

# **SVQ in Retail (Sales Professional) at SCQF Level 6**

## **Scottish Vocational Qualifications**

Specification

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## **Edexcel, BTEC and LCCI qualifications**

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# 1 Introducing Scottish Vocational Qualifications

## What are Scottish Vocational Qualifications?

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Scottish Vocational Qualifications (SVQs) are work-based qualifications that give learners the opportunity to develop and demonstrate their competence in the area of work or job role to which a particular qualification relates. SVQs are benchmarks of competence so they work as a guarantee that the person who holds an SVQ can do the job the qualification covers.

SVQs are based on national standards for the appropriate sector, they are drawn up by people from industry, commerce and education. These national standards define what employees, or potential employees, must be able to do and know, and how well they should undertake work tasks and work roles.

SVQs allow flexible delivery that meets the individual learner's needs. They are suitable for those in employment, and for those studying at college who have a part-time job or access to a substantial work placement that allows demonstration of the competencies required for work.

Most learners will work towards their qualification in the workplace or in settings that replicate the working environment (as specified in the assessment strategy for the sector). Colleges, training centres and/or employers can offer these qualifications as long as they have access to appropriate physical and human resources.

## Levels and sizes of SVQs

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SVQs are recognised on the Scottish Credit and Qualifications Framework (SCQF), Scotland's national qualifications framework and are regulated by Scottish Qualifications Authority (SQA) Accreditation. The SCQF uses two measures to describe qualifications within the framework:

- Level; and
- credit points.

'Level' indicates the level of difficulty and complexity of a qualification based on a single set of level descriptors that outline the general outcomes of learning at each SCQF level. The SCQF has 12 levels ranging from SCQF Level 1 up to SCQF Level 12. SVQs are available from SCQF Level 4 up to SCQF Level 11.

'Credit points' indicate the size of a qualification by showing how much time it takes, on average, to complete. The number of credit points allocated is determined by the amount of time that an average learner at a specified level might expect to take to achieve all the outcomes of a qualification. The SCQF works on the basis that one credit point represents the amount of learning achieved through a notional 10 hours of learning time, which includes everything a learner has to do to achieve a qualification, including the assessment. There is no fixed number of credit points required for SVQs so they can be of varying sizes to reflect the specific needs of different sectors and occupations.

For more information on the SCQF go to [scqf.org.uk](http://scqf.org.uk)

At SCQF Level 5 and above SVQs are recognised as the mandatory competence component of Modern Apprenticeships and, where appropriate, can also contribute to Graduate Level Apprenticeships. For those who wish to take a work-based qualification, SVQs can be delivered as stand-alone qualifications outside of the apprenticeship frameworks.

## 2 Qualification summary and key information

Qualification title	SVQ in Retail (Sales Professional) at SCQF Level 6
Operational start date	01/01/2019
Minimum age	16
Number of required units	10
Credit points	37–78
Assessment	Portfolio of evidence (internal assessment).
Grading information	The qualification and units are graded pass/fail.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners register for this qualification. However, centres must follow the <i>A guide to recruiting with integrity and enrolling learners onto qualifications</i> document (see <i>Section 7 Access and Recruitment</i> ).
Funding	<p>Details of funding approval are available from Skills Development Scotland at: <a href="http://www.skillsdevelopmentscotland.co.uk">www.skillsdevelopmentscotland.co.uk</a> and the Scottish Funding Council at: <a href="http://www.sfc.ac.uk">www.sfc.ac.uk</a></p> <p>Information is also available on the SQA Accreditation (SQA) website, <a href="http://accreditation.sqa.org.uk">accreditation.sqa.org.uk</a></p>

The qualification title, unit titles and qualification code will appear on each learner's final certificate. Centres should tell learners this when recruiting them and registering them with Pearson. There is more information on certification in our *UK Information Manual*, available on our website: [qualifications.pearson.com](http://qualifications.pearson.com)

## 3 Qualification rationale

### Qualification objectives

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The SVQ in Retail (Sales Professional) at SCQF Level 6 is for learners who work in or who want to work in retailing.

The qualification gives learners the opportunity to:

- develop and demonstrate competence in retailing job roles in areas such as stock management, management and leadership
- develop technical skills and knowledge and understanding related to the specified retailing job roles such as staff management, customer care, multi-channel retail, product expertise and merchandising
- gain recognition for existing skills and knowledge
- achieve a nationally-recognised SCQF Level 6 qualification
- develop personal growth and engagement in learning.

### Relationship with previous qualifications

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This qualification is a direct replacement for the 2012 SVQ in Retail (Sales Professional) at SCQF Level 6, which has expired.

### Apprenticeships

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The SVQ in Retail (Sales Professional) at SCQF Level 6 is a mandatory component for the Level 6 Apprenticeship in Retail Modern Apprenticeship.

### Progression opportunities

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Learners who achieve the SVQ in Retail (Sales Professional) at SCQF Level 6 can progress to further professional and academic development, for example a Higher National Diploma in Retail Management or employment in the retail sector.

### Industry support and recognition

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This qualification is supported by People 1st, the Sector Skills Council for Retail.

### Relationship with National Occupational Standards

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This qualification is based on the National Occupational Standards (NOS) in retail subjects, which were set and designed by People 1st, the Sector Skills Council for the sector.

## 4 Qualification structure

### SVQ in Retail (Sales Professional) at SCQF Level 6

The learner will need to meet the requirements outlined in the table below before the qualification can be awarded.

The number of credits that must be achieved	37
Number of mandatory units that must be achieved	4
Number of optional units that must be achieved	6

Unit	Unit code	Mandatory units	Credit points	SCQF Level
1	PPL.E335	Support effective team working in a retail organisation	4	6
2	PPL.E336	Contribute to the planning, organisation and evaluation of your own learning in a retail organisation	5	6
3	CFACSB10	Organise the delivery of reliable customer service	6	6
Unit	Unit code	Optional units	Credit points	SCQF Level
Group A – candidates must <b>take three units</b>				
4	PPL.C223	Check customers' preferences and buying decisions when making retail sales	4	5
5	PPL.C311	Make and review plans for finding new retail clients	7	6
6	PPL.C312	Market a retail organisation's services to potential clients	7	6
7	PPL.C313	Provide a consultative selling service to retail clients	6	6
8	PPL.C314	Provide an after-sales service to retail clients as a result of retail client consultations	6	7

Unit	Unit code	Optional units	Credit points	SCQF Level
9	PPL.C355	Help retail customers to choose specialist products in a retail organisation	7	6
10	PPL.C356	Demonstrate specialist products to customers in a retail organisation	6	6
11	PPL.E338	Manage a team on a temporary basis in a retail organisation	5	6
12	PPL.E314	Monitor the service provided to customers by external suppliers of a retail organisation	4	5
13	PPL.D002	Develop effective relationships with customers within a retail organisation	7	8
14	CFACSB11	Improve the customer relationship	7	6
Group B – candidates must <b>take four units (minimum of two units must be Level 6 or above)</b>				
Stock management				
15	PPL.B301	Organise staff to receive, check and record incoming deliveries in a retail organisation	12	6
16	PPL.B302	Manage staff and maintain stock records in a storage facility in a retail organisation	12	7
17	PPL.B303	Check the storage and care of stock in a retail organisation	5	6
18	PPL.B304	Organise an audit programme and put it into practice with a team in a retail organisation	8	6
19	PPL.B305	Investigate problems and report the findings of stock audits in a retail organisation	5	6
20	PPL.B306	Choose and contract with suppliers and order stock in a retail organisation	7	6
21	PPL.B307	Check and evaluate the performance of suppliers of stock	7	6

Unit	Unit code	Optional units	Credit points	SCQF Level
Customer service				
22	PPL.C315	Decide on the value of items offered in part-exchange by retail customers	5	6
23	PPL.C316	Negotiate part-exchange sales transactions with retail customers	5	6
24	PPL.E315	Evaluate and improve external suppliers' service to customers of a retail organisation	8	7
25	CFACSD11	Lead a team to improve customer service	7	7
26	PPL.C412	Monitor and improve retail customers' experience of a retail organisation	8	8
27	PPL.D004	Monitor and resolve customer complaints within a retail organisation	6	8
Management and leadership				
28	PPL.E003	Plan and allocate work to staff in a retail organisation	6	6
29	PPL.E301	Identify and analyse opportunities for solving problems and improving retail operations	10	8
30	PPL.E302	Recommend, agree and contribute to implementing improvements to retail operations	7	6
31	PPL.E304	Monitor and maintain security in a retail organisation	5	5
32	PPL.E305	Monitor, identify and investigate loss and wastage in a retail organisation	6	8
33	PPL.E306	Assess, monitor and control risks to health and safety and provide training in a retail organisation	7	8
34	PPL.E307	Take a safe and active role when accidents and emergencies occur in a retail organisation	4	5

Unit	Unit code	Optional units	Credit points	SCQF Level
35	PPL.E337	Help colleagues to learn in a retail organisation	5	6
Merchandising				
36	PPL.C301	Organise staff to display goods for retail sale	4	6
37	PPL.C302	Assess how effective displays are in a retail organisation	4	6
38	PPL.C303	Keep stock available, correctly priced and maintain quality of stock in a retail organisation	3	5
Finance				
39	PPL.C214	Provide a payment service at point of sale in a retail organisation	4	5
40	PPL.C270	Promote a retail organisation's own credit card to customers	7	7
41	PPL.C271	Offer customers information on insurance products associated with a retail organisation's credit card	6	6
42	PPL.C272	Help customers to apply for a retail organisation's credit card and associated insurance products	8	6
43	PPL.C306	Identify the retail customer's credit or hire-purchase requirements	6	6
44	PPL.C307	Advise retail customers on the features of borrowing facilities	6	7
45	PPL.C308	Process credit or hire-purchase applications on behalf of retail customers	5	6
Multi-channel retail				
46	PPL.MCR01	Work productively with colleagues in a multi-channel retail organisation	8	6
47	PPL.MCR02	Work with colleagues to encourage innovation in a multi-channel retail organisation	6	6



Unit	Unit code	Optional units	Credit points	SCQF Level
48	PPL.MCR03	Update product information on a trading website	3	6
49	PPL.MCR05	Provide support to individual retail customers of a trading website	5	6
50	PPL.MCR06	Analyse feedback from retail customers of a multi-channel retail organisation when goods are returned	4	6
51	PPL.MCR07	Manage a social network on a trading website	4	6
52	PPL.MCR15	Use in-store online facilities to achieve retail sales	9	5
53	PPL.MCR16	Advise and support customers in a retail organisation on the use of online retail facilities	7	6
54	PPL.MCR17	Motivate colleagues to promote online retail facilities to retail customers	7	6
55	PPL.MCR18	Maintain the confidentiality and security of online data regarding retail customers	5	5
Product expertise				
56	PPL.B220	Bake (bake-off) products for sale in a retail organisation	6	5
57	PPL.B221	Finish bake-off products in a retail organisation	6	5
58	PPL.B224	Prepare greengrocery products for sale in a retail organisation	3	5
59	PPL.B225	Display and maintain greengrocery products to attract sales in a retail organisation	5	5
60	PPL.B226	Quality check the suitability of meat products for finishing in a retail organisation	6	5
61	PPL.B227	Prepare to finish meat products in a retail organisation	5	5

Unit	Unit code	Optional units	Credit points	SCQF Level
62	PPL.B228	Achieve meat product yield and finish in a retail organisation	5	5
63	PPL.B243	Organise your work to meet a dough production schedule in a retail organisation	4	5
64	IMPCB101	Select, weigh and measure ingredients in bakery operations	5	5
65	IMPCB105	Divide, mould and shape fermented dough in bakery operations	6	5
66	PPL.B248	Hand-process fish in a retail organisation	6	5
67	PPL.B308	Monitor and contribute to improving food safety in a retail organisation	8	6
68	PPL.C250	Identify retail customer's requirements for lingerie	2	5
69	PPL.C251	Measure and fit retail customers for lingerie	8	5
70	PPL.C253	Demonstrate beauty products to retail customers	6	6
71	PPL.C254	Maintain the retail customer record-card system in a retail organisation	2	5
72	PPL.C262	Establish retail customers' requirements and provide advice regarding tiling products	6	5
73	PPL.C263	Advise customers upon measuring and planning for the fixing of tiles	8	6
74	PPL.C264	Advise customers upon the fixing of their own tiles	8	6
75	PPL.C268	Help customers to choose alcoholic beverages in a retail organisation by advising on and recommending relevant products	8	6
76	PPL.C273	Use the dressing room facilities to create sales opportunities	2	6

Unit	Unit code	Optional units	Credit points	SCQF Level
77	PPL.C278	Help customers to choose delicatessen products in a specialist retail organisation	7	5
78	PPL.C279	Portion delicatessen products to meet individual customers' requirements in a specialised retail organisation or specialist counter within a general retail organisation	6	5

Centres should be aware that within the SCQF Level 6 qualification in this specification, learners may be required to meet the demands of units at SCQF Levels 7 and/or 8. Centres are advised to consider the support, guidance and opportunities they give to learners to meet the demands of the higher-level units.

## 5 Programme delivery

Centres are free to offer these qualifications using any mode of delivery (for example full-time, part-time, evening only, distance learning) that meets learners' needs. Learners must be in employment or working with a training provider on a work programme or placement so that they can develop and demonstrate the occupational competence required.

Whichever mode of delivery is used, centres must make sure that learners have access to specified resources and to the sector specialists delivering and assessing the units. Centres must adhere to the Pearson policies that apply to the different modes of delivery. Our *Collaborative and consortium arrangements for the delivery of vocational qualifications policy* document can be found on our website.

There are various approaches to delivering a successful competence-based qualification. The section below outlines elements of good practice that centres can adopt in relation to learner recruitment, preparation and support, training and assessment delivery, and employer engagement.

### Elements of good practice

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#### Learner recruitment, preparation and support

Good practice in relation to learner recruitment, preparation and support includes:

- providing initial advice and guidance, including work tasters, to potential learners to give them an insight into the relevant industry and the learning programme
- using a range of appropriate and rigorous selection methods to ensure that learners are matched to the programme best suited to their needs
- carrying out a thorough induction for learners to ensure that they completely understand the programme and what is expected of them. For example, the induction should include the requirements of the programme, an initial assessment of current competency levels, assessment of individual learning styles, identification of training needs, an individual learning plan, and details of training delivery and the assessment process. It is good practice to involve the employer in the induction process. This helps the employer to understand what will be taking place during the programme and enables them to start building a relationship with the centre to support the effective delivery of the programme
- keeping in regular contact with the learner to keep them engaged and motivated, and ensuring that there are open lines of communication between the learner, the assessor, the employer and teaching staff.

## Training and assessment delivery

Good practice in relation to training and assessment delivery includes:

- offering flexible delivery and assessment to meet the needs of the employer and learner, through the use of a range of approaches, for example virtual learning environments (VLEs), online lectures, video, printable online resources, virtual visits, webcams for distance training, eportfolios
- planning opportunities for the development and practising of skills on the job. On-the-job training presents an excellent opportunity to develop the learner's routine expertise, resourcefulness, craft skills and business-like attitude. It is, therefore, important that there is intentional structuring of practice and guidance to supplement the learning and development provided through engagement in everyday work activities. Learners need to have structured time to learn and practise their skills separate from their everyday work activities. Teaching and learning methods, such as coaching, mentoring, shadowing, reflective practice, collaboration and consultation, could be used in this structured on-the-job learning
- developing an holistic approach to assessment by matching evidence to different assessment criteria, learning outcomes and units as appropriate, thereby reducing the assessment burden on learners and assessors. It is good practice to draw up an assessment plan that aligns the units with the learning process and the acquisition of knowledge and skills, and which indicates how and when the units will be assessed
- discussing and agreeing with the learner and employer suitable times, dates and work areas where assessment will take place. Learners and employers should be given regular and relevant feedback on performance and progress.

## Employer engagement

Good practice in relation to employer engagement includes:

- communicating with the employer at the start of the programme to understand their business context and requirements so that the programme can be tailored to meet their needs
- working with the employer to ensure that learners are allocated a mentor in the workplace to assist them in the day-to-day working environment and to act as a contact for the assessor/tutor
- helping the employer to better understand their role in the delivery of the programme. It is important that the employer understands that sufficient and relevant work must be given to learners in order to provide a culture of learning and to ensure that they are given every opportunity to participate in aspects of continuous professional development (CPD).

## 6 Centre resource requirements

As part of the approval process, centres must make sure that the resource requirements below are in place before offering the qualification.

- Centres must have the appropriate physical resources available to support delivery and assessment of the qualification. For example, a workplace in line with industry standards or a Realistic Working Environment (RWE), where permitted, as specified in the assessment strategy for the sector, equipment, IT, learning materials, teaching rooms.
- Where RWE is permitted, it must offer the same conditions as the normal, day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working.
- Centres must meet any specific human and physical resource requirements outlined in the assessment strategy in *Annexe A*. Staff assessing learners must meet the occupational competence requirements in the overarching assessment strategy for the sector.
- There must be systems in place to ensure continuing professional development for staff delivering the qualification.
- Centres must have appropriate health and safety policies, procedures and practices in place for the delivery and assessment of the qualification.
- Centres must have robust internal verification systems and procedures in place to ensure the quality and authenticity of learners' work as well as the accuracy and consistency of assessment decisions between assessors operating at the centre. For information on the requirements for implementing assessment processes in centres, please refer to the *Pearson Centre Guide to Quality Assurance 2018–2019 Pearson NVQs/SVQs and Competence-based qualifications* document. Additionally, centres offering the qualification as stand alone should refer to the *Pearson Delivery Guidance & Quality Assurance Requirements* document, and centres offering the qualification within BTEC Apprenticeship frameworks should refer to the *Pearson Quality Assurance Handbook For NVQs/SVQs And Competence-Based Qualifications* document. All three documents (and any subsequent updated versions of these documents) are available on our website.
- Centres must deliver the qualification in accordance with current equality legislation. For further details on Pearson's commitment to the Equality Act 2010, see *Section 7 Access and recruitment*. For full details on the Equality Act 2010 go to [www.legislation.gov.uk](http://www.legislation.gov.uk) or [www.gov.uk.scot](http://www.gov.uk.scot)

## 7 Access and recruitment

Our policy on access to our qualifications is that:

- they should be available to everyone who is capable of reaching the required standards
- they should be free from barriers that restrict access and progression
- there should be equal opportunities for all learners wishing to access the qualifications.

Centres must ensure that their learner recruitment process is conducted with integrity. This includes ensuring that applicants have appropriate information and advice about the qualification to ensure that it will meet their needs.

### **Prior knowledge, skills and understanding**

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No prior knowledge, understanding, skills or qualifications are required before learners register for this qualification.

### **Access to qualifications for learners with disabilities or specific needs**

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Equality and fairness are central to our work. Pearson's equality and diversity policy requires all learners to have equal opportunity to access our qualifications and assessments, and that our qualifications are awarded in a way that is fair to every learner.

We are committed to making sure that:

- learners with a protected characteristic (as defined by the Equality Act 2010) are not, when they are undertaking one of our qualifications, disadvantaged in comparison to learners who do not share that characteristic
- all learners achieve the recognition they deserve from undertaking a qualification and that this achievement can be compared fairly to the achievement of their peers.

For learners with disabilities and specific needs, the assessment of their potential to achieve the qualification must identify, where appropriate, the support that will be made available to them during delivery and assessment of the qualification.

For information on reasonable adjustments and special consideration, see *Section 8 Assessment*.

## 8 Assessment

To achieve a pass for the full qualification, the learner must achieve all the units required in the stated qualification structure.

### Language of assessment

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Assessment of the units may be in English, Welsh or Irish. If assessment is to be carried out in either Welsh or Irish then centres must inform Pearson at the point of learner registration.

A learner taking the qualification may be assessed in British or Irish Sign Language where it is permitted for the purpose of reasonable adjustment.

Further information on the use of language in qualifications is available in our *Use of languages in qualifications policy* document, available on our website.

Further information on access arrangements can be found in the Joint Council for Qualifications (JCQ) document *Access Arrangements and Reasonable Adjustments and Special Consideration*.

### Internal assessment

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The units in this qualification are assessed through an internally and externally quality-assured Portfolio of Evidence made up of evidence gathered during the course of the learner's work.

Each unit has specified assessment outcomes and standards that outline the required skills, knowledge and understanding. To pass each unit the learner must:

- achieve **all** the specified outcomes and standards
- satisfy **all** the outcomes and standards by providing consistent, valid and reliable evidence for each criterion
- prove that the evidence is their own.

The learner must have an assessment record that identifies the outcomes and standards that have been met. The assessment record should be cross-referenced to the evidence provided. The assessment record should include details of the type of evidence and the date of assessment. Suitable centre documentation should be used to form an assessment record.



It is important that the evidence provided to meet the performance, behaviour and knowledge outcomes and standards:

<b>Valid</b>	is relevant to the standards for which competence is claimed
<b>Authentic</b>	is produced by the learner
<b>Consistent</b>	is achieved on more than one occasion
<b>Current</b>	is usually not more than two years old
<b>Sufficient</b>	fully meets the requirements of the performance, behaviour and knowledge outcomes and standards.

Learners can provide evidence of occupational competence from:

- **current practice** – where evidence is generated from a current job role
- a **programme of development** – where evidence comes from assessment opportunities built into a learning programme. The evidence provided must meet the requirements of the Sector Skills Council's assessment strategy
- the **Recognition of Prior Learning (RPL)** – where a learner can demonstrate that they can meet a unit's outcomes and standards through knowledge, understanding or skills they already possess without undertaking a course of development. Learners must submit sufficient, reliable, authentic and valid evidence for assessment. Evidence submitted that is based on RPL should give the centre confidence that the same level of skill, understanding and knowledge exists at the time of claim as existed at the time the evidence was produced. RPL is acceptable for accrediting a unit, several units, or a whole qualification
- a combination of these.

Further guidance is available in our policy document *Recognition of prior learning policy and process*, available on our website.

## Assessment strategy

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The assessment strategy for this qualification is included in *Annexe A*. It sets out the overarching assessment principles and the framework for assessing the units to ensure that the qualification remains valid and reliable. It has been developed by People 1st in partnership with employers, training providers, awarding organisations and the regulatory authorities.

## Types of evidence

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To achieve a unit, the learner must gather evidence that shows that they have met the required standard specified in the assessment criteria, Pearson's quality assurance arrangements (please see *Section 10 Quality assurance of centres*) and the requirements of the assessment strategy given in *Annexe A*.

In line with the assessment strategy, evidence for internally-assessed units can take a variety of forms as indicated below:

- direct observation of the learner's performance by their assessor (O)
- products of the learner's work (P)
- outcomes from simulation (S)
- professional discussion (PD)
- authentic statements/witness testimony (WT)
- expert witness testimony (EWT)
- evidence of Recognition of Prior Learning (RPL).

Learners can use the abbreviations in their portfolios for cross-referencing purposes.

Learners can also use pieces of evidence to prove their knowledge, skills and understanding across different outcomes and standards and/or across different units. It is not necessary for learners to have each standard assessed separately. They should be encouraged to reference evidence to the relevant standard. However, the evidence provided for each unit must clearly reference the unit being assessed. Evidence must be available to the assessor, the internal verifier and the Pearson standards verifier.

Any specific evidence requirements for a unit are given in the *Assessment* section of the unit.

Further guidance on the requirements for centre quality assurance and internal verification processes is available on our website.

## Appeals

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Centres must have a policy for dealing with appeals from learners. Appeals may relate to incorrect assessment decisions or unfairly conducted assessment. The first step in such a policy is a consideration of the evidence by a Lead Internal Verifier or other member of the programme team. The assessment plan should allow time for potential appeals after learners have been given assessment decisions.

Centres must document all learners' appeals and their resolutions. Further information on the appeals process can be found in the *Enquiries and appeals about Pearson vocational qualifications and end point assessment policy* document, available on our website.

## Dealing with malpractice

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Centres must have a policy for dealing with malpractice by learners. This policy must follow the Joint Council for Qualifications (JCQ) *General and Vocational qualifications: Suspected Malpractice in Examinations and Assessments Policies and Procedures* document. Centres should follow their policy in dealing with learner malpractice. There is no need to inform Pearson of learner malpractice unless the learner(s) in question have been certificated or their work quality assured.

Centres must report suspected malpractice by teachers or centres to the Investigations Team at Pearson before any investigation is undertaken by the centre. Centres should provide as much information as possible on the suspected malpractice in an email to [pqsmalpractice@pearson.com](mailto:pqsmalpractice@pearson.com). It is extremely important that malpractice is reported in a timely fashion; particularly if any units have been subject to quality assurance or certification.

For further details on malpractice and advice on preventing malpractice by learners please see the Pearson document *Centre guidance: Dealing with malpractice and maladministration in vocational qualifications*, available on our website.

## Reasonable adjustments to assessment

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Centres are able to make adjustments to assessments to take account of the needs of individual learners in line with the guidance given in the Pearson document *Supplementary guidance for reasonable adjustments and special consideration in vocational internally assessed units*. In most instances, adjustments can be achieved by following the guidance, for example allowing the use of assistive technology or adjusting the format of the evidence. We can advise you if you are uncertain as to whether an adjustment is fair and reasonable. Any reasonable adjustment must reflect the normal learning or working practice of a learner in a centre or working within the occupational area.

Further information on access arrangements can be found in the Joint Council for Qualifications (JCQ) document *Access Arrangements and Reasonable Adjustments and Special Consideration*.

## Special consideration

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Centres must operate special consideration in line with the guidance given in the Pearson document *Supplementary guidance for reasonable adjustments and special consideration in vocational internally assessed units*. Special consideration may not be applicable in instances where:

- assessment requires the demonstration of practical competence
- criteria have to be met fully
- units/qualifications confer licence to practise.

Centres cannot apply their own special consideration; applications for special consideration must be made to Pearson and can be made only on a case-by-case basis. A separate application must be made for each learner and certification claims must not be made until the outcome of the application has been received.

Further information on special consideration can be found in the Joint Council for Qualifications (JCQ) document *Access Arrangements and Reasonable Adjustments and Special Consideration*.

Both of the documents mentioned above are on our website.

## Credit transfer

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Credit transfer is a process whereby qualifications or part qualifications are given appropriate recognition to enable learners to progress without having to repeat any learning they have already undertaken. Where appropriate, learners can use the SCQF credit points gained from one qualification towards achieving all or part of another qualification. The amount of credit that a learner is allowed to use is decided on by staff in colleges, universities and other educational institutions based on the notion of 'best curriculum fit' between the prior learning and the new learning content.

Further information on credit transfer can be found in the document *Scottish Credit and Qualifications Framework (SCQF) Credit Accumulation and Transfer Policy*, available on our website.

## 9 Centre recognition and approval

### Centre recognition

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Centres that have not previously offered Pearson SVQs need to apply for, and be granted, centre recognition and approval as part of the process for approval to offer individual qualifications. Centres already delivering Pearson NVQs will not need to apply for centre approval to deliver Pearson SVQs but will need to apply for qualification approval.

Existing centres will be given 'automatic approval' for a new qualification if they are already approved for a qualification that is being replaced by a new qualification and the conditions for automatic approval are met.

Guidance on seeking approval to deliver Pearson SVQs is available on our website.

### Approvals agreement

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All centres are required to enter into an approval agreement, which is a formal commitment by the head or principal of a centre, to meet all the requirements of the specification and any associated codes, conditions or regulations. Pearson will act to protect the integrity of the awarding of qualifications. If centres do not comply with the agreement, this could result in the suspension of certification or withdrawal of approval.

## 10 Quality assurance of centres

Quality assurance is at the heart of vocational qualifications. Centres are required to declare their commitment to ensuring quality and to giving learners appropriate opportunities that lead to valid and accurate assessment outcomes.

Centres must follow quality assurance requirements for standardisation of assessors and internal verifiers and the monitoring and recording of assessment processes. Pearson uses external quality assurance procedures to check that all centres are working to national standards. It gives us the opportunity to identify and provide support to safeguard certification and quality standards. It also allows us to recognise and support good practice.

Centres offering competence-based qualifications will receive at least one visit from our Standards Verifier, followed by ongoing support and development. This may result in more visits or remote support, as required to complete standards verification. The exact frequency and duration of Standards Verifier visits will reflect the centre's performance, taking account of the:

- number of assessment sites
- number and throughput of learners
- number and turnover of assessors
- number and turnover of internal verifiers.

In order for certification to be released, confirmation is required that the National Occupational Standards (NOS) for assessment and verification, and for the specific occupational sector, are being met consistently.

Further details can be found in the document *Pearson Centre Guide to Quality Assurance 2018–2019 Pearson NVQs/SVQs and Competence-based qualifications*.

Additionally, centres offering the qualification as stand alone should refer to the *Pearson Delivery Guidance & Quality Assurance Requirements* document. Centres offering the qualification within BTEC Apprenticeship frameworks should refer to the document *Quality Assurance Handbook For NVQs/SVQs And Competence-Based Qualifications*.

All three documents (and any subsequent updated versions of these documents) are available on our website.

# 11 Units

## Unit format

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Each unit has the following sections.

### Unit title

The unit title is on the SCQF and this form of words will appear on the learner's Notification of Performance (NOP).

### Unit code

Each unit is assigned a unit code that appears with the unit title on the SQA accredited qualification structure.

### SCQF level

All units and qualifications accredited on the Scottish Credit and Qualifications Framework (SCQF) have a level assigned to them. There are 12 levels of achievement which show the depth and complexity of learning/competence, skills and knowledge required to achieve the qualification.

### Credit points

All units have credit points. Credit points show the volume of learning required to achieve a qualification. One SCQF credit point equals 10 notional learning hours.

### Unit summary

This summarises the purpose of the unit and the learning the unit offers.

### Unit assessment requirements/evidence requirements

The SSC/B set the assessment/evidence requirements. Learners must provide evidence according to each of the requirements stated in this section.

### Keywords

Key terms and concepts that feature in the unit.

### Assessment outcomes and standards

The requirements the learner is expected to meet to achieve the unit. These requirements are under subheadings of 'knowledge and understanding' and 'performance criteria'.



## Knowledge and understanding

The knowledge that the learner needs to be able to understand what they are doing and why.

## Performance criteria

The level of competence the learner has to achieve.

# Unit 1: Support effective team working in a retail organisation

**Unit code:** PPL.E335

**SCQF level:** 6

**Credit points:** 4

---

## Unit summary

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

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

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

- support effective team working in a retail organisation.

## Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

## Keywords

Retailing; retailers; supports; supporting; encourages; encouraging; efficient; efficiency; effectively; teamwork; team work; buyers; buys; buying; merchandisers; merchandises; merchandising.

## Glossary

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

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

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

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

## Performance criteria

### **You must be able to:**

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

## Unit 2: **Contribute to the planning, organisation and evaluation of your own learning in a retail organisation**

**Unit code:** PPL.E336

**SCQF level:** 6

**Credit points:** 5

---

### Unit summary

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

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

This standard is for managers, team leaders and trainees.

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

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

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; helps; helping; assists; assisting; plans; planning; organises; organising; learns; trains; training; buyers; buys; buying; merchandisers; merchandises; merchandising.

### Glossary

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

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

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

## Performance criteria

### You must be able to:

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

## Unit 3: Organise the delivery of reliable customer service

**Unit code:** CFACSB10

**SCQF level:** 6

**Credit points:** 6

---

### Unit summary

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

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

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Organising; delivery; reliable; resources; systems; support service; customer service; communication; problem solving; behaviours; work with others; team working; giving information; receiving information services; products.



## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

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

## Performance criteria

### **Plan and organise the delivery of reliable customer service**

#### **You must be able to:**

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

### **Review and maintain customer service delivery**

#### **You must be able to:**

- |    |   |
|----|---|
| 4  | maintain service delivery during very busy periods and unusually quiet periods                                  |
| 5  | maintain service delivery when systems, people or resources have let you down                                   |
| 6  | consistently meet your customers' expectations  |
| 7  | balance the time you take with your customers with the demands of other customers seeking your attention        |
| 8  | respond appropriately to your customers when they make comments about the services or products you are offering |
| 9  | respond appropriately to your customers when they make comments about the services or products you are offering |
| 10 | take action to improve the reliability of your service based on customer comments                               |
| 11 | monitor the action you have taken to identify improvements in the service you give to your customers            |

### **Use recording systems to maintain reliable customer service**

#### **You must be able to:**

- |    |  |
|----|--|
| 12 | record and store customer service information accurately following organisational guidelines               |
| 13 | select and retrieve customer service information that is relevant, sufficient and in an appropriate format |

## Performance criteria

14	quickly locate information that will help solve a customer's query
15	supply accurate customer service information to others using the most appropriate method of communication

## Unit 4: Check customers' preferences and buying decisions when making retail sales

Unit code:	PPL.C223
SCQF level:	5
Credit points:	4

---

### Unit summary

This standard is about checking the customer's preferences and buying decisions when they are making retail sales. It is also about closing the sale once a decision has been made by the customer.

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

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

- check customers' preferences and buying decisions when making retail sales.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; checks; checking; confirms; confirming; purchases; purchasing; buys; selling.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

1	how to recognise buying signals from customers
2	how to handle customers' questions confidently and effectively
3	questioning techniques for closing the retail sale
4	what the additional and associated products are and why it is important to promote these
5	why customer confidence and loyalty matter to your organisation and how members of staff contribute towards these
6	relevant legal rights and responsibilities of your retail organisation and customers in regard to the returning of unsatisfactory goods

## Performance criteria

### You must be able to:

- |   |   |
|---|---|
| 1 | give customers enough time to evaluate products and ask questions                                   |
| 2 | check the customers' preferences with them to assist in them making a buying decision               |
| 3 | handle customers' questions in a way that promotes retail sales and keeps the customers' confidence |
| 4 | identify additional and associated products and take the opportunity to increase retail sales       |
| 5 | use open and closed questioning techniques when customers are making retail sales decisions         |
| 6 | acknowledge clearly the customers' buying decisions   |
| 7 | close the retail sale when possible   |
| 8 | explain clearly any customer rights that apply  |
| 9 | explain clearly to customers where to pay for their purchases                                       |

## Unit 5: **Make and review plans for finding new retail clients**

**Unit code:** PPL.C311

**SCQF level:** 6

**Credit points:** 7

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### **Unit summary**

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

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

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

- make and review plans for finding new retail clients.

### **Unit assessment requirements/evidence requirements**

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### **Keywords**

Retailing; retailers; planning; makes; making; finds; additional; markets; marketing; sales; sells; selling.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

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



## Performance criteria

### You must be able to:

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

## Unit 6: **Market a retail organisation's services to potential clients**

**Unit code:** PPL.C312

**SCQF level:** 6

**Credit points:** 7

---

### **Unit summary**

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

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

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

- market a retail organisation's services to potential clients.

### **Unit assessment requirements/evidence requirements**

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### **Keywords**

Retailing; retailers; markets; marketing; sells; selling; sales; services, sales pipelines.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

1	the type of business relationship/s required to create potential clients
2	the image your retail organisation wants to promote to customers
3	the difference between features and benefits
4	the features and benefits of the service that can be provided
5	how to talk to potential clients in a persuasive way about the service
6	how to market your retail organisation's services to potential clients
7	how to find out about competitors' services
8	how to compare competitors' services with your retail organisations' so that potential clients can understand how using the service would benefit them
9	how to identify suitable opportunities for approaching potential clients
10	how to approach potential clients in a way that creates a positive impression of yourself and your retail organisation and is likely to help create a business relationship
11	how to create a rapport quickly with potential clients
12	the information you need to exchange with potential clients

## Knowledge and understanding

13	why promises need to be kept with potential clients, for example sending them information they have asked for
14	how to record information about potential clients so that it can be used effectively
15	why client confidentiality is important to the business relationship
16	relevant aspects of the relevant data protection laws and your retail organisation's policy to do with client confidentiality

## Performance criteria

### **You must be able to:**

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

## Unit 7: Provide a consultative selling service to retail clients

**Unit code:** PPL.C313

**SCQF level:** 6

**Credit points:** 6

---

### Unit summary

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

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

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

- provide a consultative selling service to retail clients.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; provides; providing; gives; giving; personalises; personalising; custom; customised; customising; tailored; tailoring; tailors; services; sales; sells; selling

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

1	what consultative selling is, and how this is different from other kinds of retail selling
2	your retail organisation's desired image and how to project this to retail clients
3	how to use information in retail client records to prepare for consultations
4	how to create and maintain a rapport with retail clients, both new and existing
5	the types of question to ask retail clients to find out about their buying requirements, preferences and priorities
6	when and how to ask retail clients tactfully how much they want to spend
7	how to keep informed about the brands and services that you are expected to sell, including: <ul style="list-style-type: none"><li>• seasonal trends</li><li>• new brands or services</li><li>• promotions</li><li>• stock levels</li><li>• competitor comparisons</li><li>• additional services such as store cards, gift wrapping or delivery.</li></ul>
8	how to relate the features and benefits of products or services to retail clients' requirements

## Knowledge and understanding

9	how to identify suitable opportunities to sell additional or related products
10	how to make recommendations to retail clients in a way that encourages them to take advice, without pressurising them
11	why there needs to be a balance in making immediate sales and the requirement to maintain good business relations with retail clients, and how to do so
12	your retail organisation's customer service standards and how to apply these when providing a consultative selling service to retail clients

## Performance criteria

### You must be able to:

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



## **Unit 8:**

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

**Unit code:** PPL.C314

**SCQF level:** 7

**Credit points:** 6

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### **Unit summary**

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

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

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

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

### **Unit assessment requirements/evidence requirements**

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### **Keywords**

Retailing; retailers; provides; providing; gives; giving; after sales; services; sells; selling.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

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

## Performance criteria

### You must be able to:

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

## Unit 9: Help retail customers to choose specialist products in a retail organisation

Unit code:	PPL.C355
SCQF level:	6
Credit points:	7

---

### Unit summary

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

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

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

- help retail customers to choose specialist products in a retail organisation.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Key words

Retailing; retailers; helps; helping; assists; assisting; informs; informing; chooses; choosing; picks; picking; selects; selecting; choices; selections; advises; advising; advice; sells; selling; sales; information.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

1	your retail organisation's brand values in relation to its specialist product offers, pricing and service
2	how your retail organisation compares with its competitors on specialist product offer, pricing and service
3	the retail customer profiles for your retail organisation
4	the elements of a positive retail customer experience in relation to both your retail organisation and to the specialist products being sold
5	how retail customers' circumstances, such as who they are with or the time of day, affect their willingness to engage in conversation with a salesperson
6	how to recognise from retail customers' body language whether they are likely to respond positively to an approach from a salesperson
7	how to establish and maintain a rapport with individual retail customers
8	the meaning of specialist terminology that knowledgeable retail customers are likely to use in relation to the specialist products being sold
9	how the specialist products being sold are produced or obtained, and how these methods affect the nature and quality of the specialist products

## Knowledge and understanding

10	any legal restrictions relating to the specialist products being sold, such as where the specialist products come from or who can buy or use the specialist products, and how to explain these to retail customers
11	any health and safety considerations that retail customers must be warned about, or are likely to ask about, in relation to the specialist products being sold
12	any ethical and environmental concerns that customers are likely to have about the specialist products being sold, and how to address these
13	what related products are available from your retail organisation that would enhance retail customers' experience of the specialist products being sold
14	sources of up-to-date production information and how to access and use these
15	the sources of after-sales advice and support that are available to retail customers
16	the retail customers' legal rights and your retail organisation's policy concerning returns
17	the importance of maintaining your enthusiasm for the specialist products being sold whilst helping retail customers to choose specialist products
18	how to search for and evaluate opportunities to maintain your enthusiasm for the specialist products being sold

## Performance criteria

### You must be able to:

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

## Unit 10: Demonstrate specialist products to customers in a retail organisation

Unit code: PPL.C356

SCQF level: 6

Credit points: 6

---

### Unit summary

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

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

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

- demonstrate specialist products to customers in a retail organisation.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; demonstrates; demonstrating; demonstrations; items; goods; sells; selling; sales.



## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

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

## Performance criteria

### You must be able to:

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

# Unit 11: Manage a team on a temporary basis in a retail organisation

**Unit code:** PPL.E338

**SCQF level:** 6

**Credit points:** 5

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## Unit summary

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

- a special event
- sales preparation
- stocktaking or emergency situations
- covering when managers are absent.

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

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

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

- manage a team on a temporary basis in a retail organisation.

## Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

## Keywords

Retailing; retailers; helps; helping; assists; assisting; manages; managing; management.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

1	<p>your retail organisation's procedures and policies relating to the work of the team and the way the team's daily activities are managed, including:</p> <ul style="list-style-type: none"><li>• health and safety</li><li>• security</li><li>• staffing levels</li><li>• absence reporting</li><li>• timekeeping</li><li>• personal appearance</li><li>• handling customer complaints</li><li>• laws and regulations relating to the products the team sells.</li></ul>
2	why to set an example to team members by following your retail organisation's procedures and policies at all times
3	how to check that team members are following your retail organisation's procedures and policies
4	what must be done when team members are not following your retail organisation's procedures and policies
5	how clear communication helps teams to work effectively

## Knowledge and understanding

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

## Performance criteria

### You must be able to:

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

## Unit 12: Monitor the service provided to customers by external suppliers of a retail organisation

Unit code:	PPL.E314
SCQF level:	5
Credit points:	4

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### Unit summary

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

This standard is for owners, managers and team leaders and sales staff with responsibility for monitoring external suppliers.

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

- monitor the service provided to customers by external suppliers of a retail organisation.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; monitors; monitoring; watches; watching; assesses; assessing; assessments; services; provides; providing; providers.

### Glossary

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

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

1	which services external suppliers are providing to customers of your retail organisation
2	the records required to keep, including those your retail organisation needs
3	how to monitor the services provided by external suppliers
4	how to get feedback from retail customers
5	how to find out what is making retail customers dissatisfied
6	how to deal with dissatisfied retail customers in ways that maintain good customer service



## Performance criteria

### You must be able to:

1	keep accurate and up-to-date records of the external suppliers used in your retail organisation
2	keep accurate and up-to-date records of the customer orders sent or collected from your retail organisation to external suppliers
3	monitor the progress of the service regularly to identify any difficulties or delays in processing them
4	obtain an explanation when products or services are delayed and tell the customer promptly and accurately what is happening
5	identify accurately whether your retail customer is satisfied with the ordering service or product provided
6	identify any customer dissatisfaction with the ordering service or products and the causes of this accurately
7	explain clearly and politely when a problem is the customer's responsibility
8	explain clearly and accurately the retail customer's rights when the cause of the problem lies with the external supplier
9	collect regularly and accurately report, to those who need to know, feedback on the quality of external suppliers' service

## Unit 13: Develop effective relationships with customers within a retail organisation

Unit code:	PPL.D002
SCQF level:	8
Credit points:	7

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### Unit summary

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

This standard is for owners, regional and area managers and managers.

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

- develop effective relationships with customers within the retail organisation.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; SMEs; small-medium enterprises; small medium enterprises; small enterprises; medium enterprises; independents; develops; developing; devises; devising; creates; creating; encourages; encouraging; effectively; efficiently; personal.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

Knowledge and understanding	
You need to know and understand:	
1	how to obtain information about customers and competitors that will help to decide how to develop relationships with customers
2	the typical benefits and drawbacks of offering special terms to customers, and how to estimate the effects these might have on your retail organisation
3	the negotiating techniques that will protect your retail organisation's interests and profit margins whilst following your retail organisation's customer service standards
4	the common negotiating tactics that customers use, how to recognise these, and how to choose a response to suit the circumstances
5	how to decide what level of authority individual staff members should have to negotiate with customers
6	the efficient and effective ways of keeping track of special terms agreed with customers, and how to pick the most suitable method for your retail organisation
7	the effective ways of measuring customer satisfaction and the effects of special terms
8	the factors that tend to influence customer expectations and the effectiveness of special terms, and how to monitor these factors

## Performance criteria

### You must be able to:

1	take into account customer profiles, competitor activity and the brand image when deciding on an overall approach to developing effective customer relationships
2	take into account the profit margins, the risk of lost sales and the likelihood of repeat business when deciding whether to offer special terms to retail customers
3	negotiate with customers in ways that protect your own organisation's interests but follow your retail organisation's customer service standards
4	explain positively and sensitively where customers' expectations cannot be met for special terms and offer alternatives where possible
5	give individual members of staff a level of authority to negotiate with customers that reflects the staff member's ability to do this
6	ensure individual members of staff clearly understand the limits of their authority to agree to special terms with customers
7	ensure that everyone who negotiates with customers in your retail organisation records special terms agreed with customers and passes this information on promptly
8	monitor the effects of special terms on customer satisfaction
9	analyse the sales and profit figures and check if special terms have affected them positively or if the results seen are due to something else
10	review the approach to customer relationships often enough to be able to respond to changes in circumstances or customer expectations

# Unit 14: Improve the customer relationship

**Unit code:** CFACSB11

**SCQF level:** 6

**Credit points:** 7

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## Unit summary

This Standard is part of the Customer Service Theme of Delivery. This Theme covers Customer Service behaviours and processes that have most effect on the customer experience during Customer Service delivery. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers. To improve relationships with your customers you need to deliver consistent and reliable customer service. In addition, customers need to feel that you genuinely want to give them high levels of service and that you make every possible effort to meet or exceed their expectations. This encourages loyalty from external customers or longer-term service partnerships with internal customers. You need to be proactive in your dealings with your customers and to respond professionally in all situations. You need to negotiate between your customers and your organisation or department in order to find some way of meeting your customers' expectations. In addition you need to make extra efforts to delight your customers by exceeding their customer service expectations.

## Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

## Keywords

Relationships; customer service; reliable; exceed expectations; external customer; internal customer; loyalty; service partnerships; customer service; communication; problem solving; behaviours; work with others; giving information; teamwork.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

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

## Performance criteria

### **Improve communication with your customers**

#### **You must be able to:**

- |   |  |
|---|--|
| 1 | select and use the best method of communication to meet your customers' expectations   |
| 2 | take the initiative to contact your customers to update them when things are not going to plan or when you require further information |
| 3 | adapt your communication to respond to individual customers' feelings  |
| 4 | monitor information about your interaction with customers using all available information channels                                     |

### **Balance the needs of your customer and your organisation**

#### **You must be able to:**

- |    |   |
|----|---|
| 5  | meet your customers' expectations within your organisation's service offer  |
| 6  | explain the reasons to your customers sensitively and positively when their expectations cannot be met                    |
| 7  | identify alternative solutions for your customers either within or outside the organisation                               |
| 8  | identify the costs and benefits of these solutions to your organisation and to your customers                             |
| 9  | negotiate and agree solutions with your customers which satisfy them and are acceptable to your organisation              |
| 10 | take action to satisfy your customers with the agreed solution when balancing their needs with those of your organisation |

### **Exceed customer expectations to develop the relationship**

#### **You must be able to:**

- |    |  |
|----|--|
| 11 | make extra efforts to improve your relationship with your customers                        |
| 12 | recognise opportunities to exceed your customers' expectations                             |
| 13 | take action to exceed your customers' expectations within the limits of your own authority |
| 14 | gain the help and support of others to exceed your customers' expectations                 |

## Unit 15: Organise staff to receive, check and record incoming deliveries in a retail organisation

Unit code: PPL.B301

SCQF level: 6

Credit points: 12

---

### Unit summary

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

This standard is for owners, managers and team leaders.

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

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

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; organises; organising; arranges; arranging; receives; receipt; receiving; checks; checking; delivery; stocks; goods; materials; items; produce; products; inventorying; inventories.



## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

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

## Performance criteria

### You must be able to:

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

## **Unit 16:** **Manage staff and maintain stock records in a storage facility in a retail organisation**

**Unit code:** PPL.B302

**SCQF level:** 7

**Credit points:** 12

---

### **Unit summary**

This standard is about managing staff and maintaining storage records in a storage facility.

This standard is for owners, managers and team leaders.

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

- manage staff and maintain stock records in a storage facility in a retail organisation.

### **Unit assessment requirements/evidence requirements**

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### **Keywords**

Retailing; retailers; organises; organising; maintains; maintaining; facility; areas; stores; storing; arranges; arranging; checks; checking; SMEs; small-medium enterprises; small medium enterprises; small enterprises; medium enterprises; independents.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

1	how effective storage systems contribute to reducing stock loss
2	how to organise what storage facilities are required for goods on order in your retail organisation
3	how to manage staff in your retail organisation's storage facility
4	how to protect goods from various causes of deterioration and damage
5	how to work out suitable storage layouts and solve storage problems efficiently, safely and securely
6	how to run your organisation's stock recording and controlling systems efficiently and accurately, including using them to monitor and record stock loss
7	the relevant legal requirements for storing stock, including health and safety requirements
8	why you need to maintain accurate and up-to-date stock records that can be found easily by relevant staff in your retail organisation

## Performance criteria

### You must be able to:

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

## Unit 17: Check the storage and care of stock in a retail organisation

**Unit code:** PPL.B303

**SCQF level:** 6

**Credit points:** 5

---

### Unit summary

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

This standard is for owners, managers, team leaders.

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

- check the storage and care of stock in a retail organisation.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; checks; checking; stores; stocks; goods; materials; items; produce; products.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

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

## Performance criteria

### You must be able to:

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



## **Unit 18:**

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

**Unit code:** PPL.B304

**SCQF level:** 6

**Credit points:** 8

---

### **Unit summary**

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

This standard is for owners, managers and team leaders.

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

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

### **Unit assessment requirements/evidence requirements**

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### **Keywords**

Retailing; retailers; puts; putting; audits; auditing; inventories; inventorying; practise; carry out; carries out; carrying out.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

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

## Performance criteria

### You must be able to:

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

## **Unit 19: Investigate problems and report the findings of stock audits in a retail organisation**

**Unit code:** PPL.B305

**SCQF level:** 6

**Credit points:** 5

---

### **Unit summary**

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

This standard is for managers and team leaders.

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

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

### **Unit assessment requirements/evidence requirements**

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### **Keywords**

Retailing; retailers; reports; reporting; found; results; audits; audited; inventoried; inventories.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

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

## Performance criteria

### You must be able to:

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

## Unit 20: Choose and contract with suppliers and order stock in a retail organisation

Unit code:	PPL.B306
SCQF level:	6
Credit points:	7

---

### Unit summary

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

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

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

- choose and contract with suppliers and order stock in a retail organisation.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; sources; sourcing; finds; finding; chooses; choosing; supply; supplies; supplying; stocks; items; goods; materials; products; produce; buyers; buys; buying; orders; ordering.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

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



## Performance criteria

### You must be able to:

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

## Unit 21: Check and evaluate the performance of suppliers of stock

Unit code:	PPL.B307
SCQF level:	6
Credit points:	7

---

### Unit summary

This standard is about checking the performance of suppliers of stock and evaluating this against agreed service levels.

This standard is for owners, managers and team leaders.

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

- check and evaluate the performance of suppliers of stock.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; checks; checking; evaluates; evaluating; performs; performing; supply; stocks; items; goods; materials; products; produce; supplies; supplying; assesses; assessing.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

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

## Performance criteria

### You must be able to:

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

## **Unit 22:**

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

<b>Unit code:</b>	<b>PPL.C315</b>
<b>SCQF level:</b>	<b>6</b>
<b>Credit points:</b>	<b>5</b>

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### **Unit summary**

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

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

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

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

### **Unit assessment requirements/evidence requirements**

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### **Keywords**

Retailing; retailers; decides; deciding; determines; determining; calculates; calculating; works out; working out; values; valuations; objects; goods; products; offers; offering; part exchange; sales; sells; selling.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

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

## Performance criteria

### You must be able to:

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

## Unit 23: Negotiate part-exchange sales transactions with retail customers

Unit code: PPL.C316

SCQF level: 6

Credit points: 5

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### Unit summary

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

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

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

- negotiate part-exchange sales transactions with retail customers.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; negotiates; negotiating; agrees; agreeing; part exchange; sells; selling.



## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

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

## Performance criteria

### You must be able to:

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

## Unit 24: Evaluate and improve external suppliers' service to customers of a retail organisation

Unit code:	PPL.E315
SCQF level:	7
Credit points:	8

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### Unit summary

This standard is about evaluating feedback from customers of your retail organisation to decide how the service provided by external suppliers could be improved, and encouraging suppliers to make improvements.

This standard is for owners, managers and team leaders.

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

- evaluate and improve external suppliers' service to customers of a retail organisation.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; evaluates; evaluating; evaluations; improves; improving; improvements; services; provides; providing; providers.

### Glossary

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

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

1	how to gather feedback to assist the evaluation process
2	what the level of customer satisfaction is with individual suppliers
3	how to evaluate the quality of service given to customers by external suppliers
4	the typical problems with services provided by external suppliers used by your retail organisation
5	who to report your evaluations and recommendations to in your retail organisation
6	how to present evaluations and suggestions to external suppliers
7	what to do when external suppliers refuse to improve the quality of service

## Performance criteria

### You must be able to:

1	assess information objectively to identify external suppliers' overall quality of service to customers of your retail organisation
2	make evaluations that are consistent with the weight of evidence gathered
3	use evaluations to develop realistic and cost-effective improvements to customer service
4	present the results of evaluations and suggestions for improvement clearly to external suppliers
5	invite external suppliers to suggest improvements they can make
6	report to your manager and accurately note agreements to improve customer service
7	make an accurate report to your manager, together with your recommendations for action, if external suppliers do not improve service

## Unit 25: **Lead a team to improve customer service**

**Unit code:** CFACSD11

**SCQF level:** 7

**Credit points:** 7

---

### **Unit summary**

This standard covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers. If you are responsible for leading a team delivering customer service, you need to plan and organise their work and support them as they develop their performance.

This standard is about looking at both your organisation and your staffing resources and bringing these together in a constructive way to improve overall customer service. You need to give support and guidance to your team to encourage them to improve their customer service delivery. It is about having a passion for customer service and sharing this enthusiasm with your colleagues and staff team. It is about leading by example.

### **Unit assessment requirements/evidence requirements**

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### **Keywords**

Team leading; customer service; contact centres; staffing resources; support, guidance; leading by example; developing; improving; communication; problem solving; behaviours; work with others; teamwork; giving information; receiving information; services; ticketing; customer; communicate; box office; admissions; visitor.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

1	the roles and responsibilities of your team members and where they fit in with the overall structure of the organisation
2	how team and individual performance can affect the achievement of organisational objectives
3	the implications of failure to improve customer service for your team members and your organisation
4	how to plan work activities
5	how to present plans to others to gain understanding and commitment
6	how to facilitate meetings to encourage frank and open discussion
7	how to involve and motivate staff to encourage teamwork
8	how to recognise and deal sensitively with issues of underperformance

## Performance criteria

### **Plan and organise the work of a team**

#### **You must be able to:**

- |   |  |
|---|--|
| 1 | treat team members with respect at all times   |
| 2 | agree with team members their role in delivering effective customer service  |
| 3 | involve team members in planning and organising their customer service work  |
| 4 | allocate work which takes full account of team members' customer service skills and the objectives of the organisation |
| 5 | motivate team members to work together to raise their customer service performance                                     |

### **Provide support for team members**

#### **You must be able to:**

- |   |  |
|---|--|
| 6 | check that team members understand what they have to do to improve their work with customers and why that is important |
| 7 | check with team members what support they feel they may need throughout this process                                   |
| 8 | provide team members with support and direction when they need help  |
| 9 | encourage team members to work together to improve customer service  |

### **Review performance of team members**

#### **You must be able to:**

- |    |  |
|----|--|
| 10 | provide sensitive feedback to team members about their customer service performance                                      |
| 11 | encourage team members to discuss their customer service performance   |
| 12 | discuss sensitively with team members action they need to take to continue to improve their customer service performance |



## Unit 26: Monitor and improve retail customers' experience of a retail organisation

**Unit code:** PPL.C412

**SCQF level:** 8

**Credit points:** 8

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### Unit summary

The quality of the retail customer experience can help keep retail customers loyal or lose them to your competitors. This standard is relevant if you are a retail manager, area manager or regional manager and have some responsibility for the quality of the retail customer experience. You need to be able to monitor and improve all aspects of retail customers' experience.

The standard includes being in the retail sales area regularly, training staff and gathering feedback from retail customers. For simplicity we have referred to a single retail organisation throughout the standard, but if you are a regional or area manager you should understand this to mean all the locations you manage. This standard is for owners, area/regional managers and managers.

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

- monitor and improve retail customers' experience of a retail organisation.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; monitors; monitoring; watches; watching; checks; checking; improves; improving; enhances; enhancing; experiences; walks the floor; walking the floor.

## Glossary

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

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

Knowledge and understanding	
You need to know and understand:	
1	what can be learned by looking at your retail organisation from retail customers' point of view
2	how often, and at what times of day, a 'walk the store' needs to be carried out
3	things that should be monitored that could affect the retail customer experience
4	which areas and facilities outside your retail organisation can be influenced
5	your retail organisation's legal requirements and policy towards customers with disabilities
6	the reasons why products can't always be placed where retail customers would prefer, such as the requirement to encourage impulse purchases or protect high value goods
7	your retail organisation's policy regarding: <ul style="list-style-type: none"><li>• layout and appearance</li><li>• staff appearance and behaviour</li><li>• service at point of sale.</li></ul>
8	the types of special offers and promotions that run in your retail organisation and how these are intended to boost sales
9	any additional services or facilities your retail organisation offers, how they enhance the retail customer experience and how retail customers can access them

## Knowledge and understanding

### You need to know and understand:

- |    |   |
|----|---|
| 10 | the methods available for gathering retail customer feedback and how they compare on: <ul style="list-style-type: none"><li>• cost-effectiveness</li><li>• timeliness</li><li>• acceptability to the retail customer</li><li>• relevance and accuracy of the information they provide.</li></ul>                          |
| 11 | the authority and the budget available to make improvements to the retail customer experience   |
| 12 | who can authorise changes that are above your level of authority  |
| 13 | the elements of a persuasive business case for making changes, including: <ul style="list-style-type: none"><li>• justifiable cost</li><li>• likely impact on sales or goodwill</li><li>• consistency with your retail organisation's ethos and desired image</li><li>• suitability compared with alternatives.</li></ul> |
| 14 | your retail organisation's policy and retail customers' legal rights regarding refunds and exchanges  |

## Performance criteria

### You must be able to:

1	'walk the store' regularly to experience it from retail customers' viewpoint
2	check your retail organisation inside and out from retail customers' point of view, noticing relevant features such as: <ul style="list-style-type: none"><li>• cleanliness and tidiness</li><li>• staff dress and behaviour</li><li>• queues at payment points</li><li>• how easy it is to enter and move about in the sales area</li><li>• information about special offers</li><li>• how easy it is to find products</li><li>• information to help retail customers choose retail products, including information about prices.</li></ul>
3	train and encourage your retail organisation's staff to notice and report things that need improving
4	ensure your retail organisation's staff know your retail organisation's policy and procedures for dealing with refunds, exchanges and retail customer complaints, including the situations in which staff should ask for help
5	gather feedback from retail customers about their experience of your retail organisation using methods that are: <ul style="list-style-type: none"><li>• cost-effective</li><li>• timely</li><li>• likely to be acceptable to retail customers</li><li>• likely to draw out honest and relevant feedback from retail customers.</li></ul>
6	identify ways of improving the retail customer experience that are cost-effective and reflect the importance your retail organisation places on promoting sales and preventing theft

## Performance criteria

### You must be able to:

- |   |  |
|---|--|
| 7 | take prompt and suitable action to make improvements that are within your level of authority and budget      |
| 8 | make realistic recommendations to the correct person for improvements that are above your level of authority |

## Unit 27: Monitor and resolve customer complaints within a retail organisation

Unit code:	PPL.D004
SCQF level:	8
Credit points:	6

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### Unit summary

This standard is about ensuring customer complaints do not escalate if a customer is not satisfied with a first-level resolution offer. It is also about monitoring customer complaints to ensure complex or serious complaints are passed to those with the authority to handle difficult complaints.

This standard is for owners, managers and department managers.

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

- monitor and resolve customer complaints within a retail organisation.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; SMEs; small-medium enterprises; small medium enterprises; small enterprises; medium enterprises; independents; resolves; resolving; problems; issues.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

1	the current laws relating to customers' rights and your responsibilities to customers and how to stay informed about relevant laws
2	how to identify the needs of staff for training in handling customer complaints
3	how to devise effective procedures for handling complaints, including deciding what the different roles should be
4	the effects that difficult customers can have on staff morale and behaviour, and effective ways of maintaining morale and standards of service when customers are difficult
5	the types of information that customers tend to appreciate when their complaints are not yet resolved
6	how to recognise and deal with customers in a respectful manner when there is not going to be an agreement about the nature of a problem
7	the ways of dealing respectfully with customers without necessarily changing your stance on a complaint
8	what to look for when identifying and monitoring recurring complaints in your retail organisation
9	the typical causes of recurring complaints in your retail organisation



## Performance criteria

### You must be able to:

1	ensure that your retail organisation handles complaints in line with current laws relating to customers' rights and your responsibilities to customers
2	ensure staff have the training they need to enable them to handle common customer complaints in ways that follow your retail organisation's customer service standards
3	ensure staff are clear about the types of complaint they should refer and how they should do this
4	make sure staff have the support they need from others with the responsibility to deal with difficult customers
5	keep customers informed about the action being taken and the time this is likely to take when a complaint cannot be resolved immediately
6	discuss the nature of the complaint and an acceptable solution when there is a disagreement with the customer
7	ensure respect is shown to the customer at all times and your retail organisation's interests are protected
8	monitor recurring complaints and investigate the possible causes
9	resolve recurring complaints following your retail organisation's customer service standards at all times

## Unit 28: Plan and allocate work to staff in a retail organisation

**Unit code:** PPL.E003

**SCQF level:** 6

**Credit points:** 6

---

### Unit summary

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

This standard is for owners, managers and team leaders.

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

- plan and allocate work to staff in a retail organisation.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; SMEs; small medium enterprises; small enterprises; medium enterprises; independents; allocates; allocating; assigns; assigning; delegates; delegating; tasks; jobs; workers.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

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

## Performance criteria

### You must be able to:

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

# Unit 29: Identify and analyse opportunities for solving problems and improving retail operations

Unit code:	PPL.E301
SCQF level:	8
Credit points:	10

---

## Unit summary

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

This standard is for owners, managers and team leaders.

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

- identify and analyse opportunities for solving problems and improving retail operations.

## Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

## Keywords

Retailing; retailers; identifies; identifying; spots; spotting; opportunity; chances; solves; issues; threats; dangers; improves; improvement.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

1	your retail organisation's quality standards
2	your retail organisation's policies, procedures and systems to be used to gather information
3	the different ways of identifying facts and opinions about retail operational performance and how useful each one is
4	the common causes of failure to achieve your retail organisation's quality standards
5	how to generate and analyse ideas for improving retail operations
6	how to evaluate the benefits of potential improvements and how urgent they are
7	how to work out what resources are required to put improvements into practice
8	how to weigh the costs of suggested improvements against the benefits

## Performance criteria

### You must be able to:

1	obtain accurate, up-to-date information from relevant sources about operations within your area of responsibility
2	identify and analyse the causes of problems accurately where operations are not meeting your retail organisation's quality standards or sales targets
3	identify the scope for further development clearly and accurately where operations are achieving your retail organisation's quality standards and sales targets
4	analyse the suggested improvements to operations accurately to see if they are practical, consistent with your retail organisation's policy and style, and be straightforward to put into practice
5	identify the ideas and resources that offer the greatest benefits for your retail organisation and its customers
6	weigh up the costs of suggested improvements against benefits to retail operations

## Unit 30: Recommend, agree and contribute to implementing improvements to retail operations

**Unit code:** PPL.E302

**SCQF level:** 6

**Credit points:** 7

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### Unit summary

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

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

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

- recommend, agree and contribute to implementing improvements to retail operations.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; recommends; recommending; suggests; suggesting; improves; improvements; enhances; enhancing; enhancements.



## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

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

## Performance criteria

### You must be able to:

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

# Unit 31: Monitor and maintain security in a retail organisation

Unit code: PPL.E304

SCQF level: 5

Credit points: 5

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## Unit summary

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

This standard is for owners, managers and team leaders.

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

- monitor and maintain security in a retail organisation.

## Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

## Keywords

Retailing; retailers; practices; practises; implements; implementing; implementation; maintains; maintaining; secures; securing.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

1	your retail organisations' security procedures to support opening, operating and closing your retail organisation's premises
2	<p>the security threats most likely to happen in your retail organisation for the following:</p> <ul style="list-style-type: none"><li>• outside locations</li><li>• inside the premises</li><li>• stock and resources</li><li>• people</li><li>• cash.</li></ul>
3	<p>how your retail organisation expects you to monitor and maintain the following:</p> <ul style="list-style-type: none"><li>• outside locations</li><li>• inside the premises</li><li>• stock and resources</li><li>• people</li><li>• cash.</li></ul>
4	how to identify problems with security and resolve them promptly, legally and in line with your retail organisation's requirements

## Knowledge and understanding

5	the different methods of briefing staff about security arrangements, and when it is appropriate to use each method
6	who has authority to stop and search staff and customers and how to contact the relevant authorities

## Performance criteria

### You must be able to:

1	monitor the work area daily in your retail organisation to identify possible problems with the security of the following: <ul style="list-style-type: none"><li>• outside locations</li><li>• inside the premises</li><li>• stock and resources</li><li>• people</li><li>• cash.</li></ul>
2	follow your retail organisation's requirements for maintaining security when opening, monitoring and closing premises
3	identify problems with security and resolve them promptly, legally and in line with your retail organisation's requirements
4	brief and update staff clearly and regularly about security procedures and their responsibilities for maintaining security
5	follow relevant regulations and your retail organisation's authorisation policy about who can stop and search colleagues and retail customers
6	contact relevant authorities when security has been breached

## Unit 32: Monitor, identify and investigate loss and wastage in a retail organisation

**Unit code:** PPL.E305

**SCQF level:** 8

**Credit points:** 6

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### Unit summary

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

This standard is for owners, managers and team leaders.

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

- monitor, identify and investigate loss and wastage in a retail organisation.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; monitors; monitoring; checks; checking; investigates; investigation; assesses; assessing; assessment; waste; wastage.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

1	your retail organisation's security policy and procedures
2	your retail organisation's procedures for monitoring, identifying and recording loss and wastage
3	your retail organisation's investigation procedures and its definition of unacceptable loss and wastage
4	how unacceptable loss and wastage are likely to happen in your retail organisation
5	the items most likely to be at risk in your retail organisation
6	the purpose of loss-control and stocktaking systems
7	different strategies for preventing loss and wastage and when to use each one
8	how to explain causes of loss and wastage to colleagues so that they can contribute to reducing them
9	how to check loss and wastage evaluations

## Performance criteria

### You must be able to:

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



## Unit 33: Assess, monitor and control risks to health and safety and provide training in a retail organisation

**Unit code:** PPL.E306

**SCQF level:** 8

**Credit points:** 7

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### Unit summary

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

This standard is for owners, managers and team leaders and nominated health and safety representatives in retail organisations who do not hold recognised qualifications for health and safety in the workplace.

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

- assess, monitor and control risks to health and safety and provide training in a retail organisation.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; assesses; assessing; assessments; controls; controlling; limits; limiting; monitors; monitoring; dangers; threats; evaluates; evaluating; evaluations.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

1	your rights, duties and responsibilities under relevant health and safety and risk assessment legislation
2	your rights, duties and responsibilities under relevant fire safety, accident reporting, first aid and COSHH regulations
3	your retail organisation's procedures for assessing and monitoring health and safety and incidents
4	how to control risks to health and safety
5	how to arrange staff training on health and safety matters and incidents
6	where to get information and advice about relevant health and safety legislation, policy and procedures
7	who to and which authorities to report assessment results and risks to
8	what safety equipment and protective clothing is available and the instructions for using it
9	how to monitor staff to confirm that they are using equipment, PPE and hazardous substances according to the instructions they have been given
10	how to identify and control different risks
11	why there is a need to assess risks and how to do this
12	how to communicate effectively to others and relevant authorities to control risks
13	how to maintain all relevant records to support your assessments, monitoring and control activities

## Performance criteria

### You must be able to:

1	monitor your retail organisation continually to make sure it is clean and free from health and safety risks
2	assess any health and safety risks you observe for their severity and to check if they breach relevant legislation and your retail organisation's procedures
3	prioritise risks in the order in which they should be controlled and eliminated
4	control any health and safety risks using relevant procedures within your retail organisation
5	obtain advice immediately from the appropriate authority when a risk cannot be controlled
6	monitor staff to confirm that they are using equipment, PPE and hazardous substances according to the instructions they have been given and COSHH regulations
7	provide or organise staff training, instructions and information when risks occur
8	carry out health, safety and maintenance checks in line with relevant legal and your retail organisation's requirements
9	review and update assessment procedures to take account of changes in factors affecting health and safety
10	record risk assessments accurately and make the records available to those who need them
11	maintain all relevant records to support your assessments, monitoring and control activities

## Unit 34: Take a safe and active role when accidents and emergencies occur in a retail organisation

Unit code:	PPL.E307
SCQF level:	5
Credit points:	4

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### Unit summary

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

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

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

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

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; puts; putting; accidents; emergencies; policy; policies; practise; health; safety.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

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

## Performance criteria

### You must be able to:

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

## Unit 35: Help colleagues to learn in a retail organisation

**Unit code:** PPL.E337

**SCQF level:** 6

**Credit points:** 5

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### Unit summary

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

This standard is for owners, managers and team leaders.

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

- Help colleagues to learn in a retail organisation.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in Annexe A.

### Keywords

Retailing; retailers; helps; helping; assists; assisting; colleagues; learns; learning; trains; training; buyers; buys; buying; merchandisers; merchandises; merchandising.

### Glossary

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

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

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

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



## Performance criteria

### You must be able to:

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

## Unit 36: Organise staff to display goods for retail sale

Unit code: PPL.C301

SCQF level: 6

Credit points: 4

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### Unit summary

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

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

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

- organise staff to display goods for retail sale.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; organises; organising; displaying; displays; items; products; produce; materials; stocks; planograms.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

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

## Performance criteria

### You must be able to:

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

## Unit 37: **Assess how effective displays are in a retail organisation**

**Unit code:** PPL.C302

**SCQF level:** 6

**Credit points:** 4

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### **Unit summary**

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

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

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

Assess how effective displays are in a retail organisation.

### **Unit assessment requirements/evidence requirements**

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### **Keywords**

Retailing; retailers; assesses; assessing; evaluates; evaluating; effectiveness; efficient; efficiency.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

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

## Performance criteria

### You must be able to:

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

## Unit 38: **Keep stock available, correctly priced and maintain quality of stock in a retail organisation**

**Unit code:** PPL.C303

**SCQF level:** 5

**Credit points:** 3

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### Unit summary

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

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

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

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

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; keeps; keeping; produce; items; goods; stocks; materials; maintains; maintaining; shelf filling; facing up; shelf fills; faces up; facing-up; faces-up; face-up; replenishes; replenishing; rotates; rotating; refreshes; refreshing.



## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

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

## Performance criteria

### You must be able to:

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

## Unit 39: Provide a payment service at point of sale in a retail organisation

Unit code:	PPL.C214
SCQF level:	5
Credit points:	4

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### Unit summary

This standard is about taking payment from retail customers at the payment point. It covers all payment types and also identifying suspected fraudulent or counterfeit payments.

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

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

- provide a payment service at point of sale in a retail organisation.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; provides; providing; gives; giving; serves; serving; checkouts; check outs; tills; cashiers; operators; payments; pays; paying; fraudulent

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

1	how to keep cash and other payments secure
2	the types of payment that your retail organisation is authorised to receive
3	procedures for authorising non-cash transactions
4	how to check for and identify counterfeit or fraudulent payments
5	how to check for stolen cash equivalents, such as: <ul style="list-style-type: none"><li>• debit cards</li><li>• credit cards</li><li>• loyalty cards</li><li>• credit applications</li><li>• digital payments.</li></ul>
6	how to deal with retail customers offering suspect payments
7	your retail customers' and your retail organisation's relevant legal rights, duties and responsibilities
8	your retail organisation's procedures for taking payments
9	your retail organisation's procedures for dealing with suspected fraudulent payments
10	why it is important to balance the needs of retail customers when providing a payment service

## Performance criteria

### You must be able to:

1	greet retail customers at the point of sale according to your retail organisation's procedures
2	check the items requiring payment and inform retail customers of the correct amount to pay
3	check accurately the amount and means of payment offered by retail customers including the following (where it is acceptable): <ul style="list-style-type: none"><li>• cash, ensuring it is legal tender</li><li>• store, credit and debit card payments</li><li>• digital payments.</li></ul>
4	process the payment in line with your retail organisation's procedures
5	tell retail customers tactfully when payment cannot be approved
6	offer additional payment services to retail customers where these are available
7	treat retail customers politely throughout the payment service process
8	balance the need to give attention to individual retail customers with the need to acknowledge retail customers who are waiting for help

## Unit 40: Promote a retail organisation's own credit card to customers

Unit code: PPL.C270

SCQF level: 7

Credit points: 7

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### Unit summary

This standard is about promoting your retail organisation's own credit card. The features and benefits of the card need to be explained persuasively and responsibly to customers. A credit card is a financial product and its promotion is subject to strict laws that must be complied with at all times. A credit card is not simply a card that offers rewards such as points or discounts, although it may have these additional features. The difference between a credit card and a card that is purely a loyalty card is that customers incur a financial debt when they use a credit card to pay for purchases. This debt must eventually be paid, and can cost customers extra money in the form of interest if payment is not made in full on the due date.

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

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

- promote the retail organisation's own credit card to customers.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; promotes; promoting; advertises; advertising.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

1	the benefits to your retail organisation of having card holders
2	the reasons for promoting your retail organisation's credit card to customers
3	when opportunities arise to ask if customers already have your retail organisation's credit card
4	friendly and engaging questioning techniques that can be used to find out if customers are credit card holders
5	the benefits to customers of having your retail organisation's credit card
6	how to explain to customers in a persuasive manner the benefits to them of being credit card holders
7	who is eligible to apply for the credit card
8	what the costs involved are and the repayment terms of your retail organisation's credit card
9	what customers' rights to cancel the credit card are, any discounts that may apply to the credit card and what balance transfer options with your retail organisation's credit card there are
10	typical concerns that customers might have about the credit card
11	how to respond to customers' concerns honestly whilst continuing to stress the benefits of the credit card
12	why it is important to your retail organisation to make existing credit card holders feel special and to continue to promote to them the benefits of the credit card
13	what the legal issues are around mis-selling credit cards

## Performance criteria

### **You must be able to:**

1	take suitable opportunities and use effective questioning techniques to find out if customers have credit cards with your retail organisation
2	promote the benefits to customers of having the credit card where they are not already holders
3	remind customers in a friendly and persuasive manner of the benefits of using the credit card after acknowledging they are already holders
4	give customers clear and factually accurate information about the costs involved, repayment terms, their right to cancel the credit card, any discounts that apply and any balance transfer options where they express an interest in having your retail organisation's credit card
5	address customers' concerns honestly whilst continuing to stress the benefits of the credit card where customers express concern about the credit card



## **Unit 41:**

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

<b>Unit code:</b>	<b>PPL.C271</b>
<b>SCQF level:</b>	<b>6</b>
<b>Credit points:</b>	<b>6</b>

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### **Unit summary**

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

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

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

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

### **Unit assessment requirements/evidence requirements**

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### **Keywords**

Retailing; retailers; offers; offering; informs; informing; policies; policy.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

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

## Performance criteria

### You must be able to:

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

## Unit 42: Help customers to apply for a retail organisation's credit card and associated insurance products

**Unit code:** PPL.C272

**SCQF level:** 6

**Credit points:** 8

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### Unit summary

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

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

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

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

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; helps; helping; assists; assisting; applies; applying; policies; policy.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

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

## Performance criteria

### You must be able to:

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

## Unit 43: Identify the retail customer's credit or hire-purchase requirements

Unit code:	PPL.C306
SCQF level:	6
Credit points:	6

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### Unit summary

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

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

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

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

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; identifies; identifying; determines; determining; works out; working out; HP; hire purchases; hire-purchases; needs.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

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



## Performance criteria

### You must be able to:

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

## Unit 44: Advise retail customers on the features of borrowing facilities

Unit code: PPL.C307

SCQF level: 7

Credit points: 6

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### Unit summary

This standard is about advising retail customers on the features of your retail organisation's borrowing facilities and helping customers to understand fully the rights and obligations involved so that they can make informed decisions. These borrowing facilities need to be legally and ethically promoted.

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

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

- advise retail customers on the features of borrowing facilities.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; advises; advising; informs; informing; explains; explaining; credit; HP; hire-purchases; hire purchases.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

Knowledge and understanding	
You need to know and understand:	
1	the terms, conditions and features of the borrowing facilities your retail organisation is authorised to offer retail customers
2	why advice must be given to retail customers to help them understand their responsibilities in relation to the borrowing facility
3	how to explain the terms and conditions of borrowing facilities in ways that different retail customers can understand
4	how to give retail customers the chance to ask questions and check they understand the terms, conditions and features of the borrowing facility
5	how to prepare accurate written quotations from the information retail customers have given
6	the information that your retail organisation and the relevant legislation requires to be provided to retail customers in relation to borrowing facilities, and where this can be obtained
7	the ethics and morals of promoting borrowing
8	why it is important to follow your retail organisation's customer service standards

## Performance criteria

### You must be able to:

1	advise retail customers clearly and accurately on the terms and conditions of the borrowing facility
2	check with retail customers that they understand their responsibilities in relation to the borrowing facility
3	give retail customers the chance to check they understand and to ask questions about the borrowing facility and its features
4	give retail customers the chance to compare the benefit and value of different borrowing options where they are available
5	provide retail customers with accurate written quotations together with all the information your retail organisation and the law say must be provided
6	follow your retail organisation's customer service standards at all times whilst dealing with retail customers

## **Unit 45: Process credit or hire-purchase applications on behalf of retail customers**

**Unit code:** PPL.C308

**SCQF level:** 6

**Credit points:** 5

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### **Unit summary**

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

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

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

- process credit or hire-purchase applications on behalf of retail customers.

### **Unit assessment requirements/evidence requirements**

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### **Keywords**

Retailing; retailers; processes; processing; hire purchases; hire purchases; applies; applying; HP.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

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

## Performance criteria

### You must be able to:

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

## Unit 46: Work productively with colleagues in a multi-channel retail organisation

Unit code:	PPL.MCR01
SCQF level:	6
Credit points:	8

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### Unit summary

This standard is about working productively with colleagues both in the same channel of your retail organisation and within other channels. Cooperation across channels is essential to the success of your retail organisation as a whole.

This standard describes what everyone within your multi-channel retail organisation needs to do in order to work together effectively. It applies to everyone in your retail organisation regardless of their particular specialism, their level of responsibility or the channel within which they work. This standard is for owners, managers, department managers and team leaders.

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

- work productively with colleagues in a multi-channel retail organisation.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.



## Glossary

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

Colleagues – those who work in any of the following:

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

## Keywords

Retailing; retailers; internet; e-commerce; e-tailing; e-tailers; works; working; cooperates; cooperating; effectively; efficiently; co-workers; multi-channel.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

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

## Performance criteria

### You must be able to:

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

## Unit 47: Work with colleagues to encourage innovation in a multi-channel retail organisation

Unit code:	PPL.MCR02
SCQF level:	6
Credit points:	6

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### Unit summary

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

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

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

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

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Glossary

Colleagues – those who work in any of the following:

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

## Keywords

Retailing; retailers; internet; e-commerce; e-tailing; e-tailers; multi-channel; working; works; cooperates; cooperating; encourages; encouraging; promotes; promoting; co-workers; innovative.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

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

## Performance criteria

### You must be able to:

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

## Unit 48: Update product information on a trading website

**Unit code:** PPL.MCR03

**SCQF level:** 6

**Credit points:** 3

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### Unit summary

An up-to-date and readily-searchable product database is an essential component of a successful trading website. This standard is about the role in maintaining product information databases that contribute to sales and customer satisfaction. Data concerning product details and prices must comply with any relevant legislation.

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

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

- update product information on a trading website.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; internet; e-commerce; e-tailing; e-tailers; multi-channel; multi channel; updates; updating; refreshes; refreshing; products; items; goods; services; materials; produce; details.

### Glossary

Colleagues – those who work in any of the following:

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



## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

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

## Performance criteria

### You must be able to:

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

## Unit 49: Provide support to individual retail customers of a trading website

Unit code:	PPL.MCR05
SCQF level:	6
Credit points:	5

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### Unit summary

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

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

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

- provide support to individual retail customers of a trading website.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; internet; e-commerce; e-tailing; e-tailers; multi-channel; provides; providing; gives; giving; offers; offering; supports; supporting; assistance; assists; assisting; helps; helping; individuals.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

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

## Performance criteria

### You must be able to:

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

## Unit 50: Analyse feedback from retail customers of a multi-channel retail organisation when goods are returned

Unit code:	PPL.MCR06
SCQF level:	6
Credit points:	4

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### Unit summary

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

This standard is about analysing such feedback from customers when goods are returned and making recommendations based on the analysis. This standard is for owners, managers, department managers and team leaders.

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

- analyse feedback from retail customers of a multi-channel retail organisation when goods are returned.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; internet; e-commerce; e-tailing; e-tailers; multi-channel; analyses; analysing; analysis; comments; criticism; praise; consumers; shoppers.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

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

## Performance criteria

### You must be able to:

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



# Unit 51: Manage a social network on a trading website

**Unit code:** PPL.MCR07

**SCQF level:** 6

**Credit points:** 4

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## Unit summary

This standard is about managing through monitoring a social network on a trading website. Comments posted by customers on social networking sites can impact on your retail organisation almost instantly and so need to be monitored carefully and dealt with promptly.

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

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

- manage a social network on a trading website.

## Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

## Keywords

Retailing; retailers; internet; e-commerce; e-tailing; e-tailers; multi-channel; multi-channel; manages; managing; moderates; moderating; moderator; forums; chat; networks; networking.

## Glossary

Access points and devices – These may include for example:

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

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

Colleagues – those who work in any of the following:

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

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

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

## Performance criteria

### You must be able to:

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

## Unit 52:

## Use in-store online facilities to achieve retail sales

**Unit code:** PPL.MCR15

**SCQF level:** 5

**Credit points:** 9

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### Unit summary

This standard is about using the web-based activities available in store to promote and achieve retail sales. It includes using the online facilities to help fulfil customers' requirements and making customers aware of the availability and scope of the web-based facilities available to them. This can include checking stock availability, placing orders on behalf of customers, and processing payments using online facilities available instore. It also includes providing a positive and 'seamless' service to customers, irrespective of the customer journey, i.e. whether customers shop in person in store using designated terminals or online via their own PC, tablet or mobile telephone etc.

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

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

- use in-store online facilities to achieve retail sales.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

online; on-line; customer; web; internet; web-based retail; multi-channel.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

1	how to operate the range of web-based retail selling facilities available instore within your retail organisation, including any mobile apps
2	the features of the web-based retail selling facilities and their associated benefits, both to retail customers and to your retail organisation
3	the impact of multi-channel retailing upon in-store selling within your retail organisation, including its impact for retail customers' ability to research and order products from your retail organisation and its competitors
4	the importance of providing a 'seamless' service to your retail organisation's customers, irrespective of the customer journey taken, and what this means when dealing with retail customers in-store
5	the opportunities for building retail customer relations when retail customers visit stores to collect and to return products purchased online
6	how retail customers' attitudes and understanding of online technology can affect their use of in-store online facilities and the need to be sensitive to such attitudes and to respond accordingly
7	your responsibilities for monitoring and maintaining in-store online retail facilities
8	the impact of relevant distance selling legislation and consumer rights upon your area of responsibility and in particular upon online retail selling
9	the impact of relevant legislation and regulatory requirements upon the selling of products within your area of responsibility

## Performance criteria

### You must be able to:

1	make retail customers aware of the availability and scope of your retail organisation's in-store web-based retail facilities
2	communicate the features and benefits of the online facilities to retail customers
3	operate all aspects of your retail organisation's relevant in-store web-based retail selling facilities correctly
4	use in-store online facilities for the benefit of retail customers, based upon identifying retail customer requirements
5	respond to retail customer requirements from, and interest in, the online facilities, involving them in using the online process where appropriate in order to achieve retail sales
6	be proactive in checking online the availability of stock sought by retail customers and in placing orders online on behalf of retail customers, where relevant
7	process retail customer payments using online facilities correctly, where relevant, applying appropriate discounts, and in line with your retail organisation's requirements to achieve retail sales
8	seek feedback from customers upon their experience of using your retail organisation's web-based retail facilities
9	monitor in-store web-based selling facilities, ensuring that good housekeeping standards are maintained and report any faults promptly to the correct person

## Unit 53:

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

**Unit code:** PPL.MCR16

**SCQF level:** 6

**Credit points:** 7

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### Unit summary

This standard is about advising and supporting retail customers in the use of the web-based facilities available to them within your retail organisation. This includes their use of 'kiosks', standalone terminals and mobile apps and how customers can use these to browse and research products, to check stock availability, to place orders, and where appropriate, to pay for their purchases. In supporting retail customers in the use of the web-based facilities you will need to demonstrate the online processes in a manner that promotes understanding and that is sensitive to different retail customers' existing understanding and attitude to online technology. This standard is for all sales personnel who help customers in store. When you have completed this standard you will be able to demonstrate your understanding of and ability to:

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

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Online; on-line; customer; web; internet; web-based retail; multi-channel; coaching; selling.



## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

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

## Performance criteria

### You must be able to:

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

## Unit 54:

## Motivate colleagues to promote online retail facilities to retail customers

**Unit code:** PPL.MCR17

**SCQF level:** 6

**Credit points:** 7

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### Unit summary

This standard is about motivating your retail colleagues to use the available web-based online retail facilities and to recognise and respond positively to the opportunities that these facilities provide for engaging with customers and for building sales overall. Your colleagues can be those who work with you in your immediate retail area, or others with whom you have contact. You need not necessarily have supervisory responsibility for these colleagues. Indeed, such colleagues might be amongst those more senior to you, and they can also include those in your peer group. As this standard is about motivating colleagues, you need not be a 'subject expert' in the use of facilities, although you must know how to operate the web-based retail facilities available in your store. This standard is for all sales team members. When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- motivate colleagues to promote online retail facilities to retail customers.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Online; online; on-line; customer; web; internet; web-based retail; motivate; multi-channel; colleagues; communication.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

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

## Knowledge and understanding

10	the importance of demonstrating respect for colleagues when helping them in their use of online technology and methods of achieving this
11	the sources of information within your retail organisation regarding developments in multi-channel retail online facilities affecting your retail organisation

## Performance criteria

### You must be able to:

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

## Unit 55: Maintain the confidentiality and security of online data regarding retail customers

**Unit code:** PPL.MCR18

**SCQF level:** 5

**Credit points:** 5

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### Unit summary

This standard is about taking personal responsibility for maintaining the confidentiality and security of information held online regarding your retail organisation's customers. This includes managing requests for information from customers about their transactions and/or accounts, whether in person, online or by email or telephone and also from third parties, such as suppliers or partnered companies, for which permission may be required before passing on particular information. It also includes protecting sensitive information within the workplace, with all actions being in line with the retail organisation's relevant policies relating to data protection and confidentiality.

This standard is for all team members who handle customer information in any format.

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

- maintain the confidentiality and security of online data regarding retail customers.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Online; on-line; customer; web; information; internet; web-based retail; multi-channel; data; confidentiality; security; social media; data protection; legal.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

1	the relevant legal and your retail organisation's requirements relating to maintaining the confidentiality and security of online data
2	how information should be recorded, shared and transmitted, and their impact for your area of responsibility
3	your retail organisation's policies and guidelines for the retention, protection and disposal of information, including that information that may be recorded
4	the reasons why different items of retail customer information are required
5	the customers' rights to see the data held about them by your retail organisation, and how to respond to any requests by customers to see such data
6	your retail organisation's guidelines regarding your use of social media in relation to maintaining retail customer confidentiality
7	why maintaining the protection of information is important to everyone in your retail organisation and others outside your retail organisation
8	the potential implications of an information security incident to you, your retail organisation and others outside your retail organisation
9	how to protect information held electronically, including the use of encryption and passwords



## Knowledge and understanding

10	the security checks required by your retail organisation before releasing information to a third party by telephone and online
11	the actions to take where a retail customer or other third party is unable to satisfy the required security checks when seeking information by telephone and online
12	the methods of sending information securely according to the value and sensitivity of information and the level of protection that it needs
13	your retail organisation's procedures to arrange for computer media to be made unreadable, ahead of such media being disposed of properly

## Performance criteria

### You must be able to:

1	keep documents, computers or electronic equipment containing online data and information secure
2	check that information is not changed in any unauthorised way
3	encrypt all data entered electronically where required
4	check that any parties seeking information have the authority to receive it, following your retail organisation's procedures
5	provide information to third parties only where they have satisfied relevant security checks, in line with your retail organisation's procedures
6	share relevant information only with those who need to use the information
7	check your authority to release any information to others, and that when required, it is sent securely
8	make a record of only that information that needs to be recorded, according to your retail organisation's requirements
9	keep all records of confidential information away from public display
10	protect confidentiality by making sure that information is destroyed properly when it is no longer required
11	seek guidance about maintaining the security of online data when required
12	maintain your retail organisation's requirements relating to the confidentiality and security of data

## Unit 56: Bake (bake-off) products for sale in a retail organisation

**Unit code:** PPL.B220

**SCQF level:** 5

**Credit points:** 6

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### Unit summary

This standard is about preparing bake-off products in an oven for sale in a retail organisation. These products may arrive in retail bakeries ready to be baked-off and sold in store, or prepared in the bakery and kept for future sales. It involves following specifications for baking a range of bake-off products as well as using a variety of different items of equipment safely. Hygiene and safety are important factors as well as making decisions about the quality of products, and taking suitable actions if they do not meet the quality required.

This standard is for bakery personnel who are responsible for 'bake-off' products.

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

- bake (bake-off) products for sale in a retail organisation.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; baking; bakes; preparing; prepares; cooking; cooks; bake off; bakery; CDF.

## Glossary

**Bake** [baking methods] – Oven work

### **Legal and organisation requirements:**

1. food hygiene regulations, health and safety at work regulations and associated laws, regulations and approved codes of practice
2. standard operational policies and procedures
3. product specification
4. production schedule.

### **Products:**

Fermented products can include:

1. soft rolls
2. crusty rolls
3. white bread
4. wholemeal bread
5. fruited bread or buns
6. fermented pastries.

Non-fermented products can include:

1. non-laminated pastry
2. biscuits
3. scones.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

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

## Performance criteria

### **You must be able to:**

- |   |   |
|---|---|
| 1 | use approved procedures for checking that the quantity and quality of baked products is satisfactory                    |
| 2 | follow procedures for dealing with products that fail to meet the product specification before baking and after baking  |
| 3 | use approved methods to bake the correct quantity and quality of bake-off products for sale in your retail organisation |
| 4 | use relevant regulations and your retail organisation's procedures for working hygienically with bake off products      |
| 5 | store products at the correct temperature for the next stage in the bakery process                                      |

# Unit 57: Finish bake-off products in a retail organisation

**Unit code:** PPL.B221

**SCQF level:** 5

**Credit points:** 6

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## Unit summary

This standard is about finishing bake-off products in your retail organisation. It involves working with specifications for finishing a range of bake-off products as well as using a variety of different items of equipment safely. It includes glazing, coating and decorating finishing techniques. Hygiene and safety are important factors in the performance of this standard. The standard also includes making decisions about the quality of the products and what to do with them if they do not meet the quality required.

This standard is for all bakery personnel who finish off bake off products.

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

- finish bake-off products in a retail organisation.

## Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

## Keywords

Retailing; retailers; bake off; bakery; glazing; glazes; coating; coats; decorating; decorates; finishes; finishing.

## Glossary

**Finishing** [materials] – examples of finishing materials can include:

1. coatings and toppings
2. glazes
3. edible decorative material
4. basic piping
5. pastes.

**Finishing** [methods] – examples of finishing methods can include:

1. glazing
2. piping
3. spreading
4. coating
5. positioning
6. dipping.

**Legal and organisation requirements:**

1. food hygiene regulations, health and safety at work regulations and associated laws, regulations and approved codes of practice
2. standard operational policies and procedures
3. product specification
4. production schedule.

**Products:**

Fermented products can include:

1. soft rolls
2. crusty rolls
3. white bread
4. wholemeal bread
5. fruited bread or buns
6. fermented pastries.

**Non-fermented products can include:**

1. non-laminated pastry
2. biscuits
3. scones.



## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

1	the types of finishing materials for bake-off products your retail organisation supplies and how to use them
2	how to apply coatings, glazes and decorative materials
3	how to maintain the quality of coatings, glazes and decorative materials while applying them
4	how to recognise products that are not fit to sell and how to deal with them
5	the relevant legal requirements to follow during working practices
6	your retail organisations procedures for hygiene and safety when finishing bake-off products
7	the procedures for reporting problems with finishing bake-off products

## Performance criteria

### You must be able to:

1	check that bake-off products are in the right condition for finishing including coating, glazing or decorating
2	make sure that finishing materials have the right texture, thickness, colour and temperature
3	check that coated, glazed and decorated products meet the specification and are correctly positioned for the next stage in the bakery process
4	follow your retail organisation's procedures for dealing with finished products that fail to meet the product specification
5	make the amount of coated, glazed and decorated products needed
6	follow your retail organisations procedures for hygiene and safety when finishing bake-off products
7	follow your retail organisation's procedures for reusing and recycling waste materials

## Unit 58: Prepare greengrocery products for sale in a retail organisation

Unit code: PPL.B224

SCQF level: 5

Credit points: 3

---

### Unit summary

This standard is about preparing greengrocery products for sale in a retail organisation. Preparation covers unpacking, handling and removing unwanted parts of vegetables, fruits and salad products.

This standard is for owners, managers, team leaders and sales personnel who work in a greengrocery department or greengrocery retail organisation.

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

- prepare greengrocery products for sale in a retail organisation.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; preparing; prepares; vegetables; fruits; salads; produce.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

1	the greengrocery products that are prepared by your retail organisation and how to handle them without damaging them
2	your retail organisation's procedures for recycling unwanted packaging and waste from greengrocery products
3	why greengrocery products must be handled hygienically
4	your retail organisation's quality standards for greengrocery products
5	how to recognise greengrocery products that must be rejected or reclassified
6	how to recognise parts of greengrocery products that must be removed to make the products more attractive to customers
7	how to prepare greengrocery products so they are attractive to customers

## Performance criteria

### You must be able to:

1	remove unwanted packaging from a range of greengrocery products, including vegetables, fruit and salad
2	follow your retail organisation's procedures for recycling unwanted packaging and waste from greengrocery products
3	handle greengrocery products hygienically at all times and in a way that protects them from damage
4	choose only those greengrocery products that match the quality your retail organisation sells
5	deal with greengrocery products that do not match your retail organisation's requirements for quality
6	remove unwanted parts of greengrocery products to make them as attractive as possible to customers
7	weigh, classify and package greengrocery products

# Unit 59: Display and maintain greengrocery products to attract sales in a retail organisation

Unit code:	PPL.B225
SCQF level:	5
Credit points:	5

---

## Unit summary

This standard is about displaying and maintaining greengrocery products on display to attract sales, regularly checking displays and dealing with substandard produce on display in your retail organisation.

This standard is for staff who are responsible for displaying and maintaining greengrocery products.

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

- display and maintain greengrocery products to attract sales in a retail organisation

## Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

## Keywords

Retailing; retailers; displaying; displays; vegetables; fruits; salads; produce; facing up.

## Glossary

### Display areas:

1. shelves
2. chillers
3. displays.

**Greengrocery products:**

1. vegetables
2. fruit
3. salad.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

1	the greengrocery products that are sold by your retail organisation and how they should be displayed
2	why greengrocery products need displaying in the correct display areas
3	your retail organisation's display procedures and how greengrocery products are displayed to attract sales
4	why regular checks should be made on the quality and shelf life of greengrocery products, and how to do so
5	why products need rotating
6	how to rotate products
7	how to price and display greengrocery products with limited shelf life to encourage customers to buy them
8	the relevant legal and your organisation's procedures for recycling greengrocery products that cannot be sold because they have deteriorated or are past their shelf life
9	your retail organisation's procedures for maintaining greengrocery products' attractiveness to customers
10	how to clean and maintain display areas



## Performance criteria

### You must be able to:

1	check that display areas are clean and in the correct condition for greengrocery products to be displayed
2	place specific greengrocery products in the correct display areas
3	make displays attractive to encourage sales whilst following your retail organisation's display plan and procedures
4	check the quality and shelf life of greengrocery products on display regularly
5	follow your retail organisation's procedures for displaying and maintaining greengrocery products to keep them attractive to customers
6	follow the relevant legal procedures for recycling and removing items that have little or no shelf life or that have deteriorated in quality
7	rotate greengrocery products correctly according to their shelf life
8	check that ticketing and coding is accurate and correct
9	check the condition and cleanliness of displays regularly and correct them if needed

# Unit 60: Quality check the suitability of meat products for finishing in a retail organisation

Unit code:	PPL.B226
SCQF level:	5
Credit points:	6

---

## Unit summary

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

This standard is for staff responsible for checking the quality of meat products in a meat department of a retail organisation or an independent retail butchery store.

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

- quality check the suitability of meat products for finishing in a retail organisation.

## Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

## Keywords

Retailing; retailers; checks; checking; butchery; butchers; butchering.

## Glossary

### **Products:**

1. meat
2. poultry
3. ingredients.

### **Product quality and suitability checks:**

1. temperature
2. visual
3. touch
4. smell.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

1	the meat products your retail organisation prepare for sale
2	how to carry out quality and suitability checks on meat products and recognise when they are suitable for finishing
3	the reasons why meat products should be rejected
4	the temperatures at which meat products should be held during handling, transfer and storage, and why they are important
5	why accurate and up-to-date records about meat products and storage temperatures must be kept
6	the reasons for checking temperature records and why problems must be identified and reported
7	how to refer to and use your retail organisation's policy and procedures for quality checking meat products

## Performance criteria

### You must be able to:

1	select suitable meat products for finishing following your retail organisation's procedures
2	carry out product quality and suitability checks effectively against your retail organisation's specifications
3	identify and reject meat products that are unsuitable for finishing
4	place rejected meat products in allocated areas away from other products
5	deal with rejected meat products safely and hygienically
6	keep meat products at the specified temperature during transfer and storage once they have been passed as suitable for finishing
7	record relevant information on meat products and storage temperatures accurately

# Unit 61: Prepare to finish meat products in a retail organisation

Unit code: PPL.B227

SCQF level: 5

Credit points: 5

---

## Unit summary

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

This standard is for all staff who finish meat products in a meat department of a retail organisation or independent butchery store.

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

- prepare to finish meat products in a retail organisation.

## Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

## Keywords

Retailing; retailers; prepares; preparing; preparation; finishes; finishing; butchery; butchers; butchering; poultry.

## Glossary

### **Processing [needs/requirements]:**

1. organisation policies for storing and preparing ingredients and products
2. procedures for processing meat products
3. instructions for carrying out specifications
4. organisation policies for storing tools and equipment.

### **Safe and hygienic working practices:**

1. using checking procedures
2. maintaining personal hygiene
3. using personal protective clothing and equipment.

### **Safety [needs/requirements]:**

1. UK and NI laws
2. codes of practice and guidance notes.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

1	the dangers associated with butchery tools and equipment and the safety precautions to take
2	why it is important to use the correct processes for storing and using tools and equipment
3	which tools and equipment are used for finishing meat products in your retail organisation
4	reasons for preparing tools and equipment
5	how to keep tools and equipment clean and in good working order
6	how to prepare knives and keep them sharp and in good working order using safe and hygienic working practices
7	what to do about faulty tools and equipment
8	how to prepare a range of meat products for finishing in your retail organisation



## Performance criteria

### You must be able to:

1	obtain your retail organisation's instructions for finishing meat products and organise your work in line with them
2	keep the work area free from dangers and prepare and organise it to meet your retail organisation's safety and processing needs
3	choose butchery tools that are appropriate for the task
4	prepare tools and equipment in line with your retail organisation's safety and processing requirements
5	identify faulty tools and equipment and follow your retail organisation's procedures for dealing with them
6	follow your retail organisation's safe and hygienic working practices when preparing meat products for finishing at all times

## Unit 62: **Achieve meat product yield and finish in a retail organisation**

**Unit code:** PPL.B228

**SCQF level:** 5

**Credit points:** 5

---

### **Unit summary**

This standard is about finishing meat products to achieve the yield and finish required.

This standard is for all staff who finish meat products in a meat department of a retail organisation or an independent retail butchery store.

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

- achieve meat product yield and finish in a retail organisation.

### **Unit assessment requirements/evidence requirements**

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### **Keywords**

Retailing; retailers; finishes; finishing; butchery; butchers; butchering; poultry.

## Glossary

### **Products:**

1. meat
2. poultry
3. ingredients.

### **Product specification:**

1. yield
2. finish.

### **Safe and hygienic working practices:**

1. working on your own
2. working in a team
3. using checking procedures
4. maintaining personal hygiene.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

1	your retail organisation's product specifications for achieving meat product yield
2	your retail organisation's specifications for finishing meat products
3	the temperatures at which meat products should be kept during handling, transfer and storage, and the reasons for this
4	reasons for rejecting finished meat products
5	procedures to deal with finished meat products that have been rejected
6	how to clean tools and equipment
7	reasons for storing tools and equipment as instructed
8	your retail organisation's safe and hygienic working practices

## Performance criteria

### You must be able to:

1	identify and reject meat products that don't meet the specification your retail organisation expects, and put them in a suitable place away from other meat products
2	deal with finished meat products that have been rejected in line with your retail organisation's safety requirements
3	achieve the finished meat product specification your retail organisation expects within the time allowed
4	keep finished meat products at the specified temperatures and store them safely, securely and hygienically
5	clean and store tools and equipment in line with your retail organisation's safety and processing requirements
6	follow your retail organisation's safe and hygienic working practices at all times

## Unit 63: Organise your work to meet a dough production schedule in a retail organisation

Unit code:	PPL.B243
SCQF level:	5
Credit points:	4

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### Unit summary

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

This standard is for individuals responsible for working to bakery schedules and targets and includes owners, managers, team leaders and bakery personnel.

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

- organise your work to meet a dough production schedule in a retail organisation.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; bakery; baking; bakes; doughs; pastries; biscuits; scones; pastry; buns; organising; organises.

## Glossary

### **Dough:**

Common types of fermented dough include those used for:

1. bread
2. plain and fruited buns
3. Danish pastries
4. croissants.

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

1. puff pastry
2. scones
3. biscuits.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

1	how to organise your work efficiently within a dough production schedule, including reorganising your work to meet changing dough production needs and your retail organisation's expectations
2	how to organise your work so as to avoid delays that result in dough no longer being in the required condition
3	how to get the instructions needed for your dough production schedule
4	the limits of your authority and responsibility for organising your work within the dough production schedule
5	how to organise your work within the dough production schedule to make best use of your time and other resources
6	where and when to get help and advice about problems with dough production schedules and resources
7	how to meet dough schedules for your retail organisation
8	the requirements for health and safety and food safety and hygiene that apply to your work within the dough production schedule, and why these must be followed
9	how to make suggestions about improvements that can make dough production schedules more effective



## Performance criteria

### You must be able to:

1	check all the instructions needed for your dough production schedule in your retail organisation
2	organise your work within the dough production schedule making best use of time and resources
3	tell the correct person about any problems with the quantity or quality of resources available to make dough production achievable
4	tell the correct person if your dough production schedule does not seem to be realistically achievable
5	meet the dough production schedule in your retail organisation
6	work within the relevant requirements for health and safety and food safety and hygiene
7	make suggestions to the correct person about how dough production schedules can be more effective

## Unit 64: **Select, weigh and measure ingredients in bakery operations**

**Unit code:** IMPCB101

**SCQF level:** 5

**Credit points:** 5

---

### **Unit summary**

This standard covers the skills and knowledge needed to select, weigh and measure bakery ingredients by hand, in craft, artisan or in-store bakery operations.

You need to show and understand how you identify and select the correct ingredients, required by a product specification, recipe or work instructions. You will need to check and know the condition of the ingredients, weigh and measure the required quantities and store these in preparation for mixing or use later in processing. You need to know how to check weighing and measuring equipment, prevent contamination of ingredients and know the common factors affecting the quality of ingredients. Complying with and understanding health and safety, food safety, allergen and organisational requirements are essential features of this standard.

This standard is for you if you work in bakery operations, and can be applied in the context of fermented dough, non-fermented dough or flour confectionery production.

### **Unit assessment requirements/evidence requirements**

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### **Keywords**

Select; weigh; measure; ingredients; bakery; baker.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

1	the standards of health and safety and food safety you are required to comply with, why it is important that you do so and what might happen if standards are not met
2	common factors affecting the quality of ingredients, during handling, weighing, measuring and storage
3	the importance of handling and preparing ingredients at the optimum temperature and conditions for effective weighing, measuring
4	how to avoid contamination and cross-contamination of ingredients during handling, weighing, measuring and storage and what might happen if this is not done
5	how to recognise and report substandard ingredients, signs of contamination, infestation or damage to ingredients and packaging
6	what the lines and methods of effective communication are and why it is important to use them
7	what the documentation requirements are and why it is important to meet them
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
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

## Knowledge and understanding

10	the importance of working within time constraints required by production schedule
11	how to report non-availability of ingredients and source alternative supplies of ingredients or alternative ingredients as permitted
12	the importance of using the correct type weighing and measuring equipment according to the types and quantities of ingredients used
13	how to label safely and store ingredients ready for mixing or further processing

## Performance criteria

### Identify ingredients

#### You must be able to:

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

### Select ingredients

#### You must be able to:

4	select ingredients to meet production and quality needs in accordance with specifications
5	isolate and report ingredients of substandard quality, condition or quantity to the relevant personnel
6	take action where ingredients are not available to source alternative supplies or establish whether alternative ingredients can be utilised in accordance with procedures
7	store and position ingredients ready for further processing
8	comply with health, safety, food safety, allergen and organisational requirements

## Performance criteria

### **Weigh and measure ingredients**

#### **You must be able to:**

9	check selected ingredients against your instructions and specifications
10	select and check the accuracy of bakery weighing and measuring equipment in accordance with procedures
11	weigh and measure the required ingredients, avoiding contamination or cross-contamination in accordance with procedures
12	place the weighed and measured ingredients in the correct conditions and label storage containers or mixing bowls, where required, ready for further processing
13	comply with health, safety, food safety, allergen and organisational requirements
14	carry out cleaning, lubrication and detection activities in accordance with procedures
15	operate within the limits of your own authority and capabilities

## Unit 65: Divide, mould and shape fermented dough in bakery operations

Unit code:	IMPCB105
SCQF level:	5
Credit points:	6

---

### Unit summary

This standard covers the skills and knowledge needed to divide, mould and shape fermented dough by hand, in craft, artisan or in-store bakery operations. Fermented dough typically includes that for bread, rolls sticks, enriched, sour and laminated dough and dough for free-from products.

You need to show and understand how you hand divide dough using a knife and scales, and a manually operated dough portioning device. You will need to demonstrate hand moulding skills, and the shaping of dough by hand and using a rolling pin. You need to know how to recognise and prevent contamination during processing. You need to understand the role of yeast and the principles of the fermentation process in dough. You need to know the basic structure of dough and how processing affects gas production and retention rates. You also need to know, how the control of fermentation during processing determines product quality. Complying with and understanding health and safety, food safety, allergen and organisational requirements are essential features of this standard.

This standard is for you if you work in bakery operations, and is applied in the context of fermented dough production.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Divide; mould; shape; dough; fermentation; bakery; baker.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

1	the standards of health and safety and food safety you are required to comply with, why it is important that you do so, and what might happen if standards are not met
2	why it is important to follow work instructions and product specifications or recipes throughout dough processing
3	how to recognise and report dough that do not meet specification, and the procedure for rejecting and isolating failed dough and dough portions
4	the importance of accurate dividing and check weighing of fermented dough
5	how to seek advice and make process adjustments to dough, to take into account minor changes in ingredient performance, production timing and environmental conditions, necessary to keep a dough within specification
6	how to prevent dough contamination and cross-contamination during processing and what might happen if this is not done
7	what the lines and methods of effective communication are and why it is important to use them correctly
8	what the documentation requirements are and why it is important to meet them
9	personal protective clothing/equipment and working practices which are useful in combating the potentially harmful effects of dust and allergies resulting from breathing or skin contact with ingredients or dough
10	the cell structure and properties of yeast as a living organism, the feeding, growth and multiplication of yeast cells

## Knowledge and understanding

11	the principles of fermentation in dough; the role and action of enzymes, carbon dioxide gas and alcohol production
12	the factors affecting fermentation rate; temperature, sugar, salt, pH, nitrogen, fats, spices, mould and rope inhibitors
13	what happens if dough fermentation is allowed to progress without processing controls
14	how the rate of dough fermentation is controlled in dough by temperature and humidity-controlled processing environments
15	the structure of dough, its capacity to form gas cells and trap gas bubbles, and changes that occur during moulding, shaping and resting that are critical to successful dough fermentation and development
16	the function of key ingredients in dough making which can influence dough fermentation rates
17	the gas production and retention properties of long process dough processing methods; bulk fermentation process (BFP), sponge and dough process
18	the gas production and retention properties of short process dough processing methods; mechanical dough development in the Chorleywood Bread Process (CBP), activated dough development (ADD), no-time dough process
19	how to maintain dough condition and deal with fermentation time constraints
20	how to recognise dough fermentation problems which do not comply with specification



## Performance criteria

### **Divide fermented dough**

#### **You must be able to:**

- |   |  |
|---|--|
| 1 | check the available dough against your instructions and specifications and take prompt action on discovering any discrepancy |
| 2 | obtain and check the condition of dividing tools and the accuracy of equipment in accordance with procedures                 |
| 3 | hand divide dough in accordance with product specifications  |
| 4 | minimise waste and deal with scrap material in accordance with procedures  |
| 5 | position and maintain divided dough portions for further processing  |
| 6 | position and maintain divided dough portions for further processing  |

### **Mould and shape fermented dough**

#### **You must be able to:**

- |    |  |
|----|--|
| 7  | check the available portioned dough against your instructions and specifications and take prompt action on discovering and discrepancy |
| 8  | prepare and maintain an appropriate table surface for moulding and shaping   |
| 9  | hand mould and shape portioned dough in accordance with product specifications   |
| 10 | wash and dress shaped dough surfaces as required to specification  |
| 11 | minimize waste and deal with scrap material in accordance with procedures  |
| 12 | place dough in the correct condition and location for further processing   |
| 13 | comply with health, safety, food safety, allergen and organisational requirements throughout moulding and shaping operations           |

## Performance criteria

14	carry out cleaning, lubrication and detection activities in accordance with procedures
15	operate within the limits of your own authority and capabilities

## Unit 66: Hand-process fish in a retail organisation

**Unit code:** PPL.B248

**SCQF level:** 5

**Credit points:** 6

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### Unit summary

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

This standard is for owners, managers, team leaders and sales personnel on a fish counter or in a retail fishmongers.

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

- hand-process fish in a retail organisation.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; processes; processing; hand-processes; hand-processing; preparing; prepares; flat fish.

## Scope/range related to knowledge and understanding

### **Fish**

1. flat fish
2. round fish.

### **Hand-processing**

1. filleting
2. skinning
3. heading
4. scaling
5. gutting
6. boning
7. portioning
8. steaking.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

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

## Performance criteria

### You must be able to:

- |   |  |
|---|--|
| 1 | organise your work area, equipment and tools so that fish can be dealt with safely, hygienically and efficiently   |
| 2 | maintain hygienic working conditions when checking and hand-processing fish  |
| 3 | check that the fish is of saleable quality   |
| 4 | hand-process fish in ways that achieve specifications for yield and quality, minimise waste, and keep fish in a saleable condition throughout processing |
| 5 | maintain the health and safety of yourself, colleagues and customers   |
| 6 | dispose of waste in ways that are safe and hygienic and that meet the relevant legal and your retail organisation's requirements for recycling           |
| 7 | follow the schedule for cleaning and tidying the work area, tools and equipment  |
| 8 | put hand-processed products that meet specifications into containers that will keep the products in a saleable condition                                 |

## Unit 67: Monitor and contribute to improving food safety in a retail organisation

**Unit code:** PPL.B308

**SCQF level:** 6

**Credit points:** 8

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### Unit summary

This standard is for personnel who supervise staff that handle or prepare wrapped or unwrapped food, including food subject to temperature control. The standard is firstly about monitoring food safety in line with a retail organisation's food safety procedures. Secondly, the standard is about making a contribution to continuously improving food safety. This standard is for owners, managers and team leaders. When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- monitor and contribute to improving food safety in a retail organisation.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; monitors; monitoring; improves; improving; helps; helping; assists; assisting; meat; fish; produce; bakery; butchery.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

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



## Knowledge and understanding

13	why it is important to have food safety procedures in place
14	what continuous improvement is and why it is important to contribute to the improvement process

## Performance criteria

### You must be able to:

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

## Unit 68: Identify retail customers' requirements for lingerie

**Unit code:** PPL.C250

**SCQF level:** 5

**Credit points:** 2

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### Unit summary

This standard is about explaining the lingerie-fitting service and finding out what type of lingerie your retail customers require, sometimes when they are unclear about their own requirements.

This standard is for sales staff who may or may not conduct lingerie fitting as part of their responsibility. When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- identify retail customers' requirements for lingerie.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; identifies; identifying; finds out; finding out; works out; working out; requirements; customers; bras.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

1	how to approach retail customers in the lingerie department
2	how to use information offered by retail customers to identify their requirements
3	what is involved in the lingerie-fitting service and how long a fitting session is likely to take
4	questioning techniques used to clarify and agree retail customers' buying requirements
5	how to build trust and relax retail customers using the lingerie-fitting service
6	how to talk to different types of retail customers and help them to understand the information provided

### Performance criteria

#### **You must be able to:**

1	approach retail customers in the lingerie department and accurately identify what their requirements are from the information given
2	describe accurately to retail customers the process and benefits of the lingerie-fitting service
3	offer retail customers the lingerie-fitting service or, if the retail customer prefers, book a later appointment

## Unit 69: Measure and fit retail customers for lingerie

**Unit code:** PPL.C251

**SCQF level:** 5

**Credit points:** 8

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### Unit summary

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

- disability
- mastectomy
- minors or customers with limited mental capacity
- gender realignment.

It also covers the relevant legislation related to equality and diversity as well as dealing with minors. This standard is for staff who conduct lingerie fitting as part of their role. When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- measure and fit retail customers for lingerie.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; measures; measuring; sizes; sizing; fits; fitting; customers; bras.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

Knowledge and understanding	
You need to know and understand:	
1	basic styles, shapes and sizes of lingerie
2	the different parts of lingerie and their technical names
3	brands, colours, fabrics, trims and price range of available products
4	the size range and fit of the lingerie in stock and where different types of lingerie can be found
5	the features, advantages and benefits of different types of lingerie
6	the ordering service using in-house systems or brand catalogues for lines either not in stock or not carried by your retail organisation
7	solution dressing – what to wear under different outfits
8	accessories such as enhancers and co-ordinating garments
9	the manufacturer's guidance on washing and caring for products
10	scheduled delivery dates for new products
11	trends in design, technological solutions and fabrics
12	how to assess the retail customer's body size and age
13	the equipment and layout required for the lingerie fitting room

## Knowledge and understanding

14	how and where to measure for the retail customer's band size using a tape measure
15	how to estimate the cup size required
16	how to choose the correct lingerie for the fitting
17	how to educate the retail customer on band sizes, cup sizes and correct fitting using the lingerie chosen
18	body shapes and breast sizes
19	what special requirements a range of retail customers may have
20	how to adjust and fit the lingerie both inside and outside the fitting room
21	how to build trust and relax retail customers whilst working with them
22	how to talk to different types of retail customers and help them understand the information provided
23	how to deal with challenging situations, including unusual body shape, body odour, disability, mastectomy and maternity
24	the importance of retail customers' confidence and loyalty to your retail organisation and how to contribute to them
25	the relevant legal and your retail organisation's requirements when dealing with retail customers with special requirements

## Performance criteria

### You must be able to:

1	follow your retail organisation's customer service standards at all times with retail customers while assessing their measuring and fitting requirements
2	explain clearly and tactfully to retail customers that an accurate fit cannot be guaranteed if measurements are taken on top of the retail customers' clothing
3	Follow your retail organisation's retail requirements when dealing with retail customers with special requirements
4	position yourself and the retail customers correctly so that: <ul style="list-style-type: none"> <li>• measurements can be taken accurately</li> <li>• the product can be adjusted to fit retail customers</li> <li>• retail customers can see the product when worn and correctly fitted.</li> </ul>
5	meet the retail customers' requirements for privacy and help while they are trying products on
6	take and record the required measurements accurately
7	choose accurately and offer a range of products in the retail customer's size and that meet retail customers' requirements
8	adjust and fit products to provide retail customers comfort and prolong the life of the products
9	check the fit of the products and whether retail customers are satisfied with the product
10	explain other possible courses of action if lingerie cannot be found to fit retail customers



## Unit 70: Demonstrate beauty products to retail customers

**Unit code:** PPL.C253

**SCQF level:** 6

**Credit points:** 6

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### Unit summary

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

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

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

- demonstrate beauty products to retail customers.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; demonstrates; demonstrating; cosmetics; skincare; skin care; make-up; make up; items; goods; materials; toiletries.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

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

## Performance criteria

### You must be able to:

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

# Unit 71: Maintain the retail customer record-card system in a retail organisation

Unit code:	PPL.C254
SCQF level:	5
Credit points:	2

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## Unit summary

This standard is about maintaining accurate and up-to-date record cards of retail customers to help to provide a more effective service to them. It is also about making sure that your retail organisation database is active and relevant for the purposes of promotional activities. This is a service your retail organisation may use instead of a customer database using technology. This standard is for owners, managers, department managers, team leaders and sales/customer service assistants. When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- maintain the retail customer record-card system in a retail organisation.

## Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

## Keywords

Retailing; retailers; maintaining; maintains; customers; records; record card; cards; systems.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

1	how using a retail customer record-card system can help achieve sales targets
2	your retail organisation's rules and procedures relating to the retail customer record-card system
3	the benefits to retail customers of the record-card system
4	the importance of updating and maintaining the record-card system regularly and how to do this effectively and efficiently
5	how to find time in the working day to update the retail customer record-card system
6	the relevant aspects of current data protection laws and the importance of keeping to these laws
7	how to identify opportunities to make follow-up appointments
8	the importance of asking retail customers about any special considerations
9	where to find information about products or services and how to interpret this information

## Performance criteria

### You must be able to:

1	identify suitable opportunities to ask retail customers whether a record card may be set up for them
2	explain clearly to retail customers the benefits to the record-card system
3	record information clearly and accurately
4	keep information about retail customers confidential
5	follow your retail organisation's rules and procedures for setting up, maintaining and updating retail customers' record cards
6	maintain and update the record-card system regularly to ensure effectiveness and efficiency
7	ask retail customers whether they have any special requirements and record this information accurately
8	identify which products and details of retail customers require special consideration when completing the record-card system
9	identify the top retail customers from the record-card system and use this information to help increase sales
10	offer retail customers opportunities to make appointments for return visits to your retail organisation while setting up new record cards

## **Unit 72:** **Establish retail customers' requirements and provide advice regarding tiling products**

**Unit code:** PPL.C262

**SCQF level:** 5

**Credit points:** 6

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### **Unit summary**

This standard is about establishing retail customers' requirements and providing the correct advice upon tiling products that are best suited for the intended application. This standard is for owners, managers, department managers, team leaders and sales/customer service assistants. When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- establish retail customers' requirements and provide advice regarding tiling products.

### **Unit assessment requirements/evidence requirements**

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### **Keywords**

Retailing; retailers; establishes; establishing; identifies; identifying; works out; working out; determines; determining; requirements; provides; providing; gives; giving; advises; advising; tiles; grouts; sealants; ceramics; customers.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

1	the different locations where tiles are used, the factors to consider when determining which tiles are suitable and why this is important when advising retail customers
2	the relative advantages and disadvantages of a tiled area compared with the principal other types of surfaces
3	how to use questioning to establish retail customers' requirements regarding tiling products
4	the constituent materials and general manufacturing process of the tiling products that your retail organisation is involved in selling
5	the delivery times for the tiles that your retail organisation is involved in selling
6	the implications of building regulations and sustainability for the tiles that your retail organisation offers
7	the principal types of adhesives and grouts and what these are used for
8	the principal types of integral fittings and accessories available and which can be installed during or after tiling
9	procedures for cutting and drilling through tiles
10	the reasons for possible differences in sizes and shading of tiles, and the purpose of batch numbers
11	current trends in tiling design and fashion
12	the types of tile fixing, trim and beading and those most appropriate for different applications



## Knowledge and understanding

### You need to know and understand:

13	the circumstances when it is important to use silicone sealants
14	where to seek information appropriate to retail customers' requirements, particularly non-standard requirements
15	how to follow your retail organisation's customer service standards when advising retail customers on tiling products
16	how to listen actively
17	the principal forms of underfloor heating, and those floor finishes that are suitable

## Performance criteria

### You must be able to:

1	establish correctly where retail customers intend to use the tiling products and why they are being considered
2	determine retail customers' budget and delivery timescale for the tiling products
3	establish the nature of the surface to be tiled, and determine correctly any consequent considerations regarding the suitability of particular tiling products and how they might be fixed
4	identify whether retail customers require any fixtures or fittings once their requirements have been established and advise them accordingly
5	establish how the tiled surfaces are to be used and advise retail customers correctly upon the available types of tile suited to the intended use
6	explore and determine retail customers' preferred colours, styles, design and layout of tiles
7	provide retail customers with samples of appropriate tiles and displays according to their requirements
8	advise why certain styles may be better suited to particular types of homes
9	advise retail customers correctly regarding the relevant tiling finishes available, including appropriate trims and beadings
10	determine correctly whether retail customers are seeking other requirements such as underfloor heating
11	follow your retail organisation's customer service standards whilst establishing retail customers' requirements and advising them regarding tiling products
12	listen actively and promote understanding by using words that are clear, concise and suited to retail customers' requirements

## Unit 73: Advise customers upon measuring and planning for the fixing of tiles

**Unit code:** PPL.C263

**SCQF level:** 6

**Credit points:** 8

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### Unit summary

This standard is about establishing customers' circumstances and advising those seeking to measure and plan for the fixing of tiles upon how best to achieve this. This standard is for owners, managers, department managers, team leaders and sales/customer service assistants. When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- advise customers upon measuring and planning for the fixing of tiles.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; advice; advises; advising; measures; plans; fixes; provides; providing; gives; giving; tiling.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

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

## Performance criteria

### You must be able to:

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

## Unit 74: Advise customers upon the fixing of their own tiles

**Unit code:** PPL.C264

**SCQF level:** 6

**Credit points:** 8

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### Unit summary

This standard is about establishing customers' circumstances and advising them upon the fixing of their own tiles upon surface preparation. This standard is for owners, managers, department managers, team leaders and sales/customer service assistants. When you have completed this standard you will be able to demonstrate your understanding of and ability to:

- advise customers upon the fixing of their own tiles.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; advice; advises; advising; fixes; provides; providing; gives; giving; tiling.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

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

## Knowledge and understanding

### You need to know and understand:

11	how to cut and drill tiles safely and effectively and which tiles cannot be cut or drilled and why
12	methods and materials for fitting, fixing and sealing underfloor heating systems
13	how to finish tiled surfaces off upon completion of tiling
14	principal methods for undertaking routine cleaning and maintenance of all tiled surfaces, including tiles and grouting, and how to recognise and deal with problems such as mildew, discolouration of tiles and grouting
15	the various cleaning and maintenance products available, the application of these and how to use them safely
16	why it is important to advise customers correctly upon fixing tiles



## Performance criteria

### You must be able to:

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

## **Unit 75: Help customers to choose alcoholic beverages in a retail organisation by advising on and recommending relevant products**

**Unit code:** PPL.C268

**SCQF level:** 6

**Credit points:** 8

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### **Unit summary**

This standard is about helping customers to choose the alcoholic beverages that best match their requirements in a retail organisation. This involves finding out what customers are looking for, advising on products and supporting any recommendations with relevant product information. Strict laws apply to the sale of alcohol in retail organisations in the United Kingdom and they need to be complied with at all times. This standard is for owners, managers, department managers, team leaders and sales/customer service assistants.

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

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

### **Unit assessment requirements/evidence requirements**

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### **Keywords**

Retailing; retailers; helps; helping; assists; assisting; chooses; choosing; picks; picking; selects; selecting; wines; beers; lagers; stouts; ales; ciders; spirits; alcopops; alco-pops; liqueurs; drinks; bottles; cans.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

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

## Performance criteria

### You must be able to:

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

## Unit 76: Use the dressing room facilities to create sales opportunities

**Unit code:** PPL.C273

**SCQF level:** 6

**Credit points:** 2

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### Unit summary

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

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

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

- use the dressing room facilities to create sales opportunities.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; uses; using; dressing rooms; changing rooms; fitting rooms; sells; selling.

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

1	how many dressing rooms there are and what other facilities are available
2	when a dressing room is likely to be busy and needs to be open and when it is not so it can be closed
3	why approaching customers on the sales floor and offering use of the dressing room facilities can create sales opportunities
4	how to greet customers in a welcoming manner
5	your retail organisation's policy on checking how many items are being taken into the dressing room facilities and how to deal with customers who dispute the policy
6	how to keep up to date about in-store offers and promotions and how to advise customers about them
7	how to engage customers in conversation in order to create sales opportunities
8	how informing customers about special offers and promotions can lead to sales opportunities
9	how suggesting matching items and accessories can lead to sales opportunities
10	how to monitor customers entering and leaving the dressing rooms so none remain empty whilst customers are waiting
11	your retail organisation's procedures for dealing with suspected stock loss
12	the right person to contact if stock loss is suspected
13	how to check whether alternative dressing room areas are available at busy times

## Performance criteria

### You must be able to:

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

## Unit 77: Help customers to choose delicatessen products in a specialist retail organisation

Unit code:	PPL.C278
SCQF level:	5
Credit points:	7

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### Unit summary

This standard is about helping customers to choose delicatessen products in your specialist retail organisation. It also covers providing information about delicatessen products to help customers make choices and suggesting alternatives where appropriate.

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

This standard is for owners, managers, department managers, team leaders and sales/customer service assistants with suitable food safety training.

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

- help customers choose delicatessen products in a specialist retail organisation.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

### Keywords

Retailing; retailers; helps; helping; assists; assisting; chooses; choosing; choices; picks; picking; selects; selecting; delicatessens; produce; goods; items; cheeses; cold meats; meats; salads.



## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### **You need to know and understand:**

1	how to establish a rapport with customers
2	the kinds of questions you need to ask customers in order to find out their requirements
3	where to find reliable information about the delicatessen products on sale that will help customers choose appropriately
4	effective ways of comparing and contrasting products for customers
5	how to recognise opportunities to recommend associated or additional products
6	practical limits on portion weight, size or shape
7	how to explain tactfully to customers when portion requirements cannot be met, and what alternatives can be offered

## Performance criteria

### You must be able to:

- |   |  |
|---|--|
| 1 | use questioning techniques effectively to establish a rapport with customers and find out what they are looking for              |
| 2 | match products as closely as possible to customers' stated requirements, from the delicatessen products available                |
| 3 | support product recommendations with factually correct information that is likely to help customers choose delicatessen products |
| 4 | compare and contrast products in ways that help customers choose the products that best meet their requirements                  |
| 5 | recognise and act on suitable opportunities to recommend to customers associated or additional products                          |
| 6 | suggest alternative portion sizes or products in a tactful way when customers' requests are impractical                          |

## Unit 78:

## Portion delicatessen products to meet individual customers' requirements in a specialised retail organisation or specialist counter within a general retail organisation

**Unit code:** PPL.C279

**SCQF level:** 5

**Credit points:** 6

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### Unit summary

This standard is about helping customers to choose delicatessen products in your specialist retail organisation or on a specialist counter within a more general retail organisation, portioning products to meet individual customers' requirements. For the purposes of this standard, delicatessen products are ready-to serve products such as cheeses, cold cooked meats and salads. Customers specify the portion size or weight and expect the resulting portions to be very close to the specified size or weight and to be in a presentable condition. This standard is for owners, managers, department managers, team leaders and sales/customer service assistants who have received suitable food safety training.

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

- portion delicatessen products to meet individual customers requirements in a specialist retail organisation or on a specialist counter within a general retail organisation.

### Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall assessment strategy in *Appendix A*.

## Keywords

Retailing; retailers; portions; portioning; cuts; cutting; slices; slicing; delicatessens; produce; goods; items; cheeses; cold meats; meats; salads; individuals; needs

## Assessment outcomes and standards

To pass this unit, the learner needs to demonstrate that they can meet all the assessment outcomes and standards for the unit. The standards outline the requirements the learner is expected to meet to achieve the unit.

### Knowledge and understanding

#### You need to know and understand:

1	the relevant food safety and general health and safety requirements to be complied with when handling, portioning and disposing of products
2	why it is important to meet individual customers requirements
3	which tools and utensils to use with which products and why
4	how to cut products safely and in ways that achieve the required portions whilst minimising waste
5	the conventionally accepted portion shapes for the products requiring portioning
6	how to use weighing scales, including how to allow for the weight of additional items such as containers
7	how to choose packaging to suit the product type and portion size
8	accepted standards of presentation for products from which portions have been taken
9	when and how to adjust or dispose of remaining products

## Performance criteria

### You must be able to:

1	handle and portion delicatessen products in ways that comply with all relevant food safety legislation and meet individual customers' requirements
2	use tools and utensils suited to the products
3	cut products so as to produce conventionally acceptable portion shapes, maintain the attractiveness of the product, minimise waste and comply with all relevant health and safety requirements
4	take into account the weight of any additional items on the scales such as containers when weighing portions
5	check that customers are satisfied with the portioned products before they are wrapped
6	place portioned products in suitable packaging
7	check that the products from which portions have been taken are still in saleable condition, and adjust, remove or replace them as required
8	dispose of any unsaleable products in line with all relevant health and safety requirements, including food safety requirements

## 12 Further information and useful publications

### Key publications

- *Access Arrangements and Reasonable Adjustments* (Joint Council for Qualifications (JCQ))
- *Centre Guidance: Dealing with Malpractice* (Pearson)
- *Centre Guide to Quality Assurance Pearson NVQ/SVQ and Competence-based Qualifications* (Pearson)
- *Collaborative and Consortium Arrangements for the Delivery of Vocational Qualifications Policy* (Pearson)
- *Delivery Guidance and Quality Assurance Requirements for NVQ/SVQ and Competence-based Qualifications* (Pearson)
- *Enquiries and Appeals about Pearson Vocational Qualifications Policy* (Pearson)
- *Equality and Diversity Policy* (Pearson)
- *Guide for Centres to Enrolling onto Qualifications* (Pearson)
- *Quality Assurance Handbook For NVQs/SVQs And Competence-Based Qualifications* (Pearson)
- *Recognition of Prior Learning Policy and Process* (Pearson)
- *SCQF Credit Accumulation and Transfer Policy* (Scottish Qualifications Authority (SQA))
- *Suspected Malpractice in Examinations and Assessments Policies and Procedures* (Joint Council for Qualifications (JCQ))
- *Supplementary Guidance for Reasonable Adjustment and Special Consideration in Vocational Internally Assessed Units* (Pearson)
- *UK Information Manual* (Pearson)
- *Use of Languages in Qualifications Policy* (Pearson).

All of these publications are available on our website.

Further information and publications on the delivery and quality assurance of SVQ/competence-based qualifications are available on our website.

To order publications, please go to the resources page of our website.

For books, software and online resources for UK schools and colleges, please go to: [www.pearsonschoolsandfecolleges.co.uk](http://www.pearsonschoolsandfecolleges.co.uk)

## 13 Professional development and training

### Professional development and training

Pearson supports UK and international customers with training related to our qualifications. This support is available through a choice of training options offered on our website.

The support we offer focuses on a range of issues, such as:

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing learner-centred learning and teaching approaches
- building in effective and efficient quality assurance systems.

The national programme of training we offer is on our website. You can request centre-based training through the website or you can contact one of our advisers in the Training from Pearson UK team via Customer Services to discuss your training needs.

### Training and support for the lifetime of the qualifications

To get in touch with our dedicated support teams please visit our website.

**Online support:** find the answers to your questions by browsing over 100 FAQs on our website or by submitting a query using our Work Based Learning Ask the Expert Service. You can search the database of commonly asked questions relating to all aspects of our qualifications in the work-based learning market. If you are unable to find the information you need, send us your query and our qualification or administrative experts will get back to you. The Ask the Expert service is available on our website.

### Online forum

Pearson Work Based Learning Communities is an online forum where employers, further education colleges and workplace training providers can seek advice and clarification about any aspect of our qualifications and services, and share knowledge and information with others. The forums are sector specific and cover business administration, customer service, health and social care, hospitality and catering and retail. The online forum is on our website.



## 14 Contact us

To get in touch with us, please visit our 'Contact us' pages for Pearson Work Based Learning customers:

<http://qualifications.pearson.com/en/support/support-for-you/work-based-learning/contact-us.html>

# Appendix A: Assessment strategy



## **Assessment Strategy**

**Retail**

**Retail SVQs**

**Developed by People 1<sup>st</sup>**

**Approved by ACG**

**7 March 2018**

**Version**

**1**

## Introduction

The purpose of an assessment strategy is to provide awarding bodies with a consistent approach to assessment that complies with SQA Accreditation's regulatory requirements.

The key areas this assessment strategy will cover are:

- how external quality control of assessment will be achieved
- which aspects must always be assessed through performance in the workplace
- the extent to which a realistic work environment and simulated working conditions may be used to assess competence
- the occupational expertise requirements for assessors and verifiers.

Awarding bodies must use the assessment strategy as the basis for developing and defining the evidence requirements and assessment methods their providers will use. This includes specifying how the qualification will be internally and externally quality assured.

## External quality control

External quality control is achieved through rigorous monitoring and standardisation of assessment decisions. Awarding bodies achieve this by operating their existing systems for quality monitoring, risk assessment and management of their approved centres, following guidance issued by the regulatory authorities.

As part of this process People 1<sup>st</sup> requires awarding bodies to:

- ensure that external verification, monitoring and support provided to centres takes into account their level of risk. For example new assessment centres, and those that are experiencing difficulty in meeting the assessment requirements, should be given additional support by their awarding body
- supply People 1<sup>st</sup> with standardised information on their statistical monitoring, including registration and certification figures, on a quarterly basis. This data will remain confidential and no individual awarding body's data will be published
- report annually on the outcomes of, and any issues arising from, external verification and quality control arrangements
- highlight specific issues relating to the assessment of the sector's SVQ units and qualifications that require immediate attention, as and when they arise
- contribute to awarding body forums to review and discuss matters relating to the assessment of retail SVQ units and qualifications
- resolve issues relating to the assessment and verification of the sector's SVQ units and qualifications with the action(s), and in the timeframe, agreed.

## Workplace assessment

People 1<sup>st</sup> advocate the integration of national occupational standards within employers' organisations in order to achieve a national level of competence across the sector's labour market. As such, assessment of the sector's competence based units and qualifications will, ideally, take place within the workplace. People 1<sup>st</sup> recognise, however, that it is not always feasible for candidates to be assessed in the workplace and as such it permits the use of assessment within Realistic Working Environments (RWE). Additionally, where sector employers do not have the infrastructure to manage assessment independently, it values the role of peripatetic assessors to support the assessment process.

Within these parameters, People 1<sup>st</sup> expects that:

- the majority of assessment of the sector's SVQ units and qualifications will be based on **performance evidence**, i.e. direct observation, outputs of work and witness testimony within the workplace or a RWE approved by an awarding body. Simulation is allowed only where:
  - the assessment criteria require the learner to respond to an emergency;
  - a unit covers a limited selection of basic functions which need not involve interacting with customers; a unit originates from another SSC or SSB and the originator expressly allows simulation to be used for that unit.
- A list of those units for which simulation is allowed is appended to this document. Evidence generated from simulated activities will not be acceptable for any other unit.
- opportunities to ascertain candidate's **accreditation of prior learning** is maximised by early contact between the assessor and candidate and during initial assessment/induction period.

*Please note: External tests do not form part of People 1<sup>st</sup>'s assessment strategy.*

## **Witness Testimony**

People 1<sup>st</sup> recognise the use of **witness testimony** and **expert witness testimony** as appropriate methods for assessors to collect evidence of candidates' performance.

**Witness testimonies** can be obtained from people who are occupationally competent and who may be familiar with the national occupational standards, such as the candidate's line manager. They may also be obtained from people who are not occupationally competent, and do not have a knowledge of the national occupational standards, such as other people within the candidate's workplace, e.g. customers and suppliers. The assessor must judge the validity of the witness testimony and this may vary depending on the source.

Witness testimonies can support the assessment process but should not be used as the main form of evidence (e.g. witness testimony may be useful to authenticate a candidate's work, confirm consistency over time or confirm that a candidate has covered all of the required scope/range for a unit). In all cases the awarding body's minimum evidence requirements must be met.

**Expert witnesses** may be used where additional support relating to the assessment of technical competence is required. Expert witnesses may be:

- approved assessors for other sectors who are also familiar with the relevant occupational standards
- line managers, other managers or experienced colleagues that are not approved assessors, but who the awarding body agrees has current occupational competence, knowledge and expertise to make a judgement of a candidate's competence.

Expert witnesses must be able to demonstrate through relevant qualifications and/or practical experience and knowledge that they are qualified to provide an expert opinion on a candidate's performance in relation to the unit being assessed. People 1<sup>st</sup> believe that it is unlikely for an expert witness to be fully expert within any of the sector's occupational areas in less than 12 months. The final judgement on the validity of the expert witness testimony rests with the assessor and such testimonies may only be used in line with awarding body's requirements.

A list of Units for which Expert Witness Testimony is required if the assessor is not expert in the specialism covered by the unit can be found in **Annex A**.

## Professional Discussion

Professional discussion could be used in addition to performance evidence to confirm a candidate's overall competence. Professional discussion could also be used as a form of evidence for assessing underpinning knowledge; such discussions should enable the assessor to gather relevant evidence to ensure the candidate has a firm understanding of the standard being assessed, rather than using a prescribed list of questions.

## Realistic work environment and simulation

**Simulation** can only be used to assess candidates for the sector's SVQ units and qualifications where the opportunity to assess naturally occurring evidence is unlikely or not possible, for example assessment relating to health and safety, fire and emergency procedures. It should not include routine activities that must be covered by performance evidence.

There are no People 1<sup>st</sup> units that can be solely achieved by simulation. Where simulation is acceptable in the evidence requirements, it should only be used when performance evidence is unlikely to be generated through normal working practices.

See **Annex B** for SVQ units which permit the use of simulation.

Awarding bodies must issue adequate guidance which informs centres how simulation should be planned and organised, ensuring that demands on candidates are neither more nor less than they would encounter in a real work situation. In particular:

- a centre's overall strategy for simulation must be examined and approved by the external verifier
- all simulations must be planned, developed and documented by the centre in a way that ensures the simulation correctly reflects what the unit seeks to assess
- ideally, there should be a range of simulations to cover the same aspect of the standard
- the physical environment for the simulation, and the nature of the contingency, must be realistic
- the candidate should be given no indication as to what the simulation will present.

## Providing a Realistic Working Environment (RWE)

Where simulation is used the sector requires that:

- Simulation must be undertaken in a Realistic Working Environment
- Awarding bodies provide guidance for centres, which requires that Realistic Working Environments:

*"provide an environment which replicates the key characteristics of the workplace in which the skill to be assessed is normally employed".*

A realistic working environment (for the purpose of simulated work activities) is regarded as one that replicates a real working environment. For example, a college shop that operates on a commercial basis (i.e. it has a profit and loss account) is acceptable for retail environments but a shop laid out in a classroom environment isn't. However, simulated activity may be used within a retail setting itself, for assessment purposes in order to prevent any barriers to achievement.

## Occupational expertise of quality assurers

**The requirements relating to the occupational expertise of assessors and verifiers is set out in Annex C.**

To maintain high standards of quality and standardisation within assessment, and achieve best practice, People 1<sup>st</sup> require all external verifiers, internal verifiers and assessors to maintain a record of their **continuous professional development** – see guidance at **Annex D**.



## Annex A

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### List of Units for which Expert Witness Testimony is required if the assessor is not expert in the specialism covered by the unit

Unit Number	Unit Title
PPL.B220	Bake (bake-off) products for sale in a retail organisation
PPL.B221	Finish bake-off products in a retail organisation
PPL.B224	Prepare greengrocery products for sale in a retail organisation
PPL.B225	Display and maintain greengrocery products to attract sales in a retail organisation
PPL.B226	Quality check the suitability of meat products for finishing in a retail organisation
PPL.B227	Prepare to finish meat products in a retail organisation
PPL.B228	Achieve meat product yield and finish in a retail organisation
PPL.B235	Maintain food safety while working with food in a retail organisation
PPL.B238	Prepare to receive deliveries of fuel (for driver-controlled transfers) on a forecourt
PPL.B239	Check that driver-controlled fuel transfers have been completed
PPL.B240	Receive deliveries and transfer fuel on a forecourt
PPL.B243	Organise your work to meet a dough production schedule in a retail organisation
PPL.B248	Hand-process fish in a retail organisation
PPL.B308	Monitor and contribute to improving food safety in a retail organisation
PPL.C215	Process applications from retail customers for credit facilities
PPL.C216	Set, monitor and take action with retail customers' credit accounts
PPL.C217	Process payments made to retail customer accounts
PPL.C218	Reconcile retail customers' accounts
PPL.C220	Assemble retail products at customers' premises and assist with installation and initial use
PPL.C221	Explain to customers the features and benefits of a retail organisation's loyalty scheme and how the scheme works

Unit Number	Unit Title
PPL.C222	Gain customer commitment to a retail organisation's loyalty scheme and assist them in completing the application
PPL.C230	Interpret design briefs for retail displays
PPL.C231	Source merchandise and props to be featured in retail displays
PPL.C232	Dress in-store retail displays to guidelines
PPL.C233	Dress window displays following a retail organisation's guidelines
PPL.C234	Evaluate and improve retail displays
PPL.C235	Order graphic materials to meet retail display requirements
PPL.C236	Position graphic materials to support retail displays
PPL.C237	Dismantle retail displays
PPL.C238	Store equipment, props and graphics for retail displays
PPL.C239	Confirm the requirements for props and prototypes for retail displays
PPL.C240	Make life-size copies of items for retail displays
PPL.C241	Make scale models of items for retail displays
PPL.C242	Decorate fixtures and panels for retail displays
PPL.C243	Interpret retail display layout requirements from plans, elevations and drawings
PPL.C244	Follow guidelines for putting retail display layouts together
PPL.C250	Identify the retail customers' requirements for lingerie
PPL.C251	Measure and fit retail customers for lingerie
PPL.C253	Demonstrate beauty products to retail customers
PPL.C254	Maintain the retail customer record-card system in a retail organisation
PPL.C262	Establish retail customers' requirements and provide advice regarding tiling products
PPL.C263	Advise customers upon measuring and planning for the fixing of tiles
PPL.C264	Advise customers upon the fixing of their own tiles
PPL.C266	Authorise and monitor the self-service dispensing of motor fuel on a forecourt
PPL.C267	Maintain a display of cut flowers in a retail organisation that does not specialise in floristry
PPL.C268	Help customers to choose alcoholic beverages in a retail organisation by advising on and recommending relevant products

Unit Number	Unit Title
PPL.C270	Promote a retail organisation's own credit card to customers
PPL.C271	Offer customers information on insurance products associated with a retail organisation's credit card
PPL.C272	Help customers to apply for a retail organisation's credit card and associated insurance products
PPL.C278	Help customers to choose delicatessen products in a specialist retail organisation
PPL.C279	Portion delicatessen products to meet individual customers' requirements in a specialised retail organisation or specialist counter within a general retail organisation
PPL.C306	Identify the retail customer's credit or hire-purchase requirements
PPL.C307	Advise retail customers on the features of borrowing facilities
PPL.C308	Process credit or hire-purchase applications on behalf of retail customers
PPL.C311	Make and review plans for finding new retail clients
PPL.C312	Market a retail organisation's services to potential clients
PPL.C313	Provide a consultative selling service to retail clients
PPL.C314	Provide an after-sales service to retail clients as a result of retail client consultations
PPL.C330	Interpret requirements for retail displays
PPL.C331	Choose and agree retail merchandise to be featured in retail displays
PPL.C332	Identify and obtain graphic materials for retail displays
PPL.C333	Co-ordinate how graphic materials are used in retail displays
PPL.C334	Check how graphic materials are used in retail displays
PPL.C335	Gather information about retail customers' responses to displays and layouts
PPL.C336	Assess and report the effect of retail displays and layouts
PPL.C337	Negotiate and agree costs for visual merchandising projects
PPL.C338	Record and monitor costs for visual merchandising projects
PPL.C339	Contribute to developing a retail organisation's visual-design policy

Unit Number	Unit Title
PPL.C340	Support staff putting into practice a retail organisation's visual-design policy
PPL.C341	Develop and test solutions for retail display layouts
PPL.C342	Produce guidance for putting retail display layouts together
PPL.E308	Plan staffing levels and prepare work schedules for a retail organisation
PPL.E309	Monitor work targets to make changes in staffing levels in a retail organisation
IMPCB101	Select weigh and measure ingredients in bakery operations
IMPCB105	Divide, mould and shape fermented dough in bakery operations
PPL.MCR01	Work productively with colleagues in a multi-channel retail organisation
PPL.MCR02	Work with colleagues to encourage innovation in a multi-channel retail organisation
PPL.MCR03	Update product information on a trading website
PPL.MCR05	Provide support to individual retail customers of a trading website
PPL.MCR06	Analyse feedback from retail customers of a multi-channel retail organisation when goods are returned
PPL.MCR07	Manage a social network on a trading website
PPL.MCR15	Use in-store online facilities to achieve retail sales
PPL.MCR16	Advise and support customers in a retail organisation on the use of online retail facilities
PPL.MCR17	Motivate colleagues to promote online retail facilities to retail customers
PPL.MCR18	Maintain the confidentiality and security of online data regarding retail customers

## Annex B

### SVQ units in Retail that permit simulation

There are no People 1<sup>st</sup> units that may be achieved solely by the use of simulation. However, partial simulation is permissible in the units listed in the table below.

The overarching principle to be applied to units identified as suitable for simulation is that it should only be undertaken in a minority of cases where:

- there is a high risk to the security or safety
- the opportunity to present evidence from work-based practice happens infrequently and therefore insisting that candidates wait for such an occurrence would be unreasonable or create blockages in the assessment system and might carry the risk of de-motivating candidates
- there would otherwise be a breach of confidentiality or privacy.

Unit number	Unit title
PPL.B101	Move goods and materials manually in a retail organisation
PPL.B102	Check stock levels in a retail organisation
PPL.C101	Package goods for customers in a retail organisation
PPL.C266	Authorise and monitor the self-service dispensing of motor fuel on a forecourt
PPL.E101	Identify and report security risks in a retail organisation
PPL.E102	Identify and seek assistance when accidents and emergencies occur in a retail organisation
PPL.E103	Maintain health and safety procedures in a retail organisation
PPL.E105	Work effectively as part of a team in a retail organisation
PPL.E106	Follow a training plan for your own learning to improve your skills and knowledge in a retail organisation
PPL.E107	Keep work surfaces clean in a retail organisation
PPL.E108	Safely remove and dispose of waste and litter in a retail organisation
PPL.E109	Maintain personal hygiene in a retail organisation
PPL.E205	Help maintain security in a retail organisation
PPL.E206	Deal with accidents and emergencies within the limits of your authority in a retail organisation
PPL.E207	Contribute to reducing risks to health and safety in a retail organisation

<b>Unit number</b>	<b>Unit title</b>
PPL.E208	Work effectively in a team to meet targets in a retail organisation
PPL.E304	Monitor and maintain security in a retail organisation
PPL.E305	Monitor, identify and investigate loss and wastage in a retail organisation
PPL.E306	Assess, monitor and control risks to health and safety and provide training in a retail organisation
PPL.E307	Take a safe and active role when accidents and emergencies occur in a retail organisation

## Annex C

### Occupational Expertise of Assessors and Verifiers

The requirements set out below relates to all assessors and verifiers.

✓ = mandatory

Assessors, Internal Verifiers and External Verifiers must:	A	IV	EV
Have a good knowledge and understanding of the national occupational standard and competence based units and qualifications which are being assessed or verified.	✓	✓	✓
Hold or be working towards relevant assessment and/or verification qualification(s) as identified by SQA Accreditation, qualifications regulator, confirming their competence to assess or verify SVQ units and qualifications assessment as follows:			
<ul style="list-style-type: none"> <li>Assessors and verifiers who hold current assessor and/or verifier units and undertake appropriate continuous professional development (CPD)</li> </ul>	✓	✓	✓
<ul style="list-style-type: none"> <li>Assessors and verifiers who hold previous versions of assessor and/or verifier units, who work to the current Learning and Development (L&amp;D) National Occupational Standards (NOS) and undertake appropriate continuous professional development (CPD)</li> </ul>	✓	✓	✓
<ul style="list-style-type: none"> <li>Any new assessors or verifiers who do not currently hold any assessor or verifier units must undertake the relevant current unit(s)</li> <li>In the case that an assessor or verifier is working towards their assessor/verifier unit, a representative sample of their assessment/verification decisions must be counter-signed by a colleague who has achieved an appropriate assessor/verifier unit. This colleague should have the same occupational expertise.</li> </ul>	✓	✓	✓

Assessors, Internal Verifiers and External Verifiers must:	A	IV	EV
Have relevant occupational expertise and knowledge, at the appropriate level of the occupational area(s) they are assessing and/or verifying which has been gained through 'hands on' experience in the industry.	✓	✓	✓
Adhere to the awarding body's assessment requirements and practice standardised assessment principles.	✓	✓	✓
Have sufficient resources to carry out the role of assessor or verifier, i.e. time and budget.	✓	✓	
Have supervisory/management, interpersonal and investigative skills; including the ability to analyse information, hold meetings, guide, advise, plan and make recommendations at all levels, taking into account the nature and size of the organisation in which assessment is taking place. High standards of administration and record keeping are also essential.		✓	✓
Hold qualifications, or have undertaken training, that has legislative relevance to the competence based units and qualifications being assessed (see Annex D).	✓	Good practice	Good Practice
Update their occupational expertise and industry knowledge in the areas being assessed and verified through planned Continuous Professional Development (see Annex E).	✓	✓	✓



## Annex D

### Continuous Professional Development for Assessors and Verifiers

It is necessary for assessors and verifiers to maintain a record of evidence of their continuous professional development (CPD). This is necessary to maintain currency of skills and understanding of the occupational area(s) being assessed, and can be achieved in a variety of ways. It should be a planned process, reviewed on an annual basis, for example as part of an individual's performance review.

Assessors and verifiers should select CPD methods that are appropriate to meeting their development needs. The following provides examples of a variety of methods that could be used for CPD purposes.

<b>Updating occupational expertise</b>	<ul style="list-style-type: none"><li>• Internal and external work placements</li><li>• Work experience and shadowing (e.g. within associated departments)</li><li>• External visits to other organisations</li><li>• Updated and new training and qualifications</li><li>• Training sessions to update skills</li><li>• Visits to educational establishments</li><li>• Trade fairs</li></ul>
<b>Keeping up to date with sector developments and new legislation</b>	<ul style="list-style-type: none"><li>• Relevant sector websites</li><li>• Membership of professional bodies</li><li>• Papers and documents on legislative change</li><li>• Networking events</li><li>• Seminars, conferences, workshops, membership of committees/working parties (e.g. People 1<sup>st</sup> events), webinars, social media</li><li>• Staff development days</li></ul>
<b>Standardising and best practice in assessment</b>	<ul style="list-style-type: none"><li>• Regular standardisation meetings with colleagues</li><li>• Sharing best practice through internal meetings, newsletters, email circulars</li><li>• Comparison of assessment and verification in other sectors</li><li>• Attending awarding body meetings/seminars</li></ul>

Downloadable guidance on CPD can be found at CPD Guidance (<https://set.foundation.co.uk/professionalism/cpd/>)

### **Core Skills Signposting**

#### **Retail Sector**

##### **Qualification Titles:**

**SVQ Retail Skills at SCQF Level 4**

**SVQ Retail Skills at SCQF Level 5**

**SVQ Retail (Management) at SCQF Level 6**

**SVQ Retail (Sales Professional) at SCQF Level 6**

**SVQ Retail (Visual Merchandising) at SCQF Level 6**

**Developed by People 1<sup>st</sup>**

**Approved by ACG – 7 March 2018**

**Version 1**

## Introduction

Core Skills signposting indicates if there are opportunities within units to develop Core Skills in the workplace to a specified SCQF level. The signposting document should also acknowledge where there are no opportunities to develop Core Skills. This signposting can be used by providers and assessors to plan the development and assessment of Core Skills. All numbers in the columns refer to the SCQF level – any blanks indicate there is no opportunity.

The five Core Skills are:

- Communication
- Information and Communication Technology
- Numeracy
- Problem Solving
- Working with Others

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
CFACSA4	Give customers a positive impression of yourself and your organisation	4			3	3
CFACSB10	Organise the delivery of reliable customer service	4	3	3	5	5
CFACSB11	Improve the customer relationship	5	4	4	6	5
CFACSD2	Support customer service improvements	5			5	5
CFACSD8	Work with others to improve customer service	5			6	6
CFACSD11	Lead a team to improve customer service	5			4	6
IMPCB101	Select weigh and measure ingredients in bakery operations	4		4	3	
IMPCB105	Divide, mould and shape fermented dough in bakery operations	3		3	3	
PPL.B101	Move goods and materials manually in a retail organisation	3		3		4
PPL.B102	Check stock levels in a retail organisation	3		3		
PPL.B103	Replenish stock on the sales floor in a retail organisation	3		3		3
PPL.B105	Sort and prepare donated goods in a retail-charity organisation for selling or recycling	3				
PPL.B201	Prepare to receive deliveries in a retail organisation	4		3	3	3

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.B202	Receive deliveries and check storage arrangements of goods in a retail organisation	4	3	3	3	3
PPL.B204	Put goods into storage in a retail organisation	3		3		
PPL.B205	Check the level of goods on sale in a retail organisation	4	3	4	3	3
PPL.B206	Replenish goods on sale in a retail organisation	3	3	4	4	3
PPL.B207	Check the availability of goods for customer orders	4		4	4	4
PPL.B208	Process orders for retail customers	4	3	4	3	4
PPL.B209	Assist retail customers who need to return goods	4		3	4	4
PPL.B210	Process refunds and returns of retail goods	4	3	3	3	4
PPL.B212	Prepare and assemble products for selling to retail customers	4		3	3	
PPL.B220	Bake (bake-off) products for sale in a retail organisation	3		4		
PPL.B221	Finish bake-off products in a retail organisation	3		3		
PPL.B224	Prepare greengrocery products for sale in a retail organisation			3		
PPL.B225	Display and maintain greengrocery products to attract sales in a retail organisation			3		

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.B226	Quality check the suitability of meat products for finishing in a retail organisation	3		3		
PPL.B227	Prepare to finish meat products in a retail organisation	none				
PPL.B228	Achieve meat product yield and finish in a retail organisation	3		3		
PPL.B235	Maintain food safety while working with food in a retail organisation	4		3		
PPL.B238	Prepare to receive deliveries of fuel (for driver-controlled transfers) on a forecourt	4		4	4	3
PPL.B239	Check that driver-controlled fuel transfers have been completed	3		3		3
PPL.B240	Receive deliveries and transfer fuel on a forecourt	3		3	4	3
PPL.B243	Organise your work to meet a dough production schedule in a retail organisation	3		3	3	3
PPL.B245	Pick goods to fulfil customer orders in a retail organisation	4	3	4	3	
PPL.B246	Assist in loading customer orders for despatch in a retail organisation	4				4
PPL.B247	Count stock levels and resolve problems with stock levels in a retail organisation	4	3	4	4	4

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.B248	Hand-process fish in a retail organisation			3		
PPL.B301	Organise staff to receive, check and record incoming deliveries in a retail organisation	5		4	4	6
PPL.B302	Manage staff and maintain stock records in a storage facility in a retail organisation	5	4	4	4	6
PPL.B303	Check the storage and care of stock in a retail organisation	5	4	4	4	6
PPL.B304	Organise an audit programme and put it into practice with a team in a retail organisation	5	5	4	5	6
PPL.B305	Investigate problems and report the findings of stock audits in a retail organisation	5	5	4	6	5
PPL.B306	Choose and contract with suppliers and order stock in a retail organisation	5	4	5		5
PPL.B307	Check and evaluate the performance of suppliers of stock	4	4	5	4	5
PPL.B308	Monitor and contribute to improving food safety in a retail organisation	5	4	4	5	6
PPL.C101	Package goods for customers in a retail organisation	3		3		4
PPL.C201	Prepare display areas and materials in a retail organisation in line with display plans	3		3		4

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.C202	Set up and dismantle displays in line with display plans in a retail organisation	3		3		4
PPL.C203	Label displays of stock in a retail organisation	3			3	
PPL.C204	Help retail customers find products	4				5
PPL.C205	Help retail customers choose products	5				5
PPL.C206	Identify opportunities to increase sales of particular products	5	5	5		4
PPL.C207	Promote particular retail products	5		5		4
PPL.C208	Provide information and advice to meet the requirements of retail customers	5			4	4
PPL.C209	Help retail customers resolve complaints	5			4	5
PPL.C213	Work out the price of customers' retail purchases			4	4	4
PPL.C214	Provide a payment service at point of sale in a retail organisation	4	4	4		4
PPL.C215	Process applications from retail customers for credit facilities	4	3			4
PPL.C217	Process payments made to retail customer accounts	4	4	4	4	4
PPL.C218	Reconcile retail customers' accounts	4	4	5	4	4
PPL.C220	Assemble retail products at customers' premises and assist with installation and initial use	5				4



URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.C221	Explain to customers the features and benefits of a retail organisation's loyalty scheme and how the scheme works	5				4
PPL.C222	Gain customer commitment to a retail organisation's loyalty scheme and assist them in completing the application	4				4
PPL.C223	Check the customers' preferences and buying decisions when making retail sales	5				4
PPL.C224	Provide assistance at the self-service payment point in a retail organisation	4	3		4	4
PPL.C230	Interpret design briefs for retail displays	4				
PPL.C231	Source merchandise and props to be featured in retail displays	4		3	4	4
PPL.C232	Dress in-store retail displays to guidelines	4				
PPL.C233	Dress window displays following a retail organisation's guidelines	none				
PPL.C234	Evaluate and improve retail displays				3	4
PPL.C235	Order graphic materials to meet retail display requirements	4		3		4
PPL.C236	Position graphic materials to support retail displays	4				

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.C237	Dismantle retail displays	none				5
PPL.C238	Store equipment, props and graphics for retail displays	3		3	3	
PPL.C239	Confirm the requirements for props and prototypes for retail displays	4		4		
PPL.C240	Make life-size copies of items for retail displays	4		4		
PPL.C241	Make scale models of items for retail displays	4		6		
PPL.C242	Decorate fixtures and panels for retail displays	3		5		
PPL.C243	Interpret retail display layout requirements from plans, elevations and drawings	4		5	4	
PPL.C244	Follow guidelines for putting retail display layouts together	4			4	
PPL.C250	Identify the retail customers' requirements for lingerie	4				4
PPL.C251	Measure and fit retail customers for lingerie	4		4	4	5
PPL.C252	Follow procedures for retail sales of age-restricted products	4		3	4	4
PPL.C253	Demonstrate beauty products to retail customers	5				5
PPL.C254	Maintain the retail customer record-card system in a retail organisation	4		4		4

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.C262	Establish retail customers' requirements and provide advice regarding tiling products	4		4		5
PPL.C263	Advise customers upon measuring and planning for the fixing of tiles	5		5		5
PPL.C264	Advise customers upon the fixing of their own tiles	5		4	3	5
PPL.C266	Authorise and monitor the self-service dispensing of motor fuel on a forecourt		3	3	4	
PPL.C267	Maintain a display of cut flowers in a retail organisation that does not specialise in floristry	4				4
PPL.C268	Help customers to choose alcoholic beverages in a retail organisation by advising on and recommending relevant products	5				5
PPL.C269	Cash up one or more payment registers		3	4	3	
PPL.C270	Promote a retail organisation's own credit card to customers	5		4		4
PPL.C271	Offer customers information on insurance products associated with a retail organisation's credit card	5		4		4

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.C272	Help customers to apply for a retail organisation's credit card and associated insurance products	5	4	4		4
PPL.C273	Use the dressing room facilities to create sales opportunities	4		3	3	4
PPL.C274	Keep dressing room facilities ready for customer use				3	
PPL.C275	Promote sales of food or drink products by offering samples to customers and following relevant food safety requirements	4			3	4
PPL.C276	Deliver products to customers' premises making the best use of time and resources	4		3	3	4
PPL.C277	Contribute to monitoring and maintaining ease of shopping in a retail sales area				3	4
PPL.C278	Help customers to choose delicatessen products in a specialist retail organisation	5		3		4
PPL.C279	Portion delicatessen products to meet individual customers' requirements in a specialised retail organisation or specialist counter within a general retail organisation	3		4		4

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.C280	Demonstrate products to customers in a retail organisation	5				4
PPL.C301	Organise staff to display goods for retail sale	5				6
PPL.C302	Assess how effective displays are in a retail organisation	5				5
PPL.C303	Keep stock available, correctly priced and maintain quality of stock in a retail organisation	5	4	4	4	4
PPL.C306	Identify the retail customer's credit or hire-purchase requirements	5	4	5		4
PPL.C307	Advise retail customers on the features of borrowing facilities	5	4	4		4
PPL.C308	Process credit or hire-purchase applications on behalf of retail customers	5	3	4	3	4
PPL.C309	Evaluate takings practices and procedures in a retail organisation	5	4	5	5	5
PPL.C310	Monitor practices and procedures at the payment point in a retail organisation	5	4	5	5	5
PPL.C311	Make and review plans for finding new retail clients	5	4	4	5	5
PPL.C312	Market a retail organisation's services to potential clients	5	4			6

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.C313	Provide a consultative selling service to retail clients	5	4	4		6
PPL.C314	Provide an after-sales service to retail clients as a result of retail client consultations	5	4	3	3	4
PPL.C315	Decide on the value of items offered in part-exchange by retail customers	4		4	3	5
PPL.C316	Negotiate part-exchange sales transactions with retail customers	5		4	3	5
PPL.C330	Interpret requirements for retail displays	4				4
PPL.C331	Choose and agree retail merchandise to be featured in retail displays	4			3	4
PPL.C332	Identify and obtain graphic materials for retail displays	4		4		4
PPL.C333	Co-ordinate how graphic materials are used in retail displays	4		4		5
PPL.C334	Check how graphic materials are used in retail displays	4			4	4
PPL.C335	Gather information about retail customers' responses to displays and layouts	5	4	5		4
PPL.C336	Assess and report the effect of retail displays and layouts	4	4	5	5	4

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.C337	Negotiate and agree costs for visual merchandising projects	6	4	5	4	5
PPL.C338	Record and monitor costs for visual merchandising projects	4	4	5	4	4
PPL.C339	Contribute to developing a retail organisations visual-design policy	5	4	5	5	4
PPL.C340	Support staff putting into practice a retail organisation's visual-design policy	5		4	4	5
PPL.C341	Develop and test solutions for retail display layouts	5	4	4	4	4
PPL.C342	Produce guidance for putting retail display layouts together	5	5	5	3	4
PPL.C355	Help customers to choose specialist products in a retail organisation	5		4	3	4
PPL.C356	Demonstrate specialist products to customers in a retail organisation	5				4
PPL.C412	Monitor and improve customers' experience of a retail organisation	5		4		5
PPL.D002	Develop effective relationships with customers within a retail organisation	5	4	5	4	5
PPL.D004	Monitor and resolve customer complaints within a retail organisation	5			4	4

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.E002	Recruit and retain staff in a retail organisation	5	4	4	4	5
PPL.E003	Plan and allocate work to staff in a retail organisation	4		3	3	5
PPL.E101	Identify and report security risks in a retail organisation	4		3	3	3
PPL.E102	Identify and seek assistance when accidents and emergencies occur in a retail organisation	3			3	3
PPL.E103	Maintain health and safety procedures in a retail organisation	3				3
PPL.E104	Manually lift and handle goods and materials safely in a retail organisation	3		3		3
PPL.E105	Work effectively as part of a team in a retail organisation	4		3	3	4
PPL.E106	Follow a training plan for your own learning to improve your skills and knowledge in a retail organisation	4			3	4
PPL.E107	Keep work surfaces clean in a retail organisation	3				3
PPL.E108	Safely remove and dispose of waste and litter in a retail organisation	3				3
PPL.E109	Maintain personal hygiene in a retail organisation	None				
PPL.E205	Help maintain security in a retail organisation	3			3	3



URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.E206	Deal with accidents and emergencies within the limits of your authority in a retail organisation	4			3	3
PPL.E207	Contribute to reducing risks to health and safety in a retail organisation	4			3	3
PPL.E209	Improve the way you learn in a retail organisation	4			4	4
PPL.E210	Prepare newspapers and magazines for return to the merchandiser	3		3		
PPL.E211	Monitor and support secure use of the payment register and service area in a retail organisation	3	3	4	4	4
PPL.E212	Check the accuracy of records of hours worked in a retail organisation	4	4	4	4	4
PPL.E301	Identify and analyse opportunities for solving problems and improving retail operations	5	5	5	6	4
PPL.E302	Recommend, agree and contribute to implementing improvements to retail operations	5	4	4	4	5
PPL.E304	Monitor and maintain security in a retail organisation	4			4	4
PPL.E305	Monitor, identify and investigate loss and wastage in a retail organisation	5	4	5	5	4

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.E306	Assess, monitor and control risks to health and safety and provide training in a retail organisation	5	4	4	4	4
PPL.E307	Take a safe and active role when accidents and emergencies occur in a retail organisation	4				4
PPL.E308	Plan staffing levels and prepare work schedules for a retail organisation	4	4	4	4	4
PPL.E309	Monitor work targets to make changes in staffing levels in a retail organisation	5	3	4	4	4
PPL.E314	Monitor the service provided to customers by external suppliers of a retail organisation	4		3	4	4
PPL.E315	Evaluate and improve external suppliers service to customers of a retail organisation	4	3	4		4
PPL.E335	Support effective team working in a retail organisation	5			4	6
PPL.E336	Contribute to the planning, organisation and evaluation of your own learning in a retail organisation	5		4		4
PPL.E337	Help colleagues to learn in a retail organisation	5				5
PPL.E338	Manage a team on a temporary basis in a retail organisation	5		3	5	6

URN	Unit title	Communication	ICT	Numeracy	Problem Solving	Working with Others
PPL.MCR01	Work productively with colleagues in a multi-channel retail organisation	5	4		4	5
PPL.MCR02	Work with colleagues to encourage innovation in a multi-channel retail organisation	5	4		4	5
PPL.MCR03	Update product information on a trading website	5	5	4	4	5
PPL.MCR05	Provide support to individual retail customers of a trading website	5	4	4	4	4
PPL.MCR06	Analyse feedback from retail customers of a multi-channel retail organisation when goods are returned	5	4	5	4	4
PPL.MCR07	Manage a social network on a trading website	5	5		4	5
PPL.MCR15	Use in-store online facilities to achieve retail sales	5	5	4	4	5
PPL.MCR16	Advise and support customers in a retail organisation on the use of online retail facilities	5	5		4	5
PPL.MCR17	Motivate colleagues to promote online retail facilities to retail customers	5	5		4	5
PPL.MCR18	Maintain the confidentiality and security of online data regarding retail customers	5	4	3	4	4

All numbers refer to SCQF level – any blanks indicate no opportunity

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