

Candidate Logbook

SVQ

SVQ3 in Retail (Sales Professional) at SCQF Level 6

December 2011

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Contents

Section 1: SVQ3 in Retail (Sales Professional) at SCQF Level 6	1
Introduction	1
National Occupational Standards and SVQs	1
Which SVQs in Retail Skills/Retail are available?	1
Who is this SVQ for?	2
What progression opportunities does this SVQ offer me?	2
What is the structure of the SVQ3 in Retail (Sales Professional) at SCQF Level 6?	3
Section 2: Examples of forms	9
Collecting your evidence	9
Example form 1 – Portfolio title page	11
Example form 2 – Personal profile	13
Example form 3 – Contents checklist	15
Example form 4 – Index of evidence	17
Example form 5 – Unit assessment plan	19
Example form 6 – Unit sign-off record	21
Example form 7 – Work Log	23
Example form 8 – Observation record	25
Example form 9 – Witness testimony	27
Example form 10 – Expert witness evidence record	29
Example form 11 – Record of questions and candidate's answers	31
Section 3: Logbook	33
Mandatory units	35
Unit 1: Work effectively in your retail organisation	37
Optional units	53
Unit 2: Process part-exchange sales transactions in a retail environment	55
Unit 3: Develop individual retail service opportunities	71
Unit 4: Provide a personalised sales and after-sales service to your retail clients	83

Unit 5:	Help customers to choose specialist products in a retail environment	95
Unit 6:	Demonstrate specialist products to customers in a retail environment	105
Unit 7:	Organise the receipt and storage of goods in a retail environment	113
Unit 8:	Audit stock levels and stock inventories in a retail environment	129
Unit 9:	Monitor and help improve food safety in a retail environment	141
Unit 10:	Help customers to choose alcoholic beverages in a retail store	153
Unit 11:	Assist customers to obtain appropriate insurance	161
Unit 12:	Source required goods and services in a retail environment	185
Unit 13:	Maintain the availability of goods for sale to customers in a retail environment	199
Unit 14:	Help to manage a retail team	215
Unit 15:	Contribute to the continuous improvement of retail operations	225
Unit 16:	Plan, monitor and adjust staffing levels and schedules in a retail environment	239
Unit 17:	Develop productive working relationships with colleagues	251
Unit 18:	Enable customers to apply for credit and hire purchase facilities	265
Unit 19:	Monitor and support secure till use during trading hours	281
Unit 20:	Monitor and evaluate the quality of service provided to your customers by external suppliers	289
Unit 21:	Organise the delivery of reliable customer service	301
Unit 22:	Improve the customer relationship	315
Unit 23:	Work with others to improve customer service	329
Unit 24:	Monitor and solve customer service problems	343
Unit 25:	Promote continuous improvement	357
Unit 26:	Help to monitor and maintain the security of the retail unit	371
Unit 27:	Promote the store's credit card to customers	381
Unit 28:	Help customers to apply for the store's credit card and associated insurance products	389
Unit 29:	Provide the lingerie fitting service in a retail environment	403
Unit 30:	Provide service to customers in the dressing room of a retail store	419
Unit 31:	Process bake-off products for sale in a retail environment	433

Unit 32:	Process greengrocery products for sale in a retail environment	443
Unit 33:	Finish meat products by hand in a retail environment	455
Unit 34:	Hand-process fish in a retail environment	469
Unit 35:	Contribute to the control and efficiency of dough production in a retail environment	477
Unit 36:	Select, weigh and measure bakery ingredients	489
Unit 37:	Hand divide, mould and shape fermented doughs	503
Unit 38:	Promote sales of food or drink products by offering samples to customers	515
Unit 39:	Help customers to choose delicatessen products in a retail outlet	523
Unit 40:	Portion delicatessen products in a retail outlet to meet individual customers' requirements	531
Unit 41:	Establish customer needs and provide advice regarding tiling products	539
Unit 42:	Advise customers upon measuring and planning for the fixing of tiles	549
Unit 43:	Advise customers upon the fixing of tiles	557
Unit 44:	Promote beauty products to retail customers	567
Unit 45:	Cash up in a retail store	581

Section 1: SVQ3 in Retail (Sales Professional) at SCQF Level 6

Introduction

This document contains information specific to the SVQ3 in Retail (Sales Professional) at SCQF Level 6.

National Occupational Standards and SVQs

The standards, Assessment Strategy and qualification structures for the SVQ3 in Retail (Sales Professional) at SCQF Level 6 are owned by Skillsmart Retail, who reviewed these National Occupational Standards. The SVQs have been developed from the National Occupational Standards.

The SVQ3 in Retail (Sales Professional) at SCQF Level 6 gives recognition of candidates' skills, knowledge and understanding. It allows candidates to gain a qualification in the workplace that relates to their job and promotes good working practice.

You can contact the Sector Skills Council (SSC) at:

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SVQs are designed to be assessed in the workplace, or in conditions resembling the workplace. However, simulation of real working practice might be permitted. Where this is allowed it will be shown in the individual units, within the standards that are in this logbook.

Simulation must be carried out in conditions resembling the workplace. These conditions are described as being a 'realistic working environment' (RWE).

Which SVQs in Retail Skills/Retail are available?

The SVQ in Retail Skills is available as follows:

SVQ1 in Retail Skills at SCQF Level 4

SVQ2 in Retail Skills at SCQF Level 5

SVQ3 in Retail (Sales Professional) at SCQF Level 6

SVQ3 in Retail (Visual Merchandising) at SCQF Level 6

SVQ3 in Retail (Management) at SCQF Level 6

It is important that you select the most appropriate level related to your work role.

Who is this SVQ for?

The SVQ3 in Retail (Sales Professional) at SCQF Level 6

The SVQ3 in Retail (Sales Professional) at SCQF Level 6 is based on the National Occupational Standards (NOS) developed by Skillsmart Retail and is intended for individuals who work in the retail sector. These individuals may be working as:

- retail sales people
- retail assistants
- counter assistants
- stockroom/warehouse assistants
- visual merchandisers
- cash point operators
- managers in all of the above roles.

What progression opportunities does this SVQ offer me?

Candidates may progress within their own employment, from a supervisory role to line management. They can also progress to:

- the Edexcel BTEC Level 3 Award, Certificate and Diploma in Retail Knowledge (QCF)
- the SVQ3 in Management at SCQF Level 7
- the Edexcel BTEC Level 3 Award and Certificate in Management (QCF)
- the Edexcel BTEC Level 3 Diploma and Extended Diploma in Business (Management) (QCF)
- the Edexcel BTEC Level 3 Award/Certificate in Management (QCF)
- the SVQ4 (at SCQF Level 9) in Management
- the Edexcel BTEC Level 4 HNC Diploma and Level 5 HND Diploma in Business (Management) (QCF)
- the Edexcel BTEC Level 5 Award/Certificate/Diploma in Management and Leadership (QCF).

What is the structure of the SVQ3 in Retail (Sales Professional) at SCQF Level 6?

To achieve the whole qualification at Level 6, you must prove competence in six units.

This comprises:

- one mandatory unit
- four units chosen from any of the Groups A, B, C, D, E, F, G, H and I
- one further unit from Group A, B, C, D, E, F, G, H, I or J.

Mandatory unit for the SVQ3 in Retail (Sales Professional) at SCQF Level 6

You must achieve unit the listed below:

Unit number	Unit code	Title	Unit credit	SCQF level
1	E.08	Work effectively in your retail organisation	9	6

Optional units for the SVQ3 in Retail (Sales Professional) at SCQF Level 6

You must achieve:

- four units chosen from any of the Groups A, B, C, D, E, F, G, H or I
- one further unit from Group A, B, C, D, E, F, G, H, I or J.

Group A - Sales

Unit number	Unit code	Title	Unit credit	SCQF level
2	C.07	Process part-exchange sales transactions in a retail environment	12	6
3	C.30	Develop individual retail service opportunities	6	6
4	C.31	Provide a personalised sales and after-sales service to your retail clients	8	6
5	C.56	Help customers to choose specialist products in a retail environment	7	6
6	C.57	Demonstrate specialist products to customers in a retail environment	5	6

Group B - Stock management

Unit number	Unit code	Title	Unit credit	SCQF level
7	B.14	Organise the receipt and storage of goods in a retail environment	11	7
8	B.15	Audit stock levels and stock inventories in a retail environment	6	7

Group C - Product expertise (food and drink)

Unit number	Unit code	Title	Unit credit	SCQF level
9	B.22	Monitor and help improve food safety in a retail environment	12	6
10	C.45	Help customers to choose alcoholic beverages in a retail store	6	6
11	C.38	Assist customers to obtain appropriate insurance	12	6

Group D - Sourcing

Unit number	Unit code	Title	Unit credit	SCQF level
12	B.16	Source required goods and services in a retail environment	10	7

Group E - Merchandising

Unit number	Unit code	Title	Unit credit	SCQF level
13	C.13	Maintain the availability of goods for sale to customers in a retail environment	11	6

Group F - Management and leadership

Unit number	Unit code	Title	Unit credit	SCQF level
14	E.09	Help to manage a retail team	11	6
15	E.10	Contribute to the continuous improvement of retail operations	10	6
16	E.12	Plan, monitor and adjust staffing levels and schedules in a retail environment	11	7
17	E.15	Develop productive working relationships with colleagues	9	6

Group G - Finance and administration

Unit number	Unit code	Title	Unit credit	SCQF level
18	C.15	Enable customers to apply for credit and hire purchase facilities	12	6
19	E.21	Monitor and support secure till use during trading hours	3	6

Group H - Customer service

Unit number	Unit code	Title	Unit credit	SCQF level
20	E.17	Monitor and evaluate the quality of service provided to your customers by external suppliers	9	6
21	D.13*	Organise the delivery of reliable customer service	6	6
22	D.14*	Improve the customer relationship	7	6
23	D.15*	Work with others to improve customer service	8	6
24	D.16*	Monitor and solve customer service problems	6	6
25	D.17*	Promote continuous improvement	7	7

**Only one unit can count towards the qualification when chosen from Units D.13, D.14, D.15, D.16 and SCQF level 7 unit D.17*

Group I - Organisational effectiveness

Unit number	Unit code	Title	Unit credit	SCQF level
26	E.11	Help to monitor and maintain the security of the retail unit	11	6

Group J - Optional SCQF Level 5 units

Unit number	Unit code	Title	Unit credit	SCQF level
Sales				
27	C.47	Promote the store's credit card to customers	3	5
28	C.52	Help customers to apply for the store's credit card and associated insurance products	4	5
Product expertise (clothing and footwear)				
29	C.17	Provide the lingerie fitting service in a retail environment	8	5
30	C.48	Provide service to customers in the dressing room of a retail store	1	5
Product expertise (food and drink)				
31	B.10	Process bake-off products for sale in a retail environment	6	5
32	B.12	Process greengrocery products for sale in a retail environment	9	5
33	B.13	Finish meat products by hand in a retail environment	9	5
34	B.31	Hand-process fish in a retail environment	8	5
35	B.32	Contribute to the control and efficiency of dough production in a retail environment	4	5
36	B.33	Select, weigh and measure bakery ingredients	6	5
37	B.34	Hand divide, mould and shape fermented doughs	6	5
38	C.49	Promote sales of food or drink products by offering samples to customers	2	5
39	C.54	Help customers to choose delicatessen products in a retail outlet	6	5
40	C.55	Portion delicatessen products in a retail outlet to meet individual customers' requirements	6	5
Product expertise (home and garden)				
41	C.40	Establish customer needs and provide advice regarding tiling products	6	5
42	C.41	Advise customers upon measuring and planning for the fixing of tiles	6	5
43	C.42	Advise customers upon the fixing of tiles	6	5

Group J - SCQF Level 5 units (*continued ...*)

Unit number	Unit code	Title	Unit credit	SCQF level
Product expertise (other)				
44	C.35	Promote beauty products to retail customers	10	5
Finance and administration				
45	C.46	Cash up in a retail store	2	5

Section 2: Examples of forms

Collecting your evidence

This section contains examples of the forms you, your assessor and the internal verifier will use while you are undertaking your SVQ3 in Retail (Sales Professional) at SCQF Level 6.

The forms are:

- Form 1: Portfolio title page
- Form 2: Personal profile
- Form 3: Contents checklist
- Form 4: Index of evidence
- Form 5: Unit assessment plan
- Form 6: Unit sign-off record
- Form 7: Work Log
- Form 8: Observation record
- Form 9: Witness testimony
- Form 10: Expert witness evidence record
- Form 11: Record of questions and candidate's answers.

You should ask your assessor for further advice and support if you are still unsure about how to use the forms and who should complete them.

Example form 1 – Portfolio title page

Name:	
Job title:	
Name of employer/training provider/college:	
Their address:	
Postcode:	
Telephone number (Home):	(Work):
Email address:	Fax number:
SVQ:	
Level:	
Units submitted for assessment:	
Mentor/Supervisor:	
(Please provide details of mentor's/supervisor's experience):	
Assessor:	Date:

Example form 2 – Personal profile

Name:	
Address:	
Postcode:	
Telephone number (Home):	(Work):
Email address:	Fax number:
Job title:	
Relevant experience	
Description of your current job:	
Previous work experience or attach copy of a current CV:	
Qualifications and training and/or attach copy of a current CV:	

continued overleaf...

Voluntary work/interests:	
Name of employer/training provider/college:	
Address:	
Postcode:	
Telephone number (work):	Fax number:
Email address:	
Type of business, if employer:	
Number of staff:	
Structure of organisation (including chart or diagram if available):	

Example form 3 – Contents checklist

SVQ title:		
Candidate:		
	Completed?	Page/section number
Title page for the portfolio		
Personal profile • your own personal details • a brief CV or career profile • description of your job • information about your employer/training provider/college		
Summary of the units		
Completed units • signed by yourself, your assessor and the internal verifier (where relevant) • reference numbers included • unit assessment plans		
Unit progress records		
Index of evidence (with cross-referencing information completed)		
Evidence (with reference numbers) • observation records • details of witnesses (witness testimony sheets) • personal statements		

Example form 4 – Index of evidence

[illegible]

Example form 5 – Unit assessment plan

SVQ title:				
Unit:				
Candidate:			Assessor:	
Normal working activities performed				
	TYPICAL EVIDENCE	WORK AREA	EXPECTED COMPLETION DATE	LINKS TO OTHER UNITS/ELEMENTS
ELEMENT:				
ELEMENT:				
ELEMENT:				
Activities needing to be performed				
ELEMENT:				
ELEMENT:				
ELEMENT:				
Additional comments				
Assessor's signature:			Date:	
Candidate's signature:			Date:	

Example form 6 – Unit sign-off record

SVQ title and level:									
Candidate:									
Assessor:									
To achieve the whole qualification, you must prove competence in Xxx mandatory units and Xxx optional units.									
Unit checklist: list here the units you will be undertaking, then circle the reference number of each unit as you complete it.									
Mandatory									
Optional									

Mandatory units			
Unit number	Title	Assessor's signature	Date

continued overleaf...

Example form 7 – Work Log

SVQ title and level:				
Unit/element(s):				
Candidate:				
Purpose of statement:				
Evidence index number:				
Date	Evidence index number	Details of statement	Links to other evidence <i>(enter numbers)</i>	Units, elements and PCs covered
Candidate's signature:			Date:	
Assessor's signature:			Date:	

Example form 8 – Observation record

SVQ title and level:	
Unit/element(s):	
Candidate:	Date of observation:
Evidence index number:	
Skills/activities observed:	PCs and range covered:
Knowledge and understanding apparent from this observation:	
Other units/elements to which this evidence may contribute:	
Assessor comments and feedback to candidate:	
I can confirm the candidate's performance was satisfactory.	
Assessor's signature:	Date:
Candidate's signature:	Date:

Example form 9 – Witness testimony

SVQ title and level:	
Candidate name:	
Evidence index number:	
Where applicable, evidence number to which this testimony relates:	
Unit:	
Element(s):	
Range:	
Date of evidence:	
Witness name:	
Relationship to candidate:	
Details of testimony:	
I can confirm the candidate's evidence is authentic and accurate.	
Witness signature:	
Name:	Date:
Contact telephone number:	
Please tick (✓) the appropriate box.	
☐	QUALIFIED AS AN ASSESSOR FOR WORKPLACE PERFORMANCE
☐	FAMILIAR WITH THE SVQ STANDARDS TO WHICH THE CANDIDATE IS WORKING

Example form 10 – Expert witness evidence record

SVQ title and level:	
Candidate name:	
Evidence index number:	
Where applicable, evidence number to which this testimony relates:	
Unit:	
Element(s):	
Date of evidence:	
Expert witness name:	
Relationship to candidate:	
Details of testimony:	
I can confirm the candidate's evidence is authentic and accurate.	
Expert witness signature:	
Name:	Date:
Contact telephone number:	

<i>Please tick (✓) the appropriate box.</i>	
☐	QUALIFIED AS AN ASSESSOR FOR WORKPLACE PERFORMANCE
☐	RELEVANT PROFESSIONAL WORK ROLE THAT INVOLVES EVALUATING EVERYDAY STAFF PRACTICE
☐	CURRENT EXPERTISE
☐	FAMILIAR WITH THE SVQ STANDARDS TO WHICH THE CANDIDATE IS WORKING

Example form 11 – Record of questions and candidate's answers

SVQ title and level:	
Candidate name:	
Unit:	Element(s):
Evidence index number:	
Circumstances of assessment:	
List of questions and candidate's responses:	
Q:	
A:	
Q:	
A:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Section 3: Logbook

	Page number
Mandatory units	35
Unit 1: Work effectively in your retail organisation	37
Optional units	53
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Unit 37:	Hand divide, mould and shape fermented doughs	503
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Unit 39:	Help customers to choose delicatessen products in a retail outlet	523
Unit 40:	Portion delicatessen products in a retail outlet to meet individual customers' requirements	531
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Unit 42:	Advise customers upon measuring and planning for the fixing of tiles	549
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Mandatory units

Unit 1: Work effectively in your retail organisation

Unit code: E.08

Unit credit: 9

Unit level: 6

Introduction

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

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Support effective team working in a retail environment - you need to know and understand: K1.1 your team's purpose, aims and targets K1.2 your responsibility for contributing to the team's success K1.3 your colleagues' roles and main responsibilities K1.4 the importance of sharing work fairly with colleagues K1.5 the factors that can affect your own and colleagues' willingness to carry out work, including skills and existing workload K1.6 the importance of being a reliable team member K1.7 the factors to take account of when making commitments, including your existing workload and the degree to which interruptions and changes of plan are within your control K1.8 the importance of maintaining team morale, the circumstances when morale is likely to flag, and the kinds of encouragement and support that are likely to be valued by colleagues K1.9 the importance of good working relations, and techniques for removing tension between colleagues K1.10 the importance of following the company's policies and procedures for health and safety, including setting a good example to colleagues		

Knowledge	Type of evidence	Date
2. Help to plan and organise your own learning in a retail environment - you need to know and understand: K2.1 who can help you set goals, help you plan your learning, and give you feedback about your progress K2.2 how to identify the knowledge and skills you will need to achieve your goals K2.3 how reflecting on your past learning experiences can help you to plan your future learning, and techniques for doing so K2.4 how to work out how much time you need to devote to learning and how much time you can make available for learning K2.5 how often to check your progress and how to do this K2.6 how to adjust your plans as needed to help you meet your goals K2.7 why you should ask for feedback on your progress, how to do so, and how to respond positively		
3. Help others to learn in a retail environment - you need to know and understand: K3.1 your role in helping others to learn in the workplace K3.2 how to work out what skills and knowledge you can usefully share with others K3.3 how and when to offer help and advice to colleagues who are learning K3.4 methods of helping others to learn on the job, and how to choose suitable methods for different learning situations K3.5 health, safety and security risks that are likely to arise when people are learning on the job, and how to reduce these risks K3.6 sources of help within your organisation for people who are learning, and how to access them		

Additional evidence (if applicable):

COLUMN KEY:	O = DIRECT OBSERVATION OF THE LEARNER’S PERFORMANCE BY THEIR ASSESSOR	PD = PROFESSIONAL DISCUSSION
	Q&A = OUTCOMES FROM ORAL OR WRITTEN QUESTIONING	A = ASSIGNMENT, PROJECT/CASE STUDIES
	P = PRODUCTS OF THE LEARNER’S WORK	WT = AUTHENTIC STATEMENTS/WITNESS TESTIMONY
	RA = PERSONAL STATEMENTS AND/OR REFLECTIVE ACCOUNTS	EPW = EXPERT WITNESS TESTIMONY
	S = OUTCOME FROM SIMULATION, WHERE PERMITTED BY THE ASSESSMENT STRATEGY	RPL = EVIDENCE OF RECOGNITION OF PRIOR LEARNING

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational Standards.

Candidate signature: _____ Date: _____

I confirm that the candidate has achieved all the requirements of this Unit.

Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Element 1 : Support effective team working in a retail environment

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.6 follow the company's health and safety procedures as you work						

Additional evidence (if applicable):

COLUMN KEY:	O = DIRECT OBSERVATION OF THE LEARNER'S PERFORMANCE BY THEIR ASSESSOR	PD = PROFESSIONAL DISCUSSION
	Q&A = OUTCOMES FROM ORAL OR WRITTEN QUESTIONING	A = ASSIGNMENT, PROJECT/CASE STUDIES
	P = PRODUCTS OF THE LEARNER'S WORK	WT = AUTHENTIC STATEMENTS/WITNESS TESTIMONY
	RA = PERSONAL STATEMENTS AND/OR REFLECTIVE ACCOUNTS	EPW = EXPERT WITNESS TESTIMONY
	S = OUTCOME FROM SIMULATION, WHERE PERMITTED BY THE ASSESSMENT STRATEGY	RPL = EVIDENCE OF RECOGNITION OF PRIOR LEARNING

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational Standards.

Candidate signature: _____ Date: _____

I confirm that the candidate has achieved all the requirements of this Unit.

Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

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

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 discuss and agree with the right people goals that are relevant, realistic and clear						
P2.2 identify the knowledge and skills you will need to achieve your goals						
P2.3 agree action points and deadlines that are realistic, taking account of your past learning experiences and the time and resources available for learning						
P2.4 regularly check your progress and, when necessary, change the way you work						
P2.5 ask for feedback on your progress from those in a position to give it, and use their feedback to improve your performance						

Additional evidence (if applicable):

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Element 3: Help others to learn in a retail environment

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.1 encourage colleagues to ask you for work-related information or advice that you are likely to be able to provide						
P3.2 notice when colleagues are having difficulty performing tasks at which you are competent, and tactfully offer advice						
P3.3 give clear, accurate and relevant information and advice relating to tasks and procedures						
P3.4 explain and demonstrate procedures clearly, accurately and in a logical sequence						
P3.5 encourage colleagues to ask questions if they don't understand the information and advice you give them						
P3.6 give colleagues opportunities to practise new skills, and give constructive feedback						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.7 check that health, safety and security are not compromised when you are helping others to learn						
P3.8 recognise when you are not the most appropriate person to advise colleagues in their learning and guide them to suitable sources of help						

Additional evidence (if applicable):

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Optional units

Unit 2: Process part-exchange sales transactions in a retail environment

Unit code: C.07

Unit credit: 12

Unit level: 6

Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Decide on the value of items offered in part exchange by retail customers - you need to know and understand: K1.1 the type and quality of items you can accept in part exchange K1.2 relevant aspects of the law relating to ownership and re-sale of goods K1.3 how to check that items are clean and operate normally, including different kinds of checks and when to use them K1.4 the potential for re-selling the item offered in part exchange K1.5 the company's pricing policy for part-exchange items K1.6 the benefits to the customer of part-exchange arrangements K1.7 how to treat the customer politely, including telling the customer the item cannot be accepted in part exchange		
2. Negotiate part-exchange sales transactions with retail customers - you need to know and understand: K2.1 company policies and procedures for checking who owns the item K2.2 what might happen if you do not check ownership properly K2.3 the terms and conditions of sale for items the store buys K2.4 how to deal with customer objections		

Knowledge	Type of evidence	Date
2. Negotiate part-exchange sales transactions with retail customers - you need to know and understand:		
K2.5 how to treat the customer politely during negotiations		
K2.6 how to fill in the paperwork when buying part-exchange items		
3. Provide service at point of sale in a retail store - you need to know and understand:		
K3.1 how to keep cash and other payments secure		
K3.2 the types of payment that you are authorised to receive		
K3.3 procedures for authorising non-cash transactions		
K3.4 how to check for and identify counterfeit payments		
K3.5 how to check for stolen cash equivalents		
K3.6 how to deal with customers offering suspect payments		
K3.7 relevant legal rights, duties and responsibilities		
K3.8 company procedures for taking payments		
K3.9 company procedures for dealing with suspected fraud		

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

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

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

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Element 2: Negotiate part-exchange sales transactions with retail customers

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 follow company policies and procedures for checking who owns the item						
P2.2 work out accurately the balance the customer should pay on the item they want to buy						
P2.3 accept or refuse the customer's offers according to company policies and the discretion you are allowed						
P2.4 end the transaction politely if the customer is not willing to go ahead						
P2.5 explain clearly and accurately the terms and conditions of the sale						
P2.6 fill in the paperwork for the transaction						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.7 treat the customer politely throughout negotiations						

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Element 3: Provide service at point of sale in a retail store

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.1 tell customers the correct amount to pay						
P3.2 check accurately the amount and means of payment offered by the customer						
P3.3 where the payment is acceptable, process the payment in line with company procedures						
P3.4 tell the customer tactfully when payment cannot be approved						
P3.5 offer additional services to the customer where these are available						
P3.6 treat customers politely throughout the payment process						
P3.7 balance the need to give attention to individual customers with the need to acknowledge customers who are waiting for help						

Additional evidence (if applicable):

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Unit 3: Develop individual retail service opportunities

Unit code: C.30

Unit credit: 6

Unit level: 6

Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge		Type of evidence	Date
1. Make plans for finding new retail clients - you need to know and understand:			
K1.1	your sales targets and when you should achieve them by		
K1.2	client profiles relevant to the brands and services you are personally responsible for selling		
K1.3	the number and types of clients you are likely to need in order to meet your sales targets		
K1.4	company policies and procedures for developing business relationships with clients		
K1.5	how best to balance your time between finding new clients and selling to existing clients		
K1.6	how often to review your progress in finding new clients		
K1.7	how to measure your progress in ways that help you decide if you need to change your approach		
K1.8	when and how you should report your progress to your manager		
2. Market your service to potential retail clients - you need to know and understand:			
K2.1	the type of business relationships you need to create with potential clients		
K2.2	the image your company wants to promote to customers		
K2.3	the difference between features and benefits		
K2.4	the features and benefits of the service you provide		
K2.5	how to talk to potential clients in a persuasive way about your service		
K2.6	how to find out about competitors' services		

Knowledge	Type of evidence	Date
2. Market your service to potential retail clients - you need to know and understand: K2.7 how to compare competitors' services with yours, so that potential clients can understand how using your service would benefit them K2.8 how to identify suitable opportunities for approaching potential clients K2.9 how to approach potential clients in a way that creates a positive impression of you and your company and is likely to help create a business relationship K2.10 how to create a rapport quickly with prospective clients K2.11 the information you need to exchange with potential clients K2.12 why you need to keep any promises you make to potential clients, for example sending them information they have asked for K2.13 how to record information about potential clients so that you can use it effectively K2.14 why client confidentiality is important to the business relationship K2.15 relevant aspects of the data protection laws and company policy to do with client confidentiality		

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Element 1: Make plans for finding new retail clients

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

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

Additional evidence (if applicable):

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Element 2: Market your service to potential retail clients

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 spot suitable opportunities to approach potential clients						
P2.2 approach potential clients in a way that projects your company's image effectively and is likely to help create a business relationship						
P2.3 quickly create a rapport with potential clients						
P2.4 talk to potential clients in a persuasive way about your services						
P2.5 compare your service with competitors' services in ways that make clear the advantages of your service while being honest and fair						
P2.6 exchange relevant information with potential clients when appropriate						
P2.7 record client information promptly, accurately and in a way that allows you to use the information effectively						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.8 store and use client information in line with data protection laws and company policy						
P2.9 when it is not possible to keep promises to potential clients, tell them promptly and offer any other suitable information or help						

Additional evidence (if applicable):

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Unit 4: Provide a personalised sales and after-sales service to your retail clients

Unit code: C.31

Unit credit: 8

Unit level: 6

Introduction

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

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

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Provide a personalised service to retail clients - you need to know and understand: K1.1 what consultative selling is, and how this is different from other kinds of retail selling K1.2 your company's desired image and how to project this to clients K1.3 how to use information in client records to prepare for client visits K1.4 how to create and maintain a rapport with clients, both new and existing K1.5 the types of question to ask clients to find out about their buying needs, preferences and priorities K1.6 when and how to ask clients tactfully how much they want to spend K1.7 how to keep yourself informed about the brands and services you are expected to sell, including: • seasonal trends • new brands or services • promotions • stock levels • competitor comparisons • additional services such as store cards, gift wrapping or delivery K1.8 how to relate the features and benefits of products or services to the client's needs K1.9 how to identify suitable opportunities to sell additional or related products		

Knowledge	Type of evidence	Date
1. Provide a personalised service to retail clients - you need to know and understand:		
K1.10 how to make recommendations to clients in a way that encourages them to take your advice, without pressurising them		
K1.11 why you need to balance the need to make immediate sales with the need to maintain good business relations with the client, and how to do so		
K1.12 the company's customer service standards and how to apply these when providing a personalised service to clients		
2. Provide an after-sales service to retail clients - you need to know and understand:		
K2.1 why you need to keep client records up to date and store them correctly		
K2.2 company procedures for updating client records		
K2.3 company systems and procedures for recording and storing client information		
K2.4 relevant aspects of the data protection laws and company policy for client confidentiality		
K2.5 why you should keep to clients' wishes as to how and when you may contact them		
K2.6 why you need to keep your promises to clients		

Additional evidence (if applicable):
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Element 1: Provide a personalised service to retail clients

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 use available information in the client records to help you prepare for consultations						
P1.2 before starting a consultation, check that the work area is clean and tidy and that all the equipment you need is to hand						
P1.3 quickly create a rapport with the client at the start of the consultation						
P1.4 talk and behave towards the client in ways that project the company image effectively						
P1.5 ask questions that encourage the client to tell you about their buying needs, preferences and priorities						
P1.6 where appropriate, tactfully check how much the client wants to spend						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.7 explain clearly to the client the features and benefits of the products or services you are recommending and relate these to the client's individual needs						
P1.8 identify suitable opportunities to sell additional or related products or services that are suited to the client's needs						
P1.9 make recommendations to the client in a confident and polite way and without pressurising them						
P1.10 pace client consultations so you make good use of your selling time while maintaining good relations with the client						
P1.11 meet your company's customer service standards in your dealings with the client						

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Element 2: Provide an after-sales service to retail clients

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

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

Additional evidence (if applicable):

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Unit 5:	Help customers to choose specialist products in a retail environment
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Unit code:	C.56
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Unit credit:	7
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Unit level:	6
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Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Help customers to choose specialist products in a retail environment - you need to know and understand: K1.1 your company's brand values in relation to its product offer, pricing and service K1.2 how your company compares with its competitors on product offer, pricing and service K1.3 the customer profiles for your store K1.4 the elements of a positive customer experience in relation both to your company and to the products you sell K1.5 how customers' circumstances, such as who they are with or the time of day, affect their willingness to engage in conversation with a salesperson K1.6 how to recognise from customers' body language whether they are likely to respond positively to an approach from a salesperson K1.7 how to establish and maintain a rapport with individual customers K1.8 the meaning of specialist terminology that knowledgeable customers are likely to use in relation to the products you sell K1.9 how the products you sell are produced or obtained, and how these methods affect the nature and quality of the products K1.10 any legal restrictions relating to the products you sell, such as where the products come from or who can buy or use the products, and how to explain these to customers K1.11 any health and safety considerations that customers must be warned about, or are likely to ask about, in relation to the products you sell		

Knowledge	Type of evidence	Date
1. Help customers to choose specialist products in a retail environment - you need to know and understand: K1.12 any ethical and environmental concerns that customers are likely to have about the products you sell, and how to address these K1.13 what related products are available from your organisation that would enhance customers' experience of the products you sell K1.14 sources of up-to-date production information and how to access and use these K1.15 the sources of after-sales advice and support that are available to customers K1.16 the customer's legal rights and the organisation's policy concerning returns K1.17 the importance of maintaining your own enthusiasm for the products you sell K1.18 how to search for and evaluate opportunities to maintain your enthusiasm for the products you sell		

Additional evidence (if applicable):
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Candidate signature: _____ Date: _____

I confirm that the candidate has achieved all the requirements of this Unit.

Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Element 1: Help customers to choose specialist products in a retail environment

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

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

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

Additional evidence (if applicable):

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Countersigning assessor signature (if applicable): _____ Date: _____

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Unit 6:	Demonstrate specialist products to customers in a retail environment
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Unit code:	C.57
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Unit credit:	5
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Unit level:	6
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Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Demonstrate specialist products to customers in a retail environment - you need to know and understand: K1.1 how demonstrations can help to promote and sell specialist products K1.2 the elements of a positive customer experience in relation both to your company and to the specialist products you demonstrate to customers K1.3 how customers' circumstances, such as who they are with or the time of day, affect their willingness to watch or take part in a product demonstration K1.4 how to recognise from customers' body language whether they are likely to respond positively to an invitation to watch or take part in a product demonstration K1.5 how to establish a rapport with individual customers and maintain this throughout a product demonstration K1.6 the health and safety requirements that apply to the demonstrations you give K1.7 what constitutes a smoothly run and efficient product demonstration K1.8 how to keep customers interested during product demonstrations K1.9 how to respond to customers' comments and questions during demonstrations in ways that promote sales and goodwill K1.10 the steps you are authorised to take to minimise the security risks associated with product demonstrations		

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Element 1: Demonstrate specialist products to customers in a retail environment

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

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

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.6 respond to customers' comments and questions during demonstrations in ways that promote sales and goodwill						
P1.7 take the necessary steps, within the limits of your own authority, to minimise any security risks associated with the demonstrations you carry out						

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

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Countersigning internal verifier (if applicable): _____ Date: _____

Unit 7: **Organise the receipt and storage of goods in a retail environment**

Unit code: B.14

Unit credit: 11

Unit level: 7

Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Organise staff to receive and check incoming deliveries in a retail environment - you need to know and understand: K1.1 how to prepare to receive and handle different types of goods K1.2 procedures for receiving goods, including dealing with incorrect, damaged and late deliveries K1.3 which staff are involved in or are affected by a delivery schedule and the information they need to receive goods efficiently K1.4 the company's standards for acceptable goods K1.5 why incoming goods must be checked against requirements straight after unloading K1.6 recording and control system including procedures for checking goods received K1.7 safety and security procedures for receiving goods		
2. Organise and maintain storage facilities in a retail environment - you need to know and understand: K2.1 how effective storage systems contribute to reducing stock loss K2.2 how to work out what storage facilities are needed for goods on order K2.3 how to protect goods from various causes of deterioration and damage K2.4 how to work out suitable storage layouts and solve storage problems efficiently, safely and securely K2.5 how to run the stock recording and controlling systems efficiently and accurately, including using them to monitor and record stock loss K2.6 the legal requirements for storing stock, including health and safety requirements		

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

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

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Countersigning internal verifier (if applicable): _____ Date: _____

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

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 gather enough competent staff and brief them well enough before deliveries are received						
P1.2 make sure that the area for receiving goods is prepared and that you have enough storage space for the delivery						
P1.3 check that deliveries are unloaded safely and securely						
P1.4 make sure that goods are promptly checked against requirements						
P1.5 make sure that delivery records are complete and accurate and processed promptly						
P1.6 use delivery records to check that each supplier has met your company's service needs						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.7 spot problems with deliveries and sort them out properly						

Additional evidence (if applicable):

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Element 2: Organise and maintain storage facilities in a retail environment

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 organise storage facilities to take account of day-to-day work, safety requirements and the need to keep goods secure and in a saleable condition						
P2.2 give staff accurate, up-to-date information and suitable training so they can use the storage system securely, safely and in line with relevant legal requirements						
P2.3 give staff clear roles and responsibilities for storing and moving goods and check they understand these roles and responsibilities						
P2.4 develop and update plans to cope with unforeseen storage problems						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.5 check regularly that staff are storing and moving goods competently, safely, securely and in line with relevant legal requirements						
P2.6 keep complete, accurate and up-to-date stock records that can be found easily by everyone who needs them						

Additional evidence (if applicable):

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Internal verifier signature: _____ Date: _____

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

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

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

Additional evidence (if applicable):

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Unit 8: **Audit stock levels and stock inventories in a retail environment**

Unit code: B.15

Unit credit: 6

Unit level: 7

Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Put an audit programme into practice in a retail environment - you need to know and understand: K1.1 why it is important to audit levels of stock inventories K1.2 how often you need to carry out audits K1.3 the information held in the stock inventory and how to access it K1.4 how to interpret information and correct mistakes in the stock inventory K1.5 the types of situation that can make it difficult to carry out an effective audit in the time available, and how to prevent them K1.6 the resources you need to be able to carry out an audit K1.7 when and how to tell colleagues that an audit is to take place, and how it is likely to affect colleagues' work K1.8 how to choose people to help you with the audit and give them responsibilities K1.9 how to explain to your audit team what their responsibilities are during the audit and how you want these responsibilities to be carried out K1.10 how to check on the progress of the audit		
2. Report the findings of a retail stock audit - you need to know and understand: K2.1 how to organise audit findings so that problems can be easily identified K2.2 methods for spotting problems in audit findings		

Knowledge	Type of evidence	Date
2. Report the findings of a retail stock audit - you need to know and understand:		
K2.3 the types of problem that can happen and how to sort them out		
K2.4 the layout needed for the audit report		
K2.5 who needs to see the report		
K2.6 how to distribute the report so that each person receives it on time		

Additional evidence (if applicable):

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Element 1: Put an audit programme into practice in a retail environment

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 find out and make sure you understand when to carry out an audit, why it is needed, what it should cover and who needs the audit report						
P1.2 find out how the report should be laid out and the level of detail needed						
P1.3 find out what resources are available to carry out the audit						
P1.4 spot any problems that are likely to prevent you from carrying out the audit effectively in the time available, and sort them out before your start the audit						
P1.5 choose staff to help with the audit, check their availability and give responsibilities to each of them						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.6 brief your audit team so that they know what their responsibilities are during the audit, and how to carry out those responsibilities						
P1.7 plan the work of the audit team so you make sure it is accurate and will cause as little disruption as possible to normal work						
P1.8 check on the audit team's progress at suitable intervals and help them to sort out any problems they may be having in completing the audit						

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Element 2: Report the findings of a retail stock audit

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

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

Additional evidence (if applicable):

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Unit 9:	Monitor and help improve food safety in a retail environment
Unit code:	B.22
Unit credit:	12
Unit level:	6

Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

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

Additional evidence (if applicable):

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Element 1: Monitor food safety at critical control points

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 identify and monitor critical control points, which means you: • identify relevant food safety control measures • allocate and supervise food safety responsibilities • identify and meet staff training needs • complete all specified operational controls and checks at the set time frequency • keep accurate and complete records of checks • obtain verification for completed checks, following set procedures						

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.2 troubleshoot, which means you: • take suitable corrective action with the appropriate degree of urgency when control measures fail • report to the appropriate person any procedures that are out of line with critical limits • seek expert advice and support for matters outside your own level of authority or expertise						

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Element 2: Contribute to continuous improvement of food safety

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 highlight areas for improvement, which means you: • identify and report any factors or issues that arise in your work activities which may affect the safety of food • identify and report any factors or issues within the environment, supplies or product which may affect the safety of food						
P2.2 contribute to improving food safety, which means you: • contribute to team meetings with ideas and suggestions to improve procedures or processes • contribute to introducing new procedures and/or reviewing existing ones in order to improve food safety						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.3 interpret and use food safety management procedures, which means you: • check that you understand and can use any new control measures that are introduced relating to food safety						

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Unit 10: Help customers to choose alcoholic beverages in a retail store

Unit code: C.45

Unit credit: 6

Unit level: 6

Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Help customers to choose alcoholic beverages in a retail store - you need to know and understand: K1.1 the laws and the store's policies relating to the sale of alcoholic beverages K1.2 why you must follow the law and your store's policies for selling alcohol and what can happen to you and to the company if these are not followed K1.3 when and how to explain to customers the law and your store's policies for selling alcohol K1.4 how to establish a rapport with customers K1.5 the kinds of questions you need to ask customers in order to find out their requirements K1.6 where to find reliable information about the alcoholic content of the alcoholic beverages the store carries K1.7 the characteristics of different alcoholic beverages and how to match these to customers' requirements K1.8 how product information can give customers confidence in your product recommendations K1.9 how to decide which product features are relevant and how much detail the customer needs to help them choose products K1.10 effective ways of comparing and contrasting products for customers K1.11 why it is important to encourage customers to ask questions about products K1.12 how to respond to customers' questions in ways which promote sales and goodwill K1.13 how to recognise opportunities to recommend associated or additional products K1.14 why it is important to check the store for security and potential sales while helping customers		

Additional evidence (if applicable):

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Element 1: Help customers to choose alcoholic beverages in a retail store

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.6 compare and contrast products in ways that help customers choose the products that best meet their requirements						
P1.7 encourage customers to ask you questions and respond to their questions, comments and objections in ways that promote sales and goodwill						
P1.8 recognise and act on suitable opportunities to recommend to customers associated or additional products						
P1.9 constantly check the store for security and potential sales whilst helping customers						

Additional evidence (if applicable):

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Unit 11: Assist customers to obtain appropriate insurance

Unit code: C.38

Unit credit: 12

Unit level: 6

Introduction

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

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. For the whole unit, you need to know and understand:		
K1.1 the principles and practice of insurance (an introductory knowledge only) including: • utmost good faith • insurable interest • indemnity • subrogation • contribution • risk as it relates to insurance • contract and agency • proximate cause • compulsory insurance K1.2 the legal and regulatory requirements relating to securing insurance products and arrangements, including: • an awareness of FSA rules and powers (for example Insurance Conduct of Business Rules) • your own and the company's responsibility for complying with all legislation including FSA rules, and the consequences of failing to comply • money laundering rules and cash limits • Data Protection Act (DPA) • consumer protection • financial promotions • crime prevention measures relating to insurance:		

Knowledge	Type of evidence	Date
1. For the whole unit, you need to know and understand:		
– ABI data sharing project – guidelines on the exchange of – information between the police, – insurers and loss adjusters – acceptance criteria and – guidelines for the reporting of – suspected fraudulent insurance – claims to the police K1.3 the limits of your own responsibility for dealing with insurance arrangements, complaints and claims		
2. Identify the customer's insurance needs - you need to know and understand:		
K2.1 the procedure for advising customers of your status and your company's status in relation to the products you offer		
K2.2 how to assist different types of customer: • retail/consumer/commercial • on the telephone, face-to-face • advised/non-advised basis		
K2.3 policies and procedures for obtaining and supplying information to customers, and keeping records of requests		
K2.4 when and how to pass requests for product information to a higher authority		

Knowledge	Type of evidence	Date
K2.5 the documentation that needs to be issued, and/or completed and stored, in durable medium, that may included: • status disclosure • demands and needs statements • key fact statement K2.6 legal and regulatory requirements relating to insurance products and their sale		
3. Agree insurance policies with the customer to enable them to be appropriately insured - you need to know and understand:		
K3.1 how to identify the type of customer (retail/consumer or commercial) K3.2 how to identify the insurance products which best suit the customer K3.3 how to select different insurance products for different types of insurance needs and customer preferences, including: • types of insurance • types of cover • features and benefits of different types of insurance • terms and conditions of policies • exclusions and limitations on insurance cover • cancellation rights • duration of insurance cover • premiums and fees • complaints procedures • compensation schemes K3.4 how to prepare, present and record written and verbal quotes for insurance agreements K3.5 different methods of payment and their effect on total cost K3.6 cancellation of cover costs K3.7 when you must disclose commission		

Knowledge	Type of evidence	Date
3. Agree insurance policies with the customer to enable them to be appropriately insured - you need to know and understand:		
K3.8 how to calculate the premium and any other associated fees if appropriate		
K3.9 your company's procedures for the handling of client money		
4. Process insurance applications - you need to know and understand:		
K4.1 how and when to carry out credit checks		
K4.2 how to recognise inconsistencies and discrepancies in information and the correct action to take		
K4.3 common problems that occur with insurance applications and when you need to seek advice on how to deal with them or refer them		
K4.4 policies and procedures for dealing with and recording complaints		
K4.5 how to inform customers of decisions about insurance arrangements		
K4.6 the information and documentation that is needed, in the required format and in durable medium, in order to progress insurance applications, which may include: • statement of price • demands and needs statements • key fact statement • proposal form • certificate of insurance • policy summary • policy booklet • policy schedule		
K4.7 where and how to store completed documentation		
K4.8 legal and regulatory requirements relating to processing insurance applications		

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

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Element 2: Identify the customer's insurance needs

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 advise the customer of your status and your company's status in relation to the products you offer						
P2.2 accurately find out what the customer requires to meet their insurance needs						
P2.3 recognise any requests for product information that you are not authorised to deal with and promptly pass them to an appropriate authority						
P2.4 accurately complete and store all initial documentation in accordance with procedures						
P2.5 comply at all times with relevant legal and regulatory requirements						

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

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.1 identify the types of insurance products that can be offered to the customer that meet their needs						
P3.2 clearly and accurately describe the details of the product offered and provide a policy summary						
P3.3 provide details of exclusions and cancellation rights and complaints and claims procedures						
P3.4 where necessary, supply accurate written quotations for insurance cover in the required format						
P3.5 accurately calculate and confirm with the customer the premium due and arrange payment in accordance with procedures						
P3.6 where necessary, refer issues that arise during the arrangement of insurance to an appropriate authority						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.7 issue legible and accurate confirmation of cover where this is appropriate						
P3.8 accurately complete and store all necessary documentation in accordance with procedures						
P3.9 identify additional insurance services where appropriate and relevant to the needs of the customer						
P3.10 comply at all times with relevant legal and regulatory requirements						

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Element 4: Process insurance applications

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P4.1 gather all necessary information to enable applications for insurance to proceed						
P4.2 send documentation and other necessary information to the insurers, or others, within the time agreed						
P4.3 where necessary, obtain further information from the customer where checks reveal inconsistencies or discrepancies in details supplied by the customer						
P4.4 where problems occur with insurance applications, seek advice and assistance from an appropriate authority						
P4.5 deal promptly with any complaints, refer issues to an appropriate authority and keep accurate records						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P4.6 keep the customer informed of progress at all stages						
P4.7 check and issue all documents to the customer within the time required						
P4.8 make accurate and complete records at all stages and store them correctly in the customer file						
P4.9 comply at all times with relevant legal and regulatory requirements						

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Element 5: Assist customers with claims

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P5.1 where appropriate, disclose whether you are acting on behalf of an insurer in relation to a claim						
P5.2 give customers appropriate guidance, according to procedures, to help them to make a claim						
P5.3 gather all necessary information to allow a valid claim, or to direct the claim to the appropriate people						
P5.4 where necessary, complete accurately the required documentation to process the claim						
P5.5 where appropriate, inform the customer of the progress of the claim and any outcome						
P5.6 deal with complaints or pass them to the appropriate authority						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P5.7 if necessary, refer issues to an appropriate authority						
P5.8 make accurate and complete records at all stages and store them correctly						
P5.9 comply at all times with relevant legal and regulatory requirements						

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Unit 12:	Source required goods and services in a retail environment
Unit code:	B.16
Unit credit:	10
Unit level:	7

Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Choose suppliers and order stock for retail sale - you need to know and understand: K1.1 the types of goods the company normally needs K1.2 how to use the stock records to find out what needs to be ordered K1.3 the suppliers currently being used K1.4 the suppliers who have been used in the past and why they are no longer being used K1.5 how to find possible new suppliers and check whether they are suitable K1.6 company policy for choosing suppliers, including relevant aspects of your company's sustainability policy K1.7 what makes a legally binding contract K1.8 why you need to check suppliers' terms and conditions K1.9 company procedures for placing orders K1.10 company procedures for keeping records of orders		
2. Check and evaluate the performance of suppliers of stock for retail sale - you need to know and understand: K2.1 company systems and procedures for returning goods K2.2 the company's legal rights as a buyer		

Knowledge	Type of evidence	Date
2. Check and evaluate the performance of suppliers of stock for retail sale - you need to know and understand:		
K2.3 company policy for paying creditors, and who to consult in the accounts department if a supplier suspends the account		
K2.4 the records your company keeps about suppliers' performance and how to find and use them		
K2.5 who in your company can comment on the quality and delivery time of goods or services received, and when and how to ask for their comments		
K2.6 how to complain to suppliers		
K2.7 how to respond positively when colleagues complain to you about the speed or quality of suppliers' performance		

Additional evidence (if applicable):

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Element 1: Choose suppliers and order stock for retail sale

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 check the stock records at suitable intervals and spot which stock needs replenishing						
P1.2 follow a suitable routine for asking colleagues if they expect to have any special orders						
P1.3 compare purchase requisitions to spot items you can order together						
P1.4 use the purchasing records to find out who the regular suppliers have been, if any						
P1.5 choose suitable suppliers to use, taking account of stock availability, prices, delivery times and the extent to which the supplier's practices are compatible with your company's sustainability policy						

Performance criteria		Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:							
P1.6	order items accurately, promptly and from suitable suppliers						
P1.7	accurately work out the total cost of an order						
P1.8	keep complete, accurate and up-to-date purchasing records						
P1.9	store purchasing records so that they can be easily found by the people who need them						

Additional evidence (if applicable):

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Countersigning internal verifier (if applicable): _____ Date: _____

Element 2: Check and evaluate the performance of suppliers of stock for retail sale
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What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 promptly match deliveries with orders so you can spot overdue items						
P2.2 spot items which are overdue and promptly contact the supplier about them						
P2.3 tell colleagues promptly if their orders will not be fulfilled on time and tell them what choices they have						
P2.4 follow procedures for returning goods and getting them replaced						
P2.5 check the quality, price and times of deliveries against the company's requirements						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.6 ask colleagues for comments about the quality and delivery times of items received from suppliers						
P2.7 provide accurate comments to suppliers on the level of service they provide						

Additional evidence (if applicable):

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Unit 13: Maintain the availability of goods for sale to customers in a retail environment

Unit code: C.13

Unit credit: 11

Unit level: 6

Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Organise staff to display goods for retail sale - you need to know and understand: K1.1 how different types of display help the store to reach its sales targets K1.2 how you can position information so that it helps to promote sales K1.3 how the layout of the selling area affects sales K1.4 the legal requirements for pricing goods for sales K1.5 the company's standards for putting displays together, including standards for cleaning and preparation K1.6 how to work out what type and quantity of resources you need to set up displays K1.7 how to brief staff in a way that encourages their involvement K1.8 how to check the work of staff preparing and putting displays together and how to give feedback to staff on their performance K1.9 the security, health and safety requirements and procedures relating to displaying goods K1.10 the customer's legal rights and the company's legal duties and responsibilities in relation to the display of goods including descriptions of goods K1.11 how to check that the information in displays is accurate and legal K1.12 how to use different price marking methods and technologies		

Knowledge	Type of evidence	Date
2. Assess how effective displays are in a retail environment - you need to know and understand:		
K2.1 the standards you should apply when assessing how effective displays are		
K2.2 how to assess displays against the relevant standards		
K2.3 how to identify displays that are unsafe or not secure enough		
K2.4 how to correct displays that are unsafe or not secure enough		
K2.5 who can authorise changes in the display		
K2.6 how to involve staff in assessing and changing displays		
3. Keep products available and maintain their quality in a retail environment - you need to know and understand:		
K3.1 how to collect and record information about prices		
K3.2 how to check stock rotation and the quality of goods on display		
K3.3 what can happen to stock that is not stored correctly or renewed as needed		
K3.4 how to replenish and rotate stock and deal with sub-standard goods		
K3.5 how to check pricing and price marking, correct mistakes and change prices		
K3.6 why it is important to record price changes accurately		

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Countersigning internal verifier (if applicable): _____ Date: _____

Element 1: Organise staff to display goods for retail sale

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 confirm the purpose of the display and any relevant requirements and standards and, where necessary, check them with the appropriate authority						
P1.2 clearly explain to staff the purpose of the display and any relevant requirements and standards						
P1.3 provide opportunities for staff to check they understand the requirements and standards of the display						
P1.4 check that staff prepare the display area and put the display together in a way that causes the least inconvenience to customers						
P1.5 provide constructive feedback to staff on their performance						

Performance criteria		Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:							
P1.6	check that the assembled display conforms to company requirements and standards						
P1.7	obtain permission from the appropriate authority to modify or change the display						
P1.8	monitor that information has been placed accurately and legally, and is chosen and positioned to promote sales effectively						
P1.9	keep complete, accurate and up to date records of displays						

Additional evidence (if applicable):

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Element 2: Assess how effective displays are in a retail environment

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

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

Additional evidence (if applicable):

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

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.1 collect and record accurate information on price changes						
P3.2 give accurate, up-to-date price information to the staff who need it						
P3.3 regularly check price marking and promptly sort out any pricing problems you spot						
P3.4 make sure that stock replenishment plans are up-to-date and realistic						
P3.5 deal with out-of-date or deteriorating stock in line with company policy and any relevant laws						
P3.6 involve staff in spotting potential improvements to the way stock is organised and presented						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.7 spot realistic and effective ways of improving how stock is organised and presented						
P3.8 get permission from the right person, where necessary, to improve the way stock is organised and presented						
P3.9 make sure that you maintain customer goodwill and staff morale while stock is being re-organised						

Additional evidence (if applicable):

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Unit 14:	Help to manage a retail team
Unit code:	E.09
Unit credit:	11
Unit level:	6

Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Help to manage a retail team - you need to know and understand:		
K1.1 company procedures and policies relating to the work of your team and the way your team's daily activities are managed, including: • health and safety • security • staffing levels • absence reporting • timekeeping • personal appearance • handling customer complaints K1.2 laws and regulations relating to the products your team sells K1.3 why you should set an example to team members by following the company's procedures and policies at all times K1.4 how to check that team members follow the company's procedures and policies K1.5 what you must do when team members are not following the company's procedures and policies K1.6 how clear communication helps teams to work effectively K1.7 how to give instructions so that team members will readily understand them and feel motivated to follow them		

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

Additional evidence (if applicable):

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Element 1: Help to manage a retail team

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 set an example for the team by following company procedures and policies at all times						
P1.2 check that team members are following company procedures and policies						
P1.3 take prompt and suitable action when team members are not following company procedures and policies						
P1.4 give clear information and instructions to your team						
P1.5 use methods suited to individual team members' levels of motivation and expertise, when encouraging them to complete tasks						
P1.6 recognise when team members need support						
P1.7 choose and apply suitable methods for supporting team members						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.8 praise good performance promptly and tell your manager about it						
P1.9 manage your own time so that you carry out both your management duties and your other duties						
P1.10 recognise when you should treat information as confidential and release it only to those who have a right to it						
P1.11 share work and privileges fairly between team members						
P1.12 act within the limits of your responsibility and authority						
P1.13 promptly ask the right person for advice when problems are beyond your responsibility, authority or expertise to resolve						

Additional evidence (if applicable):

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Unit 15: Contribute to the continuous improvement of retail operations

Unit code: E.10

Unit credit: 10

Unit level: 6

Introduction

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

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Identify opportunities for solving problems and improving retail operations - you need to know and understand: K1.1 the company's standards for customer service K1.2 the sales targets your unit is expected to reach K1.3 company policies, procedures and computerised systems affecting your work K1.4 the main characteristics of the company's customer base and products or services K1.5 different sources of facts and opinions about operational performance and how useful each one is K1.6 common causes of failure to achieve quality standards and sales targets K1.7 how to identify aspects of customer service and sales that could be improved K1.8 how to generate ideas for improving customer service and sales K1.9 how to evaluate the benefits of potential improvements and how urgent they are K1.10 how to work out what resources you would need to put improvements into practice K1.11 how to weigh the costs of your improvements against the benefits		

Knowledge	Type of evidence	Date
2. Recommend ways of improving retail operations - you need to know and understand:		
K2.1 how to present your recommendations to management clearly, concisely and in a suitable format		
K2.2 the types of questions and concerns management are likely to have when considering your recommendations, and how to handle these		
K2.3 why it is important to encourage staff and colleagues to suggest ideas for improvement, and why it is important to make sure they get the credit if their ideas are put into practice		
3. Contribute to putting improvements in retail operations into practice - you need to know and understand:		
K3.1 why it is important for staff to understand the purpose and intended benefits of improvements		
K3.2 different ways of explaining plans to staff, and how to decide which one to use		
K3.3 how your manner and behaviour while explaining improvements can affect your staff's response to plans		
K3.4 why it is important to show enthusiasm and lead by example when putting improvements into practice		
K3.5 how and why different people will need different levels of support, encouragement, advice and training to put improvements into practice		
K3.6 how to identify problems with putting improvements into practice and who to ask for advice and support		

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Element 1: Identify opportunities for solving problems and improving retail operations

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

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

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Element 2: Recommend ways of improving retail operations

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 offer recommendations to management that are clear, concise, in a suitable format and supported by relevant information						
P2.2 clearly and honestly acknowledge recommendations that are based on suggestions from other people						
P2.3 clearly explain the benefits the recommended improvements could bring and the resources needed to put them into practice						
P2.4 discuss recommendations with the relevant decision makers						

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Element 3: Contribute to putting improvements in retail operations into practice

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.1 explain plans to staff in a way which encourages understanding and involvement						
P3.2 give appropriate support, encouragement, advice and training to members of staff for as long as they need it						
P3.3 promptly ask for appropriate advice and support when you have problems putting improvements into practice						
P3.4 consistently show staff by your behaviour that you are committed to achieving the benefits of the improvement						

Additional evidence (if applicable):

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Unit 16: **Plan, monitor and adjust staffing levels and schedules in a retail environment**

Unit code: E.12

Unit credit: 11

Unit level: 7

Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Plan staffing levels and prepare work schedules for a retail team - you need to know and understand: K1.1 why staffing plans are needed K1.2 relevant laws, company policy and contract terms and conditions which affect the hours that staff must work K1.3 the relationship between staffing plans and work targets K1.4 how to work out staffing requirements K1.5 how to produce and present staffing plans in a form suitable for the needs of the relevant people K1.6 how to schedule work so that you meet operational needs and take account of operational limits		
2. Monitor staffing levels and schedules against the work targets of a retail team - you need to know and understand: K2.1 how staffing levels and the way in which staff are used can affect the work that can be done K2.2 how to collect and evaluate information on staffing K2.3 how to adjust staffing levels and schedules K2.4 the factors, other than staffing, that may affect progress towards work targets, and the effect these are likely to have K2.5 how to justify assessments of effectiveness K2.6 how your manner and behaviour when presenting the results of assessments is likely to influence staff's response to them		

Additional evidence (if applicable):

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Countersigning internal verifier (if applicable): _____ Date: _____

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

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 produce staffing plans and schedules that cover all operational needs and take account of operational limits						
P1.2 produce staffing plans and schedules that include accurate numbers and realistic levels of skill, work allocation, places where people will work and start and finish times						
P1.3 schedule hours of work that keep to relevant laws, company policy and contracts of employment						
P1.4 produce plans that are easy for the relevant people to understand and use						
P1.5 include realistic emergency plans to cope with abnormal situations						

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

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 collect and organise enough information about the staff available and the work they are doing						
P2.2 assess realistically whether you have enough staff for the targets you need to achieve						
P2.3 find out what progress is being made towards achieving your work targets						
P2.4 use the information about staffing and progress towards targets to make realistic and justifiable assessments of how effective staff are						
P2.5 adjust staffing levels and schedules so that you can meet targets						
P2.6 clearly and promptly recommend changes in staffing to your manager						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.7 promptly pass on the results of assessments to the people who need them						
P2.8 use the results of assessments to encourage staff to reach their targets						

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Unit 17: **Develop productive working relationships with colleagues**

Unit code: E.15

Unit credit: 9

Unit level: 6

Introduction

This unit is about developing working relationships with colleagues, within your own organisation and within other organisations, that are productive in terms of supporting and delivering your work and that of the overall organisation.

‘Colleagues’ are any people you are expected to work with, whether they are at a similar position or in other positions, including your manager.

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Develop productive working relationships with colleagues - you need to know and understand: K1.1 the benefits of developing productive working relationships with colleagues K1.2 the importance of creating an environment of trust and mutual respect where you have no authority, or shared authority, over those you are working with K1.3 the importance of understanding difficult situations and issues from your colleague's perspective and providing support, where necessary, to move things forward K1.4 principles of effective communication and how to apply them in order to communicate effectively with colleagues K1.5 how to identify disagreements with colleagues and the techniques for sorting them out K1.6 how to identify conflicts of interest with colleagues and the measures that can be used to manage or remove them K1.7 how to take account of diversity and inclusion issues when developing working relationships with colleagues K1.8 the importance of exchanging information and resources with colleagues K1.9 how to get and make use of feedback on your performance from colleagues K1.10 how to provide colleagues with useful feedback on their performance		

Knowledge	Type of evidence	Date
2. Industry/sector specific knowledge and understanding		
K1.11 regulations and codes of practice that apply in the industry or sector		
K2.12 standards of behaviour and performance in the industry or sector		
K3.13 working culture of the industry or sector		
3. Context specific knowledge and understanding		
K1.14 current and future work being carried out		
K2.15 colleagues who are relevant to the work being carried out, their work roles and responsibilities		
K3.16 processes within the organisation for making decisions		
K4.17 line management responsibilities and relationships within the organisation		
K5.18 the organisation's values and culture		
K6.19 power, influence and politics within the organisation		
K7.20 standards of behaviour and performance expected in the organisation		
K8.21 information and resources that different colleagues might need		
K9.22 agreements with colleagues		

Additional evidence (if applicable):

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Element 1: Develop productive working relationships with colleagues

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 establish working relationships with all colleagues who are relevant to the work being carried out						
P1.2 recognise, agree and respect the roles and responsibilities of colleagues and, particularly in situations of matrix management, their managers' requirements						
P1.3 understand and take account of the priorities, expectations, and authority of colleagues in decisions and actions						
P1.4 create an environment of trust and mutual respect where you have no authority, or shared authority, over those you are working with						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.5 understand difficult situations and issues from your colleague's perspective and provide support, where necessary, to move things forward						
P1.6 fulfil agreements made with colleagues and let them know						
P1.7 advise colleagues promptly of any difficulties or where it will be impossible to fulfil agreements						
P1.8 identify and sort out conflicts of interest and disagreements with colleagues in ways that minimise damage to work being carried out						
P1.9 exchange information and resources with colleagues to make sure that all parties can work effectively						
P1.10 provide feedback to colleagues on their performance and seek feedback from colleagues on your own performance in order to identify areas for improvement						

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Element 2: Behaviours which underpin effective performance

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 present information clearly, concisely, accurately and in ways that promote understanding						
P2.2 seek to understand people's needs and motivations						
P2.3 make time available to support others						
P2.4 clearly agree what is expected of others and hold them to account						
P2.5 work to develop an atmosphere of professionalism and mutual support						
P2.6 model behaviour that shows respect, helpfulness and co-operation						
P2.7 keep promises and honour commitments						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.8 consider the impact of your own actions on others						
P2.9 say 'no' to unreasonable requests						
P2.10 show respect for the views and actions of others						
P2.11 consider the impact of your own actions on others						
P2.12 say 'no' to unreasonable requests						
P2.13 show respect for the views and actions of others						

Additional evidence (if applicable):

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Unit 18: Enable customers to apply for credit and hire purchase facilities

Unit code: C.15

Unit credit: 12

Unit level: 6

Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Identify the retail customer's credit or hire-purchase requirements - you need to know and understand: K1.1 the range of borrowing facilities your company offers K1.2 the legal requirements for all aspects of the borrowing transaction K1.3 the terms and conditions that apply to specific borrowing facilities K1.4 how to work out the annual percentage rate (APR) and the difference between the annual percentage rate and simple interest K1.5 how to carry out credit checks and authorise credit applications		
2. Advise retail customers on the features of borrowing facilities - you need to know and understand: K2.1 the terms and conditions of the borrowing facilities you are authorised to offer customers K2.2 why you must help customers to understand their responsibilities in relation to the borrowing facility K2.3 how to explain the terms and conditions of borrowing facilities in ways that different customers can understand K2.4 how to give customers the chance to ask questions and check they understand K2.5 how to prepare accurate written quotations from the information the customer has given		

Knowledge	Type of evidence	Date
2. Advise retail customers on the features of borrowing facilities - you need to know and understand:		
K2.6 the information that your company and the law need you to provide to customers in relation to borrowing facilities, and where you can get this		
K2.7 how to talk to customers about borrowing facilities in ways that promote goodwill and confidence in you and the store		
3. Process credit or hire purchase applications on behalf of retail customers - you need to know and understand:		
K3.1 the documents you need for credit or hire-purchase applications, and how to fill them in accurately		
K3.2 how to check for problems with information about customers, and how to question the customer tactfully about any problems		
K3.3 the credit checks you need to carry out and how to do this		
K3.4 company procedures for authorising credit applications		
K3.5 legal requirements that apply to credit or hire purchase including data protection		
K3.6 reasons why credit applications may be refused		
K3.7 how to explain tactfully to customers that credit applications have been refused		
K3.8 additional or associated services you are authorised to offer to customers, and how to spot suitable opportunities to offer these		
K3.9 the limits of your authority to make judgements about credit applications		
K3.10 who can help sort out problems with processing applications		

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

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 agree with the customer the deposit they need to pay to qualify for borrowing facilities						
P1.2 accurately work out the balance the customer needs to borrow so they can pay in full						
P1.3 accurately work out the interest the customer will have to pay on the amount they have borrowed						
P1.4 agree the customer's borrowing needs with them						
P1.5 identify the options you can offer to the customer in relation to their borrowing needs						
P1.6 strictly follow legal requirements in relation to borrowing in all aspects of the transaction						

Additional evidence (if applicable):

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Element 2: Advise retail customers on the features of borrowing facilities

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 explain to the customer clearly and accurately the terms and conditions of the borrowing facility						
P2.2 check with the customer that they understand their responsibilities in relation to the borrowing facility						
P2.3 give customers the chance to check they understand and to ask questions about the borrowing facility						
P2.4 give customers chance to compare the benefit and value of different borrowing options where they are available						
P2.5 give the customer accurate written quotations together with all the information your company and the law say you must provide						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.6 deal with the customer politely and in a way that promotes goodwill and confidence in you and the store						

Additional evidence (if applicable):

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

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.1 accurately fill in all the documents needed for the credit application						
P3.2 complete the necessary credit checks and authorisation procedures						
P3.3 tactfully and politely ask for more information from the customer where credit checks reveal problems in any information given						
P3.4 keep customer information strictly confidential						
P3.5 refer problems with applications to the right person when you are not authorised to sort out problems yourself						
P3.6 tell the customer politely and clearly the decision about their application to access credit or borrow funds						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.7 tactfully give reasons to the customer when credit has been refused and give contact details so that the customer can query or complain about the decision						
P3.8 offer additional or associated services to the customer where appropriate						
P3.9 keep a suitable level of confidentiality when processing information about customers						

Additional evidence (if applicable):

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Unit 19: Monitor and support secure till use during trading hours

Unit code: E.21

Unit credit: 3

Unit level: 6

Introduction

This unit is about your responsibility for maintaining the secure use of the till during trading hours.

The unit refers to a single till and service area, but you should take this to mean all the tills and service areas you are responsible for at any one time.

You contribute to keeping cash, staff and data secure, both by monitoring the service area and carrying out transactions and adjustments within the limits of your authority. You do this during trading hours, so you need to ensure that customers are not kept waiting any longer than necessary and that you project a positive image of your company at all times.

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Monitor and support secure till use during trading hours - you need to know and understand: K1.1 the till and service area for which you are responsible K1.2 why it is important to keep personal data confidential K1.3 the data security risks which can arise at the till and how to minimise these K1.4 the types of till transactions and adjustments you are authorised to carry out K1.5 how to carry out the till transactions and adjustments for which you are responsible K1.6 who can authorise a transaction that is outside your level of authority, and how to contact that person K1.7 how to top up the change in the till, including company procedures for keeping cash and yourself secure in the process K1.8 how to monitor the till and service area whilst completing your other tasks K1.9 who is authorised to draw cash and cash equivalents from the till during trading hours		

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Element 1: Monitor and support secure till use during trading hours

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 during trading hours, check the till and service area often enough to ensure that personal data is kept confidential						
P1.2 authorise till transactions and adjustments within the limits of your authority and in line with company procedures for: • customer service • security • stock control						
P1.3 refer till transactions and adjustments promptly to the right person when you cannot authorise these yourself						
P1.4 top up the change in the till in a timely fashion and in line with company security procedures						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.5 check the authorisation of anyone who draws cash or cash equivalents from the till during trading hours						
P1.6 prioritise your tasks so as to minimise customer waiting times and queue size						

Additional evidence (if applicable):
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Unit 20: **Monitor and evaluate the quality of service provided to your customers by external suppliers**

Unit code: E.17

Unit credit: 9

Unit level: 6

Introduction

This unit involves monitoring the service provided by external suppliers your store places customer orders with. This involves checking the progress of orders, keeping customers informed and getting customer feedback about the service provided. The unit is also about using customer feedback to decide how the service provided by external suppliers could be improved and encouraging suppliers to make improvements.

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Monitor the quality of customer service provided by external suppliers to your retail customers - you need to know and understand: K1.1 which services external suppliers are giving your customers K1.2 the records you need to keep, including those the company needs K1.3 how to get feedback from customers K1.4 how to find out what is making customers dissatisfied K1.5 how to deal with dissatisfied customers in ways that promote goodwill and future sales		
2. Evaluate and improve external suppliers' service to your retail customers - you need to know and understand: K2.1 what the level of customer satisfaction is with individual suppliers K2.2 how to evaluate the quality of service given to customers K2.3 typical problems with services provided by external suppliers K2.4 how to present evaluations and suggestions to suppliers K2.5 what you can do when suppliers refuse to improve the quality of service		

Additional evidence (if applicable):

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Element 1: Monitor the quality of customer service provided by external suppliers to your retail customers

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 keep accurate and up-to-date records of the customer orders sent from your store to external suppliers						
P1.2 regularly check the progress of orders to identify any difficulties or delays in dealing with them						
P1.3 when service is delayed, get an explanation and tell your customer promptly and accurately what is happening						
P1.4 accurately identify whether your customer is satisfied with the ordering service provided						
P1.5 identify and accurately note any customer dissatisfaction with the ordering service and the causes of this						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.6 tactfully explain when the problem is your customer's responsibility						
P1.7 clearly and accurately explain your customer's rights when the cause of the problem lies with the external supplier						
P1.8 regularly collect and accurately report, to those who need to know, feedback on the quality of suppliers' service						

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Element 2: Evaluate and improve external suppliers' service to your retail customers

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 assess information fairly to identify external suppliers' overall quality of service to customers						
P2.2 make evaluations which are consistent with the weight of evidence you have						
P2.3 use evaluations to develop realistic and cost-effective improvements to customer service						
P2.4 present the results of evaluations and suggestions for improvement clearly to external suppliers						
P2.5 invite external suppliers to suggest improvements they can make						
P2.6 accurately note, and report to your manager, agreements to improve customer service						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.7 make an accurate report to your manager, together with your recommendations for action, if suppliers do not improve service						

Additional evidence (if applicable):

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Unit 21: Organise the delivery of reliable customer service

Unit code: D.13

Unit credit: 6

Unit level: 6

Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

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

Additional evidence (if applicable):

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Element 1: Plan and organise the delivery of reliable customer service

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 plan, prepare and organise everything you need to deliver services or products to different types of customers						
P1.2 organise what you do to ensure that you are consistently able to give prompt attention to your customers						
P1.3 reorganise your work to respond to unexpected additional workloads						

Additional evidence (if applicable):

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Element 2: Review and maintain customer service delivery

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 maintain service delivery during very busy periods and unusually quiet periods						
P2.2 maintain service delivery when systems, people or resources have let you down						
P2.3 consistently meet your customers' expectations						
P2.4 balance the time you take with your customers with the demands of other customers seeking your attention						
P2.5 respond appropriately to your customers when they make comments about the products or services you are offering						
P2.6 alert others to repeated comments made by your customers						
P2.7 take action to improve the reliability of your service based on customer comments						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.8 monitor the action you have taken to identify improvements in the service you give to your customers						

Additional evidence (if applicable):

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Element 3: Use recording systems to maintain reliable customer service

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.1 record and store customer service information accurately following organisational guidelines						
P3.2 select and retrieve customer service information that is relevant, sufficient and in an appropriate format						
P3.3 quickly locate information that will help solve a customer's query						
P3.4 supply accurate customer service information to others using the most appropriate method of communication						

Additional evidence (if applicable):

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Unit 22: Improve the customer relationship

Unit code: D.14

Unit credit: 7

Unit level: 6

Introduction

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.

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge		Type of evidence	Date
1. For the whole unit, you need to know and understand:			
K1.1	how to make best use of the method of communication chosen for dealing with your customers		
K1.2	how to negotiate effectively with your customers		
K1.3	how to assess the costs and benefits to your customer and your organisation of any unusual agreement you make		
K1.4	the importance of customer loyalty and/or improved internal customer relationships to your organisation		

Additional evidence (if applicable):

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Element 1: Improve communication with your customers

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 select and use the best method of communication to meet your customers' expectations						
P1.2 take the initiative to contact your customers to update them when things are not going to plan or when you require further information						
P1.3 adapt your communication to respond to individual customers' feelings						

Additional evidence (if applicable):

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Element 2: Balance the needs of your customer and your organisation

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

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

Additional evidence (if applicable):
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Element 3: Exceed customer expectations to develop the relationship

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.1 make extra efforts to improve your relationship with your customers						
P3.2 recognise opportunities to exceed your customers' expectations						
P3.3 take action to exceed your customers' expectations within the limits of your own authority						
P3.4 gain the help and support of others to exceed your customers' expectations						

Additional evidence (if applicable):

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Unit 23: Work with others to improve customer service

Unit code: D.15

Unit credit: 8

Unit level: 6

Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge		Type of evidence	Date
1. For the whole unit, you need to know and understand:			
K1.1	who else is involved either directly or indirectly in the delivery of customer service		
K1.2	the roles and responsibilities of others in your organisation		
K1.3	the roles of others outside your organisation who have an impact on your services or products		
K1.4	what the goals or targets of your organisation are in relation to customer service and how these are set		
K1.5	how your organisation identifies improvements in customer service		

Additional evidence (if applicable):
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Element 1: Improve customer service by working with others

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 contribute constructive ideas for improving customer service						
P1.2 identify what you have to do to improve customer service and confirm this with others						
P1.3 agree with others what they have to do to improve customer service						
P1.4 cooperate with others to improve customer service						
P1.5 keep your commitments made to others						
P1.6 make others aware of anything that may affect plans to improve customer service						

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Element 2: Monitor your own performance when improving customer service

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 discuss with others how what you do affects customer service performance						
P2.2 identify how the way you work with others contributes towards improving customer service						

Additional evidence (if applicable):
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Element 3: Monitor team performance when improving customer service

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.1 discuss with others how teamwork affects customer service performance						
P3.2 work with others to collect information on team customer service performance						
P3.3 identify with others how customer service teamwork could be improved						
P3.4 take action with others to improve customer service performance						

Additional evidence (if applicable):

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Countersigning assessor signature (if applicable): _____ Date: _____

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Unit 24: Monitor and solve customer service problems

Unit code: D.16

Unit credit: 6

Unit level: 6

Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge		Type of evidence	Date
1. For the whole unit, you need to know and understand:			
K1.1	organisational procedures and systems for dealing with customer service problems		
K1.2	organisational procedures and systems for identifying repeated customer service problems		
K1.3	how the successful resolution of customer service problems contributes to customer loyalty with the external customer and improved working relationships with service partners or internal customers		
K1.4	how to negotiate with and reassure customers while their problems are being solved		

Additional evidence (if applicable):

COLUMN KEY:	O = DIRECT OBSERVATION OF THE LEARNER’S PERFORMANCE BY THEIR ASSESSOR	PD = PROFESSIONAL DISCUSSION
	Q&A = OUTCOMES FROM ORAL OR WRITTEN QUESTIONING	A = ASSIGNMENT, PROJECT/CASE STUDIES
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	S = OUTCOME FROM SIMULATION, WHERE PERMITTED BY THE ASSESSMENT STRATEGY	RPL = EVIDENCE OF RECOGNITION OF PRIOR LEARNING

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Candidate signature: _____ Date: _____

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Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Element 1: Solve immediate customer service problems

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 respond positively to customer service problems following organisational guidelines						
P1.2 solve customer service problems when you have sufficient authority						
P1.3 work with others to solve customer service problems						
P1.4 keep customers informed of the actions being taken						
P1.5 check with customers that they are comfortable with the actions being taken						
P1.6 solve problems with service systems and procedures that might affect customers before they become aware of them						
P1.7 inform managers and colleagues of the steps taken to solve specific problems						

Additional evidence (if applicable):

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Countersigning assessor signature (if applicable): _____ Date: _____

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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Element 2: Identify repeated customer service problems and options for solving them

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 identify repeated customer service problems						
P2.2 identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option						
P2.3 work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of your organisation						

Additional evidence (if applicable):

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Candidate signature: _____ Date: _____

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Countersigning assessor signature (if applicable): _____ Date: _____

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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Element 3: Take action to avoid the repetition of customer service problems

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.1 obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated						
P3.2 action your agreed solution						
P3.3 keep your customers informed in a positive and clear manner of steps being taken to solve any service problems						
P3.4 monitor the changes you have made and adjust them if appropriate						

Additional evidence (if applicable):

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Unit 25:	Promote continuous improvement
Unit code:	D.17
Unit credit:	7
Unit level:	7

Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

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

Additional evidence (if applicable):

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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Element 1: Plan improvements in customer service based on customer feedback

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 gather feedback from customers that will help to identify opportunities for customer service improvement						
P1.2 analyse and interpret feedback to identify opportunities for customer service improvements and propose changes						
P1.3 discuss with others the potential effects of any proposed changes for your customers and your organisation						
P1.4 negotiate changes in customer service systems and improvements with somebody with sufficient authority to approve trial or full implementation of the change						

Additional evidence (if applicable):

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Element 2: Implement changes in customer service

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 organise the implementation of authorised changes						
P2.2 implement the changes following organisational guidelines						
P2.3 inform people inside and outside your organisation who need to know of the changes being made and the reasons for them						
P2.4 monitor early reactions to changes and make appropriate fine-tuning adjustments						

Additional evidence (if applicable):
--

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Countersigning internal verifier (if applicable): _____ Date: _____

Element 3: Review changes to promote continuous improvement

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.1 collect and record feedback on the effects of changes						
P3.2 analyse and interpret feedback and share your findings on the effects of changes with others						
P3.3 summarise the advantages and disadvantages of the changes						
P3.4 use your analysis and interpretation of changes to identify opportunities for further improvement						
P3.5 present these opportunities to somebody with sufficient authority to make them happen						

Additional evidence (if applicable):

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Countersigning internal verifier (if applicable): _____ Date: _____

Unit 26: **Help to monitor and maintain the security of the retail unit**

Unit code: E.11

Unit credit: 11

Unit level: 6

Introduction

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

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Put procedures into practice to maintain security in a retail environment - you need to know and understand: K1.1 the security procedures to put into practice when opening, operating and closing your retail unit K1.2 the security threats most likely to happen in a retail unit K1.3 the company's policies for responsibility for security K1.4 different methods of briefing staff about security arrangements, and when it is appropriate to use each method K1.5 who has authority to stop and search staff and customers and how to contact the relevant authorities		
2. Monitor and investigate losses in a retail environment - you need to know and understand: K2.1 the company's security policy and procedures K2.2 procedures for identifying and recording losses K2.3 the company's investigation procedures and its definition of unacceptable losses K2.4 how unacceptable losses are likely to happen in a retail unit K2.5 items most likely to be at risk in the retail unit K2.6 the purpose of loss-control and stock-taking systems K2.7 different strategies for preventing wastage and loss and when to use each one K2.8 how to check loss evaluations		

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

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Internal verifier signature: _____ Date: _____

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

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 monitor the work area often enough to identify possible problems with security						
P1.2 identify problems with security and deal with them promptly, legally and in line with company requirements						
P1.3 brief and update staff clearly and often enough about security procedures and their responsibilities for maintaining security						

Additional evidence (if applicable):

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Countersigning internal verifier (if applicable): _____ Date: _____

Element 2: Monitor and investigate losses in a retail environment

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

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

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

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Countersigning internal verifier (if applicable): _____ Date: _____

Unit 27: Promote the store's credit card to customers

Unit code: C.47

Unit credit: 3

Unit level: 5

Introduction

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

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

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Promote the store's credit card to customers - you need to know and understand: K1.1 the benefits to your store of having card holders K1.2 the opportunities you can take to ask customers if they are already card holders K1.3 friendly and engaging questioning techniques you can use to find out if customers are card holders K1.4 the benefits to the customer of having your store's credit card K1.5 how to explain to customers in a persuasive manner the benefits to them of being card holders K1.6 who is eligible to apply for the card K1.7 the features of your store's credit card including: • the costs involved • the repayment terms • the customer's right to cancel the card K1.8 typical concerns which customers might have about the card K1.9 how to respond to customers' concerns honestly whilst continuing to stress the benefits of the card K1.10 why it is important to the business to make existing card holders feel special and to continue to promote to them the benefits of the card		

Additional evidence (if applicable):
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Candidate signature: _____ Date: _____

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Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Element 1: Promote the store's credit card to customers

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 take suitable opportunities and use effective questioning techniques to find out if customers have credit cards with your store						
P1.2 where customers aren't already card holders, tell them in a persuasive manner about the benefits to them of having the card						
P1.3 where customers are already card holders, acknowledge this and remind them in a friendly and persuasive manner of the benefits of using the card						
P1.4 where customers express an interest in having the card, give them clear and factually accurate information about the features of the card including: - the costs involved - the repayment terms - the customer's right to cancel the card						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.5 where customers express concern about the card, address their concerns honestly whilst continuing to stress the benefits of the card						

Additional evidence (if applicable):

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Unit 28: **Help customers to apply for the store's credit card and associated insurance products**

Unit code: C.52

Unit credit: 4

Unit level: 5

Introduction

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

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

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Offer customers insurance products associated with the store's credit card - you need to know and understand: K1.1 the difference between informing and advising customers about insurance products, and why you must give information and not advice K1.2 which insurance products you are authorised to offer, and to whom K1.3 product features which you must tell the customer about, including: • whether or not the insurance is optional • the cost of the insurance • the cover available • significant and unusual exclusions • the customer's right to cancel the insurance K1.4 how to give customers information about insurance products which is: • consistent • clear • unbiased • factually correct • compliant with relevant legislation, regulations and guidelines K1.5 the benefits to the customer of reading the policy summary K1.6 legal requirements for offering the customer the opportunity to read the policy summary		

Knowledge	Type of evidence	Date
1. Offer customers insurance products associated with the store's credit card - you need to know and understand: K1.7 who is eligible for the insurance products you offer and how to check eligibility K1.8 how to deal with customers' requests for advice and recommendations concerning insurance products K1.9 who the customer can contact for help with queries which you are not authorised to deal with yourself K1.10 why it is important to check that the customer understands the product information you give, and the verbal and non-verbal indications to listen and look for		
2. Help customers to apply for the store's credit card and associated insurance products - you need to know and understand: K2.1 the legal and company requirements for giving customers information about the application process K2.2 why customers may wish to take application forms away to study in detail and why this is to be welcomed K2.3 why you must void blank application forms and how to do so K2.4 why customers must prove their identity and what proofs you can accept K2.5 why you must keep customers' personal data secure during the application process and how to do this K2.6 the procedures agreed between the store and the insurer for processing applications K2.7 the procedures to follow when an application is accepted K2.8 how to treat customers with courtesy and tact when their applications have been declined		

Knowledge	Type of evidence	Date
2. Help customers to apply for the store's credit card and associated insurance products - you need to know and understand:		
K2.9 why you must not try to guess with customers about the possible reasons why their applications have been declined K2.10 the contact details you can give to customers who want to enquire further about declined applications K2.11 how to use the application system and equipment and how to deal with technical problems that may occur with these		

Additional evidence (if applicable):

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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

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

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 use compliant wording to give credit card applicants consistent, clear, unbiased and factually correct information about the associated insurance products available, including: • whether or not the insurance is optional • the cost of the insurance • the cover available • significant and unusual exclusions • the customer's right to cancel the insurance						
P1.2 offer customers the policy summary and explain clearly the benefits of reading it						

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.3 allow customers enough time to read the policy summary if they wish						
P1.4 politely check that customers are eligible for the insurance products you are offering						
P1.5 in response to customers' requests for advice or recommendations, clearly and politely explain that you cannot answer these yourself and tell the customer who they can contact for further help						
P1.6 check that the customer understands the product information by listening carefully to what they say and observing their body language						

Additional evidence (if applicable):	
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Element 2: Help customers to apply for the store's credit card and associated insurance products

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 meet legal and company requirements for giving customers information about the application process						
P2.2 if customers wish to take the application form away to consider, make it clear that they are welcome to do so and follow procedures for voiding the blank form						
P2.3 ask customers politely for proof of identity and check that suitable proof is provided						
P2.4 keep the customer's personal data secure throughout the application process						
P2.5 process applications in line with the procedures agreed between the store and the insurer						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.6 where an application is accepted, confirm clearly to the customer: • the decision • the customer's credit limit • the Annual Percentage Rate which applies						
P2.7 follow procedures to enable accounts to be set up for customers whose applications have been accepted						
P2.8 where an application is declined, tell the customer tactfully and explain how they can enquire about the reasons						
P2.9 where technical problems occur with the application system or equipment, deal with these in line with procedures and report promptly to the right person any problems you can't resolve yourself						

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Unit 29: Provide the lingerie fitting service in a retail environment

Unit code: C.17

Unit credit: 8

Unit level: 5

Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge		Type of evidence	Date
1. Identify the retail customer's needs for lingerie - you need to know and understand:			
K1.1	how to approach customers on the lingerie department		
K1.2	what is involved in the lingerie-fitting service and how long a fitting session is likely to take		
K1.3	questioning techniques used to clarify and agree customers' buying needs		
K1.4	how to build trust and relax customers you are working with		
K1.5	how to talk to different types of customers and help them to understand the information you provide		
2. Measure and fit the retail customer for lingerie - you need to know and understand:			
K2.1	basic styles, shapes and sizes of bra		
K2.2	the different parts of bras and their technical names		
K2.3	brands, colours, fabrics, trims and price range of available products		
K2.4	the size range and fit of the bras in stock and where you can find different types of bra		
K2.5	the features, advantages and benefits of different bras		
K2.6	the ordering service using in-house systems or brand catalogues for lines either not in stock or not carried by the store		
K2.7	solution dressing - what to wear under different outfits		
K2.8	accessories such as enhancers and coordinating garments		

Knowledge	Type of evidence	Date
2. Measure and fit the retail customer for lingerie - you need to know and understand: K2.9 manufacturers' guidance on washing and caring for products K2.10 scheduled delivery dates for new products K2.11 trends in design, technological solutions and fabrics K2.12 how to assess the customer's body size and age K2.13 the equipment and layout needed for the lingerie fitting room K2.14 how and where to measure for the customer's band size using a tape measure K2.15 how to estimate the cup size needed K2.16 how to choose the correct bras for the fitting K2.17 how to educate the customer on band sizes, cup sizes and correct fitting using the bras you have chosen K2.18 body shapes and breast sizes K2.19 how to adjust and fit the bra both inside and outside the fitting room K2.20 how to build trust and relax customers you are working with K2.21 how to talk to different types of customers and help them understand the information you provide K2.22 how to deal with challenging situations, including unusual body shape, body odour, disability, mastectomy and maternity K2.23 the importance of customer confidence and loyalty to the organisation and how you contribute to them		

Knowledge	Type of evidence	Date
3. Check the customer's preferences and buying decisions when making retail sales - you need to know and understand:		
K3.1 how to recognise buying signals from customers K3.2 how to handle customers' questions confidently and effectively K3.3 techniques for closing the sale K3.4 why customer confidence and loyalty matter to the store and how you contribute towards these K3.5 legal rights and responsibilities of retailers and customers to do with returning of unsatisfactory goods		

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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Element 1: Identify the retail customer's needs for lingerie

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 approach customers on the lingerie department and accurately find out what they are looking for from the information they give you						
P1.2 describe accurately to customers the process and benefits of the lingerie fitting service						
P1.3 offer customers the lingerie fitting service or, if the customer prefers, book a later appointment						

Additional evidence (if applicable):

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Element 2: Measure and fit the retail customer for lingerie

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 create a rapport with the customer while assessing their fitting needs						
P2.2 clearly and tactfully explain to the customer that you cannot guarantee an accurate fit if measurements are taken on top of the customer's clothing						
P2.3 position yourself and the customer correctly so you can: • take accurate measurements • adjust the product to fit the customer • allow the customer to see the product when worn and correctly fitted						
P2.4 meet the customer's needs for privacy and help while they are trying products on						
P2.5 measure the chest accurately						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.6 accurately choose and offer a range of products in the customer's size and that meet the customer's needs						
P2.7 adjust and fit the product to provide customer comfort and prolong the life of the product						
P2.8 check the fit of the product and whether the customer is satisfied with the product						
P2.9 explain other possible courses of action if you cannot find a bra to fit the customer						

Additional evidence (if applicable):
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Element 3: Check the customer's preferences and buying decisions when making retail sales

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P3.1 give customers enough time to evaluate products and ask questions						
P3.2 handle customers' questions in a way that promotes sales and keeps the customer's confidence						
P3.3 identify the need for additional and associated products and take the opportunity to increase sales						
P3.4 clearly acknowledge the customer's buying decisions						
P3.5 clearly explain any customer rights that apply						
P3.6 when necessary, clearly explain to the customer where to pay for their purchases						

Additional evidence (if applicable):

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Unit 30:	Provide service to customers in the dressing room of a retail store
Unit code:	C.48
Unit credit:	1
Unit level:	5

Introduction

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

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

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

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Use the dressing room facilities to create sales opportunities - you need to know and understand: K1.1 how many cubicles there are and what other facilities are available K1.2 when a dressing room is likely to be busy and needs to be open and when it is not so it can be closed K1.3 how to greet customers in a welcoming manner K1.4 store policy on checking how many items are being taken into the dressing room area and how to deal with customers who dispute the policy K1.5 how to keep yourself informed about in-store offers and promotions and how to advise the customer about them K1.6 how to engage the customer in conversation in order to suggest additional purchases K1.7 how to monitor customers entering and leaving the cubicles so none remain empty while customers are waiting K1.8 company procedures for dealing with suspected stock loss K1.9 the right person to contact if you suspect stock loss has occurred K1.10 how to check whether alternative dressing room areas are available at busy times		

Knowledge	Type of evidence	Date
2. Keep dressing room facilities ready for customer use - you need to know and understand: K2.1 why it is important to keep the dressing room area clean, tidy, and in good working order K2.2 the company's standards for the cleanliness, tidiness and hygiene of the dressing room area K2.3 who can help to resolve problems with the dressing room area which you are unable to deal with yourself K2.4 where cleaning materials are kept and how to clean the dressing room area safely and effectively K2.5 how to routinely check in a discreet manner that the dressing room and cubicles are clean and tidy, while customers are using the area K2.6 where to store unsold merchandise before preparing it for return to the shop floor K2.7 how to prepare merchandise for return to the shop floor K2.8 how to recognise merchandise that is no longer of saleable quality K2.9 company procedures for dealing with merchandise that is no longer of saleable quality		

Additional evidence (if applicable):

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Element 1: Use the dressing room facilities to create sales opportunities

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 monitor the sales floor for customers who may be interested in trying clothes on						
P1.2 welcome customers in a friendly manner when they approach the dressing room						
P1.3 check how many items are being taken into the cubicle, and follow company policy for restricting the number of items when necessary						
P1.4 politely but firmly advise the customer of the store policy regarding how many items of clothing are allowed in a cubicle at any one time and deal with any disputes						
P1.5 let the customer know how to get further help if needed						
P1.6 take suitable opportunities to tell customers about special offers and promotions						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.7 take suitable opportunities to suggest matching items and accessories						
P1.8 keep track of the number of cubicles that are in use whilst carrying out your other duties						
P1.9 politely check that the customer has brought all the items of clothing out of the cubicle which they took into it in case of any discrepancies						
P1.10 if there is a discrepancy promptly follow the store procedures on how to deal with possible stock loss						
P1.11 acknowledge customers who are waiting to use the dressing room and direct them to alternative facilities if these are available						

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Element 2: Keep dressing room facilities ready for customer use

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 before opening a dressing room area check it is in a fit state for customers to use, in line with the company's standards for cleanliness, tidiness and hygiene						
P2.2 clean and tidy cubicles as needed, using suitable equipment and materials and safe and effective procedures						
P2.3 report to the right person any problems with the dressing room area which you cannot sort out yourself						
P2.4 while the dressing room is open, regularly and discreetly check that the cubicles and dressing room area are clean, tidy and free from obstructions in line with company safety and security policies						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.5 when merchandise needs returning to the shop floor and this cannot be done immediately, place it in the designated area						
P2.6 prepare unsold merchandise for prompt return to the shop floor						
P2.7 follow company procedures for dealing with merchandise that is no longer of saleable quality						

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Unit 31: Process bake-off products for sale in a retail environment

Unit code: B.10

Unit credit: 6

Unit level: 5

Introduction

This unit is about processing ready-prepared goods such as bread, pastry, biscuits and scones, and covers two stages of the preparation process. The first involves baking ready-prepared goods and checking their quality. The second is about following instructions for decorating ready-prepared goods.

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Bake products for sale (bake-off) in a retail environment - you need to know and understand: K1.1 the factors that affect baking including temperature, time, humidity, density, weight and shape K1.2 the behaviour of ingredients during baking and their effect on baking K1.3 why baked products must be cooled in the correct conditions and what these conditions are K1.4 approved procedures for baking products K1.5 approved procedures for checking the quality of products K1.6 how to recognise products that are not fit for sale and what to do about them K1.7 the legal and company requirements you must follow when baking products for sale K1.8 procedures for reporting problems with baking processes		
2. Glaze, coat and decorate bake-off products in a retail environment - you need to know and understand: K2.1 types of finishing materials for bake-off and how to use them K2.2 how to apply coatings, glazes and decorative materials K2.3 how to maintain the quality of coatings, glazes and decorative materials while applying them K2.4 how to recognise products that are not fit to sell and how to deal with them K2.5 the legal and company requirements you must follow in your working practices K2.6 procedures for reporting problems with finishing bake-off products		

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

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 use approved methods to bake the correct quantity and quality of products						
P1.2 use approved procedures for checking that the quantity and quality of baked products is satisfactory						
P1.3 follow procedures for dealing with products that fail to meet the product specification						
P1.4 store products at the correct temperature for the next stage in the bakery process						

Additional evidence (if applicable):
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Countersigning internal verifier (if applicable): _____ Date: _____

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

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

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

Additional evidence (if applicable):

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Unit 32: Process greengrocery products for sale in a retail environment

Unit code: B.12

Unit credit: 9

Unit level: 5

Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge		Type of evidence	Date
1. Prepare greengrocery products in a retail environment for selling to customers - you need to know and understand:			
K1.1	the greengrocery products that are sold in your store and how to handle them without damaging them		
K1.2	how to handle greengrocery products hygienically		
K1.3	legal and company procedures for recycling unwanted packaging and waste from greengrocery products		
K1.4	why you must handle greengrocery products hygienically and without damaging them		
K1.5	company quality standards for greengrocery products		
K1.6	how to recognise greengrocery products that must be rejected or reclassified		
K1.7	how to recognise parts of greengrocery products that must be removed to make the product more attractive to customers		
2. Display greengrocery products to attract retail sales - you need to know and understand:			
K2.1	the greengrocery products that are sold in your store and how they should be displayed		
K2.2	why greengrocery products need displaying in the correct display areas		
K2.3	why you must regularly check the quality and shelf life of greengrocery products, and how to do so		
K2.4	why stock needs rotating		
Knowledge		Type of	Date

		evidence
2. Display greengrocery products to attract retail sales - you need to know and understand:		
K2.5	how to rotate stock	
K2.6	how to price and display greengrocery products with limited shelf life to encourage customers to buy them	
K2.7	legal and company procedures for recycling greengrocery products that cannot be sold because they have deteriorated or are past their shelf life	
K2.8	how to clean and maintain display areas, including chillers	

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

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 remove unwanted packaging						
P1.2 follow legal and company procedures for recycling unwanted packaging and waste from greengrocery products						
P1.3 always handle greengrocery products hygienically and in a way that protects them from damage						
P1.4 choose only those greengrocery products that match the quality of the store sells						
P1.5 correctly deal with greengrocery products that do not match the requirements for quality						
P1.6 correctly weigh, classify and package greengrocery products						
P1.7 remove unwanted parts of greengrocery products to make them as attractive as possible to customers						

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Element 2: Display greengrocery products to attract retail sales

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

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

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Unit 33:	Finish meat products by hand in a retail environment
Unit code:	B.13
Unit credit:	9
Unit level:	5

Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Check the suitability of meat products for finishing in a retail environment - you need to know and understand: K1.1 the sources of meat and other ingredients K1.2 how to carry out quality checks on products and recognise when meat and ingredients are fit for purpose K1.3 the reasons you should reject meat and other ingredients K1.4 the temperatures at which meat should be held during handling, transfer and storage, and the reasons for this K1.5 why you need to keep accurate records K1.6 the reasons for checking records and why you must identify and report problems K1.7 how to refer to and use the quality and safety management manuals		
2. Prepare to finish meat products in a retail environment - you need to know and understand: K2.1 the dangers associated with particular tools and equipment and the safety precautions to take K2.2 why it is important to use the correct tools and equipment K2.3 which tools and equipment are used for hand finishing K2.4 reasons for maintaining tools and equipment K2.5 how to keep tools and equipment clean, sharp and in good working order K2.6 what to do about faulty tools and equipment		

Knowledge	Type of evidence	Date
3. Achieve meat product yield and finish in a retail environment - you need to know and understand:		
K3.1 the temperatures at which meat should be held during handling, transfer and storage, and the reasons for this		
K3.2 reasons for rejecting finished products		
K3.3 procedures to deal with finished products which have been rejected		
K3.4 how to clean tools and equipment		
K3.5 reasons for storing tools and equipment as instructed		

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

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 effectively carry out product quality checks against specifications for process, ingredients and products						
P1.2 identify and reject products that are unsuitable for finishing by hand, and put them in a suitable place away from other products						
P1.3 safely and hygienically deal with rejected products						
P1.4 keep products at the specified temperature during transfer and storage once they have been passed as suitable for finishing by hand						
P1.5 accurately record relevant information						

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Element 2: Prepare to finish meat products in a retail environment

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 get the finishing instructions and organise your work in line with them						
P2.2 keep the work area free from dangers and organise it to meet safety and processing needs						
P2.3 choose hand tools and equipment in line with safety and processing requirements						
P2.4 prepare tools and equipment in line with safety and processing requirements						
P2.5 identify faulty tools and equipment and follow procedures for dealing with them						
P2.6 follow safe and hygienic working practices at all times						

Additional evidence (if applicable):
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Element 3: Achieve meat product yield and finish in a retail environment

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

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

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Unit 34: Hand-process fish in a retail environment

Unit code: B.31

Unit credit: 8

Unit level: 5

Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Hand-process fish in a retail environment - you need to know and understand: K1.1 the importance of hygiene in relation to hand-processing fish K1.2 the company's hygiene policy relating to hand-processing fish K1.3 safe working practices relating to hand-processing fish K1.4 why it is important to follow safe working practices when hand-processing fish K1.5 the dangers and disadvantages of using unsafe and blunt tools to hand-process fish K1.6 the types of accident and injury associated with hand-processing fish K1.7 the procedures for dealing with accidents and injuries that occur when hand-processing fish K1.8 the company's cleaning schedule for your work area K1.9 why it is important to follow the company's cleaning schedule for your work area K1.10 procedures for disposing safely and hygienically of waste resulting from hand-processing fish K1.11 legal and company requirements for recycling waste resulting from hand-processing fish K1.12 how to recognise the species of fish commonly sold in UK retail outlets K1.13 how the arrangement of body parts of a flat fish differs from that of a round fish K1.14 how the different arrangement of body parts affects the way that flat and round fish are hand-processed K1.15 hand-processing techniques that are safe and hygienic and that produce the yield and quality of fish required		

Additional evidence (if applicable):

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Element 1: Hand-process fish in a retail environment

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

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

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.6 follow the company's schedule for cleaning and tidying your work area, tools and equipment						
P1.7 put processed products that meet specifications into containers that will keep the products in a saleable condition						

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Unit code:	B.32
Unit credit:	4
Unit level:	5

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Organise your own work to meet a dough production schedule in a retail store - you need to know and understand: K1.1 how to organise your work efficiently within a dough production schedule, including reorganising your work to meet changing dough production needs K1.2 how to organise your work so as to avoid delays which result in dough no longer being in the required condition K1.3 how to get the instructions you need for your dough production schedule K1.4 the limits of your authority and responsibility for organising your work within the dough production schedule K1.5 how to organise your work within the dough production schedule to make best use of your time and other resources K1.6 where and when to get help and advice about problems with dough production schedules and resources K1.7 the requirements for health and safety and food safety which apply to your work within the dough production schedule, and why you must follow them		

Knowledge	Type of evidence	Date
2. Contribute to improving the efficiency and effectiveness of dough processing in a retail store - you need to know and understand:		
K2.1 why constant improvement to dough processing is necessary in both the short and long term		
K2.2 company procedures for making constructive suggestions for improvements to dough processing		
K2.3 how to spot ways in which dough processing could realistically be improved		
K2.4 how to explain your suggestions positively and in enough detail for further action to be agreed		
K2.5 how to react positively to feedback		

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

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 check you have all the instructions you need for your dough production schedule						
P1.2 within the limits of your authority and responsibility, organise your work within the dough production schedule to make best use of your time and other resources						
P1.3 tell the right person about any problems with the quantity or quality of resources available to you						
P1.4 tell the right person if your dough production schedule does not seem to be realistically achievable						
P1.5 work within the relevant requirements for health and safety and food safety						

Additional evidence (if applicable):
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Element 2: Contribute to improving the efficiency and effectiveness of dough processing in a retail store

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 in relation to the efficiency and effectiveness of dough processing, make suggestions for improvement which are: • realistic • based on accurate information						
P2.2 share your suggestions for improvement with the right person						
P2.3 explain your suggestions positively and in enough detail for further action to be agreed						
P2.4 react positively to feedback about your suggestions						

Additional evidence (if applicable):	
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COLUMN KEY:	O = DIRECT OBSERVATION OF THE LEARNER'S PERFORMANCE BY THEIR ASSESSOR	PD = PROFESSIONAL DISCUSSION
	Q&A = OUTCOMES FROM ORAL OR WRITTEN QUESTIONING	A = ASSIGNMENT, PROJECT/CASE STUDIES
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	RA = PERSONAL STATEMENTS AND/OR REFLECTIVE ACCOUNTS	EPW = EXPERT WITNESS TESTIMONY
	S = OUTCOME FROM SIMULATION, WHERE PERMITTED BY THE ASSESSMENT STRATEGY	RPL = EVIDENCE OF RECOGNITION OF PRIOR LEARNING

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational Standards.

Candidate signature: _____ Date: _____

I confirm that the candidate has achieved all the requirements of this Unit.

Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Unit 36: Select, weigh and measure bakery ingredients

Unit code: B.33

Unit credit: 6

Unit level: 5

Introduction

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

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. For the whole unit, you need to know and understand: K1.1 to what standards of health and safety and food safety you are required to work, why it is important that you do so and what might happen if they are not met K1.2 common factors affecting quality of ingredients, during handling, weighing, measuring and storage K1.3 the importance of handling and preparing ingredients at the optimum temperature and conditions for effective weighing, measuring and eventually mixing K1.4 how to avoid contamination of ingredients during handling, weighing, measuring and storage and what might happen if this is not done K1.5 how to recognise and report substandard ingredients, signs of contamination, infestation or damage to ingredients and packaging K1.6 what the lines and methods of effective communication are and why it is important to use them K1.7 what the documentation requirements are and why it is important to meet them K1.8 personal protective clothing/equipment and working practices which are useful in combating potentially harmful effects of dust from ingredients and allergies from skin contact with ingredients K1.9 how to use work instructions and product specifications or recipes to calculate or adjust the ratio of ingredients required and ensure these meet production needs K1.10 the importance of working within time constraints required by production schedule		

Knowledge	Type of evidence	Date
1. For the whole unit, you need to know and understand:		
K1.11 how to report non availability of ingredients and source alternative supplies of ingredients or alternative ingredients as permitted		
K1.12 the importance of using the correct type of weighing and measuring equipment according to the types and quantities of ingredients used		
K1.13 how to safely label and store ingredients ready for mixing or further processing		

Additional evidence (if applicable):

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Candidate signature: _____ Date: _____

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Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Element 1: Identify ingredients

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 identify the specified ingredient						
P1.2 check quantities according to your instructions and specifications						
P1.3 carry out any calculations necessary to establish quantities of ingredients required to meet production needs						

Additional evidence (if applicable):
--

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Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

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Countersigning internal verifier (if applicable): _____ Date: _____

Element 2: Select ingredients

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

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

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Element 3: Weigh and measure ingredients

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

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

Additional evidence (if applicable):

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Candidate signature: _____ Date: _____

I confirm that the candidate has achieved all the requirements of this Unit.

Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Unit 37: Hand divide, mould and shape fermented doughs

Unit code: B.34

Unit credit: 6

Unit level: 5

Introduction

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

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. For the whole unit, you need to know and understand:		
K1.1 to what standards of health and safety and food safety you are required to work, why it is important that you do so, and what might happen if they are not met		
K1.2 requirements of bread weight regulations and the importance of accurate dividing and check weighing of fermented dough to comply with these regulations		
K1.3 why it is important to follow work instructions and product specifications or recipes throughout dough processing to ensure successful dough processing		
K1.4 how to seek advice and make process adjustments to dough, to take into account minor changes in ingredient performance, production timing and environmental conditions, necessary to keep a dough within specification		
K1.5 common sources of dough contamination during processing		
K1.6 how to avoid contamination during dough processing and what might happen if this is not done		
K1.7 how to recognise and report dough that does not meet specification during processing		
K1.8 the procedure for rejecting and isolating failed dough and dough portions		
K1.9 what the lines and methods of effective communication during processing are and why it is important to use them correctly		
K.10 what the documentation requirements during processing are and why it is important to meet them		
K.11 personal protective clothing/equipment and working practices which are useful in combating the potentially harmful effects of dust and allergies resulting from breathing or skin contact with ingredients or dough		

Knowledge	Type of evidence	Date
1. For the whole unit, you need to know and understand:		
K.12 how to maintain dough condition and deal with time constraints and variations to conditions throughout processing		
K.13 the correct method for loading and unloading trays in racks		

Additional evidence (if applicable):

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Candidate signature: _____ Date: _____

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Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Element 1: Hand divide fermented dough

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 check the available dough against your instructions and specifications and take prompt action on discovering any discrepancy						
P1.2 obtain and check the condition of dividing tools and the accuracy of equipment						
P1.3 hand divide dough accurately and reliably						
P1.4 work with practice which minimises waste and correctly deal with scrap material						
P1.5 position and maintain divided dough portions correctly for further processing						
P1.6 comply with health, safety, food safety, bread weight regulations and organisational requirements throughout dividing operations						

Additional evidence (if applicable):
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Countersigning internal verifier (if applicable): _____ Date: _____

Element 2: Hand mould and shape fermented dough

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 check the available portioned dough against your instructions and specifications and take prompt action on discovering any discrepancy						
P2.2 prepare and maintain an appropriate table surface for moulding and shaping						
P2.3 hand mould and shape portioned dough accurately and reliably						
P2.4 wash and dress shaped dough surfaces as required to specification						
P2.5 work with practice which minimises waste and correctly deal with scrap material						
P2.6 place dough in the correct condition and location, for further processing						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.7 comply with health, safety, food safety and organisational requirements throughout moulding and shaping operations						
P2.8 operate within the limits of your own authority and capabilities						

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Unit 38:	Promote sales of food or drink products by offering samples to customers
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Unit code:	C.49
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Unit credit:	2
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Unit level:	5
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Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Promote sales of food or drink products by offering samples to customers - you need to know and understand: K1.1 how the opportunity to sample products helps to promote sales K1.2 the criteria for selecting products for sampling, including product type and sell-by date K1.3 the company's procedures and standards for preparing and displaying samples K1.4 the required temperatures for safely storing and serving samples K1.5 the information you must give customers about potentially allergenic ingredients, and the company's procedures for giving this information K1.6 how to spot opportunities to encourage customers to sample products K1.7 how to use words and body language to encourage customers to sample and buy products K1.8 where customers can buy the products sampled and how to explain this clearly to customers K1.9 why it is important to monitor the freshness of samples on display, and how to do so K1.10 legal requirements and the company's procedures for disposing of waste products and recording food disposals		

Additional evidence (if applicable):
--

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Assessor signature: _____ Date: _____

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Countersigning internal verifier (if applicable): _____ Date: _____

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

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 spot suitable opportunities to promote sales by making samples available to customers						
P1.2 select suitable products for sampling						
P1.3 prepare product samples in line with company procedures and standards for preparation and presentation						
P1.4 follow company procedures for giving customers information about potentially allergenic ingredients						
P1.5 spot suitable opportunities to encourage individual customers to sample products						
P1.6 use persuasive words and body language to encourage customers to sample and buy products						
P1.7 explain clearly to customers, when necessary, where they can buy the products sampled						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.8 monitor the freshness of samples on display and remove samples which no longer meet requirements for freshness						
P1.9 dispose of waste products in line with company and legal food safety requirements						
P1.10 follow company procedures and legal requirements for recording food disposals						

Additional evidence (if applicable):

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Unit 39: Help customers to choose delicatessen products in a retail outlet

Unit code: C.54

Unit credit: 6

Unit level: 5

Introduction

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

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

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Help customers to choose delicatessen products in a retail outlet - you need to know and understand:		
K1.1 how to establish a rapport with customers K1.2 the kinds of questions you need to ask customers in order to find out their requirements K1.3 where to find reliable information about the products you are responsible for selling K1.4 effective ways of comparing and contrasting products for customers K1.5 how to recognise opportunities to recommend associated or additional products K1.6 practical limits on portion weight, size or shape K1.7 how to explain tactfully to customers when portion requirements cannot be met, and what alternatives can be offered		

Additional evidence (if applicable):

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Candidate signature: _____ Date: _____

I confirm that the candidate has achieved all the requirements of this Unit.

Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Element 1: Help customers to choose delicatessen products in a retail outlet

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 use effective questioning techniques to establish a rapport with customers and find out what they are looking for						
P1.2 match products as closely as possible to customers' stated requirements, from the products available						
P1.3 support your product recommendations with factually correct information which is likely to give customers confidence in your recommendations						
P1.4 compare and contrast products in ways that help customers choose the products that best meet their requirements						
P1.5 recognise and act on suitable opportunities to recommend to customers associated or additional products						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.6 tactfully suggest alternative portion sizes or products when customers' requests are impractical						

Additional evidence (if applicable):
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I confirm that the candidate has achieved all the requirements of this Unit.

Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Unit 40: **Portion delicatessen products in a retail outlet to meet individual customers' requirements**

Unit code: C.55

Unit credit: 6

Unit level: 5

Introduction

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

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

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Portion delicatessen products in a retail outlet to meet individual customers' requirements - you need to know and understand: K1.1 the food safety and general health and safety requirements to be complied with when handling, portioning and disposing of products K1.2 which tools and utensils to use with which products and why K1.3 how to cut products safely and in ways which achieve the required portion while minimising waste K1.4 the conventionally accepted portion shapes for the products you are responsible for portioning K1.5 how to use weighing scales, including how to allow for the weight of additional items such as containers K1.6 how to choose packaging to suit the product type and portion size K1.7 accepted standards of presentation for products from which portions have been taken K1.8 when and how to adjust or dispose of remaining products		

Additional evidence (if applicable):
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Candidate signature: _____ Date: _____

I confirm that the candidate has achieved all the requirements of this Unit.

Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

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

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 handle and portion products in ways which comply with all relevant food safety requirements						
P1.2 use tools and utensils suited to the product						
P1.3 cut products so as to: • produce conventionally acceptable portion shapes • maintain the attractiveness of the product • minimise waste • comply with all relevant health and safety requirements						
P1.4 when weighing portions, take into account the weight of any additional items on the scales such as containers						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.5 check that the customer is satisfied with the portioned product before it is wrapped						
P1.6 place portioned products in suitable packaging						
P1.7 check that the product from which portions have been taken is still in saleable condition, and adjust, remove or replace it as needed						
P1.8 dispose of any unsaleable products in line with all relevant health and safety requirements, including food safety requirements						

Additional evidence (if applicable):

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I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational Standards.

Candidate signature: _____ Date: _____

I confirm that the candidate has achieved all the requirements of this Unit.

Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Unit 41:	Establish customer needs and provide advice regarding tiling products
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Unit code:	C.40
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Unit credit:	6
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Unit level:	5
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Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Establish customer needs and provide advice regarding tiling products - you need to know and understand:		
K1.1 the different locations where tiles are used, and the factors to consider when determining which tiles are suitable K1.2 the relative advantages and disadvantages of a tiled floor compared with the principal other types of flooring K1.3 the constituent materials and general manufacturing process of the tiles which you are involved in selling K1.4 the delivery times for the tiles which you are involved in selling K1.5 the implications of Building Regulations and sustainability for the tiles which your organisation offers K1.6 the principal types of adhesives and grouts and for what these are used K1.7 the principal types of integral fittings and accessories available and which can be installed during or after tiling K1.8 procedures for cutting and drilling through tiles K1.9 the reasons for possible differences in sizes and shading of tiles, and the purpose of batch numbers K1.10 current trends in tiling design and fashion K1.11 the types of tile fixing, trim and beading and those most appropriate for different applications		

Knowledge	Type of evidence	Date
1. Establish customer needs and provide advice regarding tiling products - you need to know and understand:		
K1.12 the circumstances when it is important to use silicone sealants		
K1.13 where to seek information appropriate to customers' needs, particularly non-standard requirements		
K1.14 the principal forms of underfloor heating, and those floor finishes which are suitable		

Additional evidence (if applicable):

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Element 1: Establish customer needs and provide advice regarding tiling products

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 establish correctly where the customer intends to use the tiles, and why tiles are being considered						
P1.2 determine the customer's budget and delivery timescale for the tiles						
P1.3 establish the nature of the surface to be tiled, and determine correctly any consequent considerations regarding the suitability of particular tiles and how they might be fixed						
P1.4 identify whether the customer requires any fixtures or fittings and advise the customer accordingly						
P1.5 establish how the tiled surfaces are to be used, and advise the customer correctly upon the available types of tile suited to the intended use						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.6 explore and determine the customer's preferred colours, styles, design and layout of tiles						
P1.7 provide customers with samples of appropriate tiles and displays						
P1.8 advise, with sensitivity, why certain styles may be better suited to particular types of homes						
P1.9 advise the customer correctly regarding the relevant tiling finishes available, including appropriate trims and beadings						
P1.10 determine correctly whether the customer is seeking other requirements such as underfloor heating						
P1.11 create a rapport with the customer and demonstrate an interest in the customer's needs						
P1.12 listen actively and promote understanding by using words that are clear, concise and suited to the customer's needs						

Additional evidence (if applicable):

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Countersigning assessor signature (if applicable): _____ Date: _____

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Countersigning internal verifier (if applicable): _____ Date: _____

Unit 42:	Advise customers upon measuring and planning for the fixing of tiles
Unit code:	C.41
Unit credit:	6
Unit level:	5

Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Advise customers upon measuring and planning for the fixing of tiles - you need to know and understand:		
K1.1 why measuring, setting out and planning for tiling is important, and the general procedures for doing this K1.2 the principal types of tools and materials required for measuring, planning and setting out, and their respective purposes K1.3 the information to be sought from customers when advising upon tiling different locations K1.4 the importance of ensuring that tiles are from the same batch, and the potential difficulties that might arise where this does not occur K1.5 how to measure the surfaces to be tiled, and the factors to be determined in identifying the number of tiles required K1.6 how to convert between metric and imperial measures K1.7 methods for planning for incorporating motif and border tiles K1.8 the types of tile fixing trim, and those most appropriate for different applications K1.9 the types and methods of applying adhesive K1.10 the types of grout available K1.11 methods for calculating the size of the electrical underfloor heating system required K1.12 where to seek help or information for customers' non-standard or particular requirements		

Additional evidence (if applicable):

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Candidate signature: _____ Date: _____

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Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

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

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 determine correctly the nature of the location being tiled, and the subsequent use to which the tiled surfaces are to be put						
P1.2 identify correctly the nature of the materials suited for the intended location						
P1.3 check and confirm, where possible, the accuracy of measurements provided by the customer, using tact and sensitivity						
P1.4 calculate correctly the area of the surface to be tiled						
P1.5 calculate correctly the number of tiles required, taking into account the intended design and any use of motif and border tiles						
P1.6 determine correctly the amount of trim, edging material and sealants required						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.7 calculate correctly the amount and type of adhesive needed						
P1.8 identify correctly the number and size of spacers required						
P1.9 determine correctly the type, colour and amount of grout required						
P1.10 calculate correctly how any other requirements, such as underfloor heating, will affect the measuring and planning process						
P1.11 provide an accurate estimate for the customer, explaining clearly and correctly its component parts						
P1.12 listen actively and encourage questions from the customer towards promoting the customer's understanding						

Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

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Unit 43: Advise customers upon the fixing of tiles

Unit code: C.42

Unit credit: 6

Unit level: 5

Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Advise customers upon the fixing of tiles - you need to know and understand: K1.1 the general principles of preparing surfaces on which tiles are to be fixed including fixing and using battens, and the circumstances when it is important to waterproof walls before tiling, and how to do this K1.2 those surfaces which are not suited for tiling, including flaking paint and wallpaper, the reasons why and what can be done to make them suitable K1.3 the types of flooring most commonly found in domestic and office buildings, and the conditions that must be satisfied for tiling to be appropriate K1.4 the purpose of movement joints and how these are sited K1.5 what a tanking system is, and the circumstances when it is required K1.6 the principal types of adhesives, grouts and admixes, the relative advantages of these and the suitability of the different types for different applications and locations when tiling, including suitability for wet areas K1.7 the principal methods for applying adhesives and grout and the importance of following manufacturers' instructions K1.8 the terms slip, open time, drying/curing time and their relevance to the use of adhesives and grouts K1.9 the principal types of tools used in the fixing, grouting and finishing of tiles K1.10 the principal types of tools and materials required for tile cutting and drilling, the respective purposes of these and how to use tools and materials safely including the use of tile cutters and tile nippers		

Knowledge	Type of evidence	Date
1. Advise customers upon the fixing of tiles - you need to know and understand:		
K1.11 how to cut and drill tiles safely and effectively and which tiles cannot be cut or drilled and why		
K1.12 methods and materials for fitting, fixing and sealing electrical underfloor heating systems		
K1.13 how to finish tiled surfaces off upon completion of tiling		
K1.14 the principal methods for undertaking routine cleaning and maintenance of all tiled surfaces including tiles and grouting, and how to recognise and deal with problems such as mildew, discolouration of tiles and grouting		
K1.15 the various cleaning and maintenance products available, the applications of these and how to use them safely		

Additional evidence (if applicable):

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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Element 1: Advise customers upon the fixing of tiles

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 determine required details about the surfaces upon which the tiles are to be fixed, establishing the nature of the surface being tiled						
P1.2 advise the customer correctly regarding any required preparation of the surface						
P1.3 establish how the finished tiled surfaces are to be used						
P1.4 identify and select appropriate adhesives and grout to meet the customer's needs						
P1.5 ensure that customers are fully informed about the products that will be used, including the order of application and how products are to be applied						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.6 identify whether there are any existing or planned fixtures, fittings, pipework and cabling, and establish correctly their potential impact for the fixing of the proposed tiles						
P1.7 agree with the customer how best to accommodate any existing or planned fixtures, fittings, pipework or cabling						
P1.8 ensure that customers are briefed on safe working and best practice techniques						
P1.9 determine whether there is, or will be, underfloor heating and determine correctly the impact for the fixing of the proposed tiles						
P1.10 explore with the customer and gain agreement on how the tiled surfaces are to be finished off						
P1.11 explain correctly how to take care of the tiled surfaces						
P1.12 offer the appropriate cleaning and maintenance products to the customer, where relevant						
P1.13 provide confidence to the customer that the decisions taken throughout the process will meet the customer's expectations and tiling requirements						

Additional evidence (if applicable):

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Unit 44:	Promote beauty products to retail customers
Unit code:	C.35
Unit credit:	10
Unit level:	5

Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
1. Demonstrate beauty products to retail customers - you need to know and understand: K1.1 the purpose and value of demonstrations in promoting and selling makeup and skincare products K1.2 the tools, materials and products you need for demonstrating makeup and skincare products effectively and hygienically K1.3 how your own personal hygiene and grooming contribute to making the demonstration comfortable for the customer K1.4 why you must get the customer's permission for the demonstration K1.5 how to protect the customer's hair and clothing from contact with the products you are demonstrating K1.6 the feelings and concerns that customers typically have about demonstrations of makeup and skincare products, and how to tackle these K1.7 the difference between features and benefits of products K1.8 the features and benefits of the makeup and skincare products you are responsible for demonstrating K1.9 techniques for applying products effectively and hygienically K1.10 how to organise demonstrations into logical steps and stages, and the importance of doing so K1.11 how to communicate clear and accurate information before and during demonstrations K1.12 why you should clear equipment and products away promptly at the end of the demonstration without keeping customers waiting too long		

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

Additional evidence (if applicable):

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Countersigning assessor signature (if applicable): _____ Date: _____

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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Element 1: Demonstrate beauty products to retail customers

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.1 gather together all the tools, materials and products you need for an effective and hygienic demonstration						
P1.2 gain the customer's permission to carry out the demonstration						
P1.3 explain to the customer clearly and in enough detail which products you are going to apply and why						
P1.4 ask the customer whether they are allergic to any products or ingredients, and take care not to apply any of these products						
P1.5 follow the company grooming guidelines and maintain your own personal hygiene						
P1.6 protect the customer's hair and clothing from coming into contact with the products you are demonstrating						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P1.7 apply products in a logical sequence, using effective and hygienic techniques						
P1.8 explain clearly the features and benefits you think are needed to gain the customer's interest in making a purchase						
P1.9 complete the demonstration bearing in mind the customer's time pressures						
P1.10 check whether the customer wants you to make any adjustments to the products you have applied						
P1.11 promptly clear away the equipment and products at the end of the demonstration while not keeping customers waiting too long						
P1.12 give the customer the opportunity to look in a mirror at the end of the demonstration and make sure that the light and angle of mirror do justice to the products you have applied						

Additional evidence (if applicable):

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Element 2: Maintain the customer record-card system in a retail store

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.1 identify suitable opportunities to ask customers whether you may set up a record card for them						
P2.2 explain clearly to customers the benefits to them of being on file						
P2.3 record information clearly and accurately						
P2.4 update the record-card system often enough to keep it useful						
P2.5 keep information about customers confidential						
P2.6 follow company rules and procedures for setting up and updating customer record cards						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
P2.7 ask customers whether they have any product or ingredient allergies, and record this information accurately						
P2.8 if a customer has an allergy, identify which products in your range contain this ingredient and note the products on the record card as unsuitable for the customer						
P2.9 identify your top customers from the record-card system and use this information to help you to boost sales						
P2.10 while setting up new record cards, offer customers opportunities to make appointments for return visits to your counter						

Additional evidence (if applicable):

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Unit 45: Cash up in a retail store

Unit code: C.46

Unit credit: 2

Unit level: 5

Introduction

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

What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

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

Additional evidence (if applicable):

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I confirm that the candidate has achieved all the requirements of this Unit.

Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Element 1: Cash up in a retail store

What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

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

Additional evidence (if applicable):

COLUMN KEY:	O = DIRECT OBSERVATION OF THE LEARNER’S PERFORMANCE BY THEIR ASSESSOR	PD = PROFESSIONAL DISCUSSION
	Q&A = OUTCOMES FROM ORAL OR WRITTEN QUESTIONING	A = ASSIGNMENT, PROJECT/CASE STUDIES
	P = PRODUCTS OF THE LEARNER’S WORK	WT = AUTHENTIC STATEMENTS/WITNESS TESTIMONY
	RA = PERSONAL STATEMENTS AND/OR REFLECTIVE ACCOUNTS	EPW = EXPERT WITNESS TESTIMONY
	S = OUTCOME FROM SIMULATION, WHERE PERMITTED BY THE ASSESSMENT STRATEGY	RPL = EVIDENCE OF RECOGNITION OF PRIOR LEARNING

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational Standards.

Candidate signature: _____ Date: _____

I confirm that the candidate has achieved all the requirements of this Unit.

Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

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