

Unit 38: Undertake Retail Merchandising for the Land-based Sector

Unit code:	A/600/9812
QCF Level 3:	BTEC National
Credit value:	10
Guided learning hours:	60

● Aim and purpose

This unit aims to provide learners with an understanding of the principles of retail merchandising in the land-based sector and how these can be put into practice. This unit is primarily aimed at learners within a centre-based setting looking to progress into the sector or to further education and training. This unit has been specifically developed for 14- 19-year-old learners in full-time education acquiring additional knowledge of retailing

● Unit introduction

As the land-based sector increases and diversifies in a competitive business environment, the need for key personnel with customer service skills, including the ability to promote and increase sales, is essential in maintaining a market share of the sector.

The focus of this unit is on developing learners' understanding of the key aspects of retail merchandising within the land-based sector. Learners will develop a range of customer service skills appropriate to different customer groups, and the ability to evaluate the service given. They will look at how to display merchandise to effectively utilise the space and layout to maximise selling opportunities. Learners will need to learn how to order, price and control retail stock to minimise waste and maximise profit.

Throughout the unit learners will be made aware of safe working practices relating to health and safety in the workplace and any additional legislation and codes of practice relating to specific land-based environments, for example the legislation relating to the sale, promotion and stock control of veterinary medicines.

Learners should be offered the opportunity, where appropriate, to demonstrate customer care skills in a 'real-life' environment. This may be a retail outlet within the centre of learning or within the local community.

● Learning outcomes

On completion of this unit a learner should:

- 1 Be able to deliver effective customer service
- 2 Understand how to display items for sale
- 3 Understand methods of promotion and marketing
- 4 Understand the principles of ordering, pricing and controlling retail stock.

Unit content

1 Be able to deliver effective customer service

Different customer groups: internal eg colleagues, service providers; external eg individuals, companies; demographic group eg age, sex, socio-economic factors, language, lifestyle, culture, disability; customer needs eg amount of goods, loyalty.

Customer service skills: staff (appearance, body language, helpfulness, commodity knowledge); communication methods eg email, telephone; interpersonal skills eg body language, attitude, behaviour, hygiene; sales skills, negotiation and customer handling skills; product or service knowledge; up-selling, secondary and additional sales; dealing with complaints; remedial measures; understanding of customer needs

Land-based outlets: eg florists, pet food and equipment outlets, angling supplies, agricultural outlets, veterinary supplies, plant centre/nursery

Recording evidence: eg diary, logbook, portfolio, video, audio, observation record, witness testimony, feedback sheets

2 Understand how to display items for sale

Outlet flow and space: entrances and exits; position of cash register/till; freestanding displays; telephone/order taking area

Display systems: types of display eg window, interior, exterior, freestanding; shelving/racking; point of sale placements; product grouping; different products eg seasonal, perishable/non-perishable, impulse goods, speciality goods; themes and special events eg industry show

Health and Safety: health and safety at work, manual handling and lifting, risk assessment

Legislation: current relevant legislation eg Sale of Goods Act 1979, Trade Descriptions Act

3 Understand methods of promotion and marketing

Methods of promotion: print eg business directories, press, mailshots, stickers; media eg local radio, television, cinema; local events eg farmers markets, county shows; new media, eg internet, texts, blogs, social and business networking sites

Marketing strategies: public/corporate image; marketing mix (price, product, place, promotion); market research (target market, market size and structure, competition, use of questionnaires, observation, focus groups, business data, government statistics); public relations; word of mouth recommendations; sales promotions eg two for one, buy one get one free (BOGOF); price reductions; discounts

Recommending improvements: short and long-term improvements; reviewing marketing strategy eg feedback from customers; strengths to build on

4 Understand the principles of ordering, pricing and controlling retail stock

Buying and ordering processes: buying and ordering; reasons for ordering and purchasing stock items; sources of supply of goods for re-sale; documentation eg buying list, invoice, delivery note; compiling buying orders; stock delivery (checking, stock returns); problems with over-ordering; relevant current legislation eg Sale of Goods Act 1979

Stock control and storage: reasons for stock control; stock rotation; storage of different types of stock eg perishable, non-perishable; security of storage eg security systems, closed-circuit television (CCTV), tags; planning stock (forecasting); monitoring stock (stock take, inspection); maintaining stock levels; monitoring shrinkage and stock losses/wastage; problems (consequences of too much stock, too little stock); relevant current legislation eg Health and Safety at Work Act 1974, Control of Substances Hazardous to Health (COSHH) Regulations 1988

Pricing methods: eg mark-ups, reductions for stock clearance

Assessment and grading criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria for a pass grade describe the level of achievement required to pass this unit.

Assessment and grading criteria		
To achieve a pass grade the evidence must show that the learner is able to:	To achieve a merit grade the evidence must show that, in addition to the pass criteria, the learner is able to:	To achieve a distinction grade the evidence must show that, in addition to the pass and merit criteria, the learner is able to:
P1 review the needs of different customer groups	M1 select and demonstrate effective customer service skills for different customer groups in a range of land-based outlets	D1 justify the selection of customer service skills for one group of customers
P2 demonstrate effective customer service skills [TW]		
P3 evaluate customer service in a given land-based outlet [RL]		
P4 analyse the customer flow and space layout of a given land-based outlet	M2 analyse space layout and display systems in detail	D2 evaluate selected space layout and display systems, making appropriate recommendations for improvement
P5 evaluate display systems		
P6 discuss the influence of legislation on goods displayed	M3 discuss at least three influences of legislation on goods displayed	D3 make justified and realistic recommendations to improve a given marketing strategy
P7 compare methods of promotion	M4 evaluate a wide range of promotional methods and marketing strategies	
P8 evaluate marketing strategies for given land-based outlets		
P9 recommend improvements to a given marketing strategy [EP]	M5 explain buying and ordering processes in relation stock control and storage methods.	D4 critically review pricing methods in relation to stock control and buying processes.
P10 explain buying and ordering processes		
P11 evaluate stock control and storage methods		
P12 review pricing methods.		

PLTS: This summary references where applicable in the pass criteria, in the square brackets, the elements of the personal, learning and thinking skills. It identifies opportunities for learners to demonstrate effective application of the referenced elements of the skills.

Key	IE – independent enquirers	RL – reflective learners	SM – self-managers
	CT – creative thinkers	TW – team workers	EP – effective participators

Essential guidance for tutors

Delivery

Delivery of this unit will involve practical and written assessments, visits to suitable collections and will link to industrial experience placements.

Tutors delivering this unit have opportunities to use a wide range of techniques, including lectures, discussions, seminar presentations, site visits, supervised practical retailing sessions, internet and/or library-based research and personal and/or industrial experience. Delivery should stimulate, motivate, educate and enthuse learners.

Work placements should be monitored regularly to ensure the quality of the learning experience. It would be beneficial if learners and supervisors were made aware of the requirements of this unit before any work-related activities so that naturally occurring evidence can be collected at the time. For example, learners may have the opportunity to undertake stock control procedures and they should be encouraged to ask for observation records and/or witness statements to be provided as evidence of this. Guidance on the use of observation records and witness statements is provided on the Edexcel website.

Whichever delivery methods are used, it is essential that tutors stress legislation relating to the sale of goods, price marking and/or trade descriptions.

Health and safety issues must be stressed and regularly reinforced, and risk assessments must be undertaken before practical activities take place.

Tutors should consider integrating the delivery, private study and assessment for this unit with other relevant units and assessment instruments learners are taking as part of their programme of study.

In some land-based circumstances the word 'customer' may not be appropriate. Tutors and learners can adopt terms used by individual businesses or organisations instead.

Outline learning plan

The outline learning plan has been included in this unit as guidance and can be used in conjunction with the programme of suggested assignments.

The outline learning plan gives **an indication of the volume of learning it would take the average learner** to achieve the learning outcomes. It is **indicative and is one way of achieving the credit value**.

Learning time should address all learning (including assessment) relevant to the learning outcomes, regardless of where, when and how the learning has taken place.

Topic and suggested assignments/activities and/assessment
Theory: Introduction and overview of the unit.
Assignment 1: Effective Customer Service: Portfolio of Performance (P1, P2, P3, M1, D1)
Tutor introduces the assignment.
Theory: review of different customer groups and their needs.
Theory: what is customer service and what are the skills, attributes and attitudes required for effective customer service?
Individual support: identifying own skills, attributes and knowledge.
Practice: customer service.
Observation of customer service in a range of land-based outlets.

Topic and suggested assignments/activities and/assessment
Work-based activities: practical application of customer service skills.
Assessment: demonstrate effective customer service skills.
Assignment 2: Displaying Items for Sale (P4, P5, P6, M2, M3, D2)
Tutor introduces the assignment.
Theory: introduce why different layouts are used in a range of outlets with regard to type and space.
Observation and analysis of different layouts and customer flow.
Theory: introduce different display systems within retail outlets.
Observation of different displays.
Theory: discuss influences of legislation on goods displayed.
Personal study: reviewing own learning.
Assessment: compiling Assignment 2.
Assignment 3: Methods of Marketing and Promotion (P7, P8, P9, M4, D3)
Tutor introduces the assignment.
Theory: discussion of different methods of promotion.
Theory: evaluation of marketing strategies used in land-based retail outlets.
Provide feedback to a retail outlet making recommendations for future improvements.
Personal study: reviewing own learning.
Assessment: compiling Assignment 3.
Assignment 4: Ordering, Pricing and Controlling Retail Stock (P10, P11, P12, M5, D4)
Tutor introduces the assignment.
Theory: buying and ordering processes.
Theory: stock control, storage and pricing methods.
Other activity: research a range of pricing methods in relation to stock control and buying processes.
Personal study: reviewing own learning.
Assessment: compiling Assignment 4.
Unit review.

Assessment

For P1, P2 and P3, learners must complete a series of practical customer service skills to meet the need of a specific customer group within a land-based outlet. These sessions should be supervised by an appropriate assessor or tutor. Each session should concentrate on specific skills. Learners should keep a practical diary that shows their role within a land-based outlet. Photographic evidence of learners providing customer service would enable them to reflect on their own performance in considering body language etc. A reflective aspect of the diary is essential in capturing the review and evaluation aspects of providing effective customer service.

P4, P5 and P6 require learners to analyse the layout of selected sales areas and their display systems in a land-based situation. Tutors should identify the land-based situation or agree it through discussion with the learners. Where possible, to ensure fairness of assessment, the size and complexity of the tasks should be the same for all learners. This may be the same as that used to provide evidence for other grading criteria. Learners must provide evidence for at least two different sales areas which have two or more display systems in operation. Evidence for this could take the form of a pictorial presentation with notes (possibly using appropriate software or an overhead projector), an annotated poster or a project.

For P7 learners need to explain how a selected land-based product or service is promoted and marketed, followed by recommendations for improving the marketing strategy observed. Tutors should identify the land-based product or service or agree it through discussion with the learners. Where possible, to ensure fairness of assessment the size and complexity of the task should be the same for all learners. This could be assessed directly by the tutor during practical activities. Suitable evidence from guided activities would be observation records completed by the learners and tutor and accompanied by appropriate work logs or other relevant learner notes. If assessed during a placement, witness statements should be provided by a suitable representative and verified by the tutor. Alternatively, the evidence could be in the same form as for P4, P5 and P6.

P10, P11 and P12 requires learners to explain the principles of ordering, pricing and controlling retail stock. Learners could contextualise their evidence to a particular land-based business. Evidence for this could take the form of a pictorial presentation with notes (possibly using appropriate software or an overhead projector) or a written assignment.

To achieve a merit grade learners must achieve all of the pass grade criteria and the merit grade criteria.

For M1, learners must select and demonstrate effective customer service skills based on at least three different customer groups in at least two land-based outlets. Tutors should identify the land-based situation or agree it through discussion with learners. Where possible, to ensure fairness of assessment the size and complexity of the tasks should be the same for all learners. This may be the same as that used to provide evidence for other grading criteria. Evidence could be extended from the practical diary kept for P1, P2 and P3.

For M2,, learners need to provide an in-depth analysis of the space layout and customer flow detailed in P4 providing and evaluate how the retail outlet uses the space to promote effective customer flow. Evidence could be an annotated pictorial floor plan demonstrating the depth of analysis and consequent evaluation.

For M3, learners need to discuss at least three influences of legislation on the display of goods. Learners could contextualise their evidence to a particular land-based business. The evidence could be in the same form as for P4, P5 and P6.

M4 requires learners to compare promotional methods, using this knowledge to evaluate marketing strategies used in a retail outlet. Learners should contextualise their evidence to a particular land-based business. Evidence could be in the form of a research assignment or pictorial presentation with notes. Alternatively, evidence could be generated by linking to assessment for P7 and P8.

For M5, learners need to explain a selected land-based business's buying and ordering processes and how this links to the control of stock and storage methods. Tutors should identify the land-based business or agree it through discussion with the learners. Where possible, to ensure fairness of assessment the size and complexity of the tasks should be the same for all learners. This may be the same as that used to provide evidence for other grading criteria. Evidence could be in the form of a written or presented assignment

For D1, learners must justify the selection and range of customer service skills used for a specific group of customers. Tutors should identify the customer group and learners should be able to reflect on their selection and change them if requested by the learner. This allows greater autonomy of the learning to suit the given situation. Evidence could be in a written format or as tutor observation and consequent reflective diary.

D2 requires learners to evaluate selected displays and space layout and make appropriate recommendations for improvement. Tutors should identify the displays and outlet or agree them through discussion with learners. Where possible, to ensure fairness of assessment the size and complexity of the tasks should be the same for all learners. Learners should provide evidence for at least four displays. Evidence could be as a recommendation document in relation to P4 and P5.

For D3, learners need to make justified and realistic recommendations for improving a selected land-based marketing strategy. Tutors should identify the marketing strategy or agree it through discussion with learners. Where possible, to ensure fairness of assessment the size and complexity of the promotional strategy should be the same for all learners. Evidence could be in the same form as for D2.

D4 requires learners to carry out a critical review of pricing methods in relation to stock control and buying processes for a given land-based business. Tutors should identify the pricing method or agree it with learners. Where possible, to ensure fairness of assessment the size and complexity of the promotional strategy should be the same for all learners. Evidence could be in the same form as for D2.

Programme of suggested assignments

The following table shows a programme of suggested assignments that cover the pass, merit and distinction criteria in the grading grid. This is for guidance and it is recommended that centres either write their own assignments or adapt any Edexcel assignments to meet local needs and resources.

Criteria covered	Assignment title	Scenario	Assessment method
P1, P2, P3, M1, D1	Effective Customer Service: Portfolio of Performance	You are working in a land-based retail outlet (ie pet shop or angling shop) to help improve your customer service skills. Using photographs and/or witness testimonials for three separate customer service sessions reflect on your customer service skills.	Practical observation and assessment. Written evidence/ photographic/verbal. Discussion and summary.
P4, P5, P6, M2, M3, D2	Displaying Items for Sale	Produce a floor plan for a given land-based business detailing the space layout, customer flow and the use of display systems throughout the outlet. Provide overarching text evaluating the display systems and the influence of legislation on how these goods are displayed.	Annotated illustration of a business's floor plan (to scale). Written evaluation and discussion.
P7, P8, P9, M4, D3	Methods of Marketing and Promotion in Land-based Outlets	For two different land-based businesses compare methods of promotion and evaluate marketing strategies used and why these businesses may have used the strategy. Make recommendations to improve one marketing strategy evaluated above.	Written report.
P10, P11, P12, M5, D4	Ordering, pricing and controlling retail stock	For a given business, evaluate the stock control and storage methods used. Explain how a typical business might buy and order stock and review the range of pricing methods used.	Presentation to peers and employers.

Links to National Occupational Standards, other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the BTEC land-based sector suite. This unit has particular links with:

Level 2	Level 3
Presentation and Service for Retailing in the Land-based Sector	Undertake and Review Work- related Experience in the Land-based Industries

Essential resources

Learners should have access to a relevant range of products and materials such as display areas, a cash register, and a chip and pin terminal.

Learners should also have access to a suitable commercial sales environment.

Access to specialist speakers and audio-visual methods that demonstrate selling, credit card fraud, working with cash, body language, display, selling up and other relevant topics should also be available.

Visits to wholesale and retail events and to retailers and wholesalers relevant to their sector would all add relevance to this unit. Research resources should include library facilities, IT and access to specialist publications.

Employer engagement and vocational contexts

The focus of this unit is on practical aspects of customer service and it will provide learners with the knowledge and understanding of a range of customer service and retail skills. Centres are encouraged to create and develop links with local land-based retail outlets and wholesale establishments. This could be via guest lectures, visits, webcams.

Indicative reading for learners

Textbooks

Brittain P and Cox R – *Retailing: An Introduction, 5th Edition* (FT Prentice Hall, 2004) ISBN 9780273678199

Pease A and Pease B – *The Definitive Book of Body Language* (Orion Publishing, 2005) ISBN 9780752858784

Websites

<http://excellencegateway.org.uk>

Excellence Gateway: Customer Care resources

www.bis.gov.uk

Department for Business, Innovation and Skills

www.businesslink.gov.uk

Business Link

www.defra.gov.uk

Department for Environment, Food and Rural Affairs

www.hse.gov.uk

Health and Safety Executive

www.lantra.co.uk

Lantra Sector Skills Council

Delivery of personal, learning and thinking skills (PLTS)

The following table identifies the PLTS opportunities that have been included within the assessment criteria of this unit:

Skill	When learners are ...
Reflective learners	selecting and justifying their use of customer care skills
Team workers	adapting customer care skills and attitude to suit different roles and situations within land-based retail outlets and with a range of different customer groups
Effective participators	making recommendations regarding marketing strategies to a real-life land-based business.

Although PLTS opportunities are identified within this unit as an inherent part of the assessment criteria, there are further opportunities to develop a range of PLTS through various approaches to teaching and learning.

Skill	When learners are ...
Independent enquirers	evaluating and analysing promotion and marketing to make recommendations for improvement
Creative thinkers	proposing alternative customer service skills
Reflective learners	Evaluate learning and retail experiences to inform future progress
Team workers	working in a retail outlet and collaborating with others, working towards the same goals and outcomes of providing effective customer service
Self-managers	working in a retail outlet and dealing with competing pressures, such as stock management and external and internal customers.

● Functional Skills – Level 2

Skill	When learners are ...
ICT – Use ICT systems	
Select, interact with and use ICT systems independently for a complex task to meet a variety of needs	logging in and out of the internet to carry out research on a range of promotional and marketing methods used in other retail businesses
Use ICT to effectively plan work and evaluate the effectiveness of the ICT system they have used	
Manage information storage to enable efficient retrieval	using 'favourites' and 'history' to map their route through research on the internet storing information found in a labelled file
Follow and understand the need for safety and security practices	logging in and out of a computer
Troubleshoot	
ICT – Find and select information	
Select and use a variety of sources of information independently for a complex task	comparing different methods of promotion used by a variety of retail outlets
Access, search for, select and use ICT-based information and evaluate its fitness for purpose	accessing webcams to observe retail space layout and customer flow
ICT – Develop, present and communicate information	
Enter, develop and format information independently to suit its meaning and purpose including: <ul style="list-style-type: none"> • text and tables • images • numbers • records 	producing written assessments using ICT programmes producing a presentation using PowerPoint or an online presentation tool such as photo share for evaluating stock control, ordering and purchasing
Bring together information to suit content and purpose	
Present information in ways that are fit for purpose and audience	producing a presentation using PowerPoint or an online presentation tool such as photo share for evaluating stock control, ordering and purchasing
Evaluate the selection and use of ICT tools and facilities used to present information	
Select and use ICT to communicate and exchange information safely, responsibly and effectively including storage of messages and contact lists	logging in to email account writing an email requesting information regarding promotional methods used and sending to retail businesses. receiving and storing the information to draw upon for assessment

Skill	When learners are ...
Mathematics	
Understand routine and non-routine problems in a wide range of familiar and unfamiliar contexts and situations	
Identify the situation or problem and the mathematical methods needed to tackle it	
Select and apply a range of skills to find solutions	drawing a floor plan to scale to better represent the layout and evaluate the customer flow and display methods used
Use appropriate checking procedures and evaluate their effectiveness at each stage	
Interpret and communicate solutions to practical problems in familiar and unfamiliar routine contexts and situations	
Draw conclusions and provide mathematical justifications	
English	
Speaking and listening – make a range of contributions to discussions and make effective presentations in a wide range of contexts	providing customer care, listening to the needs and requirements of different customer groups. presenting conclusions drawn in relation to business promotional and marketing methods used and making recommendations to employers
Reading – compare, select, read and understand texts and use them to gather information, ideas, arguments and opinions	reading and evaluating the influence of legislation on display items
Writing – write documents, including extended writing pieces, communicating information, ideas and opinions, effectively and persuasively	completing a written reflective aspect of the practical diary completing a written assessment of the analysis carried out on space layout and customer flow.