; prototypes; visual merchandising

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Make scale models of items for retail displays

Overview

This standard is about making scale models of items to be included in visual retail displays in stores.

This standard is for staff who are visual merchandising specialists with the authority and capabilities to make scale models for display.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Make scale models of items for retail displays

Make scale models of items for retail displays

Performance criteria

You must be able to:

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

Make scale models of items for retail displays

Knowledge and understanding

You need to know and understand:

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

Make scale models of items for retail displays

Glossary

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

Links to other NOS

PPL.C239 Confirm the requirements for props and prototypes for retail displays

PPL.C240 Make life-size copies of items for retail displays

PPL.C242 Decorate fixtures and panels for retail displays

Make scale models of items for retail displays

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C241
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; making; makes; creating; creates; scaled; scales; scaling; goods; materials; products; props; prototypes; visual merchandising

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

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

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

Check stock levels in a retail organisation

Overview

This standard is about checking the amounts of stock held in a retail organisation by examining and counting the stock. It also involves updating the stock records. Stock could be on the shop floor or in a storage area.

This standard is for staff who check stock levels in a retail organisation.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Check stock levels in a retail organisation

Check stock levels in a retail organisation

Performance criteria

You must be able to:

1. check existing stock levels accurately and in line with your manager's or supervisor's instructions and your retail organisation's procedures
2. ask for clarification if instructions from your manager or supervisor are not clear
3. identify unsaleable stock and tell the correct person
4. check stock levels in ways that do not disturb other people any more than required
5. update stock records accurately and in line with your retail organisation's procedures

Check stock levels in a retail organisation

Knowledge and understanding

You need to know and understand:

1. why accurate and up-to-date stock checks and records are important
2. your retail organisation's procedures for checking stock levels
3. why instructions should be followed
4. how to check stock levels in your retail organisation
5. how to check stock levels so as not to disturb other people any more than required
6. reasons why the stock for checking may be unsaleable
7. how to recognise unsaleable stock when checking stock levels
8. your retail organisation's procedures for updating stock records

Check stock levels in a retail organisation

Links to other NOS PPL.B103 Replenish stock on the sales floor in a retail organisation



Check stock levels in a retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B102
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Elementary Occupations; Elementary Goods Storage Occupations; Elementary Sales Occupations; Storage and Retailing
Suite	Retail
Keywords	Retailing; retailers; stocking; stocks; goods; products; items; materials; stock taking

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

Replenish stock on the sales floor in a retail organisation

Overview

This standard is about replenishing stock on the sales floor in a retail organisation. It is also about making sure stock, equipment, premises and people are safe from damage or injury.

This standard is for staff who replenish stock on the sales floor.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Replenish stock on the sales floor in a retail organisation

Replenish stock on the sales floor in a retail organisation

Performance criteria

You must be able to:

1. follow instructions for replenishing stock in the correct locations on the sales floor in your retail organisation
2. ask the right person for advice if instructions for replenishing stock are not clear
3. handle stock in ways that protect the safety of yourself and others
4. handle stock in ways that protect stock, equipment and premises from being damaged
5. replenish stock on the sales floor in ways that do not disturb other people any more than required
6. follow your retail organisation's requirements for stock rotation
7. clean and tidy the work area promptly after replenishing stock on the sales floor

Replenish stock on the sales floor in a retail organisation

Knowledge and understanding

You need to know and understand:

1. why stock needs replenishing in the correct locations on the sales floor
2. the safety risks of handling stock in your retail organisation
3. how to handle stock without risking the safety of yourself or others on the sales floor
4. how stock, premises and equipment can be damaged by poor stock handling
5. ways of handling stock so that stock, premises and equipment are not damaged
6. how to replenish stock on the sales floor so that others are not disturbed more than required
7. why the sales floor should be left clean and tidy
8. your retail organisation's requirements for stock rotation
9. how to clean and tidy the work area, and the equipment and materials to use

Replenish stock on the sales floor in a retail organisation

[Links to other NOS](#) PPL.B102 Check stock levels in a retail organisation



Replenish stock on the sales floor in a retail organisation

Developed by	People 1st
Version Number	2
Date Approved	March 2017
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B103
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Elementary Occupations; Elementary Goods Storage Occupations; Elementary Sales Occupations; Storage and Retailing
Suite	Retail
Keywords	Retailing; retailers; stocking; stocks; goods; products; items; materials; shelf filling; facing up

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Sort and prepare donated goods in a retail-charity organisation for selling or recycling

Overview

This standard is about sorting donated goods and preparing them for either selling or recycling as appropriate.

This standard is for owners, managers, team leaders, sales staff, and volunteers, predominantly in retail charity organisations, but not exclusively if your retail organisation is sorting donated goods in preparation for sale or recycling.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Sort and prepare donated goods in a retail-charity organisation for selling or recycling

Sort and prepare donated goods in a retail-charity organisation for selling or recycling

Performance criteria

You must be able to:

1. clean and tidy the work area before sorting in your retail-charity organisation
2. sort donated goods by their type and condition
3. follow relevant legal procedures for disposing of goods and parts that are not suitable for either selling or recycling
4. ask the correct person for help if you are unsure about the classification of goods
5. put goods suitable for recycling in appropriate containers
6. place containers in the correct place ready for collection and check that they are not in anyone's way
7. identify goods that need to be prepared for cleaning, tidying or repairing
8. follow relevant legal and your retail-charity organisation's requirements for protecting health and safety while preparing, cleaning and repairing donated goods
9. follow relevant legal and your retail-charity organisation's procedures when using irons, steamers and other equipment

Sort and prepare donated goods in a retail-charity organisation for selling or recycling

Knowledge and understanding

You need to know and understand:

1. the types of goods your retail-charity organisation sells
2. the types of goods that can be sent for recycling
3. which types of goods are not suitable for selling or recycling and how to dispose of them
4. the relevant legal and your retail charity organisation's safety requirements that apply to second-hand goods, including electrical equipment, furniture and toys
5. the relevant legal age restrictions that apply to videos, books, DVDs and computer games
6. where to store donated goods until ready to sort them
7. where and when to sort donated goods
8. why areas should be clean and tidy before starting to sort goods
9. where to put goods as they are being sorted
10. who to ask for help in identifying goods you are unsure about or deciding what to do with them
11. the procedures to follow to prepare goods for recycling
12. where to put goods for recycling so that they can be collected
13. how to identify goods that need to be cleaned, tidied or repaired and prepared for sale
14. how to clean, tidy and repair different types of goods
15. how to use irons and steamers safely and effectively



Sort and prepare donated goods in a retail-charity organisation for selling or recycling

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Date Approved	March 2017
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.B105
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Elementary Occupations; Elementary Cleaning Occupations; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; charity; donations; secondhand; second-hand; sorts; sorting; cleans; cleaning; repairs; repairing; mends; mending

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Package goods for customers in a retail organisation

Overview

This standard is about packaging goods for customers in a retail organisation. This can be to make the goods look more attractive, or to protect goods from damage. The packaging could take place at the counter or a stock area or both.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Package goods for customers in a retail organisation

Package goods for customers in a retail organisation

Performance criteria

You must be able to:

1. find out what goods need packaging for customers
2. choose packaging materials that meet relevant legal requirements and your retail organisation's policy and are suitable for the goods in your retail organisation
3. gather the right quantities of packaging materials and the correct tools for the job
4. use tools safely
5. cause as little wastage as possible
6. protect goods from damage while packaging them
7. close and seal packages neatly and in line with instructions
- 8. package goods** within the time limits allowed
9. store materials and tools correctly and promptly after use
10. dispose of waste correctly and promptly

Package goods for customers in a retail organisation

Knowledge and understanding

You need to know and understand:

1. the relevant legal requirements and your retail organisation's policy relating to the types of packaging provided to customers
2. how goods can get damaged without the correct packaging to protect them
3. types of packaging material and their uses
4. tools to use for **packaging goods** and how to use them effectively and safely
5. how to handle the goods that require wrapping without damaging them
6. where packaging materials and tools are stored, and why they should be put away promptly after use
7. why wastage should be minimised when **packaging goods**, and how to do this
8. where and how to dispose of waste, and why this should be done promptly

Package goods for customers in a retail organisation

Glossary

Packaging goods – Wrapping or packing goods to make them more attractive or to protect them from damage

Package goods for customers in a retail organisation

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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C101
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Elementary Occupations; Elementary Sales Occupations; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; packs; packing; packages; packaging; wraps; wrapping; items; products; produce

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

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

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

Label displays of stock in a retail organisation

Overview

This standard is about labelling stock on display in a retail organisation so that the information given to customers is accurate, clear and meets legal requirements.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Label displays of stock in a retail organisation

Label displays of stock in a retail organisation

Performance criteria

You must be able to:

1. check the requirements for labelling displays of stock in your retail organisation
2. check that the information on the label is clear, accurate and meets relevant legal requirements before starting to label stock
3. report promptly and to the correct person any information on labels that may require changing
4. attach the correct labels to the relevant products
5. position labels so that they are securely fastened and customers can see them clearly
6. complete labelling within the time allowed

Label displays of stock in a retail organisation

Knowledge and understanding

You need to know and understand:

1. how proper labelling of displays of stock promotes sales in your retail organisation
2. the relevant legal requirements for labelling and what can happen if these are not met
3. the importance of checking that labels are clear and accurate
4. who to tell about information that may require changing on labels
5. how to use labelling materials and equipment efficiently and effectively

Label displays of stock in a retail organisation

Links to other NOS PPL.C201 Prepare display areas and materials in a retail organisation in line with display plans
PPL.C202 Set up and dismantle displays in line with display plans in a retail organisation

Label displays of stock in a retail organisation

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Version Number	2
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C203
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; labels; labelling; items; products; produce; goods

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Promote particular retail products

Overview

This standard is about increasing the sales of a particular retail product using a definite campaign and evaluating the sales impact afterwards. It does **not** mean just promoting retail products as part of normal sales transactions.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Promote particular retail products

Promote particular retail products

Performance criteria

You must be able to:

1. tell retail customers about particular retail products clearly and follow your retail organisation's customer service standards at all times
2. use **promotions** of particular retail products to increase retail sales
3. identify and take the most effective actions for converting promotional sales into regular future sales
4. gather relevant and accurate information about the effectiveness of **promotions** and communicate this information clearly to the correct person
5. record clearly and accurately the results of **promotions**

Promote particular retail products

Knowledge and understanding

You need to know and understand:

1. techniques for encouraging retail customers to buy the particular retail product being promoted
2. techniques for building retail customers' interest in the particular retail product being promoted
3. the information that is relevant in evaluating the success of **promotions**, and who requires this information
4. how to evaluate and record the results of **promotions**

Promote particular retail products

Glossary

Promotions – Opportunities to increase sales of a particular product by using a definite campaign that you will evaluate afterwards. Promotional opportunities are not just opportunities to promote products as part of normal sales transactions

Links to other NOS

PPL.C206 Identify opportunities to increase sales of particular products

Promote particular retail products

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Version Number	2
Date Approved	March 2017
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C207
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; promotes; promoting; specific; sales; selling; sells; promotions; marketing; markets

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

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

Work out the price of customers' retail purchases

Overview

This standard is about calculating how much customers need to pay for their retail purchases. This can be with or without the use of a payment register.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Work out the price of the customers retail purchases

Work out the price of customers' retail purchases

Performance criteria

You must be able to:

1. identify accurately the price of retail purchases
2. deal promptly with any pricing problems by referring to pricing information
3. obtain advice promptly from the right person when it is not possible for you to sort out pricing problems
4. work out accurately the amount retail customers should pay

Work out the price of customers' retail purchases

Knowledge and understanding

You need to know and understand:

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

Work out the price of customers' retail purchases

Links to other NOS PPL.C214 Provide a payment service at point of sale in a retail organisation
PPL.C215 Process applications from retail customers for credit facilities



Work out the price of customers' retail purchases

Developed by	People 1st
Version Number	4
Date Approved	March 2017
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C213
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Owner/Manager; Manager; Team Leader
Suite	Retail
Keywords	Retailing; retailers; works out; working out; calculates; calculating; adds up; adding up; prices; pricing; totals; totalling; orders

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Explain to customers the features and benefits of a retail organisation's loyalty scheme and how the scheme works

Overview

This standard is about identifying customers who are not yet members of a retail organisation's loyalty scheme, and explaining to them how the scheme works, the features of it and how they would benefit from being members of the scheme.

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

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Explain to customers the features and benefits of a retail organisation's loyalty scheme and how the scheme works

Explain to customers the features and benefits of a retail organisation's loyalty scheme and how the scheme works

Performance criteria

You must be able to:

1. take suitable opportunities to ask customers if they are members of your retail organisation's loyalty scheme and whether they are interested in joining
2. explain clearly and accurately to customers how joining the scheme would benefit them, including any current special offers relating to the scheme
3. explain clearly to customers the features and benefits of the loyalty scheme and how it works
4. respond positively to any questions or concerns that customers raise
5. provide relevant information to customers to help them decide whether to join the scheme
6. treat customers politely at all times following your retail organisation's customer service standards

Explain to customers the features and benefits of a retail organisation's loyalty scheme and how the scheme works

Knowledge and understanding

You need to know and understand:

1. the features and benefits of your retail organisation's loyalty scheme and how it works
2. the sources of information about the scheme that customers can be informed about
3. why loyalty schemes are important in achieving your retail organisation's commercial aims
4. the specific offers currently available to scheme members
5. how to gain customers' attention and interest
6. how to use suitable questions to gain information about customers and their interest in joining the scheme
7. how to explain to customers about the features and benefits of the scheme
8. how to deal with frequently raised questions and concerns in relation to the scheme

Explain to customers the features and benefits of a retail organisation's loyalty scheme and how the scheme works

Links to other NOS PPL.C222 Gain customer commitment to the retail organisation's loyalty scheme and assist them in completing the application

Explain to customers the features and benefits of a retail organisation's loyalty scheme and how the scheme works

Developed by	People 1st
Version Number	4
Date Approved	March 2017
Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C221
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; explains; explaining; describes; describing; informs; informing; rewards; reward scheme; schemes

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

Dismantle retail displays

Overview

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

This standard is for staff who are visual merchandising specialists and personnel with responsibilities for visual displays.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Dismantle retail displays

Dismantle retail displays

Performance criteria

You must be able to:

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

Dismantle retail displays

Knowledge and understanding

You need to know and understand:

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

Dismantle retail displays

Links to other NOS PPL.C238 Store equipment, props and graphics for retail displays

Dismantle retail displays

Developed by	People 1st
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Indicative Review Date	March 2022
Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C237
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Merchandiser
Suite	Retail
Keywords	Retailing; retailers; dismantles; dismantling; deconstructs; deconstructing; visual merchandising

Unit Assessment: Specialist Unit - If the assessor does not have the technical competence expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit

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

Keep dressing room facilities ready for customer use

Overview

This standard is about keeping dressing room facilities ready for customers to use. Confidentiality, security and safety are important aspects of this standard. This will create a positive image of your retail organisation.

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

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- Keep dressing room facilities ready for customer use

Keep dressing room facilities ready for customer use

Performance criteria

You must be able to:

1. check dressing room facilities before opening to ensure they are ready for customers to use, in line with your retail organisation's standards for cleanliness, tidiness and hygiene
2. clean and tidy dressing rooms as required, using suitable equipment and materials and safe and effective procedures
3. report to the correct person any problems with the dressing room facilities that you cannot resolve
4. whilst the dressing room facility is open, regularly and discreetly check that the dressing rooms are clean, tidy and free from obstructions in line with your retail organisation's safety and security policies to ensure they are always ready to use
5. place merchandise in the designated area when it cannot be returned to the shop floor immediately
6. prepare unsold merchandise for prompt return to the shop floor
7. follow your retail organisation's procedures for dealing with merchandise that is no longer of saleable quality

Keep dressing room facilities ready for customer use

Knowledge and understanding

You need to know and understand:

1. why it is important to keep the dressing room facilities clean, tidy and in good working order
2. why dressing room facilities should always be ready for customers' use
3. your retail organisation's standards for the cleanliness, tidiness and hygiene of the dressing room facilities
4. who can help to resolve problems with the dressing room facilities that are outside of your authority
5. where cleaning materials are kept and how to clean the dressing room facilities safely and effectively
6. how to routinely check in a discreet manner that the dressing rooms are clean and tidy, whilst customers are using the area
7. where to store unsold merchandise before preparing it for return to the shop floor
8. how to prepare merchandise for return to the shop floor
9. how to recognise merchandise that is no longer of saleable quality
10. your retail organisation's procedures for dealing with merchandise that is no longer of saleable quality

Keep dressing room facilities ready for customer use

Links to other NOS PPL.C273 Use the dressing room facilities to create sales opportunities

Keep dressing room facilities ready for customer use

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Date Approved	March 2017
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Validity	Current
Status	Original
Originating Organisation	Skillsmart Retail
Original URN	SSR.C274
Relevant Occupations	Retail and commercial enterprise; Retailing and wholesaling; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers
Suite	Retail
Keywords	Retailing; retailers; keeps; keeping; maintains; maintaining; dressing rooms; changing rooms; fitting rooms; uses; using; cleans; cleaning; tidies; tidying

Specific Evidence Requirement: Simulation is not allowed for any performance evidence within this Unit